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What is Amazon Connect?

Amazon Connect is an omnichannel (p. 1418) cloud contact center. You can set up a contact center (p. 9) in a few steps, add agents who are located anywhere, and start engaging with your customers.

You can create personalized experiences for your customers using omnichannel communications. For example, you can dynamically offer chat and voice contact (p. 540), based on such factors as customer preference and estimated wait times. Agents, meanwhile, conveniently handle all customers from just one interface (p. 1247). For example, they can chat with customers, and create or respond to tasks as they are routed to them.

Amazon Connect is an open platform that you can integrate with other enterprise applications, such as Salesforce (p. 296). You can use Amazon Connect with other AWS services to provide innovative new experiences for your customers.

**Important**

If you found this page because you need to contact Amazon for support, see Amazon Customer Service (Amazon orders and deliveries) or AWS Support (Amazon Web Services) instead.

How to get started

If you are a first-time user of Amazon Connect, we recommend that you do the following:

- Read about the concepts (p. )
- Read the architectural guidance (p. 71)
- Set up your contact center (p. 127)

Pricing

With Amazon Connect, you pay only for what you use. For more information, see Amazon Connect pricing.

The power of AWS with Amazon Connect

To help provide a better contact center, you can use Amazon Connect with the following AWS services.
Development

You can use AWS Lambda functions to either look up or post data to sources outside of Amazon Connect. For example, you can look up an inbound caller on Salesforce based on the customer’s phone number. The function may return such results as the customer name, membership level (for example, frequent flyer), last order, and order status. Then based on that information, the call can be routed to an Amazon Lex bot or an agent.

You can also use Lambda with AWS databases like DynamoDB to create dynamic routing abilities. For example, you can retrieve a prompt in a specific language, based on input from the customer.

API Gateway and Step Functions further enhance the abilities of Lambda.

For more information, see:

• Invoke AWS Lambda functions (p. 493)

Storage

Amazon Connect uses Amazon Simple Storage Service (Amazon S3) to store recorded conversations and exported reports. When you set up Amazon Connect, it creates default buckets for these requirements, or you can point it to existing Amazon S3 infrastructure. For more information, see Step 4: Data storage (p. 129) in Create an Amazon Connect instance (p. 127).

VPC endpoints are not supported.

You can also manage the Amazon S3 policies to move data to Amazon S3 Glacier for less expensive long-term storage. However, it breaks the link in the contact record in Amazon Connect. To fix this, use a Lambda function to rename the S3 Glacier object to match the data in the contact record.
Database

You can use AWS databases with Amazon Connect for a variety of reasons. For example, with DynamoDB, you can create quick tables of data.

You can also create tables of dynamic information for call routing. For example, a Lambda function can write inbound calls to a DynamoDB table, then query the table to see if there are other matches for the phone number. If so, a decision can be made to send the caller to the same queue as before, or to flag them as a repeat caller.

For more information, see:

- Blog post: Creating dynamic, personalized experiences in Amazon Connect

Analytics

Amazon Connect tracks all interactions using contact records (p. 1081). Contact records are used for real-time and historical metrics reports. You can also use Amazon Kinesis to stream them to an AWS database like Amazon Redshift or Amazon Athena for BI analysis (Amazon QuickSight, or a third party such as Tableau). There are AWS CloudFormation templates available to set up this functionality for Amazon Redshift and Athena.

To perform analysis on your flow logs, you can set up an Amazon Kinesis stream to stream your flow log data from CloudWatch to a data warehouse service, such as Amazon Redshift. You can combine the flow log data with other Amazon Connect data in your warehouse, or run queries to identify trends or common issues with a contact flow.

For more information, see:

- How to access Kinesis Video Streams data (p. 766)
- Blog post: Recovering abandoned calls with Amazon Connect

Machine Learning (ML) and Artificial Intelligence (AI)

Amazon Connect uses the following services for ML/AI:

- Amazon Lex—Lets you create a chatbot to use as Interactive Voice Response (IVR). For more information, see Add an Amazon Lex bot to Amazon Connect (p. 564).
- Amazon Polly—Provides text-to-speech in all flows. For more information, see Add text-to-speech to prompts (p. 460) and SSML tags supported by Amazon Connect (p. 468).
- Amazon Transcribe—Grabs conversation recordings from Amazon S3, and transcribes them to text so you can review them.
- Amazon Comprehend—Takes the transcription of recordings, and applies speech analytics machine learning to the call to identify sentiment, keywords, adherence to company policies, and more.

Messaging

Amazon Connect uses the following services for messaging:

- Amazon Pinpoint—Use as an outbound messaging trigger for events; for example, bulk messaging (such as outbound marketing campaigns). For more information, see this blog post: Using Amazon Pinpoint to send text messages in Amazon Connect.
• Amazon Simple Notification Service (Amazon SNS)—Use to send and receive SMS and other channel notifications. Amazon SNS is particularly useful for sending alerts and validations.

• Amazon Simple Email Service (Amazon SES)—Use to send validation e-mails, such as a password reset bot sending a confirmation of the transaction.

Security

Amazon Connect uses the following services for added security:

• AWS Identity and Access Management (IAM)—Use to manage permissions for users. Amazon Connect users require permission for services. For more information, see Identity and access management for Amazon Connect (p. 1185).

• AWS Directory Service—Amazon Connect supports user federation through the internal directory (created in the Amazon Connect instance), using Active Directory integration (MAD, ADFS) or SAML 2.0.

For more information, see:
  • Plan your identity management in Amazon Connect (p. 115)
  • Blog post: Enabling federation with AWS Single Sign-On and Amazon Connect

Management

Amazon Connect uses the following services for monitoring usage:

• Amazon CloudWatch—Collects logs, service metrics, performance metrics for Amazon Connect. For more information, see Monitoring your instance using CloudWatch (p. 1095).

• AWS CloudFormation—Amazon Connect does not support this directly for creating instances. However, it does support AWS CloudFormation templates for associated services, like integrations, database export, and so on.

• AWS CloudTrail—Provides a record of Amazon Connect API calls.

For more information about Amazon Connect and AWS CloudTrail, see Logging Amazon Connect API calls with AWS CloudTrail (p. 1109).

Browsers supported by Amazon Connect

Agents use the Contact Control Panel (CCP) (p. 1247) in Amazon Connect to communicate with contacts. The CCP is a website that they access using a web browser.

Before you work with Amazon Connect, verify that your browser is supported using the following table.

<table>
<thead>
<tr>
<th>Browser</th>
<th>Version</th>
<th>How to check your version</th>
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<tbody>
<tr>
<td>Google Chrome</td>
<td>Latest three versions</td>
<td>Open Chrome and type chrome://version in your address bar. The version is in the Google</td>
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<tr>
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<td>Chrome field at the top of the results.</td>
</tr>
<tr>
<td>Mozilla Firefox ESR</td>
<td>Versions are supported until</td>
<td>Open Firefox. On the menu, choose the Help icon and</td>
</tr>
<tr>
<td></td>
<td>their Firefox end-of-life date.</td>
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Mobile browsers

<table>
<thead>
<tr>
<th>Browser</th>
<th>Version</th>
<th>How to check your version</th>
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</thead>
<tbody>
<tr>
<td>Mozilla Firefox</td>
<td>Latest three versions</td>
<td>Open Firefox. On the menu, choose the Help icon and then choose About Firefox. The version number is listed underneath the Firefox name.</td>
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<tr>
<td>Microsoft Edge and Edge Chromium</td>
<td>Not supported</td>
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For more requirements, see Agent headset and workstation requirements for the CCP (p. 294).

Browsers on mobile devices

The Amazon Connect console and Contact Control Panel (CCP) do not work on mobile browsers. However, your agents can forward the audio portion of the call to their mobile device. For instructions, see Forward calls to a mobile device (iPhone, Android) (p. 1254).

Issue with Firefox version 86

The following issue may occur if you embed the Amazon Connect Contact Control Panel (CCP) into your agent application and your users access the Amazon Connect CCP using the Firefox web browser with Enhanced Tracking Protection browser setting set to Strict.

An upgrade to Firefox, specifically Firefox non-ESR version 86 released on February 23, 2021, introduced Total Cookie Protection which modified cookie sharing behavior across sites for users with Enhanced Tracking Protection set to Strict (Firefox defaults to Standard). Users with this specific browser setting and version combination may be unable to access the Amazon Connect CCP when embedded in another application, preventing them from handling contacts.

To prevent impact to your users (agents), we recommend that your users do one of the following:

- Confirm (or set) Enhanced Tracking Protection as Standard in their browser settings. Users can do this by following instructions documented here.
- Do not upgrade their Firefox browser version to v86 or higher.
- Use Google Chrome to access the Amazon Connect CCP.

Supported screen readers

You can use the following screen readers with the latest version of the Amazon Connect Contact Control Panel (the CCP URL ends with /ccp-v2):

- JAWS
- NVDA
Languages supported by Amazon Connect

Contact Control Panel

<table>
<thead>
<tr>
<th>CCP</th>
<th>Supported languages</th>
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</table>
| Contact Control Panel - latest version | • Chinese (Simplified)  
• Chinese (Traditional)  
• English  
• French  
• German  
• Italian  
• Japanese  
• Korean  
• Portuguese (Brazilian)  
• Spanish |
| Contact Control Panel - earlier version | • English  
• French  
• German  
• Italian  
• Japanese  
• Korean  
• Portuguese (Brazilian)  
• Spanish |

Chat message content

Amazon Connect provides full Unicode support. You can chat with customers in any language of your choice.

Amazon Connect Admin console

• Chinese (Simplified)  
• Chinese (Traditional)  
• English  
• French  
• German  
• Italian  
• Japanese  
• Korean  
• Portuguese (Brazilian)  
• Spanish
## Contact Lens for Amazon Connect

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<td>Portuguese (Portugal)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Spanish (Spain)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Spanish (United States)</td>
<td>Spanish (United States)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Pattern match languages

In Contact Lens, the pattern match feature supports the following languages:

- English (United States)
• Arabic (Gulf)
• Chinese
• German (Germany)
• French (France)
• Hindi (Indian)
• Italian
• Japanese
• Korean
• Portuguese
• Spanish (Spain)

Amazon Connect Wisdom

• English (Australia)
• English (Great Britain)
• English (United States)

Amazon Lex

See Languages Supported in Amazon Lex in the Amazon Lex Developer Guide.

Amazon Polly

See Voices in Amazon Polly in the Amazon Polly Developer Guide.
Get started with Amazon Connect

Use these steps to set up your contact center.

1. **Create an Amazon Connect instance** (p. 127). Use an instance to contain all the resources and settings related to your contact center. You specify how you plan to manage user accounts, whether your contact center will accept incoming calls and make outbound calls, and review the location where data will be stored in your Amazon S3 bucket.

2. **Set up phone numbers for your contact center** (p. 149). If you’re using voice, either claim a phone number that AWS provides, or port your current phone number to Amazon Connect. If you choose to port your numbers, we suggest claiming a number so you can test Amazon Connect and build your contact center while waiting for your numbers to be ported over.

3. **Set up routing** (p. 222). Create your queues and routing profiles, and set your hours of operation. In your routing profiles, specify the channels that agents should use: voice, chat, tasks, or all three. You also specify how many chats and tasks an agent can manage at the same time.

4. **Create Amazon Connect Flows** (p. 307). Establish a flow to define the customer experience with your contact center from start to finish. A single flow works for voice, chat, and tasks, which makes your design more efficient. When you build flows and configure the blocks, indicate how the flow should work for voice, chat, and tasks.

5. Add users, which are your managers and agents, and configure their settings. Assign a routing profile to each agent, specify whether they are using a softphone or desk phone, and set how long they have for **After contact work**. For instructions, see **Add users to Amazon Connect** (p. 775) and **Set up agents** (p. 232).

6. If you’re using chat, we provide several tools to help you enable your customer-facing app to engage with Amazon Connect chat. For more information, see **Set up your customer’s chat experience** (p. 245).

**Next steps**

There’s a lot you can do to optimize your contact center. Here are a couple of additional steps that you may find useful:

1. **Set up recording behavior** (p. 483). Monitor live conversations and review past conversations. This is a way that managers can coach agents and help them improve. For voice conversations, set up recording in your flows. For chat conversations, set up recording at the instance level.

   To learn how to monitor conversations, see **Monitor live conversations** (p. 798).

2. **Add an Amazon Lex bot to Amazon Connect** (p. 564). Use Amazon Lex in your contact center to reduce the load on your agents. For example, a bot can handle the initial interaction before the chat is routed to an agent, and also answer common questions for the customer.

**Take a free online class**

Check out the following free online classes:

- **Introduction to Amazon Connect and the Contact Control Panel (CCP)**
- **Amazon Connect: Introduction to the Administrative Interface**
- **Amazon Connect: Creating and Managing Amazon Connect Instances**
Amazon Connect concepts

Amazon Connect enables you to create an omnichannel contact center: a contact center that provides a unified experience across multiple channels, such as voice, chat, and tasks.

- You use the same routing profiles, queues, flows, metrics, and reports for all channels.
- Managers monitor all channels from one dashboard.
- Agents handle all customers from just one interface. If a customer interaction starts with chat and moves to voice, the agent handling the voice call has the complete chat transcript so context is preserved.

You can create highly personalized experiences for your customers using omnichannel communications, and separate the channels where needed. For example, you can dynamically offer chat and/or voice contact based on such factors as customer preference, estimated wait times, and agent skill.

This section explains concepts that will help you set up your Amazon Connect contact center, whether you use one channel or more.

Contents
- Telephony (p. 10)
- Chat capabilities for Amazon Connect (p. 13)
- Tasks (p. 16)
- Routing profiles (p. 21)
- Queues: standard and agent (p. 22)
- Queues: priority and delay (p. 24)
- Queue-based routing (p. 26)
- Channels and concurrency (p. 26)
- Amazon Connect Flows (p. 27)

Telephony

Amazon Connect provides a variety of choices to enable your company to make and receive telephone calls. One of the great advantages of Amazon Connect is AWS manages the telephony infrastructure for you: carrier connections, redundancy, and routing. And, it's designed to scale.

This topic explains the options that Amazon Connect provides for telephony, which helps you build a solution to meet your business requirements.

Contents
- Telephony architecture (p. 11)
- Toll-free numbers (p. 11)
- Direct-in-dial (DID) numbers (p. 11)
- Claiming numbers in Amazon Connect (p. 12)
Telephony architecture

Amazon Connect provides capabilities to host both toll-free and direct dial numbers (DID) in all AWS Regions supported by Amazon Connect. You can use both types of numbers in a single instance. A complete list of supported countries/regions and costs, including the price differences between DID and toll-free numbers, is located on the Amazon Connect pricing page.

AWS manages the connectivity to our network of carriers providing diverse connections to multiple carriers in each region supported by Amazon Connect. When Amazon Connect is deployed in a Region, we take advantage of the built-in redundancy of the AWS Availability Zone design to provide multiple carrier interfaces into multiple data centers. You can see how AWS manages the design of a Region here.

In addition to the Amazon Connect service being spread across multiple Availability Zones, AWS also has multiple telephony providers. These providers have multiple links into the data centers in those Availability Zones. This ensures that if a single or even multiple links fail from a carrier, there are alternate routes available to ensure the service remains available.

Toll-free numbers

Toll-free numbers are telephone numbers with distinct prefix codes that can be dialed with no charge to the person placing the call. Such numbers allow callers to reach businesses and/or individuals out of the area without being charged a long-distance fee for the call.

In the United States, the Federal Communications Commission provides rules for obtaining and using toll-free numbers. In other countries, similar governing bodies ensure that toll-free numbers are managed and distributed in accordance with local laws.

AWS manages toll-free numbers as a Responsible Organization, or "RespOrg." When you claim or port a number into Amazon Connect, we register that number with SOMOS. Once the number is registered, we are able to select multiple carriers to provide BOTH route and carrier redundancy. This provides the highest level of availability, ensuring the number will remain available even in the event of a complete carrier outage. This level of service does come at an additional cost, as toll-free numbers are a higher price than direct dial, but the service reliability and customer experience make this the most attractive option.

Direct-in-dial (DID) numbers

Direct inward dialing (DID), also called direct dial-in (DDI) in Europe, is a telecommunication service offered by telephone companies to subscribers. DID numbers provide a locally formatted telephone number that can match the dialing pattern of a local subscriber. For example, in Seattle, Washington, USA, the local dialing pattern is +1(206)-NXX-XXXX. The provider of the DID number would provide numbers with the +1(206) pattern to match local dialing.

In the United States, DID numbers are regulated by State Public Utilities commissions. DID numbers are managed by a single carrier. While they are portable, they can't be load balanced/managed across multiple carriers. This makes them less reliable than toll-free numbers.

DID numbers offer you the ability to present a local calling line identification when placing outbound calls, and a local presence to inbound callers. This can be very useful to increase the likelihood outbound and queued callback calls get answered by your customers. It can also show a customer that you are local to their area, and provide a cheaper inbound route than a long-distance call if you don't publish a toll-free number.
Because DID numbers are threaded to single carrier, Amazon Connect doesn’t offer carrier redundancy for DID numbers. We do offer link redundancy across multiple Availability Zones, so in the event of a link failure that carrier still has facilities available in another location to deliver calls. DID numbers also have a capacity limitation on how many calls a single number can accommodate, and this number does vary by Region. It is important to work with your AWS account team to ensure you are properly enabled with the right type of DID numbers if you plan on using DID numbers as your primary inbound channel, and have an expectation of over 100 concurrent calls per number.

DID numbers are less expensive than toll-free numbers, but don’t have the redundancy and broad geographical coverage of a toll-free number. The ability to localize numbers may be an attractive option for your business.

Claiming numbers in Amazon Connect

Amazon Connect provides you the ability to claim both direct dial and toll-free numbers in supported countries from inventories maintained by AWS. To claim a number, log into your Amazon Connect instance and select Phone numbers. For instructions, see Claim a phone number in your country (p. 160).

Porting numbers

Porting of numbers refers to the ability to move an existing telephone number from one carrier to another provided you are the “customer-of-record.” In the United States, portability is required and regulated by the Federal Communications Commission. Laws regarding the requirements for number portability vary greatly between countries/regions. In the United States and Canada, the process is regulated and well-defined. In other countries/regions, some have well-defined processes while some are dependent on carrier and geography.

If you are trying to port a number outside of the United States, follow the porting process we’ve documented, however, the timeline to complete may vary. If porting is not possible at all, AWS Support will let you know that it’s not available.

To begin the porting process, you need to gather some documentation to enable the process to run smoothly. AWS support will need a copy of your bill showing the current carrier, number(s) to port, and the company name. Feel free to redact any pricing or company information you feel is proprietary. You will also need to provide your Amazon Connect instance ID.

For detailed porting instructions, see Port your current phone number (p. 149).

Use cases for different configurations

Starting fresh with Amazon Connect

In this case, simply select new numbers using the claim a number process. For instructions, see Claim a phone number in your country (p. 160).

Migrating to Amazon Connect from another provider/platform

If you’re migrating to Amazon Connect from another platform, we recommend starting with a proof of concept, and migrating to Amazon Connect over time.

• A best practice is to forward your existing numbers to a new number (or numbers) claimed in Amazon Connect until you are fully converted.
• Once fully converted, use the porting process (p. 149) to bring your numbers into Amazon Connect.
• This gives you a fallback in case you have migration issues.
Maintaining two separate platforms

In some cases, you may have more than one Contact Center platform requiring telephony. Here's an overview of how to configure this:

- Choose which platform is the initial call-handling service, and forward to the other platform.
- If Amazon Connect is the primary call handling platform, you can port or claim numbers. You will design your flows to transfer calls to the other platform on a telephone number you will provide in the contact flow.
- If the external platform is the primary call handler, you will need to configure that platform to forward calls to a number you claim in Amazon Connect. Choose either a toll-free number, which will give you better redundancy and capacity at an increased cost, or a bank of DID numbers to terminate the call into Amazon Connect.
- For the use case, we recommend that you engage AWS Solution Architecture support to ensure your contact center is well-architected to achieve the best possible outcomes.

Chat capabilities for Amazon Connect

Amazon Connect Chat enables your customers to start chatting with contact center agents from any of your business applications, web or mobile. Interactions are asynchronous, enabling your customers to start a chat with an agent or Amazon Lex bot, step away from it, and then resume the conversation again. They can even switch devices and continue the chat.

Agents have a single user interface to help customers using both voice and chat. This reduces the number of tools that agents have to learn and the number of screens they have to interact with. Chat activities integrate into your existing contact center flows and the automation that you built for voice. You build your flows once and reuse them across multiple channels. Likewise, for metrics collection and the dashboards you built, they automatically benefit from the unified metrics across multiple channels.

Amazon Connect Chat is charged on a per use basis. There are no required up-front payments, long-term commitments, or minimum monthly fees. You pay per chat message, independently of the number of agents or customers using it. Regional pricing may vary. For more information, see Amazon Connect pricing.

Getting started with chat

To add chat capabilities to your Amazon Connect contact center and allow your agents to engage in chats, perform two steps:

- Enable chat at the instance level by [creating an Amazon S3 bucket for storing chat transcripts](p. 129).
- Add chat to your agent's routing profile (p. 230).

Agents can then begin accepting chats through the Contact Control Panel.

Amazon Connect provides several resources to help you add chat to your website. For more information, see [Set up your customer's chat experience](p. 245).

Example chat scenario

A customer and agent are chatting. The customer stops responding to the agent. The agent asks “Are you there?” and doesn't get a reply. The agent leaves the chat. Now the chat is no longer associated with an agent. Your flow determines what happens next.
In this scenario, the customer eventually sends another message ("Hey, I'm back") and the chat resumes. Depending on the logic that you define in the flow, the chat can be assigned to the original agent, or a different agent or queue.

Here's how you build this scenario:

1. Create a disconnect flow. The following image shows the Sample disconnect flow (p. 320).

   ![Sample disconnect flow](image)

2. In the disconnect flow, add a **Wait (p. 445)** block. The Wait block has two branches:
   - **Timeout**: Run this branch if the customer hasn't sent a message after a specified amount of time. The total duration of the chat, including multiple **Wait** blocks, cannot exceed 25 hours.
     
     For example, for this branch you might just want to run a **Disconnect** block and end the chat.
   - **Customer return**: Run this branch when the customer returns and sends a message. With this branch, you can route the customer to the previous agent, previous queue, or set a new working queue or agent.

3. In your inbound flow, add the **Set Disconnect Flow (p. 406)** block. Use it to specify that when the agent or Amazon Lex bot has disconnected from the chat and only the customer remains, the set disconnect flow should run.

   In the following block, for example, we specified that the **Sample disconnect flow** should run.
When do chats end?

By default, the duration for a chat conversation, including the time spent waiting when the customer isn't active, can't exceed 25 hours. However, you can change this default duration and instead configure a custom chat duration. You can configure a chat to last from a minimum of 1 hour (60 minutes) to up to 7 days (10,080 minutes). To configure a custom chat duration, call the `StartChatContact` API and add the `ChatDurationInMinutes` parameter.

During an ongoing chat session, there's no limit to the number of times a customer can leave and rejoin an existing ongoing chat session. To accomplish this, use the `Wait` block. For example, you might wait 12 hours for the customer to resume the chat before ending the chat session. If the customer tries to resume the chat after 12 hours, in the flow you can have an Amazon Lex bot ask if they're contacting you about the same issue or a different one.

By specifying a wait time that's significantly shorter than the chat duration, you help ensure that customers have a good experience. For instance, for a 25-hour duration chat, it's possible for the customer to resume a chat after 24 hours and 58 minutes, and then be cut off after two minutes because the conversation ends at the 25-hour limit.

**Tip**
If you're using Amazon Lex with chat, note that the default session timeout for an Amazon Lex session is 5 minutes. The total duration for a session can't exceed 24 hours. To change the session timeout, see Setting the Session Timeout in the *Amazon Lex Developer Guide*.

More information

For more information about chat, see the following topics:

- Test voice, chat, and task experiences (p. 140)
- How routing works with multiple channels (p. 223)
- Create a routing profile (p. 230)
Amazon Connect Tasks allows you to prioritize, assign, track, and even automate tasks across the disparate tools agents use to support customers. For example, using Tasks you can:

- Follow-up on customer issues recorded in a customer relationship management (CRM) solution such as Salesforce.
- Follow-up with a customer via a call.
- Complete actions in a business-specific system, such as processing a customer claim in an insurance application.

Currently, Amazon Connect Tasks can be used in compliance with GDPR and is approved for SOC, PIC, HITRUST, ISO, and HIPAA.

What is a task?

A task is a unit of work that an agent must complete. This includes work that may have originated in external applications. It's routed, prioritized, assigned, and tracked just like voice and chat.

Agents handle tasks in their Contact Control Panel (CCP), again just like any other contact. When assigned a task, agents see a notification with the description of the task, information associated with the tasks, and links to any applications that they might need to complete the task. The following image shows what an agent's CCP may look like when they manage tasks.
How to create tasks

Amazon Connect provides different ways for you to create tasks:

1. You can use pre-built connectors with CRM applications (for example, Salesforce and Zendesk) to automatically create tasks based on a set of pre-defined conditions, without any custom development.

   For example, you can configure a rule in Amazon Connect to automatically create a task when a new case is created in Salesforce.

   For more information, see Set up applications for task creation (p. 747) and Create rules that generate tasks for third-party integrations (p. 549).

2. You can integrate with your homegrown or business-specific applications to create tasks using Amazon Connect APIs.

   For more information, see the StartTaskContact API.

3. You can add a Create task (p. 362) block to your flows. This block enables you to create and orchestrate tasks directly from flows based on customer input (DTMF input), and contact and tasks information.

4. You can enable your agents to create tasks from the Contact Control Panel (CCP) without you doing any development work.
For example, agents can create tasks to ensure follow up work is not forgotten, such as calling a customer back to provide a status update on their issue.

For more information, see Test voice, chat, and task experiences (p. 140).

For more information on getting started with tasks, see Set up tasks (p. 239).

**Supported contact flow types**

You can use tasks in the following flow types:

- Inbound flow
- Customer queue flow
- Agent whisper flow
- Transfer to queue flow
- Transfer to agent flow

**Supported contact blocks**

You can use tasks in the following flow blocks:

- Change routing priority/age
- Check contact attributes
- Check hours of operation
- Check queue status
- Check staffing
- Create task
- Disconnect / hang up
- Distribute by percentage
- End flow / resume
- Get queue metrics
- Invoke AWS Lambda function
- Loop
- Set contact attributes
- Set customer queue flow
- Set disconnect flow
- Set working queue
- Transfer to flow
- Transfer to queue
- Wait

**Using IAM? Add Task permissions**

If your organization is using custom IAM policies to manage access to the Amazon Connect console, make sure users have the appropriate permissions to set up applications for task creation. For a list of required permissions, see Tasks page (p. 1198).
Track tasks in real-time and historical metrics reports

You can track the status of all tasks in real-time and historical metrics reports, just like you track contacts in other channels. For example, you can track:

- How long agents spent working on each task (Agent on contact time (p. 1021)).
- The total time from when a task was created to when it was completed. (Contact handle time (p. 1024)).

There are a few metrics that don't apply to tasks so you'll notice a value of 0 on the report for them:

**Real-time metrics**
- Avg interaction and hold time (p. 999)
- Avg hold time (p. 999)

**Historical metrics**
- Agent interaction and hold time (p. 1020)
- Agent interaction time (p. 1020)
- Average agent interaction time (p. 1022)
- Average customer hold time (p. 1023)

Manage tasks to custom service levels (SL)

While voice and chats may have short service level times based on seconds or minutes, you may have some tasks with service levels that are hours or days. You can create custom service level durations that are appropriate to each of your channels. For more information, see real-time custom service levels (p. 1003) and historical custom service levels (p. 1030).

When do tasks end?

The total duration of a task can be up to 7 days. A task ends when one of the following happens:

- An agent completes the task.
- A flow runs a Disconnect / hang up (p. 368) block, which ends the task.
- A task reaches the 7 day limit.
- You end the task using the StopContact API.

Search and review completed tasks

Use the Contact search (p. 935) page to search for and review completed tasks.

The following image is an example of what the Contact Summary and References look like in a contact record for a task.
The following data is appended to the contact record but not stored with it. The data is included in an export.

- Flow ID
- Potential attributes:
  - ContactDetails (p. 1068)
    - Name: the name of the task
    - Description: the description of the task
  - References (p. 1075): any links to forms or other sites

When task is scheduled for a future date and time, Contact Summary also displays Scheduled time.

More information

- Amazon Connect feature specifications (p. 1332)
- Accept a task (p. 1283)
- Create a new task (p. 1285)
- Transfer a task (p. 1289)
Routing profiles

A routing profile determines what types of contacts an agent can receive and the routing priority.

- Each agent is assigned to one routing profile.
- A routing profile can have multiple agents assigned to it.

Amazon Connect uses routing profiles to allow you to manage your contact center at scale. To quickly change what a group of agents does, you only need to make an update in one place: the routing profile.

Default routing profile: Basic routing profile

Amazon Connect includes a default routing profile named Basic routing profile. Along with the default flows (p. 307) and default queue (named BasicQueue), it powers your contact center so you don't need to do any customization. This is what enables you to get started quickly.

Routing Profiles Link Queues and Agents

When you create a routing profile, you specify:

- The channels the agents will support.
- The queues of customers that the agents will handle. You can use a single queue to handle all incoming contacts, or you can set up multiple queues. Queues are linked to agents through a routing profile.
- Priority and delay of the queues.
There are two types of queues:

- **Standard queues**: This is where contacts wait before they are routed to and accepted by agents.
- **Agent queues**: These queues are created automatically when you add an agent to your contact center.

Contacts are only routed to agent queues when explicitly sent there as part of a flow. For example, you might route contacts to a specific agent who's responsible for certain customer issues, such as billing or premium support. Or you might use agent queues to route to an agent's voice-mail.

Contacts waiting in agent queues are higher priority than contacts waiting in standard queues. Contacts in agent queues have the highest priority and zero delay:

- **Highest priority**: If there's another contact in the basic queue, Amazon Connect chooses to give the agent the contact from the agent queue first.
- **Zero delay**: If the agent is available, the contact immediately gets routed to them.

**Queues in metrics reports**

In a real-time metrics report (p. 995), you can monitor how many contacts are in standard queues and agent queues. The following image shows a sample real-time metrics Queues report where an Agents table and Agents queues table have been added.
When an agent gets a contact from a standard queue, the contact never appears in the agent queue. It just goes directly to the agent.

In a historical metrics report (p. 1018), by default agent queues don’t appear in a Queues table. To show them, choose the Settings icon, then choose Show agent queues.
Tip
The metrics APIs don't support agent queues.

Default queue: BasicQueue

Amazon Connect includes a default queue named BasicQueue. Along with the default flows (p. 307) and default routing profile (named Basic routing profile), it powers your contact center so you don't need to do any customization. This is what enables you to get started quickly.

Queues: priority and delay

Priority and delay are powerful features that allow you to load balance contacts among groups of agents.

Example 1: Different priority but same delay

For example, one group of agents is assigned to a Sales routing profile. Since their primary job is sales, the Sales queue is Priority 1 and Delay is 0. But they can help with Support too, so that queue is Priority 2 and Delay is 0. This shown in the following table:

<table>
<thead>
<tr>
<th>Queue</th>
<th>Priority</th>
<th>Delay (in seconds)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Support</td>
<td>2</td>
<td>0</td>
</tr>
</tbody>
</table>
If there are no contacts in the Sales queue, then the agents will be presented with contacts from the Support queue.

**Example 2: Same priority but different delay**

Say you set the Support queue to Priority 1 and Delay of 30 seconds, as shown in the following table:

<table>
<thead>
<tr>
<th>Queue</th>
<th>Priority</th>
<th>Delay (in seconds)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Support</td>
<td>1</td>
<td>30</td>
</tr>
</tbody>
</table>

These agents will always get contacts from the Sales queue first because the delay is 0. However, when a contact in the Support queue ages past 30 seconds, it will also be treated as priority 1. The agents will then be presented with the contact from the Support queue.

**Example 3: Different Priorities and Delays**

Here's a more complicated example for a Support routing profile:

<table>
<thead>
<tr>
<th>Queue</th>
<th>Priority</th>
<th>Delay (in seconds)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tier 1 Support</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Tier 2 Support</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Tier 3 Support</td>
<td>2</td>
<td>20</td>
</tr>
<tr>
<td>Tier 4 Support</td>
<td>3</td>
<td>80</td>
</tr>
</tbody>
</table>

This routing profile prioritizes the Tier 1 Support and Tier 2 Support queues equally because each is priority 1.

- Agents may take contacts from the Tier 3 Support queue when:
  - Customers for Tier 3 Support are waiting for 20 seconds or longer.
  - And no contacts are in the Tier 1 Support or Tier 2 Support queues.
- Agents may take contacts from the Tier 4 Support queue when:
  - Customers in the Tier 4 Support queue have been waiting 80 seconds or longer.
  - And no contacts are in the Tier 1 Support, Tier 2 Support or Tier 3 Support queues.

*Priority takes precedence.* (You might think that agents take contacts from Tier 4 Support when contacts are in Tier 1 Support, Tier 2 Support, or Tier 3 Support and waiting 20 seconds or longer, but that's not right.)

**Example 4: Same Priority and Delay**

In this example a routing profile has only two queues, and they have the same priority and delay:

<table>
<thead>
<tr>
<th>Queue</th>
<th>Priority</th>
<th>Delay (in seconds)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales</td>
<td>1</td>
<td>0</td>
</tr>
</tbody>
</table>
Queue-based routing

In your business, you might want to route customers to specific agents based on certain criteria, such as the skill of the agent. This is called queue-based routing, also known as skills-based routing.

For example, an airline might have some agents who handle reservations for English-speaking customers, others who handle Spanish-speaking customers, and a third group that handles both types of customers, but only over the phone.

The following illustration shows you can:

- Assign the same routing profile to multiple agents.
- Assign multiple queues to a routing profile.
- Assign a queue to multiple routing profiles.

For an overview of the steps to set up queue-based routing, see Set up queue-based routing (p. 232).

Channels and concurrency

Agents can be available concurrently on voice, chat, and tasks at the same time. Here's how this works:

Suppose an agent is configured in their routing profile for voice, up to 10 chats, and up to 10 tasks. When the agent logs in, they can be routed a chat, task, or voice call. However, once they are on a voice call, no more voice calls, chats, or tasks are routed to them until they finish the call.
If the agent accepts a chat first, up to 10 chats will be routed to them, but no voice calls or tasks. Once they are done with the chats, they're available for the next contact, which can be voice, chat, or tasks. To learn more, see How routing works (p. 223).

To learn more about what the agent experiences in the Contact Control Panel when handling multiple chats, see Work with chats (p. 1258).

Amazon Connect Flows

A flow defines how a customer experiences your contact center from start to finish. At the most basic level, flows enable you to customize your IVR (interactive voice response) system.

For example, you can give customers a set of menu options and route customers to agents based on what they enter on their phone. Although with Amazon Connect, flows are significantly more powerful than that: you can create dynamic, personalized flows that interact with other AWS services.

Default flows

When you create an instance and claim a number, you automatically have a working contact center in just 5 minutes. This is because Amazon Connect includes a set of default flows that have already been published. It uses them to power your contact center.

When you customize your contact center and create new flows, you're replacing the default flows with your own.

For example, say you create a flow that includes putting the customer on hold.

- You can create a prompt to play while the customer is on hold, such as "Do your holiday shopping early this year. We're offering free shipping in November." And then play some music.

- If you don't create a prompt, Amazon Connect will play the Default customer hold flow automatically.

To see the list of default flows in the Amazon Connect console, go to Routing, Flows. They all start with Default in their name.

For a list of all the default flows and what they do, see Default flows (p. 307).

Flow designer

To customize your contact center, you use the flow designer. It's a drag-and-drop interface that allows you to customize your contact center without any coding.

Flow blocks

Flow blocks are the building blocks of your flows. Each block is designed for a specific function a business might want in a contact center.

You configure a flow block by accessing its Properties page, as shown in the following GIF.
For a list of the available flow blocks and descriptions about what they do, see Flow block definitions (p. 327).

**Sample flows**

To see how to put flow blocks together to create different flows, see Sample flows (p. 318).
Best practices for Amazon Connect

This list of best practices can help you get the maximum benefit from Amazon Connect. These best practices are for flows, Lambda, chat, Amazon Lex, and the Contact Control Panel (CCP).

We also recommend reviewing Security Best Practices for Amazon Connect (p. 1245).

Flows

- Use consistent attribute naming conventions across all AWS services. Use camel case for yourAttributeNames to avoid confusion when passing and referencing variables.
- Use standard naming conventions for attribute names. Don't use spaces or special characters that could impact downstream reporting processes such as AWS Glue crawlers.
- Create modular flows. Make the flows as small as possible, and then combine modular flows into an end-to-end contact experience. This helps to keep your flows manageable, and you won't require numerous regression testing cycles.
- When you set User Defined or External values in dynamic attribute fields, use only alphanumeric characters (A-Z, 0–9) and periods. No other characters are allowed.
- Ensure all error branches are routed to a block that effectively handles the error or terminates the contact.
- Use a Set logging behavior block to enable or disable logging for segments of the flow where sensitive information is collected and can't be stored in CloudWatch.
- Use Set recording behavior block in your flow to disable and enable recordings according to your use case. Keep in mind that Amazon Connect records conversations with agents only. It doesn't record IVR interactions.
- Ensure that attributes used in the flow are set and referenced correctly. If there are periods prepended to the attribute names, you are likely using JSONPath ($.) format while also selecting a variable type from the pick list. For example, using:
  - Save text as attribute and value $.External.variableName works as expected.
  - Set dynamically and value variableName works as expected.
  - Set dynamically and $.External.variableName results in a prepended period.
- Before transferring a call to agent and putting that call in a queue, ensure that Check hours of operation and Check staffing blocks are used. They verify that the call is within working hours and that agents are staffed to service.
- Ensure that callbacks are offered before and after queue transfer by using Check queue status blocks. Include a condition for Queue capacity that is greater than X, where X is a number representing your expected queue capacity.
  - If queue capacity exceeds the expected capacity, use a Get Customer Input block to offer a callback. This retains the caller's position in the queue and calls them back when an agent is available.
  - In the Set callback number block, choose the number to be used to call the customer back in the CCP. Use System and Customer Number or a new number, collected by a Store Customer Input block, using System and Stored customer input.
  - Finally, add a Transfer to queue block. Configure it to Transfer to callback queue and configure the callback options to fit your specific use case.
- Use a Loop prompts block in your Customer queue flow to interrupt with a queued callback and external transfer at regular intervals.
- Ensure that all countries referenced in external transfers or used for outbound dialing are added to the service quota for your account-instance.
Amazon Connect Administrator Guide
Lambda

Ensure that all numbers referenced in external transfers are in E.164 format. Drop the national trunk prefix that you use when calling locally. This prefix would be the leading 0 for most of Europe, 1 for the US. The prefix is replaced by the country code. For example, the UK mobile number 07911 123456 in E.164 format is +44 7911 123456 (tel:+447911123456).

Ensure that there are no infinite loops in the flow logic. Also ensure that for each call, the flow connects the caller to an agent, bot, or transferred externally for further assistance.

Lambda

Amazon Connect limits the duration of a sequence of Lambda functions to 20 seconds. It times out with an error message when the total execution time exceeds this threshold. Because customers hear silence while a Lambda function runs, we recommend adding a Play prompt block between functions to keep them engaged during the long interaction.

By breaking up a chain of Lambda functions with the Play prompt block, you can invoke multiple functions that last longer than the 20 second threshold.

Chat and Amazon Lex

You can use the same bot for both the voice and chat channels. However, you may want the bot to respond differently based on the channel. For example, you want to return SSML for voice so a number is read as a phone number, but you want to return normal text to chat. You can do this by passing the Channel attribute. For instructions, see How to use the same bot for voice and chat (p. 544).

For voice, some words are best spelled phonetically to get the correct pronunciation, such as last names. If this is the case with your scenario, include it in the design of your bot. Or, you can keep the voice and chat bots separate.

Tell agents about the bot. When a contact is connected to the agent, the agent sees the entire transcript in their window. The transcript includes text from both the customer and the bot.

Contact Control Panel

If your agents use Google Chrome 71 to Chrome 75, and they use chat or tasks, add the CCP URL to the allow list in the agent's Chrome settings. Otherwise, they won't hear the audio indicator notifying them that there's an incoming chat or task.

For instructions, see this Google Chrome Help article.
Tutorials: An introduction to Amazon Connect

The tutorials in this section are provided to help you start using Amazon Connect. They show you how to set up your first instance, and test a sample voice and chat experience. Next, they show you how to set up an IT Help Desk contact center that uses the features in Amazon Lex.

These tutorials are suitable for both knowledge workers and developers.

Prerequisite

- An AWS account. If you don't already have one, create an account at: aws.amazon.com.

Print the tutorials

If you want to print the tutorials, choose the PDF icon at the top of any page, as shown in the following image.

A PDF version of the documentation opens. Press Ctrl+Home to return to the beginning of the PDF, then scroll down to the table of contents. Choose which pages to print.

Contents

- Tutorial 1: Set up your Amazon Connect instance (p. 31)
- Tutorial 2: Test the sample voice and chat experience (p. 40)
- Tutorial 3: Create an IT help desk (p. 46)

Tutorial 1: Set up your Amazon Connect instance

You can have multiple instances of Amazon Connect. Each instance contains all the resources related to your contact center, such as phone numbers, agent accounts, and queues.
In this tutorial, you open Amazon Connect, create an instance of Amazon Connect, and claim a phone number that you can use for testing.

Contents

- Step 1: Launch Amazon Connect (p. 32)
- Step 2: Create an instance (p. 33)
- Step 3: Claim a phone number (p. 38)

Step 1: Launch Amazon Connect

In step walks you through finding Amazon Connect in the AWS console, and opening the Amazon Connect console.

1. Log in to the [AWS Management Console](https://console.aws.amazon.com/console) using your AWS account.
2. In the AWS Management Console, at the top of the page, choose the Services drop-down menu.
3. In the search box, type Amazon Connect.
4. Choose Amazon Connect.

If this is the first time you've been to the Amazon Connect console, you'll see the following Welcome page.
5. Choose **Get started**.

**Congratulations!** You found and accessed Amazon Connect. You can use these same steps to search for and launch any AWS service.

Go to **Step 2: Create an instance (p. 33)**.

### Step 2: Create an instance

1. On the **Amazon Connect virtual contact center instances** page, choose **Add an instance**.
2. Type a unique name for your instance. For example, the following image shows **mytest10089** as a name. Choose a different name for your instance. Then choose **Next**.

![Access URL](https://mytest10089)
3. **On the Add administrator page**, add a new administrator account for Amazon Connect. Use this account to log in to your instance later using the unique access URL. Choose **Next**.

   a. The user name will be your Amazon Connect login. It’s case sensitive.
   b. The password must be between 8-64 characters, and must contain at least one uppercase letter, one lowercase letter, and one number.

4. **On the Telephony Options page**, accept the default settings and choose **Next**.

5. **On the Data storage page**, accept the default settings and choose **Next**.
6. On the **Review and create** page, choose **Create instance**.
7. After the instance is created, choose Get started.

8. On the Welcome to Amazon Connect page, choose Skip for now.
9. You're now on the Amazon Connect dashboard. On the left is the navigation menu. Your instance name (also called an alias) displays in the URL.
Congratulations! You set up your instance and now you’re on the Amazon Connect dashboard. Go to Step 3: Claim a phone number (p. 38).

Step 3: Claim a phone number

In this step, you set up a phone number so that you can experiment with Amazon Connect.

1. On the navigation menu, choose Channels, Phone numbers.

2. On the right side of the page, choose Claim a number.

3. Select the DID (Direct Inward Dialing) tab. Use the drop-down arrow to choose your country/region. When numbers are returned, choose one.
4. Write down the phone number. You call it later in this tutorial.

5. In the **Description** box, type this note: **this number is for testing**.

6. In the **Flow / IVR** box, choose the drop-down arrow, and then choose **Sample inbound flow (first contact experience)**.

7. Choose **Save**.

**Congratulations!** You set up your instance and claimed a phone number. Now you're ready to experience how chat and voice work in Amazon Connect. Go to **Tutorial 2: Test the sample voice and chat experience (p. 40)**.
Tutorial 2: Test the sample voice and chat experience

To better understand what the voice and chat experiences are like for your agents and customers, you can test them without doing any development.

This tutorial shows you how to access and use the Contact Control Panel (CCP) (p. 1247). The CCP is a web page that agents use to accept and manage voice and chat contacts.

Prerequisites

This tutorial is part of a series. If you performed Tutorial 1, you're ready to go. If not, here's what you need:

- An AWS account
- A configured Amazon Connect instance
- An Amazon Connect administrative account
- A claimed phone number

Contents

- Step 1: Handle a voice contact (p. 40)
- Step 2: Handle a chat contact (p. 44)

Step 1: Handle a voice contact

1. On the navigation menu, choose Dashboard.

2. On the Dashboard page, choose Test chat.
3. Choose **Activate Contact Control Panel**.

4. If your browser prompts you to grant microphone access, choose **Allow**.

5. If your browser prompts you to allow notifications, choose **Allow**.

6. In the test CCP, set your status to **Available**.
7. Use your mobile phone to call the phone number that you claimed earlier. If you didn't write down the number, you can find it by going to Channels, Phone numbers.

8. When your call is joined to Amazon Connect you'll hear "Press 1 to be put in queue for an agent, 2 to ..." This is the Sample inbound flow (p. 318) that Amazon Connect runs by default. You're going to change this later in the tutorial.

9. You can play around with the different options in the Sample inbound flow. To connect to an agent, press 1, 1, 1.

10. In the CCP, choose Accept call.
11. You’ll see what the CCP looks like when an agent is connected to a customer.

12. Choose **End call**.

Now the contact is in the After Contact Work (ACW) state. This is when the agent might enter some notes about the contact.
13. Choose **Close contact**. This frees up the agent to take another incoming contact.

Well done! You’ve handled your first voice contact!

**Tip**
As an administrator, you can launch the CCP from anywhere on the Amazon Connect console by choosing the phone icon on the top of the page.

Next step
Go to **Step 2: Handle a chat contact** (p. 44) to experience how to handle a chat contact.

**Step 2: Handle a chat contact**

In Step 1, you used the Contact Control Panel (CCP) to manage a voice contact. In this step, you experience how to use the CCP to manage a chat contact.

1. Choose the chat bubble to start a chat.
2. The Sample inbound flow automatically transfers to you a queue. However, you can type a message as the customer and the agent receives it. For example, *I need help resetting my password*.

3. In the CCP, accept the incoming chat.
4. Use the CCP to send chat messages to the customer.
5. When you’re done chatting, choose End chat. Then in the CCP, choose Close contact.

Congratulations! You’ve experienced what it's like to chat using Amazon Connect.

Next, try Tutorial 3 to set up an IT Help Desk. It shows you how to set up routing, create a flow, and then test the custom voice and chat experience. Go to Tutorial 3: Create an IT help desk (p. 46).

**Tutorial 3: Create an IT help desk**

This tutorial shows you how to create an IT Help Desk. It shows how to create an Amazon Lex bot that finds out why the customer is calling. You next create a flow to use the customer’s input to route them to the right queue.

**Prerequisite**

This tutorial is part of a series. If you performed Tutorial 1, you're ready to go. If not, here's what you need:

- An AWS account
- A configured Amazon Connect instance
- An Amazon Connect administrative account
- A claimed phone number

**Contents**

- Step 1: Create an Amazon Lex bot (p. 47)
- Step 2: Add permissions to Amazon Lex bot (p. 54)
- Step 3: Set up routing (p. 56)
- Step 4: Create a flow (p. 61)
Step 1: Create an Amazon Lex bot

Bots provide an efficient way to offload repetitive tasks from your agents. This tutorial shows how to use the bot to find out why customers are calling the IT Help Desk. Later, we use the customer’s response to route them to the right queue.

In previous tutorials, you used the Amazon Connect console. In this tutorial to set up a bot, you use the Amazon Lex console.

This step has five parts to it.

Contents

- Part 1: Create an Amazon Lex bot (p. 47)
- Part 2: Add intents to your Amazon Lex bot (p. 49)
- Part 3: Build and test the Amazon Lex bot (p. 52)

Part 1: Create an Amazon Lex bot

This step assumes it's the first time you've opened the Amazon Lex console. If you've created a Amazon Lex bot before, your steps differ slightly from the ones in this section.

1. Choose the following link to open the Amazon Lex console, or enter the URL in your web browser: https://console.aws.amazon.com/lex/.
2. If this is the first time you've created Amazon Lex bot, choose Get Started. Otherwise, you're already in the Amazon Lex dashboard.
3. Choose Create a blank bot.
4. Enter the following information:

- **Bot name** — For this tutorial, name the bot **HelpDesk**.

- **IAM permissions**: Choose **Create a role with basic Amazon Lex permissions**.

- **COPPA**— Choose whether the bot is subject to the **Children’s Online Privacy Protection Act**.
• **Idle session timeout**— Choose how long the bot should wait to get input from a caller before ending the session.

5. Choose Next.

6. On the **Add language to bot** page, choose the language and voice for your bot to use when speaking to callers. The default voice for Amazon Connect is Joanna.

7. Choose Done.

Go to **Part 2: Add intents to your Amazon Lex bot** (p. 49).

**Part 2: Add intents to your Amazon Lex bot**

An intent is the action the user wants to perform. In this part, add two intents to the bot. Each intent represents a reason that users call the Help Desk: password reset and network issues.

1. In the Amazon Lex console, in the **Intent details** section, enter **PasswordReset** as the name of your intent.
2. Scroll to the **Sample utterances** section.
3. Type I forgot my password, and then choose Add utterance. Then add reset my password and choose Add utterance again.
4. Choose Save intent.
5. On the left navigation menu, choose All intents list.
6. On the left navigation menu, choose Back to intents list.
7. Choose **Add intent**, **Add empty intent**, and assign the name **NetworkIssue**. Scroll down the page and add the following sample utterances:

- I can't access the internet
- my email is down

When you're done, go to **Part 3: Build and test the Amazon Lex bot** (p. 52).

**Part 3: Build and test the Amazon Lex bot**

Build and test your bot to make sure that it works as intended before you publish it.

1. In the Amazon Lex console, choose **Build**. The build may take a minute or two.

2. When it's finished building, choose **Test**.

3. Test the **PasswordReset** intent. In the **Test Draft version** pane, type **I forgot my password**, and press **Enter**.
4. The verification looks like what’s shown in the following image.

5. To confirm that the NetworkIssue intent is working, type my email is down. The verification looks like what’s shown in the following image.
Step 2: Add permissions to Amazon Lex bot

To use a bot in your flow, add it to your Amazon Connect instance.

1. Open the Amazon Connect console (https://console.aws.amazon.com/connect/).
2. Choose the name of the instance that you created.
3. Do not log in on the name page (this method of logging in is for emergency access only). Rather, choose Contact flows.
4. Under Amazon Lex, use the drop-down arrow to choose HelpDesk. Under Alias, choose TestBotAlias, and then choose + Add Lex Bot, and then choose Add Amazon Lex Bot.

5. When you're done, choose Amazon Connect to navigate back to instances page.

6. Choose the access URL of your instance.
This takes you back to the Amazon Connect dashboard.

**Step 3: Set up routing**

In this step, you start at the Amazon Connect console for your instance. This step shows how to set up your queues, create a routing profile, and then assign your user account to the profile.

1. On the navigation menu, go to **Routing, Queues**.

2. Choose **Add queue**.
3. Complete the page, as shown in the following image, to add a queue named **PasswordReset**. When done, choose **Save**.
For the purposes of this tutorial, leave the following empty: Outbound whisper flow, Quick connect, and Maximum contact in queue.

4. Add a queue named **NetworkIssue**. Complete the **Add queue** page like you did for the **PasswordReset** queue.

When done, you'll have three queues.

![Queue List](image1.png)

5. On the navigation menu, go to **Users, Routing Profiles**.

![Routing Profiles](image2.png)

6. Choose **Add routing profile**.
7. Assign a name to the new profile (for example, Test routing profile). Enter a description, select Voice, Chat, and set Maximum chats to 1.

8. In the Queues section, use the drop-down arrow to search for the queues you just created. Choose NetworkIssue, select Voice and Chat.

9. Choose Add Queue, and then add the PasswordReset queue. Select Voice and Chat, and then choose Save.
10. Under **Default outbound queue**, use the drop-down arrow to choose **BasicQueue**.

![Default outbound queue](image1)

11. When done, scroll to the top of the page, and choose **Save** to save the profile.

12. On the navigation menu, go to **Users, User management**.

![User management](image2)

13. Select your login name.

14. In **Settings, Routing profile** choose the routing profile you created, for example, **Test routing profile**. Choose **Save**.
Routing is all set up and ready to go.

**Step 4: Create a flow**

Although Amazon Connect comes with a set of built-in flows (p. 307), you can create your own flows to determine how a customer experiences your contact center. The flows contain the prompts that customers hear or see, and they transfer them to the right queue or agent, among other things.

In this step, create a flow that's specific to the IT Help Desk experience that you're creating.

1. On the navigation menu, go to *Routing, Flows*.

2. Choose *Create flow*. 
3. The flow designer opens. Enter a name for the flow, such as **Test flow**.

4. Use the search box to search for the following block, and drag them onto the grid: **Set logging behavior** (p. 410), **Set voice** (p. 419), and **Play prompt** (p. 396).

5. Use your mouse to drag an arrow from the **Entry** block to the **Set logging behavior** block.

6. Connect the remaining blocks, as shown in the following image.
7. Choose the **Play prompt** title to open its properties page.

8. Configure the **Play prompt** block, as shown in the following image, and then choose **Save**.

9. Add a **Get customer input (p. 372)** block and connect to the **Play prompt** block.
10. Choose the title of the Get customer input (p. 372) block to open the properties page.

11. Configure the Get customer input block, as shown in the following images.
12. While still in the **Get customer input** block, choose **Add an intent**.

13. Enter the names of the intents that you created in the Amazon Lex bot. They are case sensitive!

14. Choose **Save**.

15. Add a **Play prompt** block and connect it to the **PasswordReset** branch.
16. Choose the **Play prompt** title to open its properties page. Configure the **Play prompt** block with the message *We're putting you in a queue to help you with password reset.* Choose **Save**.

17. Add a second **Play prompt** block and connect it to the **NetworkIssue** branch.

18. Choose the **Play prompt** title to open its properties page. Configure the **Play prompt** block with the message *We're putting you in a queue to help you with your network issues.* Choose **Save**.

19. Add a **Disconnect / hang up** (p. 368) block to the grid. Connect the **Default** and **Error** branches to it.

20. Add a **Set working queue** (p. 424) block to the grid. Connect the **Play prompt**.

21. Choose the **Set working queue** title to open its properties page. Configure the **Set working queue** block by using the drop-down arrow to choose the **PasswordReset** queue. Choose **Save**

22. Add a **Set working queue** block for NetworkIssue, and configure it with the NetworkIssue queue.

23. Drag two **Transfer to queue** blocks (from the **Terminate/Transfer** group) onto the grid.

24. Connect each of the **Set working queue** blocks to a **Transfer to queue** block.

25. Drag another **Disconnect/hang up** block onto the grid. Connect all of the remaining **Error** and **At capacity** branches to it.

26. Choose **Save**, and then choose **Publish**.

![](image)

**Tip**
Any blocks that aren't connected or configured correctly generate an error. If this happens, double-check that all branches are connected.

27. When the flow publishes, it displays the message that it saved successfully.

![](image)

If the flow doesn't save, double-check that all the branches are connected to blocks. That's the most common reason flows don't publish.

**Step 5: Assign the contact flow to the phone number**

1. On the navigation menu, go to **Channels, Phone Numbers**.
2. Choose your phone number.
3. Use the drop-down box to choose the flow you just created, and then choose **Save**.

Everything is all set up! Now you’re ready to test your IT Help Desk. Continue on to **Step 6: Test a custom voice and chat experience** (p. 68).
Step 6: Test a custom voice and chat experience

You're ready to try out the Amazon Lex bot, routing, and flow. The first step is to tell Amazon Connect which flow you want to test.

1. On the navigation menu, go to the **Dashboard** and choose **Test chat**.
2. Choose **Test Settings**.
3. Use the drop-down box to choose the flow you created, for example, **Test flow**. Choose **Apply**.

Test a custom chat experience

1. If needed, choose the chat bubble to start a chat.
2. Amazon Connect automatically detects a contact and runs the flow that you created.

3. Enter that you need help resetting a password. Then accept the incoming chat. The following image shows you what the chat and agent interfaces look like when you're trying them.
4. In the customer pane on the right, choose **End chat** to close the chat window.
5. In the test CCP, choose **Close contact** to end the After Contact Work (ACW).

## Test a custom voice experience

1. If the test chat window is still open, choose **End chat** to close it. Then you can try the voice experience.
2. Call your phone number.
3. When prompted, say *I’m having trouble accessing the internet*. You should hear the message that you’re being transferred to the NetworkIssue queue.
   
   **Tip**
   After you're transferred, you'll hear this message: 
   *Thank you for calling. Your call is very important to us and will be answered in the order it was received.*
   
   This message is generated by a default flow (p. 307) named **Default customer queue** (p. 313).
4. Switch to the test CCP and accept the incoming call.
5. After you accept the call, but before you're connected to the customer, you'll hear an inbound whisper stating what queue the contact is in, for example, NetworkIssue. This helps you know what the customer is calling about.
   
   The inbound whisper is generated by a default flow (p. 307) named **Default agent whisper** (p. 315).
6. When done, end the call.
7. In the CCP, choose **Clear contact** to end After Contact Work (ACW).

**Congratulations!** You built and tested an omnichannel IT Help Desk that leverages Amazon Lex and offers customers both chat and voice.

**Tip**
If you don't want to keep the phone number that you claimed for testing, you can release it back to inventory. For instructions, see *Release a phone number* (p. 164).
Architectural guidance for Amazon Connect

This topic provides guidance and best practices for designing and building reliable, secure, efficient, and cost-effective systems for your Amazon Connect contact center workloads. Using this guidance can help you build stable and efficient workloads, allowing you to focus on innovation, reduce costs, and improve your customer’s experience.

This content is intended for chief technology officers (CTOs), architects, developers, and operations team members.

Contents

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• Scenario and deployment approaches (p. 76)
• Operational Excellence (p. 84)
• Security: Design principles for developing a secure contact center (p. 97)
• Reliability (p. 105)
• Performance efficiency (p. 105)
• Cost optimization (p. 112)

Amazon Connect workload layers

You can separate Amazon Connect workloads into the following layers: telephony, Amazon Connect interface/API, flows/IVR, agent workstation, and metric and reporting.

Telephony

Amazon Connect is integrated with multiple telephony providers with redundant dedicated network paths to three or more Availability Zones in every Region where the service is offered today. Capacity, platform resiliency, and scaling are handled as part of the managed service, allowing you to efficiently ramp from 10 to 10,000+ agents without worrying about the management or configuration of underlying platform and telephony infrastructure. Workloads are load balanced across a fleet of telephony media servers, allowing new updates and features to be delivered to you with no downtime required for maintenance or upgrades. If a particular component, data center, or an entire Availability...
Zone experiences failure, the affected endpoint is taken out of rotation, allowing you to continue to provide a consistent quality experience for your customers.

When a voice call is placed to an Amazon Connect instance, the telephony layer is responsible for controlling the endpoint that your customer calls into through their carrier, across the PSTN and into Amazon Connect. This layer represents the audio path established between Amazon Connect and the customer. Through the Amazon Connect interface layer, you can configure things like outbound caller ID, assign flow/IVRs to phone numbers, enable live media streaming, enable call recording, and the ability to claim phone numbers without any prior traditional telephony knowledge or experience. Additionally, when migrating workloads to Amazon Connect, you have the option to port your existing phone numbers by opening a support case in your AWS Management Console. You can also forward your existing phone numbers to numbers that you’ve claimed in your Amazon Connect instance until you are fully migrated.

**Amazon Connect Interface/API**

The Amazon Connect interface layer is the access point that your agents and contact center supervisors and administrators will use to access Amazon Connect components like reporting and metrics, user configuration, call recordings, and the Contact Control Panel (CCP). This is also the layer responsible for:

- Single Sign-On (SSO) integration user authentication
• Custom desktop applications created using the Amazon Connect Streams API that may provide additional functionality and/or integrate with existing Customer Relationship Management (CRM) systems including the Amazon Connect Salesforce CTI Adapter (p. 296).

• Amazon Connect contact-facing chat interface

• Chat web server hosting the Amazon Connect Chat API

• Any Amazon API Gateway endpoints and corresponding AWS Lambda functions necessary to route chat contacts to Amazon Connect.

Anything your agents, managers, supervisors, or contacts use to access, configure, or manage Amazon Connect components from a web browser or API is considered the Amazon Connect interface layer.

Flow / IVR

The Flow/IVR layer is the primary architectural vehicle for Amazon Connect and serves as the point of entry and first line of communication with customers reaching out to your contact center. After a customer contacts your Amazon Connect instance, a flow controls the interaction between Amazon Connect, the contact, and the agent, allowing you to:

• Dynamically invoke AWS Lambda functions to make API calls.
• Send real-time IVR and voice data to third-party endpoints through Amazon Kinesis.
• Access resources inside your VPC and behind your VPN.
• Call other AWS services like Amazon Pinpoint to send SMS messages from the IVR.
• Perform data dips to database like Amazon DynamoDB to service your contacts.
• Call Amazon Lex directly from the flow to invoke a Lex bot for Natural Language Understanding (NLU) and Automatic Speech Recognition (ASR).
• Play dynamic and natural Text-to-Speech through Amazon Polly, and use SSML and Neural Text-to-Speech (NTTS) to achieve the most natural and human-like text-to-speech voices possible.
Flows enable you to dynamically prompt contacts, collect and store contact attributes, and route appropriately. You can assign a flow to multiple phone numbers, and manage and configure it through Amazon Connect.

Agent workstation

The agent workstation layer is not managed by AWS. It consists of any physical equipment and third-party technologies, services, and endpoints that facilitate your agent’s voice, data, and access the Amazon Connect interface layer. Components in the agent workstation layer include:

- The Contact Control Panel (CCP) agent hardware
- Network path
- Agent headset or handset
- VDI environment
- Operating system and web browser
- Endpoint security
- All networking components and infrastructure
- Internet Service Provider (ISP) or AWS Direct Connect dedicated network path to AWS.
- All other aspects of your agent’s operating environment including power, facilities, security, and ambient noise.
Metric and reporting

The metric and reporting layer includes the components responsible for delivering, consuming, monitoring, alerting, or processing real-time and historical metrics for your agents, contacts, and contact center. This includes all native and third-party components responsible for facilitating the processing, transmission, storage, retrieval, and visualization of real-time or historical contact center metrics, activity audit, and monitoring data. For example:

- Call recordings and scheduled reports stored in Amazon Simple Storage Service (Amazon S3).
- Contact records that you can export to AWS database services like Amazon Redshift or your own on-premises data warehouse with Amazon Kinesis.
- Real-time dashboards you create with Amazon OpenSearch Service and Kibana.
- Amazon CloudWatch metrics generated that you can use to set alarms based on static thresholds, set up Amazon SNS notifications to alert to your administrators and supervisors, or launch AWS Lambda functions in response to the event.
Scenario and deployment approaches

Amazon Connect offers self-service configuration and enables dynamic, personal, and natural customer engagement at any scale with a variety of migration and integration options. In this section, we explain the following scenarios and deployment approaches to consider when designing a workload for Amazon Connect:

- Traditional contact center
- Inbound
- Outbound
- Hybrid contact center
- Legacy contact center migration
- Virtual desktop infrastructure (VDI)

Traditional contact center

The traditional contact center requires a significant telephony, media, networking, database, and compute infrastructure footprint that can span multiple vendors and data center locations to service contacts. Each individual solution and vendor have unique hardware, software, networking, and architectural requirements that have to be met while resolving versioning, compatibility, and licensing conflicts.

It is common to have separate vendors and infrastructure requirements for local and remote agent hardware and VPN connectivity, Text-To-Speech (TTS), Automatic Call Distribution (ACD), Interactive Voice Response (IVR), voice audio and data, physical desk phones, voice recording, voice transcriptions, chat, reporting, database, Computer Telephony Integration (CTI), Automatic Speech Recognition
(ASR), and Natural Language Understanding (NLP). Your contact center architecture and infrastructure becomes more complicated when you consider multi-stage development, quality assurance, and test environments.

A typical Amazon Connect deployment solves or reduces many of the challenges associated with versioning, compatibility, licensing, contact center telephony infrastructure, and maintenance. It gives you the flexibility to create instances in new locations in minutes and migrate components individually, or in parallel, to best meet your individual business objectives. You can use flows for your IVR/ACD, have voice and data delivered through a supported web browser to your agent’s softphone, port your existing phone numbers, redirect softphone audio to an existing desk phone, invoke an Amazon Lex bot natively within your flow for ASR and NLP, and use the same flow for chat and voice. You can use Amazon Contact Lens to automatically generate voice transcriptions, perform key word identification and sentiment analysis, and categorize contacts. For agent CTI data and real-time voice streaming, you can use Amazon Connect Agent Event Streams and Kinesis Video Streams. You can also create multi-stage development, quality assurance, and test environments at no additional cost and only pay for what you use.

**Inbound**

Inbound is a contact center term used to describe a communication request initiated by a contact to the center. Contacts can reach your Amazon Connect instance for inbound self-service or to speak with a live agent in a variety of ways, including voice and chat. Voice contacts go through the PSTN and are
Inbound

routed to the Amazon Connect Instance telephony entry point through the phone number claimed in your instance. You can reserve a phone number with Amazon Connect directly, port your existing phone number, or forward voice contacts to Amazon Connect. Amazon Connect can provide local and toll-free numbers in all Regions where the service is supported.

When a phone call is placed to a number claimed in or ported to your Amazon Connect instance, the flow associated with the called number will be invoked. You can define the flow using flow blocks that can be configured with no coding knowledge required. The flow determines how the contact should be processed and routed, optionally prompting the contact for additional information to assist in routing decisions, storing those attributes to the contact details, and, if necessary, routing that contact to an agent with all of the call details and transcripts gathered along the way. Through the flow, you can invoke AWS Lambda functions to query customer information, call other AWS services like Amazon Pinpoint to send SMS text messages, and use native AWS service integrations including Amazon Lex for NLU/NLP and Kinesis Video Streams for real-time streaming of voice calls.

If an inbound contact needs to reach an agent, the contact is put into a queue and routed to an agent when they change their status to Available, according to your routing configuration. When the available agent's contact is accepted manually or through auto-accept configuration, Amazon Connect connects the contact with the agent.
When an inbound contact comes from a browser or mobile app request for a chat session, the request is routed to a web service or Amazon API Gateway endpoint that calls the Amazon Connect chat API to invoke the flow configured in your request. You can use the same flows for chat and voice, where the experience is managed and routed dynamically, based on the logic defined in the flow.

**Outbound**

Amazon Connect allows you the ability to programmatically make outbound contact attempts to local and international endpoints, reduce agent set-up time between contacts, and improve agent productivity. By using the Amazon Connect Streams API and `StartOutboundVoiceContact`, you can develop your own outbound solution or take advantage of existing partner integrations that work with your CRM data to create dynamic, personalized experiences for your contacts and empowering your agents with the tools and resources they need to service those contacts.

Outbound campaigns are typically driven by contact data exported from CRMs and separated into contact lists. Those contacts are prioritized and either delivered to the agents to initiate after a period of preview or programmatically contacted via Amazon Connect Outbound API, driven by your flow logic, and connecting to agents as needed. Typical outbound contact center use cases include fraud and service alerts, collections, and appointment confirmations.
Hybrid

If you have requirements to transfer contacts between Amazon Connect and legacy contact center technologies, you can use a Hybrid model architecture to pass contact data with the transfer. For example, a sales business unit on a legacy contact center platform may need to transfer a call to the service business unit that’s been migrated to Amazon Connect. Without a Hybrid architecture, call details will be lost and may require the contact to repeat information. This could increase handle times and may result in contact calling again for the same purpose.

Hybrid architectures require you to claim as many phone numbers as your expected maximum concurrent contacts and an intermediary state database accessible by both Amazon Connect and your legacy contact center platform. When a transfer is required to the other platform, you will use one of these phone numbers as a unique identifier, flag it as in-use in your intermediary database, insert your contact details, and use that number as your ANI or DNIS when you transfer the contact. When the contact is received by the other contact center platform, you will query the intermediary database for the contact details based on the unique ANI or DNIS you used. Hybrid architectures are typically used as an interim migration step because of the additional cost and complexity associated.

IVR-only

You may choose to use Amazon Connect to drive the contact’s IVR experience while your agent population remains on your legacy contact center platform. With this approach, you can use Amazon Connect flows to drive self-service and routing logic, and, if necessary, transfer the contact to the target agent or agent queue on your legacy contact center platform.

In this diagram, the contact dials a phone number claimed in your Amazon Connect instance for service. If they need to be transferred to an agent on your legacy contact center platform, an AWS Lambda...
function is invoked to query an available unique phone number, flag it as in-use, and write relevant contact details to an intermediary database. The contact is then transferred to the legacy contact center platform with the phone number returned from the Lambda function. The legacy contact center will then perform a query on the intermediary database for the contact details, route accordingly, and reset the contact data in the intermediary database, allowing the phone number to be used again.

**Agent-only**

With this approach, your legacy contact center IVR drives the contact’s IVR self-serve and routing logic, and, if necessary, transfers the contact to Amazon Connect to route to your agent population.

![Diagram](image)

In this diagram, the contact dials a phone number claimed with your legacy contact center platform. If they need to be transferred to an agent on Amazon Connect, the legacy contact center platform will query an available unique phone number, flag it as in-use, and write relevant contact details to an intermediary database. The contact will then be transferred to Amazon Connect with the phone number returned by the legacy contact center’s query. Amazon Connect will then query the contact details from the intermediary database using AWS Lambda, route accordingly, and reset the contact data in the intermediary database, allowing the phone number to be used again.

**Mixed**

In this scenario, you may have your IVR and agents operating in parallel on Amazon Connect and your legacy contact center platform to allow for site, agent group, or line-of-business migrations.
Legacy contact center migration

When you are evaluating Amazon Connect for new or existing workloads, there are several strategies you can consider. For situations that require contact details to be included when contacts are transferred between Amazon Connect and your legacy contact center solution, a Hybrid model architecture will be required until the migration is complete. The approaches described in this section allow you to move specific lines of business in phases, manage training and support, and mitigate risks associated with change.

New workload

You may decrease risk associated with changes to existing business units and increase flexibility and digital innovation potential by adopting a net new workload on Amazon Connect. Net new workloads that do not require the Hybrid model architecture are less complex, are not affected by change in business process or agent routine, and have a faster time to market. Adopting a net new workload allows you to take advantage of usage-based, pay-as-you-go pricing. Your contact center resources are available to create a new experience for their end users, test and implement it to evaluate the platform, gain confidence, and build the skills and operational mechanisms to prepare for larger migration across existing workloads.

IVR First

You may choose to use Amazon Connect to drive the contact's IVR experience while your agent population remains on your legacy contact center platform. With this approach, you can use Amazon
Connect Flows to drive self-service and routing logic, and, if necessary, transfer the contact to the target agent or agent queue on your legacy contact center platform.

**IVR Last**

With this approach, your legacy contact center IVR drives the contact’s IVR self-serve and routing logic, and, if necessary, transfers the contact to Amazon Connect to route to your agent population.

**Line of business segmentation**

If your lines of business have separate IVRs or don’t require contact transfers to legacy contact center platforms, you may want to consider a line of business migration approach. For example, selecting your service desk for internal support as your first line of business to migrate. After migrating your service desk IVR and agent population to Amazon Connect, you may choose to forward your existing contact to Amazon Connect, porting the endpoint after testing and business validation is completed.

**Site or agent group segmentation**

If your contact center has a global footprint, services contacts from multiple countries, or is managed independently by a respective geography or location, you may want to consider a migration approach based on a physical site or geography of agents. Each agent population and/or geography can have its own unique requirements and considerations that may not apply globally. Approaching your migration this way will allow each site or agent group to gain the skills they need to continue to operate independently before moving onto the next.

**Virtual desktop infrastructure (VDI)**

While you can use the Amazon Connect Contact Control Panel (CCP) within Virtual Desktop Infrastructure (VDI) environments, it will add another layer of complexity to your solution that warrants separate POC efforts and performance testing to optimize. The configuration/support/optimization is best handled by your VDI support team and the following deployment models are the most commonly implemented.

**VDI client with local browser access**

You can build a custom CCP with the Amazon Connect Streams API by creating a CCP with no media for call signaling. This way, the media is handled on the local desktop using standard CCP, and the signaling and call controls are handled on the remote connection with the CCP with no media. The following diagram describes that approach:
VDI client without local browser access

Sometimes the VDI client does not have access to a local browser. In this scenario, you can create a single CCP instance with media run from the VDI server allowing access to enterprise resources. For this deployment model UDP audio is usually enabled on the VDI OS. This deployment model requires extensive testing to calibrate the different VDI server parameters to optimize quality of experience.

Operational Excellence

Operational excellence includes the ability to run and monitor systems to deliver business value and continually improve supporting processes and procedures. This section consists of design principles, best practices, and questions surrounding the operational excellence of Amazon Connect workloads.

Prepare

Consider the following areas to prepare for an Amazon Connect workload.

AWS account

With AWS Organizations, you can set up multiple AWS accounts for each level of your development, staging, and quality assurance environments. This allows you to centrally govern your environment as you grow and scale your workloads on AWS. Whether you are a growing startup or a large enterprise, Organizations helps you to centrally manage billing; control access, compliance, and security; and share resources across your AWS accounts. This is the starting point for consuming AWS services along with a cloud adoption framework.
Region selection

Amazon Connect Region selection is contingent upon data governance requirements, use case, services available in each Region, telephony costs in each region, and latency in relation to your agents, contacts, and external transfer endpoint geography.

Telephony

- **Phone number porting** Open a porting request as far in advance of your pending go-live date as possible.

When porting phone numbers for critical workloads, include all requirements and use case information in your claim/port number several months before the go-live date. This includes requests for live cutover support, communication prior, during, and after cutover, monitoring, and anything else specific to your use case.

For detailed information about porting your numbers, see Port your current phone number (p. 149).

- **Carrier diversity** In the US, you should use Amazon Connect telephony services for US toll-free numbers, allowing you to route toll-free traffic across multiple suppliers in an active-active fashion at no additional charge. In situations where you are forwarding inbound traffic to an Amazon Connect phone number, you should request redundant DID or Toll-Free numbers across multiple telephony providers. If you are claiming or porting multiple DID or Toll-Free numbers outside of the US, you should request that those numbers be claimed or ported to a variety of telephony providers for increased resiliency.

- **International toll-free and high-concurrency DIDs** If you are using an existing toll-free national service to redirect inbound traffic to DIDs, you should request DID phone numbers across multiple telephony providers. A general recommendation for this configuration is 100 sessions per-DID and your AWS Solutions Architect can help with capacity calculations and setup.

- **Testing** Thoroughly test all use case scenarios, preferably using the same or similar environment as your agents and customers. Ensure that you test several inbound and outbound scenarios for quality of experience, Caller ID functionality, and measure latency to ensure it falls within acceptable range for your use case. Any deviations from your target agent and customer environments need to be measured and accounted for. For more information, including use case testing instructions and criteria, see Troubleshooting Issues with the Contact Control Panel (CCP) (p. 1313).

Agent workstation

The Amazon Connect Call Control Panel (CCP) has specific network and hardware requirements that must be met to ensure the highest quality of service for your agents and contacts:

- **Set Up Your Network for CCP use** and ensure that your agent hardware meets minimum requirements.

- **Ensure that you have used the Amazon Connect Check Amazon Connectivity Tool on the same network segment as your agents** to verify that your network and environment is configured correctly for CCP use.

- **Calculate PSTN latency for use cases that require agents and contacts to be in geographically distant locations**

- **Review the Troubleshooting Issues with the Contact Control Panel (CCP) (p. 1313) section** to create runbooks and playbooks for your agents and supervisors to follow should they encounter issues.

- **Set up monitoring for your agent workstations and consider partner solutions for call quality monitoring.** Your goal with monitoring your agent workstations should be the ability to identify the source of any potential network and resource contention. For example, consider a typical agent’s softphone network connection path to Amazon Connect:
Without setting up monitoring at the local LAN/WAN, path to AWS, and agent workstation levels, it’s difficult and often impossible to determine if a voice quality issue is originating from your agent’s workstation, their private LAN/WAN, ISP, AWS, or the contact itself. Setting up logging and alerting mechanisms proactively is critical in determining root cause and optimizing your environment for voice quality.

Configure your existing directory

If you are already using an AWS Directory Service directory to manage users, you can use the same directory to manage user accounts in Amazon Connect. This must be decided and configured when you create your Amazon Connect instance. You cannot change the identity option you select after you create the instance. For example, if you decide to change the directory you selected to enable Single Sign On (SSO) for your instance, you can delete the instance and create a new one. When you delete an instance, you lose all configuration settings and metrics data for it.

Service Quotas

Review the default service quotas for each service involved in your workload as well as the default service quotas for Amazon Connect and request increases where applicable. When requesting an increase for Amazon Connect, be sure to use expected values without additional padding for fluctuations. Fluctuations are considered automatically when you make your request.
AWS Enterprise support

AWS Enterprise Support is recommended for business and/or mission-critical workloads on AWS. Both Enterprise Support and Well-Architected Review with an AWS Solutions Architect are required to qualify for the Amazon Connect Service Level Agreement.

AWS well-architected review

Before any migration or implementation to Amazon Connect, follow our best practices by using the AWS Well-Architected Framework, Operational Excellence. The Framework provides a consistent approach for you to evaluate architectures and implement designs that will scale over time based on five pillars — operational excellence, security, reliability, performance efficiency, and cost optimization. We also recommend using AWS Enterprise Support for business and mission-critical workloads in AWS. Both Enterprise Support and Well-Architected Review with your AWS Solutions Architect are required to qualify for the Amazon Connect Service Level Agreement.

Operate

Consider the following areas to operate an Amazon Connect workload.

Logging and monitoring

See Monitoring your instance using CloudWatch (p. 1095) and Logging Amazon Connect API calls with AWS CloudTrail (p. 1109).

Contact attributes

Amazon Connect allows you to dynamically set and reference contact attributes within flows to create dynamic and personalized experiences for your contacts, create powerful self-service applications, data-driven IVRs, integrations with other AWS services, simplify phone number management, and allows for custom real-time and historical reporting and analytics. The following are Best practices and considerations you can follow to reduce complexity, prevent data loss, and ensure a consistent quality of experience for your contacts.

Note the following considerations:

- **Data size** – To prevent truncation, the size limitation for contact attributes you can set in a Set contact attributes block varies depending on the charset, encoding, and language used. While this is generally enough data to play a short story for a contact, it is possible to exceed this limit, truncating any attributes set over the 32KB.

- **Data sensitivity** – Note if any attributes being set, queried, and referenced are sensitive or fall under any regulatory guidelines and ensure that the data is being treated appropriately for your use case.

- **Data persistence** – Any attributes set using the Set contact attributes block will be included in the contact record for your contact and available for screen pop to any custom agent desktop using the Streams API. Any time the attribute is referenced within your flow and logging is enabled for the flow, the name and value of the attribute will be logged to Amazon CloudWatch.

Best practices

- **Monitor usage** – As you implement new functionality, onboard new business units, and iterate on existing flows, look up your current attribute usage in contact search, copy the attributes to a text editor, add the new attributes, and ensure that you do not exceed the 32KB size limitation. Be sure to account for variable length fields like firstName and lastName and ensure that, even when the maximum space is used in a field, that you are still below the 32KB limitation.
• Clean-up – If data persistence isn’t required, you can set an attribute with the same name and a blank value to prevent the data from being stored to the contact record or passed in a screen pop to an agent using the Amazon Connect Streams API while freeing up the bytes that data would have otherwise used in the contact record.

• Sensitive data – Use the Store customer input block to collect sensitive DTMF input from your contacts and use envelope encryption to protect both the raw data and the data keys used to encrypt them. Store sensitive data in a separate database where persistence is required, use the Set logging behavior flow block to disable logging whenever sensitive information is referenced, and remove, clean up, or obfuscate sensitive data using the Set contact attributes block Clean-up method outlined previously. For more information, see Compliance validation in Amazon Connect (p. 1238).

Telephony

In the US, use toll-free phone numbers wherever possible to load balance across multiple carriers for additional route and carrier redundancy. This also helps to decrease time to resolution when compared to DID phone numbers, which must be managed by a single carrier. In situations where you use DIDs, load balance across numbers from multiple carriers, when possible, to increase reliability. Make sure that you handle all error paths in your flow appropriately, and implement the best practices, requirements, and recommendations located in Troubleshooting Issues with the Contact Control Panel (CCP) (p. 1313).

If you’re forwarding your existing telephony provider’s phone numbers to Amazon Connect, ensure that the process to change the forward destination to an alternative DID/toll-free number or otherwise remove the forward is defined and well-understood by your operations team. Ensure that you have Runbooks and Playbooks specifically for production readiness assessments, phone number porting and forwarding processes, and troubleshooting audio issues that could arise when transferring calls from your existing telephony provider. You also want a repeatable process that your operations team can follow to determine if the source of these audio issues is Amazon Connect or your existing telephony provider.

Amazon Connect APIs

Amazon Connect throttling quotas are by account, and not instance. You should consider the following best practices when working with Amazon Connect APIs:

Implement a caching/queuing solution

To decrease API data query overhead and avoid throttling, you can use an intermediary database like Amazon DynamoDB to store API call results rather than calling the API from all endpoints interested in the API data. For example, the following diagram represents the use of the Amazon Connect metric API from multiple sources that need to consume this information:
Rather than having separate AWS Lambda functions, each with their own polling requirements, you can have a single AWS Lambda function write all interesting data to Amazon DynamoDB. Rather than having each endpoint go to the API directly to retrieve the data, they point to DynamoDB, as illustrated in the following diagram:
This architecture allows you to change polling intervals and add endpoints, as needed, without worrying about exceeding service quotas, giving you the ability to scale to however many concurrent connections your database solution supports. You can use this same concept with querying any real-time data feeds from Amazon Connect. For situations where you need to perform an API action, like an Outbound API call, you can use this same concept in combination with Amazon Simple Queue Service to queue API requests Using AWS Lambda with SQS.

**Exponential back off and retry strategies**

You can run into situations where API throttling limits get exceeded. This can happen when the API calls fail and are retried repeatedly or made directly from multiple concurrent endpoints without a caching or queuing solution implemented. To avoid exceeding your service quotas and impacting downstream processes, you should consider using exponential back off and retry strategies within your AWS Lambda functions in combination with caching and queueing.

**Change management**

Two of the primary drivers for moving workloads to the Amazon Connect are flexibility and speed to market. To ensure operational excellence without sacrificing agility, follow these best practices:

- **Modular flows**: Flows in Amazon Connect are similar to modern application building where smaller, purpose-built components allow for more flexibility, control, and ease of management when compared to monolithic alternatives. You can make your flows small and re-usable, combining the modular flows into an end-to-end experience with **Transfer to flow** blocks. This approach allows you to reduce risk during change implementation, allow you to test single, smaller changes rather than regression testing the entire experience, and will make it easier to identify and address issues with your flows during testing.

- **Repositories**: Back up all versions of all flows to a repository of your choice using contact flow Import/Export as part of your change management process.
• **Distribute by percentage:** To reduce risk encountered during change management and experiment with new experiences for your contacts, you can use the **Distribute by percentage** block to route a subset of your traffic to new flows while leaving the other traffic on the original experience.

• **Measuring results:** Data driven decision making is key to successfully driving meaningful changes for your business. Having a key metric to measure your changes against is absolutely necessary. For all changes you’re making, you need to plan for how you will measure success. For example, if you’re implementing self-service functionality for your contacts, what percentage of contacts do you expect to self-serve to consider the workload successful or what other metrics are you measuring to determine success?

• **Rollbacks:** Ensure that there is a clear, well-defined, and well-understood process to back out any changes to the previous state, specific to the change performed. For example, if you publish a new flow version, ensure that the change instructions include documentation on how to roll back to the previous flow version.

**Routing profiles**

Understanding how priority, delay, and overflow routing work within Amazon Connect is critical to maximizing agent productivity, reducing contact wait times, and ensuring the best quality of experience for your contacts.

**Routing in Amazon Connect**

Contact routing in Amazon Connect is done through a collection of queues and routing configurations called a routing profile. A queue is equivalent to a skill or proficiency that agent needs to possess to service contacts for that queue. A routing profile can be viewed a set of skills that you can match to your contact's needs.

Within your flow, you can prompt for additional information and, if they need to reach an agent, you can use the flow configuration to place them in the appropriate queue. In the following example, Savings, Checking, and Loans are individual queues or skills and the three routing profiles are unique skillsets, or groups of skills:

![Routing Profile Diagram](image)

Each agent is assigned to only one routing profile based on their skillset, and many agents with similar skillset can share the same routing profile:
Each phone number or chat endpoint will be associated with one flow. The flow executes its logic, which may involve prompting the customer for information, to determine the contact's needs, and eventually routes the contact into an appropriate queue. The following diagram depicts how routing profile, queue, and flow work together to service a contact:

To illustrate how you might determine various queues, routing profiles, and agent assignments to the routing profiles, consider the following table:
On the top row, you’ve identified your skills or queues. In the left column, you have your list of agents, and in the middle, you’ve checked the skills supported by each of the agents. You can sort the matrix grouped by the common set of skill requirements across our agent population. This helps identify the routing profiles as one marked in the green box (which consists of two queues), which you can assign agents to. As a result of this exercise, you have identified four routing profiles, and assign your 13 agents to them accordingly.

Based on the previous table, an incoming call from a contact needing the Savings skill could be served by three groups of agents in the three routing profiles 1, 2, and 4 as depicted in the following diagram:

**Priority and delay**

Using the combination of priority and delay in different Routing Profiles, you can create flexible routing strategies.
The preceding routing profile example shows a set of queues, and their respective priority and delay. The lower the number, the higher the priority. All higher priority calls must be processed before a lower priority call will be processed. This is a difference from systems that will eventually process lower priority calls based upon a weighting factor.

You can also add a delay to each of the queues within each of the routing profiles. Any call coming into the queue will be held for the specified period of delay assigned to the designated queue. The call will be held for the delay period, even when agents are available. You might use this in situations where you have a group of agents who are reserved to help you meet your Service Level Agreements (SLAs), but are otherwise assigned to other tasks or queues. If a call doesn’t get answered within a specified period of time, these agents would become eligible to receive a call from the designated queue. For example, consider the following diagram:

This diagram shows an SLA of 30 seconds. A call comes in for the Savings queue. The Savings queue immediately looks for an agent in the "Savings" routing profile due to the configuration of 0 delay in the profile for the queue. Because of the configuration of 15 delay for Senior Agents, they will not be eligible to receive the Savings contact for 15 seconds. After 15 seconds elapses, the contact becomes available for a Senior Level agent and Amazon Connect looks for the Longest Available across both routing profiles.
Path to service

When you are designing customer experiences in Amazon Connect, plan to ensure a path to service. There are many planned and unplanned events that can impact the customer experience as they traverse through Amazon Connect Flows. The following sample customer experience shows some suggested checks to ensure a consistent quality experience for your contacts:

This sample customer experience takes into account planned events such as Holidays and Business hours as well as unplanned events, like agents not staffed during business hours. With this logic, you can also account for emergency situations, such as contact center closures because of inclement weather or service disruptions. Consider the following concepts as illustrated in the diagram:

- **Self-service**: In a typical IVR, you can include any greetings and disclaimer messages such as call recording announcements upfront, which can be followed by self-service options. Self-service brings cost and performance optimizations for your contact center and enables your organization to serve customers 24x7, regardless of holidays, business hours, or availability of agents. Always include a path to service in case customers are unable to self-serve and need human assistance. For example, if you are using Amazon Lex bots for self-service, you can make use of fallback intents to escalate conversations for human assistance.
• **Holidays**: Many enterprise customers have a central repository that holds corporate holidays. You can use an AWS Lambda function to data dip into that repository and offer holiday treatment to customers. Additionally, you can also store corporate holidays in DynamoDB along with a custom message for each holiday. For example, if your enterprise observes December 25 as Christmas, you could have a holiday prompt or Text to Speech, "We are currently closed for Christmas. Please call back on December 26 when our normal business hours will resume."

![Diagram showing integration of Amazon Connect, Lambda, and DynamoDB](image)

• **Business hours**: After holidays have been verified, you can check for business hours and, if outside of business hours, you can change the experience dynamically for your contacts. If the contact occurs during business hours, you can identify customer intent for calls and map to certain queues in your contact center, increasing the likelihood of getting to the correct agent, and decreasing the amount of time it takes your contact to reach service. It is highly recommended to map defaults as customers could be calling for a reason you haven’t accounted for yet or may respond in a way you don’t expect.

• **Emergency messages**: After you have identified customer intent for call, it is suggested to implement an emergency check treatment. In the event of an emergency situation that impacts your contact center, you can store an emergency True/False flag in an intermediary database like DynamoDB. To allow your supervisors and administrators to set this flag dynamically, with no code, you can build a separate IVR that authenticates your Amazon Connect administrators based upon ANI and PIN number verification for internal use only. In the event of emergency, your supervisors can call into that dedicated line from their phones and after authentication set the Emergency flag to true for scenarios such as contact center closure due to inclement weather or ISP outage at the physical location of contact center.

• **Emergency message API**: You can also consider building an AWS API gateway with AWS Lambda function at the back end to set the Emergency flag to true/false securely in the database. Your supervisors can securely access that API through web to toggle disaster mode or dynamically toggle it in response to an external event. In your Amazon Connect instance, every contact that comes in through the flow will use AWS Lambda to check for that emergency flag and, in case of disaster mode, you can dynamically make announcements and provide a customer with a path to service. This will further ensure business continuity and mitigate the impact of situations like these from affecting your customers.

• **Check agent staffing**: Before transferring to the queue in your flow, you can check agent staffing to ensure that an agent is logged in to service the contact. For example, you may have an agent busy servicing another contact that might become available in the next five minutes, or you may not have anyone logged into the system at all. During these instances, you will prefer a different customer experience rather than making them wait in the queue for an agent to become available.

• **Route to service**: When you transfer the call to the queue, you can offer queued callbacks, queue overflows, or tiered routing using Amazon Connect routing profiles to offer a consistent, high-quality experience for your callers that meet your Service Level requirements.

**Resources**

**Documentation**

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Security: Design principles for developing a secure contact center

Security includes the ability to protect information, systems, and assets while delivering business value through risk assessments and mitigation strategies. This section provides an overview of design principles, best practices, and questions surrounding security for Amazon Connect workloads.

Amazon Connect Security Journey

After you’ve made the decision to move your workload to Amazon Connect, in addition to reviewing Security in Amazon Connect (p. 1171) and Security Best Practices for Amazon Connect (p. 1245), follow these guidelines and steps to understand and implement your security requirements relative to the following core security areas:

Understanding the AWS Security Model

When you move computer systems and data to the cloud, security responsibilities become shared between you and AWS. AWS is responsible for securing the underlying infrastructure that supports the cloud, and you’re responsible for anything you put on the cloud or connect to the cloud.
Which AWS services you use will determine how much configuration work you have to perform as part of your security responsibilities. When you use Amazon Connect, the shared model reflects AWS and customer responsibilities at a high-level, as shown in the following diagram.

**AWS Shared Responsibility Model for Amazon Connect**

Compliance Foundations

Third-party auditors assess the security and compliance of Amazon Connect as part of multiple AWS compliance programs. These include SOC, PCI, HIPAA, C5 (Frankfurt), and HITRUST CSF.

For a list of AWS services in scope of specific compliance programs, see AWS Services in Scope by Compliance Program. For general information, see AWS Services Compliance Programs.
Region selection

Region selection to host the Amazon Connect instance depends on data sovereignty restrictions and where the contacts and agents are based. After that decision is made, review network requirements for Amazon Connect and ports and protocols that you need to allow. Additionally, to reduce the blast radius use the domain allow list or allowed IP address ranges for your Amazon Connect instance.

For more information, see Set up your network (p. 552).

AWS services integration

We recommend reviewing each AWS service in your solution against the security requirements of your organization. See the following resources:

- Security in AWS Lambda
- Security and Compliance in DynamoDB
- Security in Amazon Lex

Data Security in Amazon Connect

During your security journey, your security teams may require a deeper understanding of how data is handled in Amazon Connect. See the following resources:

- Detailed network paths for Amazon Connect (p. 560)
- Infrastructure security in Amazon Connect (p. 1241)
- Compliance validation in Amazon Connect (p. 1238)

Workload diagram

Review your workload diagram and architect an optimum solution on AWS. This includes analyzing and deciding which additional AWS services should be included in your solution and any third-party and on-premises applications that need to be integrated.

For example, a workload for automatically distributing scheduled reports for Amazon Connect stores the scheduled reports in an S3 bucket. A CloudWatch event initiates an AWS Lambda function when a new report is added to the S3 bucket. It then sends an email with the report attached. The following workload diagram shows Amazon Connect along with AWS Lambda, Amazon S3, Amazon CloudWatch, and Amazon Simple Email Service (Amazon SES).
AWS Identity and Access Management (IAM)

Types of Amazon Connect Personas

There are four types of Amazon Connect personas, based on the activities being performed.

1. IAM administrator – IAM administrators create or modify Amazon Connect resources and may also delegate administrative access to other principals. The scope of this persona is focused on creating and administering your Amazon Connect instance.

2. Amazon Connect administrator – Service administrators determine which Amazon Connect features and resources employees should access within the Amazon Connect console. The service administrator assigns security profiles to determine who can access the Amazon Connect console and what tasks they can perform. The scope of this persona is focused on creating and administering your Amazon Connect contact center.

3. Amazon Connect agent – Agents interact with Amazon Connect to perform their job duties. Service users may be contact center agents or supervisors.

4. Amazon Connect Service contact – The customer who interacts with your Amazon Connect contact center.

IAM Administrator Best Practices

IAM administrative access should be limited to approved personnel within your organization. IAM administrators should also understand what IAM features are available to use with Amazon Connect. For IAM best practices, see Security best practices in IAM in the IAM User Guide. Also see Amazon Connect identity-based policy examples (p. 1209).

Amazon Connect Service Administrator Best Practices

Service administrators are responsible for managing Amazon Connect users, including adding users to Amazon Connect give them their credentials, and assign the appropriate permissions so they can access
the features needed to do their job. Administrators should start with a minimum set of permissions and grant additional permissions as necessary.

**Security profiles (p. 780)** help you manage who can access the Amazon Connect dashboard and Contact Control Panel, and who can perform specific tasks. Review the granular permissions granted within the default security profiles available natively. Custom security profiles can be set up to meet specific requirements. For example, a power agent who can take calls but also has access to reports. After this is finalized, users should be assigned to the correct security profiles.

**Multi-Factor Authentication**

For extra security, we recommend that you require multi-factor authentication (MFA) for all IAM users in your account. MFA can be set up through AWS IAM or your SAML 2.0 identity provider, or Radius server, if that's more applicable for your use case. After MFA is set up, a third text box becomes visible on the Amazon Connect login page to provide the second factor.

**Identity Federation**

In addition to storing users in Amazon Connect, you can enable single sign-on (SSO) to Amazon Connect (p. 116) by using identity federation. Federation is a recommended practice to allow for employee lifecycle events to be reflected in Amazon Connect when they are made in the source identity provider.

**Access to Integrated Applications**

Steps within your flows may need credentials to access information in external applications and systems. To provide credentials to access other AWS services in a secure way, use IAM roles. An IAM role is an entity that has its own set of permissions, but that isn't a user or group. Roles also don't have their own permanent set of credentials and are automatically rotated.

Credentials such as API keys should be stored outside of your flow application code, where they can be retrieved programmatically. To accomplish this, you can use AWS Secrets Manager or an existing third-party solution. Secrets Manager enables you to replace hardcoded credentials in your code, including passwords, with an API call to Secrets Manager to retrieve the secret programmatically.

**Detective controls**

Logging and monitoring are important for the availability, reliability and, performance of contact center. You should log relevant information from Amazon Connect Flows to Amazon CloudWatch and build alerts and notifications based on the same.

You should define log retention requirements and lifecycle policies early on, and plan to move log files to cost-efficient storage locations as soon as practical. Amazon Connect public APIs log to AWS CloudTrail. You should review and automate actions set up based on CloudTrail logs.

Amazon S3 is the best choice for long-term retention and archiving of log data, especially for organizations with compliance programs that require log data to be auditable in its native format. After log data is in an S3 bucket, define lifecycle rules to automatically enforce retention policies and move these objects to other, cost-effective storage classes, such as Amazon S3 Standard - Infrequent Access (Standard - IA) or Amazon S3 Glacier.

The AWS cloud provides flexible infrastructure and tools to support both sophisticated in cooperation with offerings and self-managed centralized-logging solutions. This includes solutions such as Amazon OpenSearch Service and Amazon CloudWatch Logs.

Fraud detection and prevention for incoming contacts can be implemented by customizing Amazon Connect Flows per the customer requirements. As an example, customers can check incoming contacts against previous contact activity in DynamoDB, and then take action, such as disconnecting a contact because they are a blocked contact.
Infrastructure protection

Although there is no infrastructure to manage in Amazon Connect, there could be scenarios where your Amazon Connect instance needs to interact with other components or applications deployed in infrastructure residing on-premises. Consequently, it is important to ensure that networking boundaries are considered under this assumption. Review and implement specific Amazon Connect infrastructure security considerations. Also, review contact center agent and supervisor desktops or VDI solutions for security considerations.

You can configure a Lambda function to connect to private subnets in a virtual private cloud (VPC) in your account. Use Amazon Virtual Private Cloud to create a private network for resources such as databases, cache instances, or internal services. Amazon Connect your function to the VPC to access private resources during execution.

Data protection

Customers should analyze the data traversing through and interacting with the contact center solution.

- Third party and external data
- On-premises data in hybrid Amazon Connect architectures

After analyzing the scope of the data, data classifications should be performed paying attention to identifying sensitive data. Amazon Connect conforms to the AWS shared responsibility model. Data protection in Amazon Connect (p. 1171) includes best practices like using MFA and TLS and the use of other AWS services, including Amazon Macie.

Amazon Connect handles variety of data related to contact centers (p. 1172). This includes phone call media, call recordings, chat transcripts, contact metadata as well as flows, routing profiles and queues. Amazon Connect handles data at rest by segregating data by account ID and instance ID. All data exchanged with Amazon Connect is protected in transit between the user’s web browser and Amazon Connect using open standard TLS encryption.

You can specify AWS KMS keys to be used for encryption including bring your own key (BYOK). Additionally, you can use key management options within Amazon S3.

Protecting Data Using Client-Side Encryption

Your use case may require encryption of sensitive data that is collected by flows. For example, to gather appropriate personal information to customize the customer experience when they interact with your IVR. To do this you can use public-key cryptography with the AWS Encryption SDK. The AWS Encryption SDK is a client-side encryption library designed to make it efficient for everyone to encrypt and decrypt data using open standards and best practices.

Input validation

Perform input validation to ensure that only properly formed data is entering the flow. This should happen as early as possible in the flow. For example, when prompting a customer to say or enter a telephone number, they may or may not include the country code.

Amazon Connect security vectors

Amazon Connect security can be divided into three logical layers as illustrated in the following diagram:
1. **Agent workstation.** The agent workstation layer is not managed by AWS and consists of any physical equipment and third-party technologies, services, and endpoints that facilitate your agent’s voice, data, and access the Amazon Connect interface layer.

Follow your security best practices for this layer with special attention to the following:

- Mitigate insider threat and compliance risk associated with workloads that handle sensitive information, by creating a secure IVR solution that enables you to bypass agent access to sensitive information. By encrypting contact input in your flows, you’re able to capture information securely without exposing it to your agents, their workstations, or their operating environments. For more information, see Encrypt customer input (p. 511).
- You are responsible for maintaining the allow list of AWS IP addresses, ports, and protocols needed to use Amazon Connect.

2. **AWS:** The AWS layer includes Amazon Connect and AWS integrations including AWS Lambda, Amazon DynamoDB, Amazon API Gateway, Amazon S3, and other services. Follow the security pillar guidelines for AWS services, with special attention to the following:

- Integrations with other AWS services: Identify each AWS service in the use case as well as any third-party integration points applicable for this use case.
• Amazon Connect can integrate with AWS Lambda functions that run inside of a customer VPC through the VPC endpoints for Lambda.

3. **External**: The External layer includes contact points including chat, click-to-call endpoints, and the PSTN for voice calls, integrations you may have with legacy contact center solutions in a Hybrid contact center architecture, and integrations you may have with other third-party solutions. Any entry point or exit point for a third party in your workload is considered the external layer.

This layer also covers integrations customers may have with other third-party solutions and applications such as CRM systems, work force management (WFM), and reporting and visualization tools and applications, such as Tableau and Kibana. You should consider the following areas when securing the external layer:

• You can create contact filters for repeat and fraudulent contacts using AWS Lambda to write contact details to DynamoDB from within your flow, including ANI, IP address for click-to-dial and chat endpoints, and any other identifying information to track how many contact requests occur during a given period of time. This approach allows you to query and add contacts to deny lists, automatically disconnecting them if they exceed reasonable levels.

• ANI Fraud detection solutions using Amazon Connect telephony metadata (p. 528) and partner solutions can be used to protect against caller ID spoofing.

• Amazon Connect Voice ID (p. 944) and other voice biometric partner solutions can be used to enhance and streamline the authentication process. Active voice biometric authentication allows contacts the option to speak specific phrases and use those for voice signature authentication. Passive voice biometrics allow contacts to register their unique voiceprint and use their voiceprint to authenticate with any voice input that meets sufficient length requirements for authentication.

• Maintain the application integration (p. 563) section in the Amazon Connect console for adding any third-party application or integration points to your allow list, and remove unused endpoints.

• Send only the data necessary to meet minimum requirements to external systems that handle sensitive data. For example, if you have only one business unit using your call recording analytics solution, you can set an AWS Lambda trigger in your S3 bucket to process contact records, check for the business unit's specific queues in the contact record data, and if it is a queue that belongs to the unit, send only that call recording to the external solution. With this approach, you only send the data necessary and avoid the cost and overhead associated with processing unnecessary recordings.

For an integration that enables Amazon Connect to communicate with Amazon Kinesis and Amazon Redshift to enable the streaming of contact records, see Amazon Connect integration: Data streaming.

**Resources**

**Documentation**

• AWS Cloud Security
• Security in Amazon Connect (p. 1171)
• IAM Best Practices
• AWS Compliance
• AWS Security blog

**Articles**

• Security Pillar
• Introduction to AWS Security
• AWS Security Best Practices
Reliability

Reliability includes the ability of a system to recover from infrastructure or service disruptions, dynamically acquire computing resources to meet demand, and mitigate disruptions such as misconfigurations or transient network issues. As resiliency is handled as part of the service, there are no reliability practices unique to Amazon Connect beyond what is covered in Operational Excellence (p. 84). You can find prescriptive guidance on implementation in the Reliability Pillar whitepaper.

Resources

Documentation

- AWS Service quotas
- Resilience in Amazon Connect (p. 1240)
- Amazon CloudWatch

Whitepaper

- Reliability Pillar

Video

- Embracing Failure: Fault-Injection and Service Reliability

Product

- Trusted advisor: An online tool that provides you real-time guidance to help you provision your resources following AWS best practices.

Performance efficiency

Performance efficiency includes the ability to use computing resources efficiently to meet system requirements, and to maintain that efficiency as demand changes and technologies evolve. This section provides an overview of design principles, best practices, and questions surrounding performance efficiency for Amazon Connect workloads. You can find prescriptive guidance on implementation in the Performance Efficiency Pillar whitepaper.

Architectural design

There are two fundamental architectural design principles to consider when designing experiences for the contact center:

- Reductionism is a philosophical tenet stating that by analyzing a system to its ultimate component parts, you can unravel it at deeper levels.
• Holism, in contrast, states that by considering the whole picture one gets a deeper and more complete view of a situation than by analyzing it into its component parts.

The reductionist approach focuses on each individual component (IVR, ACD, Speech Recognition) on its own and often results in a disjointed customer experience that, when evaluated individually, may meet performance requirements for the use case. However, when evaluated end-to-end, can result in decreased quality of experience for your contacts while funneling development efforts into operational silos. This approach complicates regression testing, increases time to market, and limits the development of cross-discipline operational resources critical to the success of your contact center.

A holistic view of the contact center is shown in the following diagram:

The holistic approach results focus on a more complete and cohesive experience for customers, and not which technology will provide which part of that experience.

Let the customer and what they want define and guide your efforts. The experiences that you create for your contacts should not be static or an end state, but should serve as a starting point that should be iterated on continuously based on customer feedback. The regular collection and review of operational and tuning data surrounding how your contacts are interacting and navigating throughout their journey should drive that iteration. Your goal should be dynamic and personalized experiences for contacts.
reaching your company. This can be accomplished through dynamic data-driven contact design and routing, resulting in an experience that conforms to your contact and their individual needs.

You can start with the default experience, building out your flows, but refactoring your single flow into two to enable future segmentation:

In your next iteration, identify additional experiences that you need to plan for and build routing and, if necessary, flows for each. For example, you may want to play different prompts for a contact that is past due on their bill or that may have tried to contact multiple times for the same purpose. With this approach, you are working towards personalized, dynamic experiences that are pertinent to your contacts and why they are contacting you. In addition to improving the quality of experience for your contacts and decreasing handle times, you're encouraging contact self-service by providing a more intelligent and flexible experience. Your next iteration may look like the following illustration:
Flow design

A flow defines the customer experience with your contact center from start to finish. Your flow configuration can have a direct impact on performance, operational efficiency, and ease of maintenance.

Many large businesses support multiple phone numbers, business units, prompts, queues, and other Amazon Connect resources. While it is possible to have unique flows for each phone number and line of business, it can lead to a one-to-one mapping of phone numbers and flows. This results in unnecessary service quota requests and a large number of flows to support and maintain. A one-to-one mapping of DNIS and Flow implementation is illustrated in the following figure:
Alternatively, you should consider an approach that results in Multiple DNIS to one or few flows by using the dynamic nature of Amazon Connect Flows. With this approach, you can store configuration information like Prompts, Queues, Business Hours, Whisper Prompts/Flows, Queues, Queue Treatments and Hold Messages etc., in NoSQL Database DynamoDB. In Amazon Connect, you can associate multiple phone numbers to the same flow and use the Lambda function to look up configurations for that phone number. This allows you to dynamically define the contact's experience based on the attributes returned from DynamoDB.

For example, you can play prompts or use Text-to-Speech (TTS) to greet callers based upon the lookups in DynamoDB or associate queues using dynamic attributes supported in flow blocks. The result with this approach is a flow implementation that is efficient to build, maintain, and support:
Load testing

If you need to run load or scale testing, you can employ third-party or partner solutions to run load tests, or develop your own custom solution using the Amazon Connect StartOutboundVoiceContact API to generate calls combined with browser automation scripts to simulate agent behavior. Before performing load tests, review and follow the Amazon Connect Load Testing Policy.

Agent enablement

Amazon Connect provides a readily available browser-based Contact Control Panel (CCP) for agents to interact with customer contacts. Your agents use the CCP to accept contacts, chat with contacts, transfer them to other agents, put them on hold, and perform other key tasks. You can realize significant performance efficiency through the creation of custom agent desktop solutions using the Amazon Connect Streams API. Consider using the Streams API to increase performance efficiency in the following areas:

- **CRM integration** - The Streams API allows you to embed the CCP in your CRM application, create your own interface, or integrate with other AWS services and partner solutions to provide your agents with the tools and resources they need to service your contacts. With a custom desktop, like the Amazon Connect and Salesforce integration (p. 296), your agents can get a comprehensive view of customer and contact in a single interface without managing multiple screens and interfaces.
- **Authentication** - You can configure SAML for identity management in Amazon Connect and use IAM Identity Center (SSO) to allow your agents to use the same credentials they use to access your other systems and avoid the need to enter them multiple times.
- **Agent automation** - In addition to streamlining your agent experience, you can automate common, repeatable tasks. For example, automatically creating cases or pre-filling webforms and offering a screen pop with relevant information when a contact is offered. This can reduce handle times and improve the quality of experience for your agents and contacts.
- **Enhanced capabilities** - You can also enhance/extend the CCP functionality to include real-time Transcriptions, Translations, Suggested Actions and Knowledge base integrations. Integrating enhanced capabilities with your agent desktop will allow skilled agents to service contacts more efficiently and unskilled agents to provide service when skilled agents aren’t available. For example, you can use this approach to automatically translate a chat contact for unskilled agent that doesn’t know the language. When your agent replies, you can automatically translate the text to the contact’s language, allowing for real-time bilingual communication.

Using other AWS services

This section discusses AWS services that you can use to improve performance, identify areas of opportunity, and gain valuable insights into your contact data.

**AWS Lambda**

You can use AWS Lambda in your Amazon Connect Flows to perform data dips for customer information, send SMS text messages, and with other services like Amazon S3 to automatically distribute scheduled reports. For more information, see Best Practices for Working with AWS Lambda functions.

**AWS Direct Connect**

AWS Direct Connect is a cloud service solution that makes it more efficient to establish a dedicated network connection from your premises to AWS. It provides a durable, consistent connection rather than relying on your ISP to dynamically route requests to AWS resources. It allows you to configure your edge router to redirect AWS traffic across dedicated fiber rather than traversing the public WAN and establish
private connectivity between AWS and your data center, office, or colocation environment. In many cases, this can reduce your network costs, increase bandwidth throughput, and provide a more consistent network experience than Internet-based connections.

While AWS Direct Connect does not solve issues specific to private LAN/WAN traversal to your edge router, it can help solve for latency and connectivity issues between your edge router and AWS resources. It can also solve for latency and poor call quality between your edge router and AWS resources.

Depending on your VDI environment, you may not be able to take advantage of AWS Direct Connect as it requires you to configure your edge router to redirect AWS traffic across dedicated fiber rather than traversing the public WAN. If the VDI environment is hosted outside of your local DXC-enabled network, you may not be able to take full advantage of AWS Direct Connect.

Do not use AWS Direct Connect for "QoS" or "increased security." AWS Direct Connect can cause performance degradation in cases where the latency from the agent workstation is higher than the ISP's path to the Amazon Connect instance. AWS Direct Connect does not offer additional security when compared to an ISP as Amazon Connect voice and data is already encrypted.

Amazon Polly

Amazon Connect offers a native integration with Amazon Polly, allowing you to play dynamic and natural Text-to-Speech (TTS), use Speech Synthesis Markup Language (SSML), and take advantage of Neural Text-to-Speech (NTTS) to achieve the most natural and human-like text-to-speech voices possible.

Amazon Lex

Your contact's path to service can be a challenging experience that doesn't always meet up to their expectations. Your contacts may wait on hold, repeat information, need to be transferred, and ultimately, spend too much time getting what they need. AI is playing a role in improving this customer experience in call centers to include engagement through chatbots — intelligent, natural language virtual assistants. These chatbots are able to recognize human speech and understand the caller's intent without requiring the caller to speak in specific phrases. Contacts can perform tasks such as changing a password, requesting a balance on an account, or scheduling an appointment without ever speaking to an agent.

Amazon Lex is a service that allows you to create intelligent conversational chatbots. It lets you turn your Amazon Connect contact center flows into natural conversations that provide personalized experiences for your callers. Using the same technology that powers Amazon Alexa, an Amazon Lex chatbot can be attached to your Amazon Connect Flow to recognize the intent of your caller, ask follow-up questions, and provide answers. Amazon Lex maintains context and manages the dialogue, dynamically adjusting the responses based on the conversation, so your contact center can perform common tasks for callers, to address many customer inquiries through self-service interactions. Additionally, Amazon Lex chatbots support an optimal (8 kHz) telephony audio sampling rate, to provide increased speech recognition accuracy and fidelity for your contact center voice interactions.

Building an effective Amazon Lex bot requires providing simple and realistic utterances as training sets to the bot, periodically reviewing your bot's performance, updating your utterance set, and modifying the bot based on such a review. For more information, see the following resources:

- Monitoring in Amazon Lex
- Building Better bots using Amazon Lex

Amazon Kinesis

For situations where you need to gain additional insight from your contact metrics and real-time data from Amazon Connect, you can:
• Export your contact record data to Amazon Redshift using Amazon Kinesis.
• Use Amazon Kinesis video stream (KVS) and AWS Lambda to transcribe call recordings or voice contacts in real-time using Amazon Transcribe and send the resulting text to Amazon Comprehend for sentiment analysis.
• Leverage the Amazon Connect Agent Event Kinesis Stream (p. 1045) for real-time agent CTI and schedule adherence data.

**Amazon OpenSearch Service and Kibana**

Using Amazon OpenSearch Service and Kibana to process real-time Amazon Connect data gives you a flexible way to query and visualize real-time and historical Amazon Connect data beyond native reporting capabilities.

**Amazon Connect Contact Lens**

Contact Lens for Amazon Connect is a set of machine learning (ML) capabilities integrated into Amazon Connect that allow contact center supervisors to better understand the sentiment, trends, and compliance risks of customer conversations to effectively train agents, replicate successful interactions, and identify crucial company and product feedback. Contact Lens for Amazon Connect transcribes contact center calls to create a fully searchable archive and surface valuable customer insights.

**Resources**

**Documentation**

- Best practices design patterns: optimizing Amazon S3 performance
- Amazon EBS volume performance on Linux instances

**Whitepaper**

- Performance Efficiency Pillar

**Video**

- AWS re:Invent 2016: Scaling Up to Your First 10 Million Users (ARC201)
- AWS re:Invent 2017: Deep Dive on Amazon EC2 Instances

**Cost optimization**

Cost Optimization includes the ability to run systems to deliver business value at the lowest price point. This section provides an overview of design principles, best practices, and questions surrounding cost optimization for Amazon Connect workloads. You can find prescriptive guidance on implementation in the Cost Optimization Pillar whitepaper.

There are five areas to consider for cost optimization for Amazon Connect workloads.

**Region selection**

Amazon Connect Region selection is one of the first decision customers make when adopting Amazon Connect for their contact center workloads. While latency and voice quality are important aspects to
Region selection, you should evaluate Region selection from a cost perspective as well. Telephony pricing for Claimed Phone Numbers Per Day and Per Minute Inbound Usage can be different for countries depending upon the AWS Region in which you select to instantiate your Amazon Connect Instance. You can find telephony price for each Region at Amazon Connect Pricing page.

**Callbacks**

You can provide a callback in your flow for callers during high call volume periods or long wait times. You can use callbacks to reduce cost and improve the quality of experience for your contacts. When your contact opts-in for the callback, Amazon Connect will retain the position in the queue and allow the caller to disconnect. When an agent becomes available to service your contact, Amazon Connect will place an outbound call to the number configured to connect the contact to your agent. A sample callback flow is included in every instance at creation. You can also use AWS Lambda and Amazon DynamoDB to prevent duplicate callback requests.

**Storage**

With Amazon Connect, you can configure your instance and flows to store call recordings and chat transcripts of caller’s interactions for compliance, quality monitoring, and training purposes. Voice contacts are not recorded unless an agent is connected to the caller. If multiple agents are connected, each will have an associated call recording or transcript. Amazon Connect stores voice recordings in Amazon S3 according to your Amazon S3 Lifecycle policy configuration. With the call recordings stored in Amazon S3, you can use Amazon S3 tiers of storage to manage retention and optimize cost. For example, you can transition objects using Amazon S3 Lifecycle to move call recordings and transcripts over three months old to S3 Glacier to reduce storage cost.

**Self-service**

Amazon Connect’s pay-as-you-go pricing model can result in lower costs as compared to traditional licensing-based contact centers. However, the traditional contact center infrastructure that spans automatic call distribution (ACD) systems, IVR, telephony and work force management (WFM) systems plays a proportionately small contribution to the overall cost of contact center operations. The largest contributor to the cost of the contact center often comes from human capital and the real estate required to provide an operating environment for your agents. Amazon Connect Flows can be used natively with Amazon Lex for NLU, NLP, and ASR and Amazon Polly for lifelike Text-to-Speech (TTS) to build highly engaging user experiences and natural conversational interactions across voice and text. By using an Amazon Lex chatbot in your Amazon Connect call center, callers can perform tasks such as changing a password, requesting a balance on an account, or scheduling an appointment, without needing to speak to an agent. These self-service options result in better customer experience and lowers your cost per contact.
Click-to-call

You can use click-to-call in Amazon Connect to initiate a voice call using the `StartOutboundVoiceContact` API for authentication through web or mobile application to reduce call handle times and improve the quality of experience. With this approach, you're able to offer your contact the ability to bypass IVR authentication, pass contextual information like URLs, recent web/mobile activity, and user data to your flows to create dynamic, personalized experiences. For example, a contact browsing your website to purchase an item or member of a financial institution who is already authenticated in the mobile app and wants to speak with an agent about a recent transaction.

Redirect voice contacts to chat

With Amazon Connect, you can allow agents to handle multiple chat conversations simultaneously where they would only able to handle one voice conversation. When you don't have a voice agent available, you can send an SMS text message to your customer to offer a link to chat with an agent right away.

Resources

Documentation

- Analyzing Your Costs with Cost Explorer
- AWS Cloud Economics Center
- What are AWS Cost and Usage Reports

Whitepaper

- Cost Optimization Pillar
Plan your identity management in Amazon Connect

Before you set up your Amazon Connect instance (p. 127), you should decide how you want to manage your Amazon Connect users. A user is anyone who needs an Amazon Connect account: agents, call center managers, analysts, and more.

You cannot change the option you select for identity management after you create an instance. Instead, you must delete the instance and create a new one. However, if you delete an instance, you lose its configuration settings and metrics data.

When you create your instance, you can choose from one of the following identity management solutions:

- **Store users with Amazon Connect**—Choose this option if you want to create and manage user accounts within Amazon Connect.

  When you manage users in Amazon Connect, the user name and password for each user is specific to Amazon Connect. Users must remember a separate user name and password to log in to Amazon Connect.

- **Link to an existing directory**—Choose this option to use an existing Active Directory. Users will log in to Amazon Connect using their corporate credentials.

  If you choose this option, the directory must be associated with your account, set up in AWS Directory Service, and be active in the same Region in which you create your instance. If you plan to choose this option, you should prepare your directory before you create your Amazon Connect instance. For more information, see Use an existing directory for identity management (p. 115).

- **SAML 2.0-based authentication**—Choose this option if you want to use your existing network identity provider to federate users with Amazon Connect. Users can only log in to Amazon Connect by using the link configured through your identity provider. If you plan to choose this option, you should configure your environment for SAML before you create your Amazon Connect instance. For more information, see Configure SAML with IAM for Amazon Connect (p. 116).

Use an existing directory for identity management

If you are already using a AWS Directory Service directory to manage users, you can use the same directory to manage user accounts in Amazon Connect. You can also create a new directory in AWS Directory Service to use for Amazon Connect. The directory you choose must be associated with your AWS account, and must be active in the AWS Region in which you create your instance. You can associate an AWS Directory Service directory with only one Amazon Connect instance at a time. To use the directory with a different instance, you must delete the instance with which it is already associated.

The following AWS Directory Service directories are supported in Amazon Connect:

- **Microsoft Active Directory**—AWS Directory Service lets you run Microsoft Active Directory as a managed service.

- **Active Directory Connector**—AD Connector is a directory gateway you can use to redirect directory requests to your on-premises Microsoft Active Directory.
• **Simple Active Directory**—Simple AD is a standalone managed directory that is powered by a Samba 4 Active Directory compatible server.

You cannot change the identity option you select after you create the instance. If you decide to change the directory you selected, you can delete the instance and create a new one. When you delete an instance, you lose all configuration settings and metrics data for it.

There is no additional charge for using an existing or a proprietary directory in Amazon Connect. For information about the costs associated with using AWS Directory Service, see [AWS Directory Service Pricing Overview](#).

The following limitations apply to all new directories created using AWS Directory Service:

• Directories can only have alphanumeric names. Only the '.' character can be used.
• Directories cannot be unbound from an Amazon Connect instance after they have been associated.
• Only one directory can be added to an Amazon Connect instance.
• Directories cannot be shared across multiple Amazon Connect instances.

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**Configure SAML with IAM for Amazon Connect**

Amazon Connect supports identity federation by configuring Security Assertion Markup Language (SAML) 2.0 with AWS IAM to enable web-based single sign-on (SSO) from your organization to your Amazon Connect instance. This allows your users to sign in to a portal in your organization hosted by a SAML 2.0 compatible identity provider (IdP) and log in to an Amazon Connect instance with a single sign-on experience without having to provide separate credentials for Amazon Connect.

**Important notes**

Before you begin, note the following:

• Choosing SAML 2.0-based authentication as the identity management method for your Amazon Connect instance requires the configuration of [AWS Identity and Access Management federation](#).
• The user name in Amazon Connect must match the RoleSessionName SAML attribute specified in the SAML response returned by the identity provider.
• An Amazon Connect user can only be associated with a single AWS IAM Role. Changing the AWS IAM Role used for federation will cause previously federated users to fail on login. For more information about Identity and Access Management user and role management, see [IAM roles](#).

**Overview of using SAML with Amazon Connect**

The following diagram shows the flow for SAML requests to authenticate users and federate with Amazon Connect.
SAML requests go through the following steps:

1. The user browses to an internal portal that includes a link to log in to Amazon Connect. The link is defined in the identity provider.
2. The federation service requests authentication from the organization's identity store.
3. The identity store authenticates the user and returns the authentication response to the federation service.
4. When authentication is successful, the federation service posts the SAML assertion to the user's browser.
5. The user's browser posts the SAML assertion to the AWS sign in SAML endpoint (https://signin.aws.amazon.com/saml). AWS sign in receives the SAML request, processes the request, authenticates the user, and forwards the authentication token to Amazon Connect.
6. Using the authentication token from AWS, Amazon Connect authorizes the user and opens Amazon Connect in their browser.

**Enabling SAML-based authentication for Amazon Connect**

The following steps are required to enable and configure SAML authentication for use with your Amazon Connect instance:

1. Create an Amazon Connect instance and select SAML 2.0-based authentication for identity management.
2. Enable SAML federation between your identity provider and AWS.
3. Add Amazon Connect users to your Amazon Connect instance. Log in to your instance using the administrator account created when you created your instance. Go to the **User Management** page and add users.
Important
Due to the association of an Amazon Connect user and an AWS IAM Role, the user name must match exactly the RoleSessionName as configured with your AWS IAM federation integration, which typically ends up being the user name in your directory.

The format should match the intersection of the format conditions of the RoleSessionName and an Amazon Connect user, as shown in the following diagram:

Format:
- String: Upper- and lower-case alphanumeric characters with no spaces
- Length constraints: Minimum length of 2. Maximum length of 64.
- Special characters: @ - .

4. Configure your identity provider for the SAML assertions, authentication response, and relay state. Users log in to your identity provider. When successful, they are redirected to your Amazon Connect instance. The IAM role is used to federate with AWS, which allows access to Amazon Connect.

Select SAML 2.0-based authentication during instance creation

When you are creating your Amazon Connect instance, select the SAML 2.0-based authentication option for identity management. On the second step, when you create the administrator for the instance, the user name that you specify must exactly match a user name in your existing network directory. There is no option to specify a password for the administrator because passwords are managed through your existing directory. The administrator is created in Amazon Connect and assigned the Admin security profile.

You can log in to your Amazon Connect instance, through your IdP, using the administrator account to add additional users.
Enable SAML federation between your identity provider and AWS

To enable SAML-based authentication for Amazon Connect, you must create an identity provider in the IAM console. For more information, see Enabling SAML 2.0 Federated Users to Access the AWS Management Console.

The process to create an identity provider for AWS is the same for Amazon Connect. Step 6 in the above flow diagram shows the client is sent to your Amazon Connect instance instead of the AWS Management Console.

The steps necessary to enable SAML federation with AWS include:

1. Create a SAML provider in AWS. For more information, see Creating SAML Identity Providers.

2. Create an IAM role for SAML 2.0 federation with the AWS Management Console. Create only one role for federation (only one role is needed and used for federation). The IAM role determines which permissions the users that log in through your identity provider have in AWS. In this case, the permissions are for accessing Amazon Connect. You can control the permissions to features of Amazon Connect by using security profiles in Amazon Connect. For more information, see Creating a Role for SAML 2.0 Federation (Console).

   **Important**
   Replacing this Role causes previously federated users to fail at login because it breaks existing user logins due to the immutable Amazon Connect user association with the previous Role.

In step 5, choose Allow programmatic and AWS Management Console access. Create the trust policy described in the topic in the procedure To prepare to create a role for SAML 2.0 federation. Then create a policy to assign permissions to your Amazon Connect instance. Permissions start on step 9 of the To create a role for SAML-based federation procedure.

**To create a policy for assigning permissions to the IAM role for SAML federation**

1. On the Attach permissions policy page, choose Create policy.

2. On the Create policy page, choose JSON.

3. Copy one of the following example policies and paste it into the JSON policy editor, replacing any existing text. You can use either policy to enable SAML federation, or customize them for your specific requirements.

   Use this policy to enable federation for all users in a specific Amazon Connect instance. For SAML-based authentication, replace the value for the Resource to the ARN for the instance that you created:

   ```json
   {
   "Version": "2012-10-17",
   "Statement": [
   {
   "Sid": "Statement1",
   "Effect": "Allow",
   "Action": "connect:GetFederationToken",
   "Resource": [
   "arn:aws:connect:us-east-1:361814831152:instance/2fb42df9-78a2-2e74-d572-c8af67ed289b/user/${aws:userid}"]
   }
   ]
   }
   ```
Use this policy to enable federation between your identity provider and AWS.

```json
{
   "Version": "2012-10-17",
   "Statement": [
      {
         "Sid": "Statement2",
         "Effect": "Allow",
         "Action": "connect:GetFederationToken",
         "Resource": "*",
         "Condition": {
            "StringEquals": {
               "connect:InstanceId": "2fb42df9-78a2-2e74-d572-c8af67ed289b"
            }
         }
      }
   ]
}
```

Use this policy to enable federation for multiple instances. Note the brackets around the listed instance IDs.

```json
{
   "Version": "2012-10-17",
   "Statement": [
      {
         "Sid": "Statement2",
         "Effect": "Allow",
         "Action": "connect:GetFederationToken",
         "Resource": "*",
         "Condition": {
            "StringEquals": {
               "connect:InstanceId": [
                  "2fb42df9-78a2-2e74-d572-c8af67ed289b",
                  "1234567-78a2-2e74-d572-c8af67ed289b"
               ]
            }
         }
      }
   ]
}
```

4. After you create the policy, choose **Next: Review**. Then return to step 10 in the To create a role for SAML-based federation procedure in the Creating a Role for SAML 2.0 Federation (Console) topic.

3. Configure your network as a SAML provider for AWS. For more information, see Enabling SAML 2.0 Federated Users to Access the AWS Management Console.

4. Configure SAML Assertions for the Authentication Response. For more information, Configuring SAML Assertions for the Authentication Response.

5. For Amazon Connect, leave the Application Start URL blank.

6. Configure the relay state of your identity provider to point to your Amazon Connect instance. The URL to use for the relay state is comprised as follows:

   `https://region-id.console.aws.amazon.com/connect/federate/instance-id`

Replace the `region-id` with the Region name where you created your Amazon Connect instance, such as us-east-1 for US East (N. Virginia). Replace the `instance-id` with the instance ID for your instance.

For a GovCloud instance, the URL is `https://console.amazonaws-us-gov.com/`: 

---

120
• https://console.amazonaws-us-gov.com/connect/federate/instance-id

**Note**
You can find the instance ID for your instance by choosing the instance alias in the Amazon Connect console. The instance ID is the set of numbers and letters after '/instance' in the Instance ARN displayed on the **Overview** page. For example, the instance ID in the following Instance ARN is 178c75e4-b3de-4839-a6aa-e321ab3f3770.

```
arn:aws:connect:us-east-1:450725743157:instance/178c75e4-b3de-4839-a6aa-e321ab3f3770
```

# Configurations for regionally isolated SAML sign in

Perform the following steps to use regional SAML endpoints. These steps are IdP agnostic; they work for any SAML IdP (for example, Okta, Ping, OneLogin, Shibboleth, ADFS, AzureAD, and more).

1. Update (or override) the AssertionConsumerService. There are two ways you can do this:

   - **Option 1:** Download the AWS SAML metadata and update the Location attribute to the Region of your choice. Load this new version of the AWS SAML metadata into your IdP.

     Following is an example of a revision:

     ```xml
     <AssertionConsumerService index="1" isDefault="true"
     Binding="urn:oasis:names:tc:SAML:2.0:bindings:HTTP-POST"
     Location="https://region-id.signin.aws.amazon.com/saml"/>
     ```

   - **Option 2:** Override the AssertionConsumerService (ACS) URL in your IdP. For IdPs like Okta that provide prebaked AWS integrations, you can override the ACS URL in the AWS admin console. Use the same format to override to a Region of your choice (for example, https://region-id.signin.aws.amazon.com/saml).

2. Update the associated role trust policy:

   a. This step needs to be done for every role in every account that trusts the given identity provider.

   b. Edit the trust relationship, and replace the singular SAML:aud condition with a multivalued condition. For example:


   c. Make these changes to the trust relationships in advance. They should not be done as part of a plan during an incident.

3. Configure a relay state for the Region-specific console page.

   a. If you don't do this final step, there's no guarantee that the Region-specific SAML sign in process will forward the user to the console sign in page within the same Region. This step is most varied per identity provider, but there are a blogs (for example, **How to Use SAML to Automatically Direct Federated Users to a Specific AWS Management Console Page**) that show the use of relay state to achieve deep linking.

   b. Using the technique/parameters appropriate for your IdP, set the relay state to the console endpoint that matches (for example, https://region-id.console.aws.amazon.com/connect/federate/instance-id).

**Note**

- Ensure that STS is not disabled in your additional Regions.
Ensure no SCPs are preventing STS actions in your additional Regions.

Use a destination in your relay state URL

When you configure the relay state for your identity provider, you can use the destination argument in the URL to navigate users to a specific page in your Amazon Connect instance. For example, use a link to open the CCP directly when an agent logs in. The user must be assigned a security profile that grants access to that page in the instance. For example, to send agents to the CCP, use a URL similar to the following for the relay state. You must use URL encoding for the destination value used in the URL:

- https://us-east-1.console.aws.amazon.com/connect/federate/instance-id?
  destination=%2Fconnect%2Fccp-v2&new_domain=true

For a GovCloud instance, the URL is https://console.amazonaws-us-gov.com/. So the address would be:

- https://console.amazonaws-us-gov.com/connect/federate/instance-id?
  destination=%2Fconnect%2Fccp-v2&new_domain=true

Add users to your Amazon Connect instance

Add users to your connect instance, making sure that the user names exactly match the users names in your existing directory. If the names do not match, users can log in to the identity provider, but not to Amazon Connect because no user account with that user name exists in Amazon Connect. You can add users manually on the User management page, or you can bulk upload users with the CSV template. After you add the users to Amazon Connect, you can assign security profiles and other user settings.

When a user logs in to the identity provider, but no account with the same user name is found in Amazon Connect, the following Access denied message is displayed.

Access denied

Your user account has not been added to Amazon Connect. Please ask your admin to add you, and then try again.

Bulk upload users with the template

You can import your users by adding them to a CSV file. You can then import the CSV file to your instance, which adds all users in the file. If you add users by uploading a CSV file, make sure that you use the template for SAML users. You can find on the User management page in Amazon Connect. A different template is used for SAML-based authentication. If you previously downloaded the template, you should download the version available on the User management page after you set up your instance with SAML-based authentication. The template should not include a column for email or password.

SAML user logging in and session duration

When you use SAML in Amazon Connect, users must log in to Amazon Connect through your identity provider (IdP). Your IdP is configured to integrate with AWS. After authentication, a token for their
session is created. The user is then redirected to your Amazon Connect instance and automatically logged in to Amazon Connect using single sign-on.

As a best practice, you should also define a process for your Amazon Connect users to log out when they are finished using Amazon Connect. They should log out from both Amazon Connect and your identity provider. If they do not, the next person that logs in to the same computer can log in to Amazon Connect without a password since the token for the previous sessions is still valid for the duration of the session. It's valid for 12 hours.

**About session expiration**

Amazon Connect sessions expire 12 hours after a user logs in. After 12 hours, users are automatically logged out, even if they are currently on a call. If your agents stay logged in for more than 12 hours, they need to refresh the session token before it expires. To create a new session, agents need to log out of Amazon Connect and your IDP and then log in again. This resets the session timer set on the token so that agents are not logged out during an active contact with a customer. When a session expires while a user is logged in, the following message is displayed. To use Amazon Connect again, the user needs to log in to your identity provider.

![Session expired](image)

Your session has expired. Please log in again to continue. Sessions expire after 12 hours.

**Troubleshoot SAML with Amazon Connect**

This article explains how to troubleshoot and resolve some of the most common issues customers encounter when using SAML with Amazon Connect.

**Error Message: Access Denied. Your account has been authenticated, but has not been onboarded to this application.**

![Access denied](image)

Your account has been authenticated, but has not been onboarded to this application. Contact your Administrator to onboard to Amazon Connect and try again.

**What does this mean?**

This error means that the user has successfully authenticated via SAML into the AWS SAML login endpoint. However, the user could not be matched/found inside Amazon Connect. This usually indicates one of the following:

- The username in Amazon Connect doesn't match the RoleSessionName SAML attribute specified in the SAML response returned by the identity provider.
Resolution

Use the following steps to check the RoleSessionName SAML attribute specified in the SAML response returned by the identity provider, and then retrieve and compare with the login name in Amazon Connect.

1. Perform a HAR capture (HTTP ARchive) for the end-to-end login process. This captures the network requests from the browser side. Save the HAR file with your preferred file name, for example, saml.har.

   For instructions, see How do I create a HAR file from my browser for an AWS Support case?

2. Use a text editor to find the SAMLResponse in the HAR file. Or, run the following commands:

   $ grep -o "SAMLResponse=.*&" azuresaml.har | sed -E 's/SAMLResponse=(.*)&/\1/' > samlresponse.txt

   - This searches for the SAMLresponse in the HAR file and saves it to a samlresponse.txt file.
   - The response is URL encoded and the contents are Base64 encoded.

3. Decode the URL response and then decode the Base64 contents using a third-party tool or a simple script. For example:

   $ cat samlresponse.txt | python3 -c "import sys; from urllib.parse import unquote; print(unquote(sys.stdin.read()));" | base64 --decode > samlresponsedecoded.txt

   This script uses a simple python command to decode the SAMLResponse from its original URL encoded format. Then it decodes the response from Base64 and outputs the SAML Response in plain text format.

4. Check the decoded response for the needed attribute. For example, the following image shows how to check RoleSessionName:

   $ export username='grep -Eo "RoleSessionName.*?\<AttributeValue\>\" samlresponsedecoded.txt | sed -E 's/\"s/\<AttributeValue\>(.*\</\<AttributeValue\>)/\1/'

5. Check whether the username returned in from the previous step exists as a user in your Amazon Connect instance:

   $ aws connect list-users --instance-id [INSTANCE_ID] | grep $username

   - If the final grep does not return a result then this means that the user does not exist in your Amazon Connect instance or it has been created with a different case/capitalization.
   - If your Amazon Connect instance has many users, the response from the ListUsers API call maybe paginated. Use the NextToken returned by the API to fetch the rest of the users. For more information, see ListUsers.

Example SAML Response

Following is an image from a sample SAML Response. In this case, the identity provider (IdP) is Azure Active Directory (Azure AD).
Error Message: Bad Request. The request was not valid and could not be processed.

What does this mean?

One of the most common reasons for this error is an Amazon Connect user logged in previously using a different identity provider. For example, first they logged in using this attribute name:

```
<Attribute Name="https://aws.amazon.com/SAML/Attributes/Role">
```

Then the same user tried to login but with a different Role SAML Attribute, for example:

```
<Attribute Name="https://aws.amazon.com/SAML/Attributes/Role">
<AttributeValue>arn:aws:iam::111111111111:role/Azure SECOND Role,arn:aws:iam::111111111111:saml-provider/AzureAD Connect_SECOND Provider</AttributeValue>
</Attribute>
<Attribute Name>
```

Resolution

The recommended solution is to reuse the existing Role associated with the Amazon Connect user and edit the trust relationship to reference a new identity provider or service principal to meet your new authentication requirements. If you do need to associate an Amazon Connect user with a new Role, you need to delete and recreate the user in the existing Amazon Connect instance which will result in the loss of data for that user.

For instructions for doing this in the Amazon Connect console, see Manage users in Amazon Connect (p. 775). Or, use these commands for doing this from the AWS CLI:

1. Get the user ID:

   ```
   aws connect list-users --instance-id [INSTANCE_ID]
   ```
2. Delete the user account:

   `aws connect delete-user --instance-id [INSTANCE_ID] --user-id [USER_ID]`

3. Create the user account:


You can also complete these actions using the AWS SDKs.

**Error Message: Access denied, Please contact your AWS account administrator for assistance.**

---

**What does this mean?**

The role that the user has assumed has successfully authenticated via SAML. However, the role doesn't have permission to call the GetFederationToken API for Amazon Connect. This call is required so the user can log in to your Amazon Connect instance using SAML.

**Resolution**

1. Attach a policy that has the permissions for `connect:GetFederationToken` to the role found in the error message. Following is a sample policy:

   ```json
   {
     "Version": "2012-10-17",
     "Statement": [
       {
         "Sid": "Statement1",
         "Effect": "Allow",
         "Action": "connect:GetFederationToken",
         "Resource": [
         ]
       }
     ]
   }
   ```

2. Use the IAM console to attach the policy. Or, use the attach-role-policy API, for example:

   ```bash
   $ aws iam attach-role-policy --role-name [ASSUMED_ROLE] --policy_arn [POLICY_WITH_GETFEDERATIONTOKEN]
   ```
Set up your contact center

Amazon Connect enables you to create a virtual contact center in the AWS cloud. To get started, create a virtual contact center instance. For more information, see Get started with Amazon Connect (p. 9).

After you create an instance, you can edit its settings, such as telephony, data storage, and data streaming. After that, you can assign your contact center a phone number or import your own phone number. You can add agents to your contact center, and assign them permissions appropriate to their roles. You can set up a single queue for incoming contacts, or set up multiple queues so that you can route contacts to agents with specific skills.

A key part of setting up your contact center is to define how your customers experience it. You do this by creating flows.

Finally, you'll need to provide your agents access to the Contact Control Panel (CCP), which they will use to interact with contacts.

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- Test voice, chat, and task experiences (p. 140)
- Set up phone numbers for your contact center (p. 149)
- Set up outbound communications (p. 207)
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- Embed the CCP into Zendesk (p. 297)

Create an Amazon Connect instance

The first step in setting up your Amazon Connect contact center is to create a virtual contact center instance. Each instance contains all the resources and settings related to your contact center.

Things to know before you begin

- When you sign up for Amazon Web Services (AWS), your AWS account is automatically signed up for all services in AWS, including Amazon Connect. You are charged only for the services that you use. To create an AWS account, see How do I create and activate an AWS account?
- To allow an IAM user to create an instance, ensure that they have the permissions granted by the AmazonConnect_FullAccess policy.
Step 1: Set identity

Permissions to access Amazon Connect features and resource are assigned to user accounts within Amazon Connect. When you create an instance, you must decide how you want to manage users. You can't change the identity management option after you create the instance. For more information, see Plan your identity management in Amazon Connect (p. 115).

To configure identity management for your instance

1. Open the Amazon Connect console at https://console.aws.amazon.com/connect/.
2. Choose Get started. If you have previously created an instance, choose Add an instance instead.
3. Choose one of the following options:
   - **Store users in Amazon Connect** - Use Amazon Connect to create and manage user accounts. You cannot share users with other applications.
   - **Link to an existing directory** - Use an AWS Directory Service directory to manage your users. You can use each directory with one Amazon Connect instance at a time.
   - **SAML 2.0-based authentication** - Use an existing identity provider (IdP) to federate users with Amazon Connect.
4. If you chose Store users within Amazon Connect or SAML 2.0-based authentication, provide the left-most label for Access URL. This label must be unique across all Amazon Connect instances in all Regions. You can't change the access URL after you create your instance.
5. If you chose Link to an existing directory, select the AWS Directory Service directory for Directory. The directory name is used as the left-most label for Access URL.
6. Choose Next.

Step 2: Add administrator

After you specify the user name of the administrator for the Amazon Connect instance, a user account is created in Amazon Connect and the user is assigned the Admin security profile.

To specify the administrator for your instance

1. Do one of the following, based on the option that you chose in the previous step:
   - If you chose Store users within Amazon Connect, select Specify an administrator, and provide a name, password, and email address for the user account in Amazon Connect.
   - If you chose Link to an existing directory, for Username, type the name of an existing user in the AWS Directory Service directory. The password for this user is managed through the directory.
   - If you chose SAML 2.0-based authentication, select Add a new admin and provide a name for the user account in Amazon Connect. The password for this user is managed through the IdP.
2. Choose Next.
Step 3: Set telephony

Use the options in this section to choose whether you want your agents to receive calls from customers, make outbound calls, and hear early media audio.

Early media

When early media audio is enabled, for outbound calls your agents can hear pre-connection audio such as busy signals, failure-to-connect errors, or other informational messages provided by telephony providers.

By default, early media is enabled for you. Note the following exception:

- Your instance was created before April 17, 2020, and you weren't enrolled in the preview program. You need to enable early media audio. For instructions, see Update telephony options (p. 132).

To configure telephony options for your instance

1. To allow inbound calls to your contact center, choose Allow incoming calls.
2. To enable outbound calling from your contact center, choose Allow outgoing calls.
3. To enable multi-party calls, choose Enable up to six parties on a call.
4. Choose Next.

Step 4: Data storage

Note

Amazon Connect does not support Amazon S3 Object Lock in compliance mode to store objects using a write-once-read-many (WORM) model.

When you create an instance, by default we create an Amazon S3 bucket. Data, such as reports and recordings of conversations, is encrypted using AWS Key Management Service, and then stored in the Amazon S3 bucket.

This bucket and key are used for both recordings of conversations and exported reports. Alternatively, you can specify separate buckets and keys for recordings of conversations and exported reports. For instructions, see Update instance settings (p. 132).

By default, Amazon Connect creates buckets for storing call recordings, chat transcripts, exported reports, and flow logs.

- When a bucket is created to store call recordings, call recording is enabled at the instance level. The next step for setting up this functionality is to set up recording behavior in a contact flow (p. 483).
- When a bucket is created to store chat transcripts, chat transcription is enabled at the instance level. Now all chat transcripts will be stored. Only if you want to monitor chat conversations do you need to set up recording behavior in a contact flow (p. 483).
- Live media streaming is not enabled by default.

By default, Amazon Connect creates a Customer Profiles domain, which stores profiles that combine customer contact history with customer information such as account number, address, billing address, and birth date. Data is encrypted using AWS Key Management Service. You can configure Customer Profiles to use your own customer managed key after your instance is set up. For more information, see Create a KMS key to be used by Customer Profiles to encrypt data (required) (p. 589).
**Step 5: Review and create**

**To create your instance**

1. Review the configuration choices. Remember that you cannot change the identity management options after you create the instance.
2. (Optional) To change any of the configuration options, choose **Edit**.
3. Choose **Create instance**.
4. (Optional) To continue configuring your instance, choose **Get started** and then choose **Let’s go**. If you prefer, you can access your instance and configure it later on. For more information, see **Next steps** (p. 130).

If you chose to manage your users directly within Amazon Connect or through an AWS Directory Service directory, you can access the instance using its access URL. If you chose to manage your users through SAML-based authentication, you can access the instance using the IdP.

**Next steps**

After you create an instance, you can assign your contact center a phone number or import your own phone number. For more information, see **Set up phone numbers for your contact center** (p. 149).

**Create a dev (Sandbox) or test (QA) instance**

You might want to create multiple contact center instances, for example, one as a Sandbox for development, another for QA, and a third for Production.

Each instance functions only within the AWS Region in which you create it.

**Important**

Most entities in Amazon Connect can be (re)created and replicated among instances using the Amazon Connect API. While doing that keep the following limitations in mind:

- Service quotas are specific to each instance.
- Some supporting services, such as User Directory, can be linked to only one Amazon Connect instance at a time.
- Any additional external and Region-specific limitations.

For more information, see **Can I migrate my Amazon Connect instance from a test environment to a production environment?**

**To create another instance**

1. In the AWS Management Console, choose **Amazon Connect**.
2. Choose **Add an instance**.
3. Complete the steps on the Amazon Connect resource configuration page. For instructions see Create an Amazon Connect instance (p. 127).

Find your Amazon Connect instance ID/ARN

When you open a support ticket, you may be asked to provide your Amazon Connect instance ID (also called the ARN). Use the following steps to find it.

1. Open the Amazon Connect console at https://console.aws.amazon.com/connect/.
2. On the instances page, choose the instance alias. The instance alias is also your instance name, which appears in your Amazon Connect URL.

On the Account overview page, in the Distribution settings section, you can see the full instance ARN.

The information after instance/ is the instance ID.

Find your Amazon Connect instance name

1. Open the Amazon Connect console at https://console.aws.amazon.com/connect/.
2. On the instances page, the instance name appears in the **Instance Alias** column. This instance name appears in the URL you use to access Amazon Connect.

   ![Amazon Connect instance settings](image)

**Update instance settings**

To update the instance settings:

1. Open the Amazon Connect console at [https://console.aws.amazon.com/connect/](https://console.aws.amazon.com/connect/).
2. On the instances page, choose the instance alias. The instance alias is also your **instance name**, which appears in your Amazon Connect URL.

   ![Amazon Connect virtual contact center instances](image)

3. Complete the following procedures.

**Update telephony options**

1. In the navigation pane, choose **Telephony**.
2. To enable customers to call into your contact center, choose **Receive inbound calls with Amazon Connect**.
3. To enable outbound calling from your contact center, choose **Make outbound calls with Amazon Connect**.
4. To enable outbound campaigns, choose **Enable outbound campaigns**.
5. By enabling early media audio, your agents can hear pre-connection audio such as busy signals, failure-to-connect errors, or other informational messages from telephony providers, when making outbound calls. Choose **Enable early media**.
6. By default, you can have three participants on a call (for example, two agents and a customer, or an agent, a customer, and an external party). To enable multi-party calls with more participants, choose **Enable up to six parties on a call**. This feature is only available in CCPv2.
7. Choose **Save**.
Update data storage

1. In the navigation pane, choose **Data storage**.
2. To specify the bucket and KMS key for recordings of voice conversations, choose **Call recordings, Edit**, specify the bucket name and prefix, select the KMS key by name, and then choose **Save**.

   When this bucket is created, call recording is enabled at the instance level. The next step for setting up this functionality is to set up recording behavior in a contact flow (p. 483).
3. To specify the bucket and KMS key for recordings (transcripts) of chat conversations, choose **Chat transcripts, Edit**, specify the bucket name and prefix, select the KMS key by name, and then choose **Save**.

   When this bucket is created, chat transcripts are enabled at the instance level. Now all chat transcripts will be stored here.
4. To enable live media streaming, choose **Live media streaming, Edit**. For more information, see Capture customer audio: live media streaming (p. 765).
5. To specify the bucket and KMS key for exported reports, choose **Exported reports, Edit**, specify the bucket name and prefix, select the KMS key by name, and then choose **Save**.
6. To enable file sharing for both agents and customers, next to **Attachments** choose **Edit**, then **Enable Attachments sharing**. For more information about this option and additional steps, see Enable attachments to share files using chat (p. 134).
7. To enable a **Customer Profiles domain**, choose that option.

   A Customer Profiles domain stores profiles that combine customer contact history with customer information such as account number, address, billing address, and birth date. Data is encrypted using AWS Key Management Service. You can configure Customer Profiles to use your own customer managed key after your instance is set up. For more information, see Create a KMS key to be used by Customer Profiles to encrypt data (required) (p. 589).

Update data streaming options

1. In the navigation pane, choose **Data streaming**.
2. Choose **Enable data streaming**. For more information, see Enable data streaming for your instance (p. 137).
3. For **Contact records**, do one of the following:
   - Choose **Kinesis Firehose** and select an existing delivery stream, or choose Create a new Kinesis Firehose to open the Kinesis Firehose console and create the delivery stream.
   - Choose **Kinesis Stream** and select an existing stream, or choose Create a new Kinesis Firehose to open the Kinesis console and create the stream.
4. For **Agent Events**, select an existing Kinesis stream or choose Create a new Kinesis Stream to open the Kinesis console and create the stream.
5. Choose **Save**.

Update analytics tools options

1. In the navigation pane, choose **Analytics tools**.
2. Choose **Enable Contact Lens**. For more information, see Analyze conversations using Contact Lens for Amazon Connect (p. 807).
3. Choose **Save**.
Update flow settings

1. In the navigation pane, choose Flows.
2. (Optional) To add a signing key for use in flows, choose Add key. For more information, see Encrypt customer input (p. 511).
3. (Optional) To integrate with Amazon Lex, select a Lex bot. For more information, see Add an Amazon Lex bot to Amazon Connect (p. 564).
4. (Optional) To integrate with AWS Lambda, select a Lambda function. For more information, see Invoke AWS Lambda functions (p. 493).
5. (Optional) To enable flow logs, choose Enable flow logs. For more information, see Track events as customers interact with flows (p. 513).
6. (Optional) To use the best available voice from Amazon Polly, choose Use the best available voice. For more information, see Amazon Polly best sounding voice (p. 460).
7. (Optional) Use the voices available in Amazon Polly.

Enable attachments to share files using chat

You can allow customers and agents to share files using chat. After you complete the steps in this topic, an attachment icon automatically appears in your agent's Contact Control Panel so they can share attachments on chats.

You will need to update your customer-facing user interface to support attachment sharing.

Using a custom agent application? Check out the APIs we've added to support attachment sharing: StartAttachmentUpload, CompleteAttachmentUpload, and GetAttachment.

Step 1: Enable attachments

1. Open the Amazon Connect console at https://console.aws.amazon.com/connect/.
2. On the instances page, choose the instance alias. The instance alias is also your instance name, which appears in your Amazon Connect URL.
   
   ![Amazon Connect virtual contact center instances](image)

   3. On the Data storage page, under the Attachments, choose Edit, select Enable Attachments sharing, and then choose Save.

   Storage options appear, similar to the following image.
4. You can change the Amazon S3 bucket location where attachments are stored. By default, your existing Amazon Connect bucket is used, with a new prefix for attachments.

   **Note**
   Currently, Amazon Connect doesn’t support S3 buckets with Object Lock enabled.

   The attachments feature leverages two Amazon S3 locations: a staging location and a final location.

   Note the following about the staging location:

   - The staging location is used as part of a business validation flow. Amazon Connect uses it to validate the file size and type before it is shared with the chat participant.
   - The staging prefix is created by Amazon Connect based on the bucket path you have selected. Specifically, it includes the S3 prefix for where you are saving files, with **staging** appended to it.
   - We recommend that you change the data retention policy for the staging prefix to one day. This way you won’t be charged for storing the staging files. For instructions, see How do I create a lifecycle rule for an S3 bucket? in the Amazon S3 User Guide.

   **Warning**
   Only change the lifecycle for the file staging location. If you accidentally change the lifecycle for the entire Amazon S3 bucket, all transcripts and attachments will be deleted.

**Step 2: Configure a CORS policy on your attachments bucket**

To allow customers and agents to upload and download files, update your cross-origin resource sharing (CORS) policy to allow PUT and GET requests for the Amazon S3 bucket you are using for attachments.
This is more secure than enabling public read/write on your Amazon S3 bucket, which we don't recommend.

**To configure CORS on the attachments bucket**

1. Find the name of the Amazon S3 bucket for storing attachments:
   
a. Open the Amazon Connect console at https://console.aws.amazon.com/connect/.
   
b. In the Amazon Connect console, choose **Data storage**, and locate the Amazon S3 bucket name.
2. Open the Amazon S3 console at https://console.aws.amazon.com/s3/.
3. In the Amazon S3 console, select your Amazon S3 bucket.
4. Choose the **Permissions** tab, and then scroll down to the **Cross-origin resource sharing (CORS)** section.
5. Add a CORS policy that has one of the following rules on your attachments bucket. For example CORS policies, see **Cross-origin resource sharing: Use-case scenarios** in the *Amazon S3 Developer Guide*.

- Option 1: List the endpoints from where attachments will be sent and received, such as the name of your business web site. This rule allows cross-origin PUT and GET requests from your website (for example, http://www.example1.com).

  Your CORS policy might look like the following example:

  ```json
  [
    {
      "AllowedMethods": [
        "PUT",
        "GET"
      ],
      "AllowedOrigins": [
        "http://www.example1.com",  // List the endpoints from where attachments will be sent and received,
        "http://www.example2.com"  // such as the name of your business web site.
      ],
      "AllowedHeaders": [
        "*
      ]
    }
  ]
  ``

- Option 2: Add the `*` wildcard to **AllowedOrigin**. This rule allows cross-origin PUT and GET requests from all origins, so you don't have to list your endpoints.

  Your CORS policy might look like the following example:

  ```json
  [
    {
      "AllowedMethods": [
        "PUT",
        "GET"
      ],
      "AllowedOrigins": [
        "*
      ],
      "AllowedHeaders": [
        "*
      ]
    }
  ]
  ```
**Step 3: Update your chat UI**

To help you update the chat user interface that your customers use, we've posted an updated version of chat interface JS. It exposes an attachment icon on the UI and supports the backend calls for attachment sharing. See Amazon Connect Chat UI Examples on GitHub.

**Enable data streaming for your instance**

You can export contact records and agent events from Amazon Connect and perform real-time analysis on contacts. Data streaming sends data to Amazon Kinesis.

**To enable data streaming for your instance**

1. Open the Amazon Connect console at https://console.aws.amazon.com/connect/.
2. On the instances page, choose the instance alias. The instance alias is also your instance name, which appears in your Amazon Connect URL.
3. In the navigation pane, choose **Data streaming**.
4. Choose **Enable data streaming**.
5. For **Contact records**, do one of the following:
   - Choose Kinesis Firehose and select an existing delivery stream, or choose Create a new Kinesis firehose to open the Kinesis Firehose console and create the delivery stream. For more information, see Creating an Amazon Kinesis Data Firehose Delivery Stream.
   - Choose Kinesis Stream and select an existing stream, or choose Create a Kinesis stream to open the Kinesis console and create the stream. For more information, see Creating and Managing Streams.
6. For **Agent Events**, select an existing Kinesis stream or choose Create a new Kinesis stream to open the Kinesis console and create the stream.
7. Choose **Save**.

**Using server-side encryption for the Kinesis stream**

If you enable server-side encryption for the Kinesis stream you select, Amazon Connect cannot publish to the stream because it does not have permission to call kms:GenerateDataKey so that it can encrypt data sent to Kinesis. To work-around this, do the following steps:

1. Enable encryption for recordings of conversations or scheduled reports.
2. Create a customer managed key to use for encryption.
3. Choose the same customer managed key for the Kinesis data stream that you use for scheduled reports or recordings of conversations.

For more information, see Creating Keys in the AWS Key Management Service Developer Guide.
Emergency admin login

As a best practice, users assigned to the Amazon Connect Admin security profile should always use their Amazon Connect instance URL to login:

- Log in to your contact center at https://instance name.my.connect.aws/.

This method ensures the appropriate levels security.

However, if there's an emergency, you can log in from the Amazon Connect console using your AWS account credentials. For example, you may need to login in this way in the following situations:

- You forgot your Amazon Connect administrator password and no other Amazon Connect administrators are around to reset it.
- Someone deleted the Amazon Connect Admin security profile by mistake.

To login for emergency access

1. Make sure you have your AWS account credentials at hand and that you have the required permissions (p. 1203).
2. Open the Amazon Connect console at https://console.aws.amazon.com/connect/.
3. If prompted to login, enter your AWS account credentials.
4. Choose the name of the instance from the Instance alias column.
5. In the navigation pane, choose Overview.
6. Choose Log in for emergency access.

You aren't prompted for your credentials because you are federated in from the AWS console.

**Important**
For daily usage, we strongly recommend always using your instance URL to login. The procedure provided in this article should only be used for emergency access when using the instance URL is not an option.

To log out

To log out of your instance, go to the title bar at the top of the screen and select the icon with the arrow (Log out) that appears next to your user name.
Delete your Amazon Connect instance

If you no longer need your contact center, you can delete your Amazon Connect instance. When you delete an instance, we release its claimed phone number back to inventory. When customers call the phone number that you've released, they'll get a message that it's not a working phone number.

**Important**
You can't restore a deleted instance or access its settings, data, metrics, and reports.

Delete your instance

**To delete your Amazon Connect instance**

1. Open the Amazon Connect console at [https://console.aws.amazon.com/connect/](https://console.aws.amazon.com/connect/).
2. Select the radio button for the instance.
3. Choose **Delete**. If you don't see the **Delete** button, you don't have permissions to delete instances. Contact your AWS administrator for help.

4. When prompted, enter the name of the instance and then choose **Delete**.

**Error message: "Region Unsupported. Amazon Connect is not available in [Region]"**

If you get this error message, it means that you selected a Region in the AWS Management Console that is not the Region in which you created the Amazon Connect instance, and Amazon Connect isn't available in that Region.

**To switch Regions and delete your Amazon Connect instance**

1. From the navigation bar, open the Region selector. Select the Region in which you created the Amazon Connect instance.
2. From the navigation bar, choose **Amazon Connect** from the list of services to open the Amazon Connect console. If you don't see the instance, keep selecting from the supported Regions until you find your instance.

3. Select the radio button for the instance.

4. Choose **Delete**. If you don't see the **Delete** button, you don't have permissions to delete instances. Contact your AWS administrator for help.

5. When prompted, enter the name of the instance and then choose **Delete**.

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Test voice, chat, and task experiences

To learn what the voice, chat, and task experiences are like for your agents and customers, you can test them without doing any development.

**Test voice**

After you claim a number you can immediately call it to hear what the experience will be like for your customers. Amazon Connect uses the **default flows (p. 307)** to power your initial experience.

To test a customized flow, **assign a phone number (p. 457)** to it and then call that number.

**Test chat**

Amazon Connect includes a simulated web page that shows how your customers can interact with you, and a Contact Control Panel (CCP) that shows the agent experience. Here's how to test chat:

1. On the navigation menu, choose **Dashboard**.
2. Choose **Test chat**.

If you don't see the option to test chat, click [here](#).

3. On the **Test Chat** page, choose **Test Settings**.

4. Under **System Settings**, choose the flow you want to test with chat, and then click **Apply**. By default, it runs the [Sample inbound flow](#) (p. 318).

**Tip**

If you want to test a chat and use contact attributes, note that the key and value pair must be enclosed in quotes, as shown in the following image:

5. In the chat window, click the icon as shown below.
6. Type a message similar to what one of your customers might type. In the agent window, type a reply.

7. To see what it’s like for an agent to handle multiple chat conversations, copy the dashboard URL into another browser window, and start another chat. The chat goes to the same instance of the CCP that you already have open.

   **Tip**
   The test environment uses the BasicQueue and Basic Routing Profile. The Basic Routing Profile is set up for 2 chats. If you want to test what it’s like to have more than two chats, change the Basic Routing Profile to 5 chats. For instructions, see Create a routing profile (p. 230).

To learn more about what the agent experiences when managing chat conversations, see Work with chats (p. 1258).

**Test tasks**

The first step in testing the task experience is to create a quick connect for the queue you want to assign the example tasks to.

**Step 1: Create a quick connect**

1. On the navigation menu, choose **Routing, Quick connects, Add a new**.
2. Enter a name for the quick connect. For example, if you want to assign the test task to yourself, enter your name (for example, **Jane Doe**).
3. Under **Type**, use the dropdown list to choose **Queue**.
4. Under **Destination**, use the dropdown list to choose a queue you set up for yourself (assuming you want to assign the test task to yourself).
5. Under **flow**, choose **Default queue transfer**.
6. Under **Description**, enter something like **Test quick connect**.
7. Choose **Save**.
Step 2: Make the quick connect visible in the CCP by assigning it to a queue

1. After you create the quick connect, go to **Routing, Queues** and then choose the appropriate queue for the contact to be routed to.
2. On the **Edit queue** page, in the **Quick connects** box, search for the quick connect you created. For example, it might have your name.
3. Select the quick connect and then choose **Save**.

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

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

Step 4: Test tasks

1. Open the CCP. Select the **Task** tab, and then choose **Create task**.
Or, if you're testing the chat experience, for example, you can choose the Task icon, as shown in the following image.
2. Complete the **Create task** page. When you choose **Assign to**, you can assign only a task to someone or a queue that has quick connect.

To create a scheduled task for the future, use the **Scheduled date/time** box to choose a future date and time. You can schedule a task up to six days in future.

Choose **Create**.
3. If you chose yourself, the task will be routed to you. Choose **Accept task**.
4. Review the task, and choose **End task** when done.
View metrics for the test experiences

When you're testing the voice, chat, and task experiences, you may also want to explore metrics.

1. On the left navigation menu, choose Analytics and optimization, Real-time metrics, Queues.
2. You can review the real-time metrics as you test the different channels.
3. To view metrics by channel in a real-time metrics report, go to Settings, Groupings, Queues grouped by channels, Apply. Your report will look similar to the following image.
Set up phone numbers for your contact center

After you create an Amazon Connect instance, you can claim a phone number to use for your contact center. You can use this phone number to place a test call into your contact center to confirm that it is working correctly. You can also use it in your production environment.

- For pricing information about claimed phone number costs, see Amazon Connect pricing.
- For a list of the telephony capabilities that Amazon Connect provides, see the Amazon Connect Telecoms Country Coverage Guide.

If you want to keep a phone number you already have, you can port the phone number and use it with Amazon Connect. After a phone number is ported to Amazon Connect, it appears in the list of available phone numbers for you to assign to flows.

Contents
- Port your current phone number (p. 149)
- Claim a phone number in your country (p. 160)
- Claim a phone number you already own in another country (p. 161)
- List the phone numbers claimed to your Amazon Connect instance (p. 161)
- Claim phone numbers for Amazon Connect in the Asia Pacific (Tokyo) Region (p. 161)
- Request numbers, international numbers, or termination points (p. 162)
- Move a phone number across instances (p. 164)
- Release a phone number (p. 164)
- Telecoms regulations (p. 165)

Port your current phone number

You can port your existing phone numbers to your Amazon Connect contact center.
Things to know before porting

The topics in this section explain which numbers can be ported, how long it takes, and what fees you might incur.

Contents
- What is phone number porting? (p. 150)
- How much does number porting cost? (p. 151)
- Can my number be ported to Amazon Connect? (p. 151)
- How long does it take to port numbers? (p. 152)
- Can I cancel a porting that is already scheduled? (p. 153)
- When do I cancel my current telecom service? (p. 153)

What is phone number porting?

Porting a phone number is the process of moving a phone number from one telephony service provider, or carrier, to another. Many businesses and organizations already have a phone number that is advertised to their customers, so changing this number would be disruptive.

If you port a phone number from your current carrier to Amazon Connect, you can keep using the same phone number for your contact center. This helps to eliminate the need to update your business contact information.

Downtime and service disruption during the porting process

The porting process requires the losing carrier to remove your number from their systems, the winning carrier to add your number to their systems, and for number routing to be updated. Most porting activities complete within 15-30 minutes, with possible call disruptions. To ensure that they have engineers available to troubleshoot issues, most losing carriers complete porting actions only during normal business hours. Carriers typically communicate a two-hour porting window to resolve any issues that could arise.

For detailed information about available porting dates and times, see Region requirements for ordering and porting phone numbers (p. 165) for your country or region.

What happens to a number after it is ported

As long as you continue to pay for the phone number, and do not release it from your Amazon Connect instance, it stays assigned to your account, and you are billed accordingly.

To release a phone number, follow the steps in Release a phone number (p. 164).

When a phone number is released from your Amazon Connect instance:
- You will no longer be charged for it.
- You cannot reclaim the phone number.
- Amazon Connect reserves the right to allow it to be claimed by another customer.
If you move your contact center away from Amazon Connect, and want to port your phone number away from Amazon Connect, see Port phone numbers away from Amazon Connect (p. 159).

How much does number porting cost?

Amazon Connect does not charge fees for porting numbers. Your existing carrier may have fees associated with the disconnection and early termination of your service.

After a phone number is ported to Amazon Connect, standard pricing applies for Amazon Connect service usage and associated telephony rates.

Can my number be ported to Amazon Connect?

Not all phone numbers can be ported. The ability to port a specific phone number depends on several factors. For example:

- The regulations in the country or region of the phone number.
- Agreements between the losing and winning carriers.
- The type of phone number being ported.
- Your service contract with your current service provider.

To find out if a phone number that you currently own—whether local, mobile, or toll-free—can be ported to Amazon Connect:

1. See if your country or region supports number porting: Region requirements for ordering and porting phone numbers (p. 165).
2. Then get started by submitting an Amazon Connect support ticket for number verification (p. 154).

Porting numbers purchased from other contact center providers

In most cases, you can port numbers that were purchased from other contact center providers. Confirm with your current contact center provider who holds the assignment to the number, and work with them to ensure the correct information is provided in the Letter of Authorization (LOA).

Port short phone numbers

Because of Telecom regulations in various countries or regions, the short phone number will need to be evaluated on a case-by-case basis. To verify if your phone number can be ported to Amazon Connect, submit an Amazon Connect support ticket (p. 154).

Port a number to one EU Region only

The Amazon Connect Regions of EU-CENTRAL-1 and EU-WEST-2 are symmetrical European Regions that offer the same carrier coverage for telephony. If a phone number cannot be ported to an instance in one of these Regions, then it cannot be ported to an instance in the other.

If you had a phone number ported into the EU-CENTRAL-1 or EU-WEST-2 Regions, and want to move it to the other Region, submit an Amazon Connect support ticket (p. 154) for assistance.

The same is true for the North America Regions of US-EAST-1 and US-WEST-2.

Port a subset of numbers from a block

If you have a block of numbers, in some instances Amazon Connect can port a subset or portion of your phone numbers. In other cases, it is required by the carrier to port full block of phone numbers.
If you want to port only a subset of the phone numbers you currently own to Amazon Connect, submit an Amazon Connect support ticket (p. 154) to verify whether the phone numbers can be ported. We will verify the actions that can be completed and assist you with next steps.

**Note**
If you port only a subset of the phone numbers, you will still be liable for the remaining phone numbers with the original carrier and any associated fees.
If your intent is release the remaining phone numbers not being ported to Amazon Connect, we recommend waiting until the requested porting has been completed to avoid any disruptions to service.

**Letter of compromise**

Before porting phone numbers, some customers ask for a letter of compromise stating that they will be allowed to move their phone numbers from Amazon Connect to another service, if their contact center moves. Because of Telecom regulations in various countries, the phone number will need to be evaluated on a case-by-case basis. To verify that your phone number can be ported to Amazon Connect, submit a ticket to Amazon Connect support (p. 154).

**How long does it take to port numbers?**

**Important**
Open a porting request as far in advance of your pending go-live date as possible.

The amount of time that it takes to port numbers depends on the country, complexity of the request, the type and quantity of numbers being ported, and your current carrier. Telecom carriers also may implement porting block days because of holidays and network maintenance. Because of this, Amazon Connect requires porting requests to be open several months before pending go-live dates.

**Inside the US and Canada**

Phone numbers in the US or Canada typically take between two to four weeks to port, after phone number portability has been verified, and all required documents are correctly submitted to the carrier.

**Outside the US and Canada**

Phone numbers outside the US and Canada require between two to six months to complete the full porting process. This includes:

- Time for you to submit all the documents to AWS Support.
- Time for the Amazon Connect service provider to verify whether they can port all of the phone numbers that you have requested.
- Time for the losing provider to verify the provided documents.

After all documents are verified by the losing provider, the losing provider and the Amazon Connect service provider will schedule a mutually agreed date to port the numbers to Amazon Connect.

**What affects porting timelines?**

Porting timelines can be negatively impacted when incorrect information is provided on the required Letter of Authorization (LOA). This causes the LOA to be rejected and resets the porting timelines.

**Port many numbers over multiple countries or carriers**

Complex porting requests have their own timelines. The timelines discussed elsewhere in this topic do not apply to complex porting requests.

Complex porting requests for more than 10 distinct number ranges or 10 distinct locations are considered a project and require advanced coordination with your AWS Account team. If you are a
Business or Enterprise customer, engage your Amazon Connect Solutions Architect (SA) or Technical Account Manager (TAM) for assistance in planning your number porting.

To help make the process as smooth as possible, gather the following information before submitting a porting request:

- Your most recent telephony bill from the carriers that currently service the numbers to be ported.
- The country specific documentation required; see Region requirements for ordering and porting phone numbers (p. 165).
- The contact information for a central point of contact who can act on behalf of your organization in support of the porting requests.

Can I choose the port date?

Depending on the country and carriers involved, you may be able to choose the porting date and time. In most cases, however, the losing carrier picks the date and time and communicates it to Amazon Connect based on their schedule.

If you have a specific date and time you want to request, provide the information in your support case. We will work with our carrier to determine if they can support the requested date and time.

**Note**

Most carriers only support porting activity during their normal business hours. For detailed information about available porting dates and times for your country, see Region requirements for ordering and porting phone numbers (p. 165).

Can I cancel a porting that is already scheduled?

**Important**

If you need to cancel or reschedule your porting, let us know immediately.

Depending on the country of service, after a mutually agreed date and time has been provided it can be difficult to cancel.

Because of the coordination required between carriers, Amazon Connect support requires a minimum of 5 business days notice to cancel or reschedule a porting request. If you need to cancel or reschedule your porting, let us know immediately.

If a porting is successfully cancelled, timelines for the port schedule are reset and the carriers will need to identify another mutually agreed date and time. This will impact the overall timeline for porting your numbers.

**Note**

Please be advised that sometimes a porting request cannot be cancelled because of process automation, but Amazon Connect support will make every attempt possible to stop the request.

When do I cancel my current telecom service?

Do not cancel your existing telecom service until your phone numbers have been ported and confirmed working in Amazon Connect.

Canceling your existing telecom service before your number is ported releases your phone number assignment, and may result in you losing the number.

Porting your phone numbers

Porting phone numbers from your existing carrier to Amazon Connect is a multi-step process. It's important to get started several months in advance of your scheduled go-live date, and have all of your documentation in order.
How to port your numbers to Amazon Connect

The following steps are for a typical porting request. This process requires timely communication to make progress. If you take longer than 30 days to respond to requests for information, your porting request may be cancelled, rescheduled, or restarted from the beginning. For a list of country-specific requirements for porting numbers, see Region requirements for ordering and porting phone numbers (p. 165).

Step 1: Submit an Amazon Connect support ticket

Submit an Amazon Connect support ticket to verify if your phone number can be ported to Amazon Connect.

Premium support plan

2. Choose Create case.
3. Choose Technical support.
4. For Case classification, do the following:
   a. Choose service as Connect (Contact center).
   b. Choose category as Phone Number Porting.
   c. Choose the required severity.
   d. For Contact Center Instance ARN, enter the instance ARN (also called the instance ID). For instructions on how to find your instance ARN, see Find your Amazon Connect instance ID/ARN (p. 131).
   e. Enter the subject.
   f. Under Case description, Use case description, include as much information as possible about your request, including phone number(s) to be ported, your current carrier, and the contact information for the person authorized to make changes to your current phone service. If you don’t know all of these details, you can leave information out.
5. Expand Contact options, and then choose your Preferred contact language and Contact methods.
6. Choose Submit.
7. The Amazon Connect team will review your ticket and gets back to you.

Basic support plan

2. Choose Create case.
3. Choose Service limit increase.
4. For Case details, do the following:
   a. For Limit type, choose Amazon Connect.
b. For **Contact Center Instance ARN - optional**, enter the instance ARN (also called the instance ID). For instructions on how to find your instance ARN, see [Find your Amazon Connect instance ID/ARN](p. 131).

5. For **Requests, Request 1** do the following:
   a. For **Region**, select the Region in which you created your Amazon Connect instance.
   b. For **Limit**, choose **Phone Number Porting**.
   c. For **New limit value**, enter the number of phone numbers to port.

6. (Optional) To port additional phone numbers, choose **Add another request**, and then repeat step 6 for each additional request.

7. For **Case description, Use case description**, include as much information as possible about your request, including whether the numbers are Direct Inward Dial or toll-free, your current carrier, and the contact information for the person authorized to make changes to your current phone service. If you don't know all of these details, you may leave information out.

8. Expand **Contact options**, and then choose your **Preferred contact language** and **Contact methods**.

9. Choose **Submit**.

10. The Amazon Connect team will review your request and get back to you.

**Step 2: Complete Letter of Authorization (LOA)**

If the phone number qualifies for porting, the Amazon Connect team will provide you a Letter of Authorization (LOA) to be completed by you. Complete all mandatory fields and sign the LOA.

Along with the LOA, Telecom regulations in many countries require additional documents to register a number, such as proof of business, proof of address, and proof of ID. For a list of country-specific requirements for porting numbers, see [Region requirements for ordering and porting phone numbers](p. 165).

**How to complete an LOA**

All portings require the completion of a Letter of Authorization (LOA). The LOA authorizes your current carrier to release your number and allow it to be ported.

- If you are porting multiple numbers from different carriers and countries, submit separate tickets for each set of phone numbers to be ported from different carriers and different countries to streamline communications, tracking, and the LOA process.
- A separate LOA is required for numbers from each losing carrier.

To complete an LOA, provide the following information:

- The numbers to port.
- Information about your current carrier, such as their business name and contact information.
- Contact information for the person authorized to make changes to your phone service. The name, address, and information you provide on the LOA must match the information on file with your current carrier exactly. To help ensure the porting process goes smoothly, include a copy of the Customer Service Record (CSR) or latest phone bill from your carrier. This will have your name, address, and related telephone numbers on it. Check that the information on your LOA matches your CSR exactly.
- If you have any questions regarding specific details about your current service, consult with your current carrier to ensure the data is accurate. This will minimize the risk that the LOA is rejected.

**Important**

Your LOA form must meet the following criteria:
• It must be legible: clearly written or typed.
• It must list your company name, the company address, and contact name. This information must match what is on the current carrier's CSR.
• It must include a true signature. Most carriers will reject an electronic or printed signature.
• It must be dated within the last 15 days.
• It must include any toll-free numbers you want to port. Up to 10 toll-free numbers can be listed on the LOA. If you are requesting more than 10 phone numbers be ported, a spreadsheet is required to be attached. Specify "See Attached" on the LOA where the phone numbers would be listed.
• It must include only those telephony numbers that belong to the same current carrier and in the same country. If you have multiple current carriers and countries, you will need to submit multiple LOAs.

To further minimize the risk of having your LOA rejected, see Common reasons why carriers reject an LOA (p. 157).

Step 3: The porting request goes to the Amazon Connect carrier

After you have submitted all required documentation, the Amazon Connect team submits the porting request on your behalf to the winning carrier.

• The losing and winning carrier follow an industry standard process to validate the contents of the LOA and submitted documentation.
• If the LOA contains discrepancies, it will be rejected and you will need to fix the discrepancies and submit a new LOA.
• After the carriers successfully validate the LOA, they will either confirm your requested date or provide an available date for the actual porting. This is known as the "mutually agreed date."

Note
Most carriers require that portings are completed during normal business hours. For country-specific business hours, see Region requirements for ordering and porting phone numbers (p. 165).

Step 4: Assign the phone number to the flow, request service quota increases

About 3–4 days before the mutually agreed date and time, the Amazon Connect support team loads the phone number that will be ported into the instance ARN you have provided, and then notifies you. Now it's time for you to perform the following steps:

1. Associate the phone number to the desired flow (p. 457) so the phone number will be ready to receive phone calls after the porting is completed. If you require assistance assigning multiple phone numbers to contact flows, let us know in your support request.

   Important
   If you do not assign the phone number to the flow, calls will not arrive successfully to your Amazon Connect contact center.

2. Submit a service quota request (p. 1325) at least five days in advance of the mutually agreed date for any changes to your service quotas required to support your use case. For example, you may need to increase the number of concurrent calls per instance, or enable countries for outbound calling.

Step 5: Checklist of activities on your porting date

The action of porting a number can be disruptive: the process involves updating the routing of phone numbers between carriers across a country or Region, including carriers not involved in the actual
porting. In rare cases it can take several hours before all routes across all Telecom carriers are fully updated.

**Steps you perform to minimize disruption to your phone services**

On the mutually agreed port date, perform the following steps:

- Double-check that the activities listed in Step 4 (p. 156) have been completed:
  1. Verify that you have assigned the number being ported into your Amazon Connect instance to the appropriate contact flow.
  2. Verify that any required service quota increases or changes for your Amazon Connect instance were implemented. For example, increase the number of concurrent calls per instance, or enable countries for outbound calling.
- Monitor call traffic from your existing contact center to confirm that incoming traffic has stopped.
- Place test calls to your Amazon Connect instance to verify calls are being routed to the correct flows.
- Ensure agents are logged in to the Contact Control Panel (CCP) and can answer calls as they are received.
- Monitor call traffic to your Amazon Connect instance to confirm that you are receiving the expected levels of traffic.

**Steps the Amazon Connect team performs to ensure a smooth transition**

1. After the Amazon Connect team receives confirmation that the porting has been completed, we will perform final testing to confirm that the porting was successful and the phone number is receiving calls to Amazon Connect.
2. After we have completed our testing, we will notify you and ask you to verify the successful completion of the porting.

**Documentation requirements for porting numbers**

The Letter of Authorization (LOA) is an industry standard document type used by carriers to authorize the transfer of a phone number from one carrier to another. In many cases, the LOA is specific to the country or region, carrier, or porting relationship between the losing and winning carriers. If your number can be ported, Amazon Connect support will provide you with an LOA form appropriate for the situation.

For more information, see How to complete an LOA (p. 155).

Additionally, regulations in some countries require a local business address and specific documentation to use a phone number. For country specific requirements, see Region requirements for ordering and porting phone numbers (p. 165). If this is required, we will ask for this information to be submitted with the completed LOA.

**Common reasons why carriers reject an LOA**

There are four common reasons that an LOA may be initially rejected by the losing carrier:

- Unsatisfactory business relationship
  This usually means that you have an unpaid balance or the carrier charges a port away fee. After you pay the bill or fee to your carrier, we will resubmit the port request.
- Name or address mismatch
  The information you submitted on your Letter of Authorization (LOA) is different from what’s on file with your carrier in their Customer Service Record (CSR). To fix this, contact your existing carrier to update your CSR information, obtain the correct CSR information, or both. Let us know when they
update your information and we will resubmit the port request. Or, send us a new LOA with the correct information as provided by your existing carrier.

• Number cannot be ported

We will work with all Amazon Connect carriers in a Region to support the porting of your numbers. In some cases, however, specific numbers may not be portable because of regulatory restrictions or carrier limitations. In these situations, consider claiming a new number from Amazon Connect.

• Missing information

One or more fields have been left blank on the LOA. This may include a missing signature, phone number, address information, or other requested information. Review all LOAs before submitting them to ensure that you have filled out all requested data. After the LOA is updated with all the required information, we will resubmit the port request.

How to verify flows before numbers are ported

We recommend that you test your call flows before the mutually agreed date and time of porting. If you would like to test your call flows, we recommend that you claim a direct inward dial (DID) or toll-free phone number available within Amazon Connect and assign it to the call flow for testing.

When you are done testing, you can release the number from your instance so you will no longer be charged for it. For instructions, see Release a phone number (p. 164).

Until you release the number, you are charged the daily rate associated with claiming a phone number and the per minute rate for telephony minutes used. For more information see the standard pricing for Amazon Connect service usage and associated telephony rates.

After the porting process completes

After you have ported your numbers to Amazon Connect, use the topics in this section to troubleshoot issues, or to release numbers you no longer need after porting.

Contents

• Not receiving calls on the ported number (p. 158)
• Release ported numbers that you no longer need (p. 158)
• Revert to original carrier after porting (p. 159)
• Port phone numbers away from Amazon Connect (p. 159)

Not receiving calls on the ported number

After the scheduled porting window has completed, if you are not receiving phone calls on the ported phone number, update your support ticket. We will troubleshoot with our carrier to verify the porting status and identify the next steps to resolve issue.

Amazon Connect and our carriers make every effort to ensure number porting occurs with minimal downtime and without issues. In most cases, the losing carrier is responsible for initiating the number porting and releasing your number to the winning carrier.

In rare situations, a number routing issue can occur, resulting in calls not arriving to Amazon Connect from the carrier.

Release ported numbers that you no longer need

You do not have to keep phone numbers assigned to your Amazon Connect instance.

When a phone number is released from your Amazon Connect instance:
• You will no longer be charged for it.
• You cannot reclaim the phone number.
• Amazon Connect reserves the right to allow it to be claimed by another customer.

To release a phone number

1. Log in to your contact center at https://instance name.my.connect.aws/. To find the name of your instance, see Find your Amazon Connect instance ID/ARN (p. 131).
2. On the navigation menu, choose Channels, Phone numbers.
3. Choose the phone number you want to release, and then choose Release.

If the phone number is associated with a flow, that flow will be deactivated until another number is associated with it.

When customers call the phone number you have released, they will get a message that it is not a working phone number.

Revert to original carrier after porting

To complete the porting, the losing and gaining carriers both make configuration changes to pass the phone number ownership. After the porting is complete, the gaining carrier has sole control of the phone number.

To move the phone number again, you must complete a new LOA and any required documentation.

Port phone numbers away from Amazon Connect

1. Create an AWS Support case to let us know:
   • Choose Service limit increase. In Limit type select Amazon Connect. In Use case description, provide the following information:
     1. Let us know you're porting away.
     2. The name of your Amazon Connect instance and the numbers you are porting away.
     3. The name of your new carrier.
2. AWS Support contacts you, indicating that you should begin the process with the winning carrier.
3. The winning carrier will request that you provide them with following information:
   • Proof of ownership of the numbers you want to port away. Provide them with screenshots of the Amazon Connect instance with the phone numbers you want to port away, and screenshots of your AWS bill.
   • Usually the winning carrier will require a LOA (Letter of Authorization) that you need to complete. It's important that you provide the correct contact details from your AWS bill.
4. The winning carrier will send the request to AWS Support.
5. AWS Support will verify that the request from the winning carrier matches the information we have about who owns those numbers. If all details match exactly, we will approve the request.
   Important
   Verifying the authenticity of the winning carrier's port-out request is critical for the security of your phone number. If the contact details are not correct (for example, there's a name mismatch), your port-out request may be rejected, causing delays and requiring you to resubmit your request.
6. The winning carrier will complete the port-out request on the date and time that you establish with them. Work with the winning carrier to complete the remainder of the port-out process to ensure a seamless transition.
Claim a phone number in your country

To place or receive calls in your instance, you need to claim a phone number. If you did not claim a number when you created the instance, follow these steps to claim one now.

To claim a number for your contact center

1. Log in to your contact center at https://instance name.my.connect.aws/.
2. On the navigation menu, choose Channels, Phone numbers.
3. Choose Claim a number. You can choose a toll free number or a Direct Inward Dialing (DID) number.
   
   Note
   Use the Amazon Connect service quotas increase form for these situations:
   
   • If you select a country or region, but no numbers display, you can request additional numbers for the country or region.
   
   • If you want to request a specific area code or prefix that you don’t see listed, we’ll try to accommodate your request.
4. Enter a description for the number and, if required, attach it to a contact flow in Flow / IVR.
5. Choose Save.
6. Repeat this process until you have claimed all your required phone numbers.

There is a service quota for how many phone numbers you can have in each instance. For the default service quota, see Amazon Connect service quotas (p. 1525). If you reach your quota, but want a different phone number, you can release one of previously claimed numbers. You cannot claim the same phone number after releasing it.

If you need more phone numbers, you can request a service quota increase using the Amazon Connect service quota increase form.

API instructions

To claim a phone number programmatically:

1. Use the SearchAvailablePhoneNumbers API to search for available phone numbers that you can claim to your Amazon Connect instance.
2. Use ClaimPhoneNumber API to claim the phone number.
   
   Claiming a number by using the ClaimPhoneNumber API puts the number in one of the following three states: CLAIMED, IN_PROGRESS, FAILED.
3. Run the DescribePhoneNumber API to determine the status of your number claiming process.
   
   • CLAIMED means the previous ClaimPhoneNumber or UpdatePhoneNumber operation succeeded.
   
   • IN_PROGRESS means a ClaimPhoneNumber or UpdatePhoneNumber operation is still in progress and has not yet completed. You can call DescribePhoneNumber at a later time to verify if the previous operation has completed.
   
   • FAILED indicates that the previous ClaimPhoneNumber or UpdatePhoneNumber operation has failed. It will include a message indicating the failure reason. A common reason for a failure may be that the TargetArn value you are claiming or updating a phone number to has reached its limit of total claimed numbers. If you received a FAILED status from a ClaimPhoneNumber API call, you have one day to retry claiming the phone number before the number is released back to the inventory for other customers to claim.
Claim a phone number you already own in another country

"You've reached the limit of Phone Numbers. To increase the limit, contact support."

Even if it's the first time you've claimed a phone number, it's possible to get this error message when you attempt to claim a number. All the issues that cause this error message require help from AWS Support to resolve.

Contact AWS Support and they will provide assistance.

Claim a phone number you already own in another country

Let's say your business is located in Germany. You also have agents in Japan to serve customers who live there, and you need a Japanese phone number for that contact center. To claim a phone number that you already own in another country, use the following steps to create a support case.

To claim a number that you don't already own in another country or Region, see Request numbers, international numbers, or termination points (p. 162).

1. Go to Create case.
2. Choose Service limit increase.
3. In Limit type select Amazon Connect.
4. In Use case description, provide the address of your business that's located in the other country.
5. In Contact options, choose whether we should contact you by email or phone.
6. Choose Submit.

We'll contact you to help with your request.

List the phone numbers claimed to your Amazon Connect instance

You can list the phone numbers claimed to your Amazon Connect instance by using the Amazon Connect console, or by using the ListPhoneNumbersV2 API.

To list phone numbers by using the Amazon Connect console

1. Log in to your contact center at https://instance name.my.connect.aws/.
2. On the navigation menu, choose Channels, Phone numbers.

   The list of phone numbers claimed to your Amazon Connect instance is displayed.

Claim phone numbers for Amazon Connect in the Asia Pacific (Tokyo) Region

To claim a phone number for an Amazon Connect instance you create in the Asia Pacific (Tokyo) Region, open an AWS support case and provide documentation that your business is located in Japan.
Important
You must provide three pieces of required documentation. For a list of acceptable identification, see Japan (JP) (p. 183), in the Region requirements for ordering and porting phone numbers (p. 165) topic.

You cannot claim numbers for personal use, only for business use.

Amazon Connect supports claiming the following phone numbers for instances created in the Asia Pacific (Tokyo) Region.

- **Direct Inward Dialing (DID) numbers**—DID numbers are also referred to as local numbers.
  - 050 prefix numbers.
  - 03 prefix for numbers in Tokyo. Amazon Connect does not offer phone numbers for other cities in Japan at this time.
- **Toll Free numbers**
  - 0120 prefix numbers.
  - 0800 prefix numbers.

**Note**
When you claim a toll free phone number for Amazon Connect, there is no corresponding DID number with a 03 prefix also assigned, as with other toll free numbers in Japan. If you need to use a DID number, you can claim one in Amazon Connect.

**Request numbers, international numbers, or termination points**

**Important**
To purchase and own a phone number, country or region regulations often require:

- A local office address.
- Specific identification documents.

For identification requirements by country, see Region requirements for ordering and porting phone numbers (p. 165).

In most countries it takes 2-6 weeks for us to fulfill your request. In some cases it can take up to 60 days. If you need a number by a certain date, let us know in your AWS Support case.

**Note**
Amazon does not provide premium rate or higher cost services. If you want these services we recommend you contract with specialist providers to route calls into Amazon Connect DIDs following local country regulations.

To request international phone numbers that require documentation, or numbers not available within a specific region, create an AWS Support case. In the support case, you must specify exactly how many numbers you want for each country.

Submit an Amazon Connect support ticket to verify if your phone number can be ported to Amazon Connect.

**Premium support plan**

2. Choose Create case.
3. Choose **Technical support**.
4. In **Case details**, do the following:
   a. Choose service as **Connect (Contact Center)**.
   b. Choose category as **Phone Number Requests**.
   c. Choose the required severity.
   d. For **Contact Center Instance ARN**, enter the instance ARN (also called the instance ID). For instructions on how to find your instance ARN, see [Find your Amazon Connect instance ID/ARN](p. 131).
   e. Enter the subject.
   f. Under **Case description, Use case description**, include as much information as possible about your request. If you don't know all of these details, you can leave information out.
5. Expand **Contact options**, and then choose your **Preferred contact language** and **Contact methods**.
6. Choose **Submit**.
7. The Amazon Connect team will review your ticket and get back to you.

We'll contact you to help with your request.

After your request is approved, the exact number of requested phone numbers appear in your Amazon Connect console for you to claim. You won't have access to all available numbers in that country.

### Basic support plan

2. Choose **Create case**.
3. Choose **Service limit increase**.
4. For **Case details, Limit type**, choose **Amazon Connect**.
5. For **Case description, Use case description**, enter the number that you want to request or exactly how many numbers you want for each country. If you need the number by a certain date, include that, too.
6. Expand **Contact options**, and then choose your **Preferred contact language** and **Contact methods**.
7. Choose **Submit**.
8. The Amazon Connect team will review your request and get back to you.

We'll contact you to help with your request.

After your request is approved, the exact number of requested phone numbers appear in your Amazon Connect console for you to claim. You won't have access to all available numbers in that country.

### Requirements for Custom Termination Points

In the Asia Pacific (Sydney) Region, you can request Custom Termination Points.

The term "Custom Termination Points" means custom Tier 1 telephony destinations for customer calls to Amazon Connect configured as local phone numbers. In using Custom Termination Points, you understand and agree that you:

1. Have a current toll-free national service that allows you to set Custom Termination Points as a destination for customer phone calls.
2. Cannot port or move Custom Termination Points to a different telephony provider once assigned by Amazon Connect.
3. Will be billed at the standard daily rate for claimed Australian phone numbers and DID inbound usage fees.
4. You are responsible for adding the Custom Termination Points in your existing toll-free national service.

Move a phone number across instances

You can move your claimed phone number from one instance or traffic distribution group to another instance or traffic distribution group in the same AWS Region.

Moving a number by using the UpdatePhoneNumber API puts the number in one of the following three states. You can run the DescribePhoneNumber API to determine the status of your number moving process.

- **IN_PROGRESS** means a UpdatePhoneNumber operation is still in progress and has not yet completed. You can call DescribePhoneNumber to verify if the previous operation has completed.
- **CLAIMED** means the previous UpdatePhoneNumber operation succeeded and the phone number is not available to be claimed by other customers.
- **FAILED** indicates that the previous UpdatePhoneNumber operation has failed. It also includes a message that indicates the reason for the failure.

Release a phone number

If you want a different phone number, or have extra numbers that you aren't using, you can release them back to inventory. You can do this using the Amazon Connect console, or programmatically using the ReleasePhoneNumber API.

When a phone number is released from your Amazon Connect instance:

- You will no longer be charged for it.
- You cannot reclaim the phone number.
- Amazon Connect reserves the right to allow it to be claimed by another customer.

**Tip**

If you want to close your Amazon Connect account, do these steps for all of your phone numbers. This will ensure you aren't billed if people erroneously call numbers that you've claimed, and initiate your flows. You may also want to delete your instances. (p. 139)

To release a phone number

1. Log in to your contact center at https://instance name.my.connect.aws/. To find the name of your instance, see Find your Amazon Connect instance ID/ARN (p. 131).
2. On the navigation menu, choose Channels, Phone numbers.
3. Choose the phone number you want to release, and then choose Release.

If the phone number is associated with a flow, that flow will be deactivated until another number is associated with it.

When customers call the phone number you have released, they will get a message that it is not a working phone number.
To use the ReleasePhoneNumber API

- Releasing a number by using the ReleasePhoneNumber API puts the number in a cool down period for 30 days. The phone number cannot be searched for or claimed until after the cool down period ends.

  **Note**
  You will not be billed for the phone number during the 30-day cool down period.

### Telecoms regulations

**Contents**

- Region requirements for ordering and porting phone numbers (p. 165)

### Region requirements for ordering and porting phone numbers

Country or region regulations often require a local office address and specific identification documents to purchase and own a phone number. The address that you provide can be the business or personal address where the phone numbers are used.

For a list of the telephony capabilities that Amazon Connect provides, see the Amazon Connect Telecoms Country Coverage Guide.

Following is a list of ID Requirements by country or region. When you request an international number (p. 162), we'll work with you to submit your documents.

**Important**

- Addresses that can be claimed without presence, such as PO Box addresses, are not valid in any country.
- After your numbers are ordered or ported, the exact number of requested phone numbers appear in your Amazon Connect console for you to claim. You won't have access to all available numbers in that country.

#### Argentina (AR)

For ordering phone numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>US East</td>
<td>Local telephone numbers:</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>US West</td>
<td>Toll-free prefixes: +54 800</td>
<td>No</td>
<td></td>
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</table>

For porting numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Porting Windows</th>
<th>Required Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not supported</td>
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<td>N/A</td>
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</table>
### Australia (AU)

**For ordering phone numbers**

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<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asia Pacific (Sydney)</td>
<td>Local telephone numbers:</td>
<td>Yes</td>
<td>Your business address. It must be in the relevant geographic zone. Do not use a PO Box.</td>
</tr>
<tr>
<td></td>
<td>Toll-free prefixes: +61 1300, +61 1800</td>
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<td>Asia Pacific (Seoul)</td>
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**For porting numbers**

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Porting Windows</th>
<th>Required Documents</th>
</tr>
</thead>
</table>
| Asia Pacific (Sydney)      | Monday-Friday 8 AM -12 PM AEST | 1. Last invoice  
2. Letter of Authorization (LOA): When you request porting services, we will provide you with a country-specific LOA template and explain how to complete it.  
3. Documents required for the Type of Number, as listed in the previous table for ordering phone numbers |
| Asia Pacific (Seoul)       |                  |                                                                                                                                                    |
| Asia Pacific (Singapore)   |                  |                                                                                                                                                    |
| Asia Pacific (Tokyo)       |                  |                                                                                                                                                    |

### Austria (AT)

**For ordering phone numbers**

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<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>US East</td>
<td>Local telephone numbers:</td>
<td>Yes</td>
<td>Proof of telecom services at your address, which must match the city code requested.</td>
</tr>
<tr>
<td>US West</td>
<td></td>
<td></td>
<td>Your business name, address, a copy of the business registration, and a copy of the ID or passport of an authorized representative.</td>
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<tr>
<td>Canada (Central)</td>
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<tr>
<td>EU (Frankfurt)</td>
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<tr>
<td>EU (London)</td>
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<td></td>
</tr>
</tbody>
</table>
Supported Regions | Type of Number | Are there ID requirements? | Acceptable Identification
--- | --- | --- | ---
 | National prefixes: +43 720 | Yes | Proof of telecom services at your address, which must be within the country. Your business name, address, a copy of the business registration, and a copy of the ID or passport of an authorized representative.

For porting numbers

Supported Regions | Porting Windows | Required Documents
--- | --- | ---
US East | Monday-Friday 10 AM to 12 PM CET | 1. Last invoice 2. Letter of Authorization (LOA): When you request porting services, we will provide you with a country-specific LOA template and explain how to complete it. 3. Documents required for the Type of Number, as listed in the previous table for ordering phone numbers
US West | | |
EU (Frankfurt) | | |
EU (London) | | |

Belgium (BE)

For ordering phone numbers

Supported Regions | Type of Number | Are there ID requirements? | Acceptable Identification
--- | --- | --- | ---
US East | Local telephone numbers: | Yes | Your business address. It must be in the relevant geographic zone.
US West | | |
Canada (Central) | Mobile prefixes: +32 46 | Yes | |
EU (Frankfurt) | Toll-free prefixes: +32 800 | No | |
EU (London) | National prefixes: +32 78 | An address is Belgium is required. | |
For porting numbers

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<th>Required Documents</th>
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<td>Monday-Friday 10 AM to 12 PM CET</td>
<td>1. Last invoice 2. Letter of Authorization (LOA): When you request porting services, we will provide you with a country-specific LOA template and explain how to complete it. 3. Mandatory to provide service address for the numbers 4. Documents required for the Type of Number, as listed in the previous table for ordering phone numbers</td>
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<tr>
<td>US West</td>
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Canada (CA)

For ordering phone numbers

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<tr>
<td>Canada (Central)</td>
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For porting numbers

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<th>Required Documents</th>
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<tbody>
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<td>Monday-Friday 7 AM to 5 PM CST</td>
<td>1. Last invoice 2. Letter of Authorization (LOA): When you request porting services, we will provide you with a country-specific LOA template and explain how to complete it.</td>
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<td>US West</td>
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<td>Canada (Central)</td>
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**Chile (CL)**

For ordering phone numbers

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<th>Required Documents</th>
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<tbody>
<tr>
<td>US East</td>
<td>Monday-Friday 9 PM to 3 AM PST</td>
<td>1. Last invoice 2. Letter of Authorization (LOA): When you request porting services, we will provide you with a country-specific LOA template and explain how to complete it. 3. Copy of legal representative's photo ID 4. Copy of local business registration</td>
</tr>
<tr>
<td>US West</td>
<td></td>
<td>N/A</td>
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**Colombia (CO)**

For ordering phone numbers

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<tr>
<td>US West</td>
<td>Toll-free prefixes: +57 800</td>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>

For porting numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Porting Windows</th>
<th>Required Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not supported</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>
## Costa Rica (CR)

For ordering phone numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>US East</td>
<td>Local telephone numbers:</td>
<td>Yes</td>
<td>Businesses must provide a copy of business registration containing a proof of address as well as an ID of an authorised representative.</td>
</tr>
<tr>
<td></td>
<td>plus local area code</td>
<td></td>
<td>Valid proofs of address include: third-party issued bank statements, utility bills (all issued in the previous 6 months); government documents issued in the previous year; the proof of ID is a copy of the national identity ID or passport of an authorized representative.</td>
</tr>
<tr>
<td></td>
<td>plus toll-free area code</td>
<td></td>
<td>The business address must be inside of Costa Rica.</td>
</tr>
<tr>
<td>US West</td>
<td>Toll-free prefixes: +506 800</td>
<td>Yes</td>
<td>Businesses must provide a copy of business registration containing a proof of address as well as an ID of an authorised representative.</td>
</tr>
<tr>
<td></td>
<td>plus toll-free area code</td>
<td></td>
<td>Valid proofs of address include: third-party issued bank statements, utility bills (all issued in the previous 6 months); government documents issued in the previous year; the proof of ID is a copy of the national identity ID or passport of an authorized representative.</td>
</tr>
<tr>
<td></td>
<td>plus toll-free area code</td>
<td></td>
<td>The business address must be inside of Costa Rica.</td>
</tr>
</tbody>
</table>
For porting numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Porting Windows</th>
<th>Required Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not supported</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>

**Croatia (HR)**

For ordering phone numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU (Frankfurt)</td>
<td>Local telephone numbers:</td>
<td>Yes</td>
<td>Your residence or business address. Both must be in the relevant geographic zone.</td>
</tr>
<tr>
<td>EU (London)</td>
<td>Mobile prefixes: + 385 95</td>
<td>Yes</td>
<td>Your business name, address, and business registration or VAT number.</td>
</tr>
<tr>
<td></td>
<td>Toll-free prefixes: + 385 800</td>
<td>Yes</td>
<td>Your business name and address.</td>
</tr>
</tbody>
</table>

For porting numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Porting Windows</th>
<th>Required Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU (Frankfurt)</td>
<td>Monday-Friday 10 AM to 12 PM CET</td>
<td>1. Last invoice \n2. Letter of Authorization (LOA): When you request porting services, we will provide you with a country-specific LOA template and explain how to complete it. \n3. Copy of Court Registration \n4. Copy of legal representative's photo ID \n5. Documents required for the Type of Number, as listed in the previous table for ordering phone numbers</td>
</tr>
</tbody>
</table>
Cyprus (CY)

For ordering phone numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU (Frankfurt)</td>
<td>Local telephone numbers:</td>
<td>Yes</td>
<td>Your business address. It must be in the relevant geographic zone.</td>
</tr>
<tr>
<td>EU (London)</td>
<td>Toll-free prefixes: +357 800</td>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>

For porting numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Porting Windows</th>
<th>Required Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU (Frankfurt)</td>
<td>Monday-Friday 10 AM to 12 PM CET</td>
<td>1. Last invoice</td>
</tr>
<tr>
<td>EU (London)</td>
<td></td>
<td>2. Letter of Authorization (LOA): When you request porting services, we will provide you with a country-specific LOA template and explain how to complete it.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>3. Copy of Certificate of Directors and Secretary of the Company</td>
</tr>
<tr>
<td></td>
<td></td>
<td>4. Copy of Certificate of Incorporation</td>
</tr>
<tr>
<td></td>
<td></td>
<td>5. Copy of legal representative's photo ID</td>
</tr>
</tbody>
</table>

Czech Republic (CZ)

For ordering phone numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>US East</td>
<td>Local telephone numbers:</td>
<td>Yes</td>
<td>Your residence or business address. Both must be in the relevant geographic zone.</td>
</tr>
<tr>
<td>US West</td>
<td>Mobile prefixes: +420 73</td>
<td>Yes</td>
<td>Your business name, address, and business registration or VAT number, and a copy of the ID or passport of an authorized representative.</td>
</tr>
<tr>
<td>Canada (Central)</td>
<td>Toll-free prefixes: +420 800</td>
<td>Yes</td>
<td>Your business name and address. A global address is acceptable.</td>
</tr>
<tr>
<td>EU (Frankfurt)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EU (London)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
For porting numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Porting Windows</th>
<th>Required Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>US East</td>
<td>Monday-Friday 3 PM to 4 PM CET</td>
<td>1. Last invoice</td>
</tr>
<tr>
<td>US West</td>
<td></td>
<td>2. Letter of Authorization (LOA): When you request porting services, we will provide you with a country-specific LOA template and explain how to complete it.</td>
</tr>
<tr>
<td>EU (Frankfurt)</td>
<td></td>
<td>3. Documents required per Type of Number as listed in the previous table for ordering numbers</td>
</tr>
<tr>
<td>EU (London)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Denmark (DK)

For ordering phone numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>US East</td>
<td>Local telephone numbers:</td>
<td>Yes</td>
<td>Your name, address, and business registration or VAT number.</td>
</tr>
<tr>
<td>US West</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Canada (Central)</td>
<td>Mobile prefixes: +45 9x</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>EU (Frankfurt)</td>
<td>Toll-free prefixes: +45 808</td>
<td>Yes</td>
<td>Your business name, address, and service description.</td>
</tr>
<tr>
<td>EU (London)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

For porting numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Porting Windows</th>
<th>Required Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>US East</td>
<td>Monday-Friday 10 AM to 12 PM CET</td>
<td>1. Last invoice</td>
</tr>
<tr>
<td>US West</td>
<td></td>
<td>2. Letter of Authorization (LOA): When you request porting services, we will provide you with a country-specific LOA template and explain how to complete it.</td>
</tr>
<tr>
<td>EU (Frankfurt)</td>
<td></td>
<td>3. Documents required per Type of Number as listed in the previous table for ordering numbers</td>
</tr>
<tr>
<td>EU (London)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
El Salvador (SV)
For ordering phone numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>US East</td>
<td>Local telephone numbers:</td>
<td>Yes</td>
<td>Businesses must provide their name, address, and RUC/ TaxID number, along with a copy of the business registration and a proof of address.</td>
</tr>
<tr>
<td>US West</td>
<td></td>
<td></td>
<td>Valid proofs of address include: third-party issued bank statements, utility bills (all issued in the previous 6 months); government documents (issued in the previous year). A local address is required.</td>
</tr>
<tr>
<td></td>
<td>Toll-free prefixes:</td>
<td>Yes</td>
<td>Businesses must provide a copy of business registration and a proof of address. Valid proofs of address include: third-party issued bank statements, utility bills (all issued in the previous 6 months); government documents (issued in the previous year).</td>
</tr>
</tbody>
</table>

For porting numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Porting Windows</th>
<th>Required Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not supported</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>

Estonia (EE)
For ordering phone numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU (Frankfurt)</td>
<td>Toll-free prefixes:</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td></td>
<td>+372 800</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Supported Regions

<table>
<thead>
<tr>
<th>Region</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>A global address is acceptable.</td>
</tr>
</tbody>
</table>

### For porting numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Porting Windows</th>
<th>Required Documents</th>
</tr>
</thead>
</table>
| EU (Frankfurt)   | Monday-Friday 10 AM to 12 PM CET                     | 1. Last invoice  
| EU (London)      |                                                       | 2. Letter of Authorization (LOA): When you request porting services, we will provide you with a country-specific LOA template and explain how to complete it.  
|                  |                                                       | 3. LOA template has to include a local address.  
|                  |                                                       | 4. If this is a company, a business number is required.  |

### Finland (FI)

#### For ordering phone numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>US East</td>
<td>Local telephone numbers:</td>
<td>Yes</td>
<td>Your residence or business address. Both must be in the relevant geographic zone.</td>
</tr>
<tr>
<td>US West</td>
<td>Toll-free prefixes: +358 800</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Canada (Central)</td>
<td>National prefixes: +358 75</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>EU (Frankfurt)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EU (London)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### For porting numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Porting Windows</th>
<th>Required Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>US East</td>
<td>Monday-Friday 10 AM to 12 PM CET</td>
<td>1. Last invoice</td>
</tr>
<tr>
<td>US West</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
# Telecoms regulations

## Supported Regions

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Porting Windows</th>
<th>Required Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU (Frankfurt)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>EU (London)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2. Letter of Authorization (LOA): When you request porting services, we will provide you with a country-specific LOA template and explain how to complete it.

3. Documents required for the Type of Number, as listed in the previous table for ordering phone numbers.

---

### France (FR)

**For ordering phone numbers**

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
</table>
| US East           | Local telephone numbers: | Yes | Your business address. It must be in the relevant geographic zone as the number. You must provide proof of the address along with a copy of the business registration. Valid forms of proof are:  
• Utility bill showing regular use  
• Government documents |
| US West           | Toll-free prefixes: +33 805 | Yes | Your business name, address, VAT ID (SIREN number for French companies), phone number, email address, and service description. |
| Canada (Central)  | National prefixes: +339 | Yes | An address in France is required. |
| EU (Frankfurt)    |                 |                           |
| EU (London)      |                 |                           |

### For porting numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Porting Windows</th>
<th>Required Documents</th>
</tr>
</thead>
</table>
| US East           | Monday-Friday 10 AM to 12 PM CET | 1. Last invoice  
2. Letter of Authorization (LOA): When you request porting services, we will provide you with a country-specific LOA template and explain how to complete it. |
<p>| US West           |                 |                    |
| EU (Frankfurt)    |                 |                    |</p>
<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Porting Windows</th>
<th>Required Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU (London)</td>
<td></td>
<td>3. Documents required per Type of Number as listed in the previous table for ordering numbers</td>
</tr>
<tr>
<td></td>
<td></td>
<td>4. It is mandatory to provide RIO code from the losing carrier, or at least the SIRET (if you're a business customers only). You can obtain the SIRET by contacting your existing telecom carrier.</td>
</tr>
</tbody>
</table>

**Georgia (GE)**

For ordering phone numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU (Frankfurt)</td>
<td>National prefixes: +995 70</td>
<td>No</td>
<td>Your business address. It must be in the relevant geographic zone as the number. You must provide proof of the address.</td>
</tr>
<tr>
<td>EU (London)</td>
<td>Local telephone numbers: (Tbilisi)</td>
<td>Yes</td>
<td></td>
</tr>
</tbody>
</table>

For porting numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Porting Windows</th>
<th>Required Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not supported</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>

**Germany (DE)**

For ordering phone numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>US East</td>
<td>Local telephone numbers:</td>
<td>Yes</td>
<td>Local address in Germany is required. The address dictates where the geographic number must be sited. Businesses must provide a copy of the business registration document (issued in the past 6 months) as proof of address.</td>
</tr>
<tr>
<td>US West</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Canada (Central)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EU (Frankfurt)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EU (London)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Supported Regions | Type of Number | Are there ID requirements? | Acceptable Identification
--- | --- | --- | ---
| Toll-free prefixes: +49 800 | Yes | Your residence or business address outside of Germany. You must provide proof of the address. For numbers to be answered inside of Germany, a special process applies. You must obtain the number directly from the local regulator and then port it to Amazon Connect. Details about the process are provided when you make the request. |
| National prefixes: +49 32 | Yes | Address in Germany is required. Businesses must provide a copy of the business registration document (issued in the past 6 months) as proof of address. |

For porting numbers

Supported Regions | Porting Windows | Required Documents
--- | --- | ---
| US East | Monday-Friday 10 AM to 12 PM CET | 1. Last invoice 2. Letter of Authorization (LOA): When you request porting services, we will provide you with a country-specific LOA template and explain how to complete it. 3. For business ports, end user stamp is mandatory on the LOA. 4. If the number to be ported is an extended line, the main line must be ported. 5. Documents required for the Type of Number, as listed in the previous table for ordering phone numbers |
### Greece (GR)

**For ordering phone numbers**

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>US East</td>
<td>Local telephone numbers:</td>
<td>Yes</td>
<td>Your business address. It must be in the relevant geographic zone.</td>
</tr>
<tr>
<td>US West</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Canada (Central)</td>
<td>Toll-free prefixes: +30 800</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>EU (Frankfurt)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EU (London)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Hong Kong (HK)

**For ordering phone numbers**

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asia Pacific (Seoul)</td>
<td>Local telephone numbers:</td>
<td>Yes</td>
<td>Your address and proof of address.</td>
</tr>
<tr>
<td>Asia Pacific (Singapore)</td>
<td>National prefixes: +852 58</td>
<td>Yes</td>
<td>Your address and proof of address.</td>
</tr>
<tr>
<td>Asia Pacific (Sydney)</td>
<td></td>
<td></td>
<td>A global address is acceptable.</td>
</tr>
<tr>
<td>Supported Regions</td>
<td>Type of Number</td>
<td>Are there ID requirements?</td>
<td>Acceptable Identification</td>
</tr>
<tr>
<td>-------------------</td>
<td>----------------</td>
<td>-----------------------------</td>
<td>---------------------------</td>
</tr>
<tr>
<td>Asia Pacific (Tokyo)</td>
<td>Toll-free prefixes: +852 800</td>
<td>Yes</td>
<td>A global address is acceptable.</td>
</tr>
<tr>
<td></td>
<td>A global address is acceptable.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

For porting numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Porting Windows</th>
<th>Required Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not support</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>

**Hungary (HU)**

**For ordering phone numbers**

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU (Frankfurt)</td>
<td>Local telephone numbers:</td>
<td>Yes</td>
<td>Your business address. It must be in the relevant geographic zone. You must provide a copy of the business registration document (issued in the past 6 months) as proof of address. A copy of the ID or passport of an authorized representative is also required.</td>
</tr>
<tr>
<td>EU (London)</td>
<td>Toll-free prefixes: +36 800</td>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>

**For porting numbers**

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Porting Windows</th>
<th>Required Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU (Frankfurt)</td>
<td>Monday-Friday 10 AM to 12 PM CET</td>
<td>1. Last invoice: must be within the last 6 months 2. Letter of Authorization (LOA): When you request porting services, we will provide you with a country-specific LOA template and explain how to complete it.</td>
</tr>
</tbody>
</table>
### Indonesia (ID)

**For ordering phone numbers**

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asia Pacific</td>
<td>Local telephone numbers:</td>
<td>No</td>
<td>Proof of business address, a copy of the ID or passport of an authorized representative, and the business registration. You must also provide a description of how you plan to use the numbers.</td>
</tr>
<tr>
<td>(Seoul)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asia Pacific</td>
<td>Mobile prefixes: +62 855</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>(Singapore)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asia Pacific</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(Sydney)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asia Pacific</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(Tokyo)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**For porting numbers**

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Porting Windows</th>
<th>Required Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not supported</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>

### Ireland (IE)

**For ordering phone numbers**

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>US East</td>
<td>Local telephone numbers:</td>
<td>Yes</td>
<td>Your business address. It must be in the relevant geographic zone.</td>
</tr>
<tr>
<td>US West</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Canada (Central)</td>
<td>Local telephone numbers:</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>EU (Frankfurt)</td>
<td>Toll-free prefixes: +353 1800</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>EU (London)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### For porting numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Porting Windows</th>
<th>Required Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>US East</td>
<td>Monday-Friday 10 AM to 12 PM CET</td>
<td>1. Last invoice 2. Letter of Authorization (LOA): When you request porting services, we will provide you with a country-specific LOA template and explain how to complete it. 3. It is mandatory to provide the main telephone number on the account. 4. It is mandatory to provide a Wholesale Account number. 5. Type of the line mandatory on the LOA. 6. Documents required for the Type of Number, as listed in the previous table for ordering phone numbers</td>
</tr>
<tr>
<td>US West</td>
<td></td>
<td></td>
</tr>
<tr>
<td>EU (Frankfurt)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>EU (London)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Italy (IT)

### For ordering phone numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>US East</td>
<td>Local telephone numbers:</td>
<td>Yes</td>
<td>Your business name, address, and VAT number. You must provide proof of the address along with a copy of the business registration (extracted within the last 6 months). You must provide the following details of an authorized representative: name and address, birth location and data, and nationality and tax code. Also provide proof of the authorized representative's identity, which can be a copy of an ID or passport. The name of the representative must appear on the business registration. A local address in Italy is required.</td>
</tr>
<tr>
<td>US West</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Africa (Cape Town)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Canada (Central)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EU (Frankfurt)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EU (London)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Telecoms regulations

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Toll-free prefixes: +39 800</td>
<td>Yes</td>
<td>Your business name, address, and VAT number. You must provide the following details of an authorized representative: name and address, birth location and data, and nationality and tax code. Also provide proof of the authorized representative's identity, which can be a copy of an ID or passport. A global address is acceptable.</td>
</tr>
</tbody>
</table>

#### For porting numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Porting Windows</th>
<th>Required Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>US East</td>
<td>Monday-Friday 10 AM to 12 PM CET</td>
<td>1. Last invoice 2. Letter of Authorization (LOA): When you request porting services, we will provide you with a country-specific LOA template and explain how to complete it. 3. Migration code of the requested number is mandatory. Obtain this code from the losing carrier. 4. Documents required for the Type of Number, as listed in the previous table for ordering phone numbers</td>
</tr>
<tr>
<td>US West</td>
<td></td>
<td></td>
</tr>
<tr>
<td>EU (Frankfurt)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>EU (London)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Japan (JP)**

#### For ordering phone numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
</table>
| Asia Pacific (Seoul) | Local telephone numbers: | Yes | Businesses must provide 3 pieces of documentation:  
  * Company registration documents. These documents must show: |
<p>| Asia Pacific (Singapore) | | | |
| Asia Pacific (Sydney) | | | |</p>
<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asia Pacific (Tokyo)</td>
<td></td>
<td></td>
<td>• The business address is in the city corresponding to the requested area code of the number.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• The authorized representative of the business.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• A copy of the personal ID or passport of the business’s authorized representative. The person must be registered on the Company Registration Documents. Valid personal ID can be government-issued IDs or passports.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Proof of address for the business. Valid proofs of address include: third-party issued bank statements, public utility bills (all issued in the previous 3 months); government documents (issued in the previous year); or IDs listing the submitted address, such as government-issued IDs, passports, and business registration (issued in the past 6 months).</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Checks should be made into a single ZIP file.</td>
</tr>
<tr>
<td>Supported Regions</td>
<td>Type of Number</td>
<td>Are there ID requirements?</td>
<td>Acceptable Identification</td>
</tr>
<tr>
<td>-------------------</td>
<td>-----------------------------------------------------</td>
<td>----------------------------</td>
<td>---------------------------</td>
</tr>
<tr>
<td></td>
<td>Toll-free prefixes: +81 120, +81 800</td>
<td>Yes</td>
<td>Businesses must provide the following documentation:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>- <strong>Company registration documents.</strong> These documents must show:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>- The business address is in the city corresponding to the requested area code of the number.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>- The authorized representative of the business.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>- <strong>A copy of the personal ID or passport of the business's authorized representative.</strong> The person must be registered on the Company Registration Documents. Valid personal ID can be government-issued IDs and passports.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>- <strong>Proof of address for the business.</strong> Valid proofs of address include: third-party issued bank statements, public utility bills (all issued in the previous 3 months); government documents (issued in the previous year); or IDs listing the submitted address, such as government-issued IDs and passports, and business registration.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>A global address is acceptable.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Copies of these documents should be made into a single ZIP file.</td>
</tr>
</tbody>
</table>

**For porting numbers**

**Note**
Local telephone numbers cannot be ported. Only toll-free numbers can be ported.
Supported Regions | Porting Windows | Required Documents
--- | --- | ---
Asia Pacific (Tokyo) | Toll-free prefixes: +81 120, +81 800 | 1. Last invoice 2. Letter of Authorization (LOA): When you request porting services, we will provide you with a country-specific LOA template and explain how to complete it. 3. Documents required per Type of Number as listed in the previous table for ordering numbers

Latvia (LV)

For ordering phone numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU (Frankfurt) EU (London)</td>
<td>Toll-free prefixes: +371 80</td>
<td>Yes</td>
<td>Businesses must provide a copy of the business registration, along with proof of address within Latvia (issued in the past 6 months). Valid forms of proof:  - Business Registration  - Third-party issued bank statement  - Public utility bill showing regular use  - Lease Agreement  - Government documents</td>
</tr>
<tr>
<td>National prefixes: +371 6</td>
<td>Yes</td>
<td>Businesses must provide proof of address within Latvia (issued in the past 6 months). Valid forms of proof:  - Business Registration  - Third-party issued bank statement  - Public utility bill showing regular use  - Lease Agreement  - Government documents</td>
<td></td>
</tr>
</tbody>
</table>
## For porting numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Porting Windows</th>
<th>Required Documents</th>
</tr>
</thead>
</table>
| EU (Frankfurt)     | Monday-Friday 10 AM to 12 PM CET | 1. Last invoice  
2. Letter of Authorization (LOA): When you request porting services, we will provide you with a country-specific LOA template and explain how to complete it.  
3. Documents required for the Type of Number, as listed in the previous table for ordering phone numbers |
| EU (London)        |                 |                    |

### Lithuania (LT)

#### For ordering phone numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU (Frankfurt)</td>
<td>Local telephone numbers:</td>
<td>Yes</td>
<td>Your business address. It must be in the relevant geographic zone.</td>
</tr>
<tr>
<td>EU (London)</td>
<td>Mobile prefixes: +370 66</td>
<td>Yes</td>
<td>Your business name, address, and registration number, along with a copy of the ID/business registration. An address in Lithuania is required.</td>
</tr>
<tr>
<td></td>
<td>Toll-free prefixes: +370 800</td>
<td>Yes</td>
<td>Your business address in the country.</td>
</tr>
</tbody>
</table>

#### For porting numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Porting Windows</th>
<th>Required Documents</th>
</tr>
</thead>
</table>
| EU (Frankfurt)     | Monday-Friday 10 AM to 12 PM CET | 1. Last invoice  
2. Letter of Authorization (LOA): When you request porting services, we will provide you with a country-specific LOA template and explain how to complete it.  
3. VAT number and local address is needed on the LOA. |
| EU (London)        |                 |                    |
**Luxembourg (LU)**

For ordering phone numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU (Frankfurt)</td>
<td>Local telephone numbers: +352 27</td>
<td>Yes</td>
<td>Your residence or business address. It must be in the relevant geographic zone.</td>
</tr>
<tr>
<td>EU (London)</td>
<td>National prefixes:</td>
<td>Yes</td>
<td>An address in Luxembourg is required. Businesses must provide a copy of the business registration.</td>
</tr>
<tr>
<td></td>
<td>Toll-free prefixes: +352 800</td>
<td>Yes</td>
<td>Your business name and address.</td>
</tr>
</tbody>
</table>

For porting numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Porting Windows</th>
<th>Required Documents</th>
</tr>
</thead>
</table>
| EU (Frankfurt)     | Monday-Friday 10 AM to 12 PM CET | 1. Last invoice  
2. Letter of Authorization (LOA): When you request porting services, we will provide you with a country-specific LOA template and explain how to complete it.  
3. You must provide the account number from the Main Losing Carrier to which the requested DID is assigned.  
4. Documents required for the Type of Number, as listed in the previous table for ordering phone numbers |
| EU (London)       |                  |                    |

**Malaysia (MY)**

For ordering phone numbers

Inside Malaysia
## Telecoms regulations

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asia Pacific (Seoul)</td>
<td>Local telephone numbers (Inbound and Outbound required post 9th July 2021)</td>
<td>Yes</td>
<td>Business Registration Documentation, Letter of Authority naming an authorised business user. Government issued ID such as passport.</td>
</tr>
<tr>
<td>Asia Pacific (Singapore)</td>
<td>Local telephone numbers (existing Inbound only pre 9th July 2021)</td>
<td>Yes</td>
<td>Business Registration Documentation, Letter of Authority naming an authorised business user. Government issued ID such as passport.</td>
</tr>
<tr>
<td>Asia Pacific (Sydney)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asia Pacific (Tokyo)</td>
<td>Toll-free prefixes: +60 1800</td>
<td>Yes</td>
<td>Business Registration Documentation, Letter of Authority naming an authorised business user. Government issued ID such as passport.</td>
</tr>
</tbody>
</table>

### Outside Malaysia

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asia Pacific (Seoul)</td>
<td>Local telephone numbers (Inbound required post 9th July 2021)</td>
<td>Yes</td>
<td>Non Malaysia Business Registration Documentation</td>
</tr>
<tr>
<td>Asia Pacific (Singapore)</td>
<td>Toll-free prefixes: +60 1800</td>
<td>Yes</td>
<td>Non Malaysia Business Registration Documentation</td>
</tr>
<tr>
<td>Asia Pacific (Sydney)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asia Pacific (Tokyo)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### For porting numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Porting Windows</th>
<th>Required Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not supported</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>
### Mexico (MX)

**For ordering phone numbers**

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>US East</td>
<td>Local telephone numbers:</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Toll-free prefixes: +52 800</td>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>

**For porting numbers**

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Porting Windows</th>
<th>Required Documents</th>
</tr>
</thead>
</table>
| US East           | Monday-Friday 10 AM to 12 PM CET or 2 PM to 4 PM CET | 1. Last invoice  
2. Letter of Authorization (LOA): When you request porting services, we will provide you with a country-specific LOA template and explain how to complete it.  
3. Copy of a representative's photo ID  
4. Copy of local business registration |
| US West           | Monday-Friday 10 AM to 12 PM CET or 2 PM to 4 PM CET | 1. Last invoice  
2. Letter of Authorization (LOA): When you request porting services, we will provide you with a country-specific LOA template and explain how to complete it.  
3. Copy of a representative's photo ID  
4. Copy of local business registration |

### New Zealand (NZ)

**For ordering phone numbers**

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asia Pacific (Seoul)</td>
<td>Local telephone numbers:</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Toll-free prefixes: +64 800</td>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>

**For porting numbers**

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Porting Windows</th>
<th>Required Documents</th>
</tr>
</thead>
</table>
| Asia Pacific (Seoul)    | Monday-Friday 7 AM to 11 AM NZST         | 1. Last invoice  
2. Letter of Authorization (LOA): When you request porting services, we will provide you with a country-specific LOA template and explain how to complete it.  
3. Copy of a representative's photo ID  
4. Copy of local business registration |
<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Porting Windows</th>
<th>Required Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asia Pacific (Singapore)</td>
<td></td>
<td>provide you with a country-specific LOA template and explain how to complete it.</td>
</tr>
<tr>
<td>Asia Pacific (Sydney)</td>
<td></td>
<td>3. Wholesale account number of the phone number from the current carrier.</td>
</tr>
<tr>
<td>Asia Pacific (Tokyo)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Netherlands (NL)**

For ordering phone numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>US East</td>
<td>Local telephone numbers:</td>
<td>Yes</td>
<td>Your business address. It must be in the relevant geographic zone.</td>
</tr>
<tr>
<td>US West</td>
<td>Mobile prefixes: +31 97</td>
<td>Yes</td>
<td>A global business address.</td>
</tr>
<tr>
<td>Canada (Central)</td>
<td>Toll-free prefixes: +31 800</td>
<td>Yes</td>
<td>No voice services are supported, only AWS Server Migration Service (AWS SMS).</td>
</tr>
<tr>
<td>EU (Frankfurt)</td>
<td>National prefixes: +31 85</td>
<td>No</td>
<td>File orders in writing. Use the form that is provided to you when you make the request. Provide the following information:</td>
</tr>
<tr>
<td>EU (London)</td>
<td></td>
<td></td>
<td>• Your name and address.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• A description of the service for which the number will be used.</td>
</tr>
</tbody>
</table>

Estimated lead time from order to activation is 6 weeks.

**For porting numbers**

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Porting Windows</th>
<th>Required Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>US East</td>
<td>Monday-Friday 10 AM to 12 PM CET</td>
<td>1. Last invoice</td>
</tr>
<tr>
<td>US West</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## Telecommunications regulations

### Supported Regions
- EU (Frankfurt)
- EU (London)

### Porting Windows

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Porting Windows</th>
<th>Required Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU (Frankfurt)</td>
<td></td>
<td>2. Letter of Authorization (LOA): When you request porting services, we will provide you with a country-specific LOA template and explain how to complete it.</td>
</tr>
<tr>
<td>EU (London)</td>
<td></td>
<td>3. Documents required for the Type of Number, as listed in the previous table for ordering phone numbers</td>
</tr>
</tbody>
</table>

### Norway (NO)

For ordering phone numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>US East</td>
<td>Local telephone numbers:</td>
<td>Yes</td>
<td>Your business address in Norway, street code, municipality code, and company organization number.</td>
</tr>
<tr>
<td>US West</td>
<td></td>
<td></td>
<td>Norwegian business registration as proof of address.</td>
</tr>
<tr>
<td>Canada (Central)</td>
<td>Toll-free prefixes: +47 800</td>
<td>Yes</td>
<td>Your business address in Norway, street code, municipality code, and company organization number.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Norwegian business registration as proof of address.</td>
</tr>
<tr>
<td>EU (Frankfurt)</td>
<td>National prefixes: +47 81</td>
<td>Yes</td>
<td>Your business address in Norway, street code, municipality code, and company organization number.</td>
</tr>
<tr>
<td>EU (London)</td>
<td></td>
<td></td>
<td>Norwegian business registration as proof of address.</td>
</tr>
</tbody>
</table>

Numbers are available to businesses only, not individuals. The DID type is Landline, instead of Geographic. This is because all formerly geographic numbers are now classified as landline, and do not have a geographic zone.
For porting numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Porting Windows</th>
<th>Required Documents</th>
</tr>
</thead>
</table>
| US East           | Monday-Friday 10 AM to 12 PM CET | 1. Last invoice  
|                   |                 | 2. Letter of Authorization (LOA): When you request porting services, we will provide you with a country-specific LOA template and explain how to complete it.  
|                   |                 | 3. Documents required for the Type of Number, as listed in the previous table for ordering phone numbers |
| US West           |                 |                    |
| EU (Frankfurt)    |                 |                    |
| EU (London)       |                 |                    |

Panama (PA)

For ordering phone numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
</table>
| US East           | Toll-free prefixes: +507 800 | Yes                       | Your business address.  
|                   |                             |                           | You can have a maximum of 5 Panama toll-free numbers per business name. |
| US West           |                             |                          |

For porting numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Porting Windows</th>
<th>Required Documents</th>
</tr>
</thead>
</table>
| US East           | Monday-Friday 12 AM to 2 AM PST | **For porting local numbers:**  
|                   |                 | 1. Last invoice and proof of payment  
|                   |                 | 2. Letter of Authorization (LOA): When you request porting services, we will provide you with a country-specific LOA template and explain how to complete it.  
|                   |                 | 3. Copy of legal representative's photo ID  
|                   |                 | 4. Copy of local business registration |
| US West           |                 | **For porting toll-free numbers:**  
|                   |                 | 1. Transfer Request  
|                   |                 | 2. Proof of contract termination with the current provider, with a defined |
Telecoms regulations

Supported Regions | Porting Windows | Required Documents
--- | --- | ---
 |  | disconnection date within at least 14 days.
 |  | 3. Documents required for the Type of Number, as listed in the previous table for ordering phone numbers.

**Peru (PE)**

For ordering phone numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>US East</td>
<td>Local telephone numbers:</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>US West</td>
<td>Toll-free prefixes: +51 800</td>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>

For porting numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Porting Windows</th>
<th>Required Documents</th>
</tr>
</thead>
</table>
| US East | Monday-Friday 10 PM to 4 AM PST | 1. Last invoice
2. Letter of Authorization (LOA): When you request porting services, we will provide you with a country-specific LOA template and explain how to complete it.
3. Copy of legal representative's photo ID
4. Copy of local business registration |
| US West |  |  |

**Poland (PL)**

For ordering phone numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>US East</td>
<td>Local telephone numbers:</td>
<td>Yes</td>
<td>Your business address and a copy of a business registration. A global address is acceptable.</td>
</tr>
<tr>
<td>US West</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Canada (Central)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EU (Frankfurt)</td>
<td>Mobile prefixes: +48 73</td>
<td>Yes</td>
<td>Your business name, address and registration number, and a copy of</td>
</tr>
</tbody>
</table>
### Supported Regions

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU (London)</td>
<td></td>
<td></td>
<td>the ID or passport of an authorized representative. A global address is acceptable.</td>
</tr>
</tbody>
</table>

<p>| | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Toll-free prefixes: +48 800</td>
<td>No</td>
</tr>
</tbody>
</table>

**For porting numbers**

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Porting Windows</th>
<th>Required Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>US East</td>
<td>Monday-Friday 10 AM to 12 PM CET</td>
<td>1. Last invoice 2. Letter of Authorization (LOA): When you request porting services, we will provide you with a country-specific LOA template and explain how to complete it. 3. Documents required for the Type of Number, as listed in the previous table for ordering phone numbers</td>
</tr>
<tr>
<td>US West</td>
<td></td>
<td>1. Last invoice 2. Letter of Authorization (LOA): When you request porting services, we will provide you with a country-specific LOA template and explain how to complete it. 3. Documents required for the Type of Number, as listed in the previous table for ordering phone numbers</td>
</tr>
<tr>
<td>EU (Frankfurt)</td>
<td></td>
<td>1. Last invoice 2. Letter of Authorization (LOA): When you request porting services, we will provide you with a country-specific LOA template and explain how to complete it. 3. Documents required for the Type of Number, as listed in the previous table for ordering phone numbers</td>
</tr>
<tr>
<td>EU (London)</td>
<td></td>
<td>1. Last invoice 2. Letter of Authorization (LOA): When you request porting services, we will provide you with a country-specific LOA template and explain how to complete it. 3. Documents required for the Type of Number, as listed in the previous table for ordering phone numbers</td>
</tr>
</tbody>
</table>

**Portugal (PT)**

**For ordering phone numbers**

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>US East</td>
<td>Local telephone numbers:</td>
<td>Yes</td>
<td>Your business address. It must be in the relevant geographic zone. You must also submit the required proof of Telecom services being provided to the address.</td>
</tr>
<tr>
<td>US West</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Canada (Central)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EU (Frankfurt)</td>
<td>Toll-free prefixes: +35 1800</td>
<td>No</td>
<td>An address in Portugal is required.</td>
</tr>
<tr>
<td>EU (London)</td>
<td>National prefixes: +351 30</td>
<td>Yes</td>
<td></td>
</tr>
</tbody>
</table>

**For porting numbers**

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Porting Windows</th>
<th>Required Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>US East</td>
<td>Monday-Friday 10 AM to 12 PM CET</td>
<td>1. Last invoice</td>
</tr>
</tbody>
</table>

195
### Puerto Rico (PR)

For ordering phone numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>US East</td>
<td>Local telephone numbers: +1 787, +1 939</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>US West Canada (Central)</td>
<td>Toll-free prefixes: +1 800</td>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>

### For porting numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Porting Windows</th>
<th>Required Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>US East</td>
<td>Monday-Friday 10 AM to 12 PM PST</td>
<td>1. Last invoice 2. Letter of Authorization (LOA): When you request porting services, we will provide you with a country-specific LOA template and explain how to complete it.</td>
</tr>
<tr>
<td>US West</td>
<td></td>
<td>3. Copy of legal representative's photo ID 4. Documents required per Type of Number as listed in the previous table for ordering numbers</td>
</tr>
</tbody>
</table>

### Romania (RO)

For ordering phone numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU (Frankfurt)</td>
<td>Local telephone numbers:</td>
<td>Yes</td>
<td>Your address and proof of address. It must be in the relevant geographic zone.</td>
</tr>
<tr>
<td>EU (London)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Supported Regions</td>
<td>Type of Number</td>
<td>Are there ID requirements?</td>
<td>Acceptable Identification</td>
</tr>
<tr>
<td>-------------------</td>
<td>----------------</td>
<td>----------------------------</td>
<td>--------------------------</td>
</tr>
<tr>
<td></td>
<td>Toll-free prefixes: +40 800</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td></td>
<td>National prefixes: +40 376</td>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>

For porting numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Porting Windows</th>
<th>Required Documents</th>
</tr>
</thead>
</table>
| EU (Frankfurt)    | Monday-Friday 10 AM to 12 PM PST | 1. Last invoice  
2. Letter of Authorization (LOA): When you request porting services, we will provide you with a country-specific LOA template and explain how to complete it.  
3. Documents required for the Type of Number, as listed in the previous table for ordering phone numbers |
| EU (London)       |                 |                    |

Serbia (RS)

For ordering phone numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
</table>
| EU (Frankfurt)    | Local telephone numbers: | Yes | Businesses must provide a copy of business registration containing a proof of address.  
Valid proofs of address include: third-party issued bank statements, utility bills (all issued in the previous 6 months); government documents (issued in the previous year).  
The business address must be outside Serbia. |
| EU (London)       |                 |                           |                          |

For porting numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Porting Windows</th>
<th>Required Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not supported</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>
### Singapore (SG)

#### For ordering phone numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asia Pacific (Seoul)</td>
<td>National prefixes: +65 31 and +65 6</td>
<td>Yes</td>
<td>Address required in country. Documents required for company: Company registration documents</td>
</tr>
<tr>
<td>Asia Pacific (Singapore)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asia Pacific (Sydney)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asia Pacific (Tokyo)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Toll-free prefixes: +65 800</td>
<td>Yes</td>
<td>Your business address. A global address is acceptable.</td>
<td></td>
</tr>
</tbody>
</table>

#### For porting numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Porting Windows</th>
<th>Required Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asia Pacific (Singapore)</td>
<td>NA</td>
<td>1. Last invoice 2. Letter of Authorization (LOA): When you request porting services, we will provide you with a country-specific LOA template and explain how to complete it. 3. List of Port in Numbers</td>
</tr>
</tbody>
</table>

### Slovakia (SK)

#### For ordering phone numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>US East</td>
<td>Local telephone numbers:</td>
<td>Yes</td>
<td>Your business address. It must be in the relevant geographic zone.</td>
</tr>
<tr>
<td>US West</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Canada (Central)</td>
<td>Toll-free prefixes: +421 800</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>EU (Frankfurt)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Supported Regions</td>
<td>Type of Number</td>
<td>Are there ID requirements?</td>
<td>Acceptable Identification</td>
</tr>
<tr>
<td>-------------------</td>
<td>----------------</td>
<td>---------------------------</td>
<td>--------------------------</td>
</tr>
<tr>
<td>EU (London)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### For porting numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Porting Windows</th>
<th>Required Documents</th>
</tr>
</thead>
</table>
| US East           | Monday-Friday 10 AM to 12 PM CET | 1. Last invoice  
2. Letter of Authorization (LOA): When you request porting services, we will provide you with a country-specific LOA template and explain how to complete it.  
3. Documents required for the Type of Number, as listed in the previous table for ordering phone numbers |
| US West           |                  |                    |
| EU (Frankfurt)    |                  |                    |
| EU (London)       |                  |                    |

### Slovenia (SI)

#### For ordering phone numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU (Frankfurt)</td>
<td>Local telephone numbers: +386 80</td>
<td>Yes</td>
<td>Your business address. It must be in the relevant geographic zone.</td>
</tr>
<tr>
<td>EU (London)</td>
<td>Toll-free prefixes: +386 80</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td></td>
<td>National prefixes: +386 82</td>
<td>Yes</td>
<td>An address in Slovenia is required.</td>
</tr>
</tbody>
</table>

#### For porting numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Porting Windows</th>
<th>Required Documents</th>
</tr>
</thead>
</table>
| EU (Frankfurt)    | Monday-Friday 10 AM to 12 PM CET | 1. Last invoice  
2. Letter of Authorization (LOA): When you request porting services, we will provide you with a country-specific LOA template and explain how to complete it.  
3. Documents required for the Type of Number, as listed in the previous table for ordering phone numbers |
| EU (London)       |                  |                    |
South Africa (ZA)
For ordering phone numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Africa (Cape Town)</td>
<td>Local numbers:</td>
<td>Yes</td>
<td>Your business address in South Africa, in the relevant geographic zone, along with your Tax ID.</td>
</tr>
<tr>
<td></td>
<td>Mobile numbers:</td>
<td>Yes</td>
<td>Your business address in South Africa and proof of address such as one of the following documents:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Excerpt from the commercial register showing the South Africa address</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Utility bill</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Tax notice</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Rent receipt</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Title deed</td>
</tr>
<tr>
<td></td>
<td>Toll-free prefixes:</td>
<td>Yes</td>
<td>Your business address in South Africa and a letter of intent (LOI).</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>You can have a maximum of 9 South Africa toll-free numbers per letter of intent.</td>
</tr>
</tbody>
</table>

South Korea (KR)
For ordering phone numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asia Pacific (Seoul)</td>
<td>Local telephone numbers: +82 2</td>
<td>Yes</td>
<td>Your business address in Seoul.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Local customers should provide a copy of their business (tax office) registration certificate, which is issued by local tax authorities and shows the company's registered address.</td>
</tr>
</tbody>
</table>
### Supported Regions

<table>
<thead>
<tr>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Toll-free prefixes: +82 308</td>
<td>Yes</td>
<td>Your business address in South Korea.</td>
</tr>
<tr>
<td>National prefixes: +82 70</td>
<td>Yes</td>
<td>Your business address in South Korea.</td>
</tr>
</tbody>
</table>

### For ordering phone numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>US East</td>
<td>Local telephone numbers:</td>
<td>Yes</td>
<td>Your business address. It must be in the relevant geographic zone as the phone number. A copy of the ID/business registration and a proof of address.</td>
</tr>
<tr>
<td>US West</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Canada (Central)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EU (Frankfurt)</td>
<td>Toll-free prefixes: +34 900</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>EU (London)</td>
<td>National prefixes: +34 518, +34 902</td>
<td>Yes</td>
<td>An address in Spain is required.</td>
</tr>
</tbody>
</table>

### For porting numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Porting Windows</th>
<th>Required Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>US East</td>
<td>Monday-Friday 10 AM to 12 PM CET</td>
<td>1. Last invoice</td>
</tr>
<tr>
<td>US West</td>
<td></td>
<td>2. Letter of Authorization (LOA): When you request porting services, we will provide you with a country-specific LOA template and explain how to complete it.</td>
</tr>
<tr>
<td>EU (Frankfurt)</td>
<td></td>
<td>3. CIF/NIF (VAT number)</td>
</tr>
<tr>
<td>EU (London)</td>
<td></td>
<td>4. Documents required for the Type of Number, as listed in the previous table for ordering phone numbers</td>
</tr>
</tbody>
</table>

### Spain (ES)

#### For ordering phone numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local telephone numbers:</td>
<td>Yes</td>
<td>Your business address. It must be in the relevant geographic zone as the phone number. A copy of the ID/business registration and a proof of address.</td>
<td></td>
</tr>
<tr>
<td>Toll-free prefixes: +82 308</td>
<td>Yes</td>
<td>Your business address in South Korea.</td>
<td></td>
</tr>
<tr>
<td>National prefixes: +82 70</td>
<td>Yes</td>
<td>Your business address in South Korea.</td>
<td></td>
</tr>
</tbody>
</table>

### For porting numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Porting Windows</th>
<th>Required Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not supported</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>
Sweden (SE)

For ordering phone numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>US East</td>
<td>Local telephone numbers:</td>
<td>Yes</td>
<td>Your business address in Sweden.</td>
</tr>
<tr>
<td>US West</td>
<td>Mobile prefixes: +46 766</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Canada (Central)</td>
<td>Toll-free prefixes: +46 20</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>EU (Frankfurt)</td>
<td>National prefixes: +46 77 and +46 10</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>EU (London)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

For porting numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Porting Windows</th>
<th>Required Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>US East</td>
<td>Monday-Friday 10 AM to 12 PM CET</td>
<td>1. Last invoice&lt;br&gt;2. Letter of Authorization (LOA): When you request porting services, we will provide you with a country-specific LOA template and explain how to complete it.&lt;br&gt;3. Your tax number has to be provided. A Swedish organization number usually contains 12 digits, starting with 16 if it is from a company, or 19 or 20 if it's personal.&lt;br&gt;4. Documents required for the Type of Number, as listed in the previous table for ordering phone numbers</td>
</tr>
<tr>
<td>US West</td>
<td></td>
<td></td>
</tr>
<tr>
<td>EU (Frankfurt)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>EU (London)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Switzerland (CH)

For ordering phone numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>US East</td>
<td>Local telephone numbers:</td>
<td>Yes</td>
<td>Your business address in the country. A copy of the ID/business registration and a proof of address.</td>
</tr>
<tr>
<td>US West</td>
<td>Toll-free prefixes: +41 800</td>
<td>Yes</td>
<td>Your business address and a copy of business registration.</td>
</tr>
<tr>
<td>Supported Regions</td>
<td>Type of Number</td>
<td>Are there ID requirements?</td>
<td>Acceptable Identification</td>
</tr>
<tr>
<td>-------------------</td>
<td>----------------</td>
<td>----------------------------</td>
<td>--------------------------</td>
</tr>
<tr>
<td>EU (Frankfurt)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EU (London)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

For porting numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Porting Windows</th>
<th>Required Documents</th>
</tr>
</thead>
</table>
| US East           | Monday-Friday 10 AM to 12 PM CET | 1. Last invoice  
2. Letter of Authorization (LOA): When you request porting services, we will provide you with a country-specific LOA template and explain how to complete it.  
3. Documents required for the Type of Number, as listed in the previous table for ordering phone numbers  
4. Proof of address  
5. Company registration |
| US West           |                  |                    |
| EU (Frankfurt)    |                  |                    |
| EU (London)       |                  |                    |

Thailand (TH)

For ordering phone numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
<th>Restrictions</th>
</tr>
</thead>
</table>
| Asia Pacific (Seoul) | Local telephone numbers: | Yes | For business address inside Thailand: Business must provide a copy of the ID of a company authorized representative and company certificate.  
For business address outside of Thailand: Proof of business address and proof of ID, such as the business registration. Also, a copy of the ID or passport of an authorized representative. | International caller ID is not guaranteed. |
| Asia Pacific (Singapore) | Local telephone numbers: | Yes |                     |
| Asia Pacific (Sydney) | Local telephone numbers: | Yes |                     |
| Asia Pacific (Tokyo) | Local telephone numbers: | Yes |                     |

Toll-free prefixes:  
+66 1800 | Yes | Proof of business address and proof |
<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
<th>Restrictions</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>of ID, such as the business registration. Also, a copy of the ID or passport of an authorized representative. The address cannot be in Thailand.</td>
<td></td>
</tr>
</tbody>
</table>

For porting numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Porting Windows</th>
<th>Required Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not supported</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>

Uganda (UG)

For ordering phone numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Africa (Cape Town)</td>
<td>Local telephone numbers:</td>
<td>Yes</td>
<td>Businesses must provide a copy of business registration containing a proof of address. Valid proofs of address include: third-party issued bank statements, utility bills (all issued in the previous 6 months); government documents (issued in the previous year). The business address must be inside of Uganda.</td>
</tr>
</tbody>
</table>

For porting numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Porting Windows</th>
<th>Required Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not supported</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>
United Kingdom (GB)

For ordering phone numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>US East</td>
<td>Local telephone numbers:</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>US West</td>
<td>Mobile prefixes: +44</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Asia Pacific (Seoul)</td>
<td>Toll-free prefixes: +44 800, +44 808</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Asia Pacific (Singapore)</td>
<td>National prefixes:</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Asia Pacific (Sydney)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asia Pacific (Tokyo)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Canada (Central)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EU (Frankfurt)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EU (London)</td>
<td></td>
<td></td>
<td></td>
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</tbody>
</table>

For porting numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Porting Windows</th>
<th>Required Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>US East</td>
<td>Monday-Friday 10 AM to 12 PM CET</td>
<td>1. Last invoice</td>
</tr>
<tr>
<td>US West</td>
<td>Monday-Friday 10 AM to 12 PM CET</td>
<td>2. Letter of Authorization (LOA): When you request porting services, we will</td>
</tr>
<tr>
<td>Asia Pacific (Seoul)</td>
<td>Monday-Friday 10 AM to 12 PM CET</td>
<td>provide you with a country-specific LOA template and explain how to complete it.</td>
</tr>
<tr>
<td>Asia Pacific (Singapore)</td>
<td>Monday-Friday 10 AM to 12 PM CET</td>
<td></td>
</tr>
<tr>
<td>Asia Pacific (Sydney)</td>
<td>Monday-Friday 10 AM to 12 PM CET</td>
<td></td>
</tr>
<tr>
<td>Asia Pacific (Tokyo)</td>
<td>Monday-Friday 10 AM to 12 PM CET</td>
<td></td>
</tr>
<tr>
<td>EU (Frankfurt)</td>
<td>Monday-Friday 10 AM to 12 PM CET</td>
<td></td>
</tr>
<tr>
<td>EU (London)</td>
<td>Monday-Friday 10 AM to 12 PM CET</td>
<td></td>
</tr>
</tbody>
</table>
United States (US)

For ordering phone numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>US East</td>
<td>Local telephone numbers:</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>US West</td>
<td>Toll-free prefixes:</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Asia Pacific</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(Seoul)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asia Pacific</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(Singapore)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asia Pacific</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(Sydney)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asia Pacific</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(Tokyo)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Canada (Central)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EU (Frankfurt)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EU (London)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

For porting numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Porting Windows</th>
<th>Required Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>US East</td>
<td>Monday-Friday 7 AM to 5 PM CST</td>
<td>1. Last invoice</td>
</tr>
<tr>
<td>US West</td>
<td></td>
<td>2. Letter of Authorization (LOA): When you request porting services, we will provide you with a country-specific LOA template and explain how to complete it.</td>
</tr>
<tr>
<td>Asia Pacific (Seoul)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asia Pacific (Singapore)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asia Pacific (Sydney)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asia Pacific (Tokyo)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>EU (Frankfurt)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>EU (London)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Vietnam (VN)

For ordering phone numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Type of Number</th>
<th>Are there ID requirements?</th>
<th>Acceptable Identification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asia Pacific (Sydney)</td>
<td>Local telephone numbers:</td>
<td>No</td>
<td>Businesses must provide a copy of business registration containing a proof of address.</td>
</tr>
<tr>
<td></td>
<td>Toll-free prefixes:</td>
<td>yes</td>
<td>Valid proofs of address include: third-party issued bank statements, utility bills (all issued in the previous 6 months); government documents (issued in the previous year).</td>
</tr>
<tr>
<td>Asia Pacific (Singapore)</td>
<td></td>
<td></td>
<td>The business address must be outside Vietnam.</td>
</tr>
<tr>
<td>Asia Pacific (Tokyo)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Coverage Limitations

- Local: All major networks except minority three networks FPT, CMC and Gtel.
- TFN: National reachability only from: VNPT fixed network, Vinaphone Mobile, and SPT network.

For porting numbers

<table>
<thead>
<tr>
<th>Supported Regions</th>
<th>Porting Windows</th>
<th>Required Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not supported</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>

Set up outbound communications

You can send outbound communications to customers for a variety of reasons, such as appointment reminders, subscription renewals, and debt collection. Amazon Connect provides both normal and outbound campaign capabilities.

Contents

- Set up outbound caller ID (p. 208)
- Set up US emergency calling in Amazon Connect (p. 211)
- Enable outbound calls (p. 217)
- Enable Amazon Connect outbound campaigns (p. 217)
- Create an outbound campaign (p. 219)
• Disable outbound campaigns (p. 221)
• Security profile permissions for outbound communications (p. 222)

Set up outbound caller ID

We recommend setting your outbound caller ID. Not doing so may result in some PSTN carriers considering your outbound calls fraudulent activity, and they may drop them.

There are a few times when your outbound caller ID—your company name and number—will appear to contacts:

• During customer callbacks.
• If an agent makes an outbound call.
• If an agent transfers a call, for example, to an external number.

Caller ID name: Set in queue

You set the caller ID name, such as the name of your company, in the queue settings. To edit queue settings, on the navigation menu choose Routing, Queues, and then choose the queue you want to edit.

If your DID/TFN phone number is in the US/CANADA: The name you use should be the same one that’s registered in the CNAM (Caller Name) database provided by Amazon Connect; this is a nationwide resource available in the US/CANADA to provide the name of the calling party on incoming calls if recipients subscribe to CNAM services from their telecom carrier.
Open an AWS Support ticket to register your US based phone number with your company name in the CNAM database of the Amazon Connect carrier. We'll handle the registration process for you. **It may take up to 30 days for the caller ID names to propagate through the database.**

If you are using CNAM phoning into CANADA, the end network may support Caller ID lookups, but this functionality is not guaranteed, as not all receiving networks support this feature. We are currently unable to provide support for lookups in other locales.

**Important**
CNAM is not supported for custom caller IDs, third-party numbers, or with the use of whisper flow transfers.

**Tip**
If you want each agent to have their own caller ID name while calling out (such as *Example Corp Billing Dept*), create a queue for each agent/caller ID name.

**Caller ID number: Set in the queue or Call phone number block**

Only phone numbers that you've claimed (p. 160) or ported to Amazon Connect (p. 149) can be used as your caller ID number.

To use an external phone number as your outbound caller ID number, contact AWS Support to see if it's possible. You'll need to provide proof of ownership (p. 165).

You can set the caller ID number as follows:

- **Call phone number (p. 332) block**: Use this block in an Outbound whisper flow (p. 448) to initiate an outbound call to a customer and, optionally, specify a custom caller ID number that is displayed to call recipients.

  This block is useful when you have multiple telephone numbers used to make outbound calls, but want to consistently display the same company phone number for the caller ID for calls made from your contact center.

  You can also use this block with the Set contact attributes (p. 403) block to set the callback number dynamically. For example, you can display a certain caller ID number based on the customer's account type.

- **Queue**: If no caller ID number is specified in the Call phone number (p. 332) block, then the caller ID in the queue settings is used.

  **Important**
  In Australia: The caller ID must be an Amazon Connect provided DID (Direct Inward Dialing) phone number. If a toll free number or a number not provided by Amazon Connect is used in the caller ID, local telephony suppliers may reject outbound calls due to local anti-fraud requirements.

**Setting the caller ID dynamically**

Use an attribute in the Call phone number (p. 332) block to set the caller ID number dynamically during the flow.

The attribute can be one you define in the Set contact attributes (p. 403) block in the flow. Or, it can be an external attribute returned from an AWS Lambda function.

The value of the attribute must be a phone number from your instance in **E.164** format.

- If the number is not in E.164 format, the number from the queue associated with the Outbound whisper flow (p. 448) is used for the caller ID number.
• If no number is set for the outbound caller ID number for the queue, the call attempt will fail.

For more information about setting the caller ID dynamically, see this AWS Support Knowledge Center article: How can I set my Amazon Connect outbound caller ID dynamically based on country?

Use E.164 format for international phone numbers

Amazon Connect requires phone numbers in E.164 format.

To express a US phone number in E.164 format, add the '+' prefix and the country code in front of the number. For example, for a US number:

• +1-800-555-1212

In the UK and many other countries internationally, local dialing requires the addition of a 0 in front of the subscriber number. However, to use E.164 formatting, this 0 must be removed. A number such as 020 718 xxxx in the UK would be formatted as +44 20 718 xxxx.

Phone numbers that are not formatted in E.164 may work, but it depends on the phone or handset that is being used as well as the carrier from which the call is originated.

When you place calls from the CCP using Amazon Connect the CCP provides the correct formatting for numbers automatically.

How to specify a custom caller ID number using a Call phone number (p. 332) block

2. Choose the down arrow next to Create flow, and then choose Create outbound whisper flow.
3. Add a Call phone number (p. 332) block to the flow, and connect the Entry point block to it.

   The Call phone number (p. 332) block must be placed before a Play prompt block if one is included in your flow.
4. Select the Call phone number (p. 332) block, and then select Caller ID number to display.
5. Do one of the following:
   • To use a number from your instance, choose Select a number from your instance, and then search for or select the number to use from the drop-down.
   • Choose Use attribute to use a contact attribute to provide the value for the caller ID number. You can use either a User Defined attribute you create using a Set contact attributes (p. 403) block, or an External attribute returned from an AWS Lambda function. The value of any attribute you use must be a phone number claimed for your instance and be in E.164 format. If the number used from an attribute is not in E.164 format, the number set for the Outbound caller ID number for the queue is used.
6. Add any additional blocks to complete your flow, and connect the Success branch of the Call phone number (p. 332) block to the next block in the flow.

   There is no error branch for the block. If a call is not successfully initiated, the flow ends and the agent is placed in an AfterContactWork (ACW) state.

Why your caller ID might not appear correctly to customers

Amazon Connect presents Outbound Caller ID Name correctly via the Calling Line/Party Presentation service on outbound calls. In testing, with all of our telephony providers, the Outbound Caller ID
Name value comes back to us intact on all the carriers we use. This service is not consistent because downstream carriers (including mobile carriers) often ignore the value we set in the Outbound Caller ID Name and CNAM is not regulated or enforced.

How to avoid labels like "spam" and "telemarketer"

Amazon Connect has contracted with a leading provider of CNAM services for US numbers to provide Calling Name to the extent possible. This enables outbound calls that show the enrolled Calling Line Identity (CLI) to generally avoid reputation-sensitive labels like "spam" or "telemarketer."

To enroll your numbers with this CNAM services provider, open an AWS Support ticket. Our support team will gather the required information to enroll your numbers. For instructions on how to access AWS Support, see Get administrative support for Amazon Connect (p. 1386).

Note
Only numbers in the 50 US states, Puerto Rico, and Virgin Islands are eligible.

Toll-free numbers for caller ID

Using toll-free numbers for outbound communications have a number of limitations. For example, using a toll-free number to dial other toll-free numbers in the United States can result in the number being filtered, blocked, or not properly routed to the destination by carriers. Toll-free numbers may be terminated at a higher than expected rate. If you know you need to call toll-free numbers in the United States you must use DIDs to make the calls to be guaranteed call delivery.

If you're using toll-free numbers outside of the US, refer to the Amazon Connect Telecoms Country Coverage Guide to see which countries support toll-free numbers as outbound. For example, for Australia the guide shows it's not permitted to use toll-free numbers due to local regulations; the National Outbound column indicates that toll-free numbers are not supported.

Important
Toll-free products are designed to be national products and phoned within the country. We do not guarantee international reachability of any of these services as access to the numbers is controlled by the caller's network access.

Set up US emergency calling in Amazon Connect

By default 911 is enabled for all users in the following North America Regions: US East (N. Virginia), US West (Oregon), and AWS GovCloud (US-West). If an agent calls 911, the call is routed through to emergency services.

For more information about calling 911, see this FAQ about the national 911 program.

What is E911?

Enhanced 911 (E911) enables location information to be sent to 911 dispatch when a 911 call is placed.

Place 911 calls from your Test Environment

Important
Calling 911 for a non-emergency situation carries a penalty of $100 per occurrence. To help you avoid penalties, we have set up 933 so you can test this capability. Calls placed from an Amazon Connect Contact Control Panel (CCP) to 933 have an audio playback message confirming:

- The number the call originated from.
- The physical address that was sent along with the call.

Contents
Build E911 capabilities into your Amazon Connect contact center

In addition to connecting a user with 911 emergency services, customers in the United States can build E911 capabilities to automatically provide the caller’s address information to 911 dispatchers.

Following is an example E911 workflow for Amazon Connect:

1. The client application obtains the location/physical address of the Amazon Connect user who may need to call 911. For example, the client application might prompt the agent for their location address. See Best practice to capture the agent address (p. 212).
2. Your workflow stores the physical address in a database.
3. The agent (or other Amazon Connect user) uses their Amazon Connect Contact Control Panel (CCP) to call 911.
4. Your workflow provisions an AWS Lambda function that retrieves the physical address and provides it to Amazon Connect to proceed with the 911 call.

The following image shows this E911 workflow.

Best practice to capture the agent address

Since agents may be working from different locations (for example, office building, home, or coffee shop), the most recently validated address should be passed along with the emergency outbound call.

We recommend storing a validated address when first setting up an agent on Amazon Connect based on the agent’s usual location and then prompting the agent to update their address at the start of an agent’s shift to help ensure that the emergency outbound call has the latest address.

Addresses should be checked against a database of valid street addresses (Master Street Address Guide).

Provision E911 in Amazon Connect

This topic explains how to provision E911 in Amazon Connect.

Detect a 911 call in Amazon Connect

For outbound voice calls within Amazon Connect, an Outbound whisper flow (p. 448) specifies the whisper to be played to customer. You can configure an Outbound whisper flow (p. 448) to do the following:

1. Inspect the outbound call string from an agent.
2. If the string equals 911 (or 933 in a test environment), then retrieve the stored location/physical address for that agent by using a Lambda function.
3. Attach the physical address to a contact attribute and proceed with the 911 (or 933) outbound call.
The following image shows an example Outbound whisper flow (p. 448).

- **Step 1:** Call a Lambda function that retrieves the location for an agent (Input parameter = Agent Username). The following image shows how to configure a Invoke AWS Lambda function (p. 389) block so the agent **username** is passed to the Lambda function.

- **Step 2:** Attach the location received to a contact attribute (see Format a physical address for E911 (p. 214) for the required format).

- **Step 3:** Update the call origination to the agent’s phone number and continue with the outbound call.

  **Note**
  The origination number is the caller ID that is passed along with the 911 outbound call. If the origination phone number supports inbound calls, emergency responders will be able to call back the agent in case the initial phone call was disconnected.

  - The 911 call is specific to United States. As a result, the origination phone number must be a valid US phone number.

  For example, when an agent places an outbound call, if an invalid US phone number is passed to the carrier network, the carrier can reject the call. To avoid this situation, if the agent uses an invalid number from Amazon Connect, Amazon Connect defaults to the Caller ID that is assigned to the queue in the agent's routing profile.
• The capability does not place any other rules on this number. For example, the origination number can the phone number of the security front desk.

Format a physical address for E911

E911 outbound calls require a physical address to be passed to Amazon Connect as a JSON string with keys and values that represent the various fields in the address. For example, consider the following US address:

- 2121 7th Ave, Seattle, WA, 98121, USA

The address must be attached as a JSON string against the key CivicAddress, as shown in the following example. Every address field is attached to a specific coded key.

CivicAddress:
{"country":"USA","RD":"7th","A3":"Seattle","PC":"98121","HNO":"2121","STS":"Ave","A1":"WA"

The following table shows a complete list of keys.

<table>
<thead>
<tr>
<th>Attribute name</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>country</td>
<td>The country is identified by the two-letter ISO 3166 code.</td>
<td>US</td>
</tr>
<tr>
<td>A1</td>
<td>National subdivisions (state, region, province, prefecture)</td>
<td>WA</td>
</tr>
<tr>
<td>A2</td>
<td>County, parish, gun (JP), district (IN)</td>
<td>King county</td>
</tr>
<tr>
<td>A3</td>
<td>City, township, shi (JP)</td>
<td>New York</td>
</tr>
<tr>
<td>A4</td>
<td>City division, borough, city district, ward, chou (JP)</td>
<td>Manhattan</td>
</tr>
<tr>
<td>A5</td>
<td>Neighborhood, block</td>
<td>Morningside Heights</td>
</tr>
<tr>
<td>A6</td>
<td>Street</td>
<td>Broadway</td>
</tr>
<tr>
<td>PRD</td>
<td>Leading street direction</td>
<td>N, W</td>
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<td>Trailing street suffix</td>
<td>SW</td>
</tr>
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<td>STS</td>
<td>Street suffix</td>
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</tr>
<tr>
<td>HNO</td>
<td>House number (numeric part only)</td>
<td>2121</td>
</tr>
<tr>
<td>HNS</td>
<td>House number suffix</td>
<td>A, 1/2</td>
</tr>
<tr>
<td>LMK</td>
<td>Landmark or vanity address</td>
<td>Low Library</td>
</tr>
<tr>
<td>LOC</td>
<td>Additional location information</td>
<td>Room 543</td>
</tr>
<tr>
<td>FLR</td>
<td>Floor</td>
<td>5</td>
</tr>
<tr>
<td>NAM</td>
<td>Name (residence, business or office occupant)</td>
<td>Example Corp</td>
</tr>
<tr>
<td>Attribute name</td>
<td>Description</td>
<td>Example</td>
</tr>
<tr>
<td>----------------</td>
<td>----------------------------</td>
<td>---------------</td>
</tr>
<tr>
<td>PC</td>
<td>Postal code</td>
<td>10027-0401</td>
</tr>
<tr>
<td>BLD</td>
<td>Building (structure)</td>
<td>Example Theater</td>
</tr>
<tr>
<td>UNIT</td>
<td>Unit (apartment, suite)</td>
<td>12a</td>
</tr>
<tr>
<td>ROOM</td>
<td>Room</td>
<td>450F</td>
</tr>
<tr>
<td>PLC</td>
<td>Place-type</td>
<td>Office</td>
</tr>
<tr>
<td>PCN</td>
<td>Postal community name</td>
<td>Leonia</td>
</tr>
<tr>
<td>ADDCODE</td>
<td>Additional code</td>
<td>13203000003</td>
</tr>
<tr>
<td>SEAT</td>
<td>Seat (desk, cubicle, workstation)</td>
<td>WS 181</td>
</tr>
<tr>
<td>RD</td>
<td>Primary road or street</td>
<td>Broadway</td>
</tr>
<tr>
<td>RDSEC</td>
<td>Road section</td>
<td>14</td>
</tr>
<tr>
<td>RDBR</td>
<td>Road branch</td>
<td>Lane 7</td>
</tr>
<tr>
<td>RDSUBBR</td>
<td>Road sub-branch</td>
<td>Alley 8</td>
</tr>
<tr>
<td>PRM</td>
<td>Road pre-modifier</td>
<td>Old</td>
</tr>
<tr>
<td>POM</td>
<td>Road post-modifier</td>
<td>Extended</td>
</tr>
</tbody>
</table>

**Note**

It is your responsibility to validate the address against a standard repository such as the Master Street Address Guide (MSAG).

**Programming notes**

Currently it isn't possible to pass a JSON structure as an Attribute to Amazon Connect. Therefore, the location retrieved by the Lambda function needs to be converted to a JSON string before it is passed to Amazon Connect. For example, using the Python programming language, if the location retrieved is stored in a JSON structure `json_agent_location` then it can be passed to Amazon Connect (from the Lambda function) as follows:

```python
return {,'CivicAddress': json.dumps(json_agent_location), 'agent_did_number': '+15555551212'}
```

For an address such as the following example:

- 2121 7th Ave, Seattle, WA, 98121, USA

The key-value pair:

```json
CivicAddress: {"country": "USA", "RD": "7th", "A3": "Seattle", "PC": "98121", "HNO": "2121", "STS": "Ave", "A1": "WA"}
```

And the corresponding JSON string that is actually passed to Amazon Connect:

```json
CivicAddress: {"country": "USA", "RD": "7th", "A3": "Seattle", "PC": "98121", "HNO": "2121", "STS": "Ave", "A1": "WA"}
```

**Note**

Using `json.dumps` adds an escape character `\` to each quotation mark (`"`).
Set up notifications when an E911 call is placed

For 911 it is important to notify the corporate security or HR administrator to be notified in real time that someone from the contact center has placed an E911 call. To do this, create an Amazon Connect task in the Outbound whisper flow (p. 448). Then add custom notification logic to the task.

The following image shows an example of a Create task (p. 362) block in an Outbound whisper flow (p. 448).

The following image shows an example of how to configure the Create task (p. 362) block for this use case.
Enable outbound calls

Before your agents can make outbound calls to customers, you need to set up your Amazon Connect instance for outbound communications.

1. Open the Amazon Connect console at https://console.aws.amazon.com/connect/.
2. On the instances page, choose the instance alias. The instance alias is also your instance name, which appears in your Amazon Connect URL.
3. In the navigation pane, choose Telephony.
4. To enable outbound calling from your contact center, choose Make outbound calls with Amazon Connect.
5. To enable outbound campaigns, choose Enable outbound campaigns.
6. By enabling early media audio, your agents can hear pre-connection audio such as busy signals, failure-to-connect errors, or other informational messages from telephony providers, when making outbound calls. Choose Enable early media.
7. Choose Save.

Note
For a list of countries you can call by default based on the Region of your instance, see Countries you can call by default (p. 1336).
For a list of all countries available for outbound calls based on the Region of your instance, see Amazon Connect pricing. If a country is not available in your dropdown menu, open a ticket to add it to your allow list.

Enable Amazon Connect outbound campaigns

This topic explains how to enable Amazon Connect outbound campaigns, a feature of Amazon Connect and formerly known as high-volume outbound communications.

Before you begin

There are a few things that you need in place before using outbound campaigns:

- Make sure your instance is enabled for outbound calling (p. 217).
- Create a dedicated outbound campaigns queue to handle any contacts that will be routed to agents as a result of the campaign.
- Assign the queue to the agent's routing profile.
- Create and publish a flow that includes a Check call progress (p. 348) block. This block enables you to branch based on whether a person answered the phone, for example, or a voicemail was detected.
Note
If you plan to call customers in Australia or New Zealand, see Step 4: Create a new campaign in the Amazon Connect instance in this blog for instructions: Make predictive and progressive calls using Amazon Connect high-volume outbound communications.

Create a AWS KMS key

When you enable outbound campaigns, you have the option to provide your own AWS KMS key. These keys are created and managed by you (AWS KMS charges apply). You also have the option to use an AWS owned key.

When enabling or disabling outbound campaigns using an API, make sure the API user is either the administrator or has the following permissions: kms:DescribeKey, kms:CreateGrant, and kms:RetireGrant for the key.

Note
To switch the KMS key that is associated with outbound campaigns, first you need to disable outbound campaigns, and then re-enable it using a different AWS KMS key.

Configure outbound campaigns

1. Open the Amazon Connect console at https://console.aws.amazon.com/connect/.
2. On the instances page, choose the instance alias. The instance alias is also your instance name, which appears in your Amazon Connect URL.
3. In the navigation pane, choose Telephony.
4. To enable outbound campaigns, choose Enable outbound campaigns.
5. Under Encryption settings, enter your own AWS KMS key or choose Create an AWS KMS key.

If you choose Create an AWS KMS key:

- A new tab in your browser opens for the Key Management Service (KMS) console. On the Configure key page, choose Symmetric, and then choose Next.
In the following example, the name of the key starts with `bcb6fdd`:

- Return to the tab in your browser for the Amazon Connect console, Telephony page. Click or tap in the AWS KMS key for the key you created to appear in a dropdown list. Choose the key you created.

6. Choose Save.

7. It takes a few minutes for outbound campaigns to be enabled. When it's successfully enabled, you can create outbound campaigns in Amazon Connect for voice calls. If it does not enable, verify you have the required IAM permissions (p. 1190).

## Create an outbound campaign

Contact centers send outbound campaigns to customers for a variety of reasons, such as appointment reminders, telemarketing, subscription renewals, and debt collection. By using Amazon Pinpoint Journeys and Amazon Connect, you can create outbound campaigns for voice, SMS, and email.

There are two ways you can create an outbound campaign:

- Use Amazon Connect console and Amazon Pinpoint. This topic provides instructions.
- Use the Amazon Connect Outbound Campaigns API. For more information, see Amazon Connect Outbound Campaigns API Reference. Note that you can't update the name of the outbound queue using the API.
How to create an outbound campaign

1. Log in to your contact center at https://instance name.my.connect.aws/.
2. On the left navigation menu, choose High-volume outbound communication, and then choose Create campaign.
3. In the Campaign details section, specify the name.

4. In the Outbound configuration section, select the published flow you created for outbound campaigns (a flow that includes a Check call progress (p. 348) block).

5. Select a queue to associate with this campaign.
6. Answering machine detection is enabled by default. If desired, you can choose to disable it.

   Note
   If you disable answering machine detection, and if your flow includes the Check call progress (p. 348) block, the contact is routed down the Error branch.

7. Choose a phone number to be shown as caller ID when making outbound calls. The outbound phone number is specified for a queue.

   Important
   - You must use a phone number that has been ported to your Amazon Connect instance, or claimed from Amazon Connect.
Disable outbound campaigns

Important
You must delete all existing campaigns before you can disable outbound campaigns.

1. Open the Amazon Connect console at https://console.aws.amazon.com/connect/.
2. On the instances page, choose the instance alias. The instance alias is also your instance name, which appears in your Amazon Connect URL.

3. In the navigation pane, choose Telephony.
4. To disable outbound campaigns, uncheck Enable outbound campaigns.
5. Choose Save.

You can no longer create outbound campaigns.

8. Choose a dialer type.
9. Choose a bandwidth allocation.
10. Open the Amazon Pinpoint console (https://console.aws.amazon.com/pinpoint/) and Create a journey, using the name of the campaign that you created in Amazon Connect.
11. Associate this campaign to a customer journey on Amazon Pinpoint to start making high-volume outbound calls.

Campaign state

After a campaign is running, you can pause or stop it. You can also delete a campaign at any time.

Following is a description of each campaign state:

- **Created** – The campaign is created.
- **Running** – The campaign as running.
- **Paused** – The campaign is paused until it is resumed.
- **Stopped** – The campaign is stopped. You can't resume a campaign that is stopped.
- **Failed** – An error state caused the campaign to fail.

Disable outbound campaigns

Important
You must delete all existing campaigns before you can disable outbound campaigns.

1. Open the Amazon Connect console at https://console.aws.amazon.com/connect/.
2. On the instances page, choose the instance alias. The instance alias is also your instance name, which appears in your Amazon Connect URL.

3. In the navigation pane, choose Telephony.
4. To disable outbound campaigns, uncheck Enable outbound campaigns.
5. Choose Save.

You can no longer create outbound campaigns.

Telecom regulations in certain countries dictate use of phone numbers from specific carriers for outbound calling. For more information, see the Amazon Connect Telecoms Country Coverage Guide to learn more.

If you plan to call customers in Australia or New Zealand, see Step 4: Create a new campaign in the Amazon Connect instance in this blog for instructions: Make predictive and progressive calls using Amazon Connect high-volume outbound communications.
Security profile permissions for outbound communications

To enable agents to make outbound calls, the following Make outbound calls permissions to the agent's security profile:

<table>
<thead>
<tr>
<th>Type</th>
<th>Access</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access Contact Control Panel</td>
<td></td>
</tr>
<tr>
<td>Make outbound calls</td>
<td></td>
</tr>
</tbody>
</table>

To enable call center managers to create outbound campaigns, assign the outbound campaigns permissions to their security profile.

For information about how add more permissions to an existing security profile, see Update security profiles (p. 797).

By default, the Admin security profile already has permissions to perform all activities.

Set up routing

In Amazon Connect, routing consists of three parts: queues, routing profiles, and flows. This topic discusses queues and routing profiles. For information about flows, see Create Amazon Connect Flows (p. 307).

A queue holds contacts waiting to be answered by agents. You can use a single queue to handle all incoming contacts, or you can set up multiple queues.

Queues are linked to agents through a routing profile. When you create a routing profile, you specify:

- Which queues will be in it.
- Whether one queue should be prioritized over another.
- What channels agents will handle in the Contact Control Panel (CCP).
- How many contacts agents can handle simultaneously for each channel.
- Whether individual queues are for all channels or specific ones.

Each agent is assigned to one routing profile.

Contents
- How routing works (p. 223)
- Create a queue (p. 224)
- Disable a queue (p. 225)
- Set the Maximum contacts in queue limit (p. 226)
- Set the hours of operation and timezone for a queue (p. 227)
How routing works

Contacts are routed through your contact center based on these factors:

- The routing profile an agent is assigned to.
- The hours of operation for a given queue.
- The routing logic you define in your flows.

For example, you use routing profiles to route specific types of contacts to agents with specific skill sets. If no agent with the required skill set is available, you can place the contact in the queue defined in the flow.

Here's the logic Amazon Connect uses to route contacts:

- Contacts in a queue are automatically prioritized and forwarded to the next available agent (that is, the agent who has been idle longest).
- Contacts are placed on hold if there are no available agents. The order in which they are serviced is determined by their time in queue, on a first-come, first-served basis.
- If multiple agents are available, the contact is routed to the agent who has been in the Available status for the longest time.
- A routing profile may assign a priority to one queue over another, but the priority within the queue is always set by the order the contact was added to the queue.

How routing works with multiple channels

When you set up a routing profile to handle multiple channels, agents must complete the interactions with inbound contacts on one channel before they can receive a contact or a task on the other.

**Example:** Say a routing profile is configured for voice contacts and for up to 10 chats and up to 10 tasks. Here's how it would work:

- When agents sign on, they can be routed a chat, task, or voice contact.
- After the agents begin interacting with a voice call, no chats, tasks, or additional voice contacts are routed to them until they finish the call.
- When agents accept a chat, up to 10 chats are routed to them, but no voice contacts or tasks. After they're done with the chats, they're available for the next contact, which could be voice, chat, or task.
- When agents accept a task, up to 10 tasks are routed to them, but no voice contacts or chats. After they're done with the tasks, they're available for the next contact, which could be voice, chat, or task.

This routing model allows agents to handle both voice and chat channels. It routes contacts to the agent based on the type of contact the agent is already on. This way, if an agent is already chatting with a customer, it's more efficient for the agent to respond to more chats instead of multitasking on two different channels.

To learn how to set up multiple channels, see **Create a routing profile (p. 230).**

Learn more about routing

See the following topics to learn more about routing:
Create a queue

**How many queues can I create?** To view your quota of Queues per instance, open the Service Quotas console at [https://console.aws.amazon.com/servicequotas/](https://console.aws.amazon.com/servicequotas/).

1. On the navigation menu, choose Routing, Queues, Add new queue.
2. Add the appropriate information about your queue and choose Add new queue.

See the following topics for detailed information about each of the above areas:

1. Set the hours of operation and timezone for a queue (p. 227)
2. Set up outbound caller ID (p. 208)
3. Set the Maximum contacts in queue limit (p. 226)
4. Create quick connects (p. 470)

The queue is automatically active.
3. Assign the queue to a routing profile; for information, see Create a routing profile (p. 230). The routing profile links the queue and agents together.

To learn how queues work, see Routing profiles (p. 21) and Queue-based routing (p. 26).

**Disable a queue**

You can quickly control the flow of contacts to queues by temporarily disabling a queue. When a queue is disabled, it's put in an offline mode. No new contacts are routed to the queue, but any existing contacts already in the queue are routed to agents.

Only users who have a security profile with Queues - Enable/Disable permissions can disable a queue.

<table>
<thead>
<tr>
<th>Security profile permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Routing</strong></td>
</tr>
<tr>
<td>Type</td>
</tr>
<tr>
<td>Routing profiles</td>
</tr>
<tr>
<td>Quick connects</td>
</tr>
<tr>
<td>Hours of operation</td>
</tr>
<tr>
<td>Queues</td>
</tr>
</tbody>
</table>

**To disable an active queue**

1. On the navigation menu, choose Routing, Queues.
2. Hover over the name of the queue to edit. Choose the power icon that appears.
3. Choose **Disable** to confirm you want to disable the queue. You can immediately re-enable the queue if needed by choosing the power button again.

### Set the Maximum contacts in queue limit

To determine how many contacts can be in a standard queue (p. 22) at the same time, you set the **Maximum contacts in queue** limit for the standard queue. This setting does not apply to agent queues (p. 22); those are always limited to 10 contacts.

This setting applies to all the contacts that are in the standard queue, across all channels. For example, you set **Maximum contacts in queue** to 100 and configure the queue for calls, chats, and tasks. This means the limit is set to a total of 100 concurrent calls AND chats AND active tasks in the queue.

**Important**

By default you cannot set **Maximum contacts in queue** to be greater than your **Concurrent calls per instance** service quota.

For information about default service quotas and how to request an increase, see Amazon Connect service quotas (p. 1325).

**To set Maximum contacts in queue**

1. On the navigation menu, choose **Routing**, **Queues**, **Add new queue**. Or, edit an existing queue.
2. Under **Maximum contacts in queue** choose **Set limit**.
3. Specify how many contacts can be in the queue before it's considered full.

Queued callbacks count towards the queue size limit, but they are routed to the error branch. For example, if you have a queue that handles both callbacks and incoming calls, and that queue reaches the size limit:

- The next callback is routed to the error branch.
- The next incoming call gets a reorder tone (also known as a fast busy tone), which indicates no transmission path to the called number is available.
Set the hours of operation

Route contacts based on queue capacity

To define routing decisions based on queue capacity, use a Transfer to queue (p. 441) block to check whether a queue is full (Maximum contacts in queue (p. 226)), and then route the contact accordingly.

The Transfer to queue (p. 441) block checks the Maximum contacts in queue (p. 226). If no limit is set, the queue is limited to the number of total concurrent contacts for the following quotas:

- Active tasks per instance
- Concurrent calls per instance
- Concurrent chats per instance

Set the hours of operation and timezone for a queue

The first thing you need to do when you set up a queue is to specify the hours of operation and timezone. The hours may be referenced in flows. For example, when routing contacts to agents, you might use the Check hours of operation (p. 353) block first, and then route the contact to the appropriate queue.

How many hours of operation can I create? To view your quota of Hours of operation per instance, open the Service Quotas console at https://console.aws.amazon.com/servicequotas/.

To set the hours of operation and timezone for a queue

1. On the navigation menu, choose Routing, Hours of operation.
2. To create a template, choose Add new hours and enter a name and a description.
3. For Time zone, select a value.
4. For Add new, set new hours.
5. Choose Save.
6. Now you can specify these the hours of operation when you create a queue (p. 224), and check them in the Check hours of operation (p. 353) block.

How to specify midnight

To specify midnight, enter 12:00AM.

For example, if you want to set your hours to 10:00AM to midnight, you would enter: 10:00AM to 12:00AM. Your call center would be open for 14 hours. Here's the math:

- 10:00AM-12:00PM = 2 hours
- 12:00PM-12:00AM = 12 hours
- Total = 14 hours

Examples

Schedule for 24x7

<table>
<thead>
<tr>
<th>Day</th>
<th>Start</th>
<th>End</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sunday</td>
<td>12:00 AM</td>
<td>12:00 AM</td>
</tr>
<tr>
<td>Monday</td>
<td>12:00 AM</td>
<td>12:00 AM</td>
</tr>
<tr>
<td>Tuesday</td>
<td>12:00 AM</td>
<td>12:00 AM</td>
</tr>
<tr>
<td>Wednesday</td>
<td>12:00 AM</td>
<td>12:00 AM</td>
</tr>
<tr>
<td>Thursday</td>
<td>12:00 AM</td>
<td>12:00 AM</td>
</tr>
<tr>
<td>Friday</td>
<td>12:00 AM</td>
<td>12:00 AM</td>
</tr>
<tr>
<td>Saturday</td>
<td>12:00 AM</td>
<td>12:00 AM</td>
</tr>
</tbody>
</table>

Schedule for Monday to Friday 9:00 AM to 5:00 PM

Remove Sunday and Saturday from the schedule.

The final schedule looks like this:
Add lunch and other breaks

If your entire contact center were to close for lunch from 12-1, for example, then you'd enter hours to specify that, as in the following image:

In most contact centers breaks are staggered. While some agents are at lunch, for example, others are still available to handle contacts. Instead of specifying this in the hours of operation, you add custom agent statuses (p. 234) that appear in the agent’s Contact Control Panel (CCP).

For example, you might create a custom status named Lunch. When the agent goes to lunch, they change their status in the CCP from Available to Lunch. During this time, no contacts are routed to them. When they return from lunch and are ready to take contacts again, they change their status back to Available.

Supervisors can change an agent’s status using the real-time metrics report.

For more information, see these topics:

- Add custom agent status (p. 234)
- About agent status (p. 1078)
- Change the “Agent activity” status in a real-time metrics report (p. 1015)

What happens during daylight saving time

Amazon Connect uses the timezone to determine whether daylight saving time is in effect for the queues, and adjusts automatically for all timezones that observe daylight saving time. When a contact comes in, Amazon Connect looks at the hours and timezone to determine whether the contact can be routed to the given queue.

Important
Eastern Standard Time (EST) is used when observing standard time. It is five hours behind Coordinated Universal Time (UTC). Eastern Daylight Time (EDT) is used when observing daylight saving time. It is four hours behind Coordinated Universal Time (UTC).

Unlike EST, Central European Time (CET) observes daylight savings time.

Use the Check Hours of Operation block

At the start of your flows, use the Check hours of operation (p. 353) block to determine whether your contact center is open, and to branch accordingly.
Create a routing profile

While queues are a ‘waiting area’ for contacts, a routing profile links queues to agents. When you create a routing profile, you specify which queues will be in it. You can also specify whether one queue should be prioritized over another.

Each agent is assigned to one routing profile. For more information about routing profiles and queues, see Routing profiles (p. 21).

How many routing profiles can I create? To view your quota of Routing profiles per instance, open the Service Quotas console at https://console.aws.amazon.com/servicequotas/.

To create a routing profile

1. On the navigation menu, choose Users, Routing profiles, Add new profile.
2. Enter or choose the following information:

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Enter a searchable display name.</td>
</tr>
<tr>
<td>Description</td>
<td>Describe what the routing profile is for.</td>
</tr>
<tr>
<td>Set channels and concurrency</td>
<td>Choose whether agents assigned to this profile handle contacts using voice, chat, or both. Also specify whether the agent can receive tasks.</td>
</tr>
<tr>
<td></td>
<td>For Chat, specify how many chat conversations that an agent can have simultaneously, up to 10.</td>
</tr>
<tr>
<td></td>
<td>For Task, specify how many tasks an agent can have simultaneously, up to 10.</td>
</tr>
<tr>
<td></td>
<td>For more on setting this option, see Tips for setting up channels and concurrency (p. 231).</td>
</tr>
<tr>
<td></td>
<td>For information about how Amazon Connect routes contacts when multiple channels are in use, see How routing works with multiple channels (p. 223).</td>
</tr>
</tbody>
</table>

3. Under Routing profile queues, enter the following information:
<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Use the dropdown menu to choose a queue you've already set up. You can add multiple queues to a routing profile.</td>
</tr>
<tr>
<td>Channels</td>
<td>Choose whether the queue is for chat, voice, task, or all three.</td>
</tr>
<tr>
<td></td>
<td><strong>Important</strong></td>
</tr>
<tr>
<td></td>
<td>The channel that you specify here must also be specified under <strong>Set channels and concurrency</strong>.</td>
</tr>
<tr>
<td></td>
<td>If it isn't, contacts from that channel won't be routed to agents.</td>
</tr>
<tr>
<td>Priority</td>
<td>Specify the order in which contacts are to be handled for that queue. For example, a contact in a queue with a priority of 2 would be a lower priority than a contact in a queue with a priority of 1.</td>
</tr>
<tr>
<td>Delay (in seconds)</td>
<td>Enter the minimum amount of time a contact should be in the queue before they are routed to an available agent.</td>
</tr>
<tr>
<td></td>
<td>To learn more about how Priority and Delay work together, see <strong>Queues: priority and delay (p. 24)</strong>.</td>
</tr>
<tr>
<td>Default outbound queue</td>
<td>Choose a queue to be associated with outbound calls placed by the agents.</td>
</tr>
</tbody>
</table>

4. Choose **Add new profile**.

**Tips for setting up channels and concurrency**

- Use **Set channels and concurrency** to toggle on and off whether agents assigned to a profile get voice, chat, and task contacts.

  For example, there are 20 queues assigned to a profile. All of the queues are enabled for voice, chat, and task. By removing the **Voice** option at the routing profile level, you can stop all voice calls to these agents, across all queues in the profile. When you want to restart voice contacts for these agents again, select **Voice**.

- For each queue in the profile, choose whether it's for voice, chat, task, or all three.
If you want a queue to handle voice, chat, and task, but want to assign a different priority to each channel, add the queue twice. For example, in the following image, voice is priority 1 but chat and task are priority 2.

<table>
<thead>
<tr>
<th>Name</th>
<th>Channels</th>
<th>Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>BasicQueue</td>
<td>✅ Voice</td>
<td>1</td>
</tr>
<tr>
<td>BasicQueue</td>
<td>Chat</td>
<td></td>
</tr>
<tr>
<td>BasicQueue</td>
<td>Task</td>
<td>2</td>
</tr>
<tr>
<td>BasicQueue</td>
<td>✅ Voice</td>
<td></td>
</tr>
<tr>
<td>BasicQueue</td>
<td>Chat</td>
<td></td>
</tr>
</tbody>
</table>

Delete a routing profile

Currently it's not possible to delete a routing profile. To take a routing profile out of use, detach it from the agents.

To indicate that the routing profile is no longer in use, we recommend renaming it with a `zz_` prefix, for example, `zz_Sales`.

Set up queue-based (skills-based) routing

Here's an overview of the steps to set up queue-based routing:

- Create the queues (p. 224), for example, one for each skill you want to use for routing.
- Create the routing profiles (p. 230):
  - Specify the channels supported by this routing profile.
  - Specify the queues: the channel, priority, and delay.
- Configure agent settings (p. 235) to assign the routing profiles to them.

When you create your flows (p. 448), you'll add the queues to them. If a contact chooses to speak to an agent in Spanish, for example, they will be routed to the Spanish Reservations queue.

For information about how routing works, and queue-based routing, see these topics:

- How routing works with multiple channels (p. 223)
- Queue-based routing (p. 26)

Set up agents

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

Contents

- Set up agent hierarchies (p. 233)
- Add custom agent status (p. 234)
Set up agent hierarchies

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

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

- Removing agents from a level affects historical reporting.
- When you use the `Restrict contact access` permission, you can restrict contact search results based on the agent's hierarchy. For more information, see Manage who can search for contacts and access detailed information (p. 938).

Required permissions

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

**Note**

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

Create a new agent hierarchy

**How many hierarchy groups can I create?** To view your quota of User hierarchy groups per instance, open the Service Quotas console at https://console.aws.amazon.com/servicequotas/.

1. Log in to the Amazon Connect console with an Admin account, or an account assigned to a security profile that has permissions to create agent hierarchies.
2. Choose Users, Agent hierarchy.
3. Enter a name and choose + to create the first level of your hierarchy.
4. Choose + to add more levels to your hierarchy.
5. Choose Save to apply the changes, or Cancel to undo them.
Tip
If the Save button isn't active, you don't have permissions to create or edit the agent hierarchy.

Add groups, teams, and agents to a hierarchy

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

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

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

Add custom agent status

Agents are responsible for setting their status in the Contact Control Panel (CCP). In fact, the only time an agent's status changes is when they manually change it in the CCP, or when their supervisor changes it (p. 1015) in a real-time metrics report.

Amazon Connect provides two default status values:

- Available
- Offline

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

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

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

To add a new agent status

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

To change the order that the status values appear in the CCP, click the waffle next to the status value and drag it to the order you want.
Configure agent settings: routing profile, phone type, and auto-accept calls

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

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

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

To configure agent settings

1. On the left navigation menu, go to Users, User management.
2. Choose the user you want to configure, then choose Edit.
3. Assign a routing profile (p. 230) to them. You can only assign one.
4. Assign the Agent security profile, unless you’ve created custom security profiles.
5. Under Phone Type choose whether the agent is using a desk phone or soft phone.
Enable auto-accept call

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

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

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

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

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

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

**Enable auto-accept call for agents**

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

**How long until the call is connected to the agent?**

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

There isn't an option for increasing the amount of time before a call is automatically accepted.

Auto-Accept Call doesn't work for callbacks.

**Enable auto-accept call for existing agents**

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

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

1. Log in to the Amazon Connect console with an Admin account, or an account assigned to a security profile that has permissions to create or edit users.
2. On the left navigation menu, choose **Users, User management**.
3. In the list of users, select an agent, and then choose **Edit**.
4. On the Edit users page, under **Phone Type**, select the **Auto-Accept Call** check box.
5. Choose Save.
6. Repeat these steps for each user that you want to edit.

**Bulk upload new users with auto-accept call enabled**

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

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

**(Optional) Verify the change in CCP logs**

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

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

```json
"type": "agent",
"initial": false,
"softphoneMediaInfo": {
  "callType": "audio_only",
  "autoAccept": true
}
```

**CCPv1: Log out agents automatically when they close their CCP**

**Important**

This topic only applies to customers who use CCPv1. The URL for CCPv1 ends with /ccp#.

When using the default Amazon Connect CCPv1, closing the CCP window or logging out doesn't automatically change an agent's status from **Available** to **Offline**. An agent must change their status manually to **Offline** and then log out.

To change this behavior, you can do one of the following:
• Use CCPv2. When agents log out, their status is automatically switched to **Offline**. However, note that CCPv2 doesn't automatically switch agents to **Offline** if they only close the window. For instructions on upgrading to CCPv2, see *My CCP URL ends with /ccp#* (p. 280).

• Create a custom CCP. See *Amazon Connect Streams API* and the **Agent API**

• Use the following steps in this topic to update your CCP so it switches agents to **Offline** and logs out agents automatically when they close the CCP window.

### Step 1: Set up the Streams API

For instructions, see the *Amazon Connect Streams Documentation*.

### Step 2: Update your application code to change the agent state

Integrate the following Streams API calls into your web application:

1. Use `connect.agent()` to subscribe to agent events and retrieve agent objects.

   ```javascript
   let mAgent;

   connect.agent(function(agent) {
      mAgent = agent;
   });
   ```

2. Call `agent.setState()` in the onbeforeunload event handler to change the agent state. The agent is marked **Offline** after executing the `beforeunload` function.

   ```javascript
   window.addEventListener("beforeunload", function(event) {
      if (mAgent != null) {
         let states = mAgent.getAgentStates();
         // "states" is an array of changeable states. You can filter the desired state to change by name.
         let offlineState = states.filter(state => state.name === "Offline")[0];

         // Change agent state
         mAgent.setState(offlineState, {
            success: function() {
               console.log("SetState succeeded");
            },
            failure: function() {
               console.log("SetState failed");
            }
         });
      }
   });
   ```

### Step 3: Design for errors

If an API call fails to execute the first time and a contact takes the error branch of your flow, there's a chance that an agent's state won't change as expected. Be sure to include logic to account for this possibility. For example, you could delay the page unload while the API call is tried again. Or, you could pop a "Call failed" warning message in a modal dialog before the page unload.
Set up agents to assign tasks to themselves

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

**Step 1: Create a quick connect for the agent**

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

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

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

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

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

**Set up tasks**

1. **Update your agent's routing profile (p. 230)** so they can manage and create tasks.
   - When you add tasks to their routing profile, you can specify that up to 10 tasks be assigned to them at a time.
2. Create quick connects (p. 470) so that agents can create/assign tasks to themselves, or other agents or shared queues.

3. Update your flows to route tasks.

4. Optionally, create task templates (p. 240) to make it easy for agents to create tasks. All the fields they need to create a task are defined for them.

5. Optionally, integrate with external applications (p. 747) and set up rules to automatically create tasks (p. 549) based on pre-defined conditions.

6. By default all agents can create tasks. If you want to block permissions (p. 245) for some agents, assign the Contact Control Panel, Restrict task creation permission in their security profile.

Create task templates

Task templates make it easy for agents to capture the right information to create and complete a task (p. 16). All the fields they need to create given type of task are provided for them.

Important things to know before you create your first template

- When you publish your first template, your agents will be prompted to select a template when they create a new task. Agents must select one of the templates you have published.
• If you want to return to the standard task experience and not require agents to select a template, on the Task templates page, use the Disable/Enable toggle to disable all templates you published.
• Verify your Amazon Connect account has permissions to create task templates (p. 245).
• Review the list of quotas for task templates, such as the Task templates per instance and Task template customized fields per instance. See Amazon Connect service quotas (p. 1325).

How to create a task template

Step 1: Name the template
1. Log in to the Amazon Connect console with an Admin account, or an account assigned to a security profile that has permissions to create task templates (p. 245).
2. In the left navigation menu, choose Channels, Task templates.
4. On the Create new template page, in the Template name box, enter the name that will be displayed your agents.
5. In the Description box, describe the purpose of the template. This information is not displayed to agents; it’s for your own use.

Step 2: Add fields, task assignment, and schedule
1. In the Fields section, choose the Add field dropdown, and then select the type of field you want to add to your template.
2. Use the up and down arrows as needed to change the order the field appears on the template.
3. In the Validation and permissions section, choose whether the field is required to be populated by the agent when they create a task, or add a default value to pre-populate the field when the agent opens the template.

The following image shows what this section looks like for a field that is type Email.
4. In the **Task assignment** section, choose whether agents can view and edit a task assignment when they creating the task. Or, assign a default value, which is a published flow that runs after the agent chooses **Create** to create the task. Agents don't see the name of the flow on the CCP.

   **Note**
   Only published flows are listed in the **Default value** dropdown.

5. In the **Task schedule** section, choose whether you want agents to be able to schedule a future start date and time for tasks.

**Step 3: Publish**

After you configure your template, choose **Publish** to create it and make it visible to your agents.

**Important**
- If this is your first template, when you choose **Publish**, agents are automatically required to select a task template when they create a task.
- If you want to maintain the standard task experience without selectable templates, disable all templates.

**What your agents experience**

After you publish a template, agents are required to select a template to create a task.
For example, the following image shows two templates have published: **Customer Email Template** and **Billing Dispute**.


In the Contact Control Panel, when agents choose **Create task**, they must choose one of the templates: **Billing Dispute** or **Customer Email Template**.


Let's assume the agent chooses **Customer Email Template**. The following image shows the fields the agent must complete in order to create a task. Notice that there is no option for the agent to assign the task; this template has **Task assignment** set to a default value.
"No data" message in the Assign to dropdown

Let's say that in the Task assignment section, you choose to allow agents to assign the task to another agent. To set up for this scenario, you must create a quick connect for the destination agent so it appears in the dropdown list of choices, as shown in the following image. For instructions about creating a quick connect for an agent, see Test tasks (p. 142).

If no quick connects exist, then the message No data appears when you choose the Assign to dropdown menu, as shown in the following image:
Security profile permissions for task templates

Assign the Routing, Task templates permissions to enable a user to create task templates.

For information about how add more permissions to an existing security profile, see Update security profiles (p. 797).

By default, the Admin security profile already has permissions to perform all task activities.

Block agents from creating tasks

To block agents from being able to create tasks, assign the Contact Control Panel (CCP), Restrict task creation permission. By default this permissions is unchecked, which means all agents can create tasks.

For information about how add more permissions to an existing security profile, see Update security profiles (p. 797).

By default, the Admin security profile already has permissions to perform all tasks activities.

Set up your customer's chat experience

You can provide a chat experience to your customers by using one of the following methods:

- Add a chat user interface to your website (p. 246).
- Download and customize our open source example (p. 255).
- Customize your solution using Amazon Connect APIs (p. 256). We recommend starting with the Amazon Connect ChatJS open source library when customizing your own chat experiences. For more information, see the Amazon Connect ChatJS repo on Github.

More resources to customize the chat experience

- Interactive messages provide customers with a prompt and pre-configured display options that they can select from. These messages are powered by Amazon Lex and configured through Amazon Lex.
using a Lambda. For instructions about how to add interactive messages through Amazon Lex, see this blog: Set up interactive messages for your Amazon Connect chatbot.

Amazon Connect supports the following templates: a list picker and a time picker. For more information, see Add interactive messages to chat (p. 580).

- Enable Apple Messages for Business (p. 261)
- Amazon Connect Service API Documentation, especially the StartChatContact API.
- Amazon Connect Participant Service API.
- Amazon Connect Chat SDK and Sample Implementations
- Amazon Connect Streams. Use to integrate your existing apps with Amazon Connect. You can embed the Contact Control Panel (CCP) components into your app.

Add a chat user interface to your website

To support your customers through chat, you can add a chat widget to your website that is hosted by Amazon Connect. You can configure the chat widget in the Amazon Connect console: customize the font and colors, and secure the widget so that it can be launched only from your website. As a result, you will have a short code snippet that you add to your website.

Because Amazon Connect hosts the widget, it ensures that the latest version is always live on your website.

Tip
Use of the chat widget is subject to default service quotas, such as the number of required characters for each message. Before launching your chat widget into production, make sure that your service quotas are set for your organization's needs. For more information, see Amazon Connect service quotas (p. 1325).

Supported browsers

The pre-built chat widget supports the following browser versions and higher:

- Google Chrome 85.0
- Safari 13.1
- Microsoft Edge version 85
- Mozilla Firefox 81.0

The chat widget supports browser notifications for desktop devices. For more information, see Browser notifications (p. 256).

Step 1: Customize your chat widget

In this step, you customize the experience of the chat widget for your customers.

1. Log in to your contact center at https://instance name.my.connect.aws/.. Choose Customize chat widget.
2. For **Typeface**, use the dropdown to choose the font for the text in the chat widget.

3. For **Chat widget**, choose the colors for the widget header, chat message bubbles, and launch and minimize icons by entering hex values (**HTML color codes**) that align the chat widget with your website branding.

   As you choose colors, the chat preview updates automatically so that you can see what your widget will look like.
4. For **Minimize chat icon**, select the colors for the icon that customers will choose or tap to minimize the chat widget.

5. For **Open chat icon**, select the colors for the icon that customers will choose or tap to start a chat with your contact center.

6. For **Select flow**, choose the inbound flow that initiates when a customer starts a chat.

7. Choose **Next**.

**Step 2: Specify the website domains where you expect to display the chat widget**

1. Enter the website domains where you want to place the chat widget. Chat loads only on websites that you select in this step.

   Choose **Add domain** to add up to five domains.
Important

- Double-check that your website URLs are valid and does not contain errors. Include the full URL starting with https://.
- We recommend using https:// for your production websites and applications.

2. Under Add security for your chat widget, we recommend choosing Yes, and working with your website administrator to set up your web servers to issue JSON Web Tokens (JWTs) for new chat requests. This provides you more control when initiating new chats, including the ability to verify that chat requests sent to Amazon Connect are from authenticated users.

Choosing Yes results in the following:

- Amazon Connect provides a 44-character security key on the next page that you can use to create JWTs.
- Amazon Connect adds a callback function within the chat widget embed script that checks for a JWT when a chat is initiated.

You must implement the callback function in the embedded snippet, as shown in the following example.

```javascript
amazon_connect('authenticate', function(callback) {
  window.fetch('/token').then(res => {
    res.json().then(data => {
      callback(data.data);
    });
  });
});
```
If you choose this option, in the next step you'll get a security key for all chat requests initiated on your websites. Ask your website administrator to set up your web servers to issue JWTs using this security key.

3. Choose Save.

**Step 3: Confirm and copy chat widget code and security keys**

In this step, you confirm your selections and copy the code for the chat widget and embed it in your website. If you chose to use JWTs in Step 2 (p. 248), you can also copy the secret keys for creating them.

**Security key**

Use this 44-character security key to generate JSON web tokens from your web server. You can also update, or rotate, keys if you need to change them. When you do this, Amazon Connect provides you with a new key and maintains the previous key until you have a chance to replace it. After you have the new key deployed, you can come back to Amazon Connect and delete the previous key.

When your customers interact with the start chat icon on your website, the chat widget requests your web server for a JWT. When this JWT is provided, the widget will then include it as part of the end customer’s chat request to Amazon Connect. Amazon Connect then uses the secret key to decrypt the token. If successful, this confirms that the JWT was issued by your web server and Amazon Connect routes the chat request to your contact center agents.

**JSON Web Token specifics**

- **Algorithm**: HS256
- **Claims**:
  - sub: widgetId
  - iat: *Issued At Time.
  - exp: *Expiration (10 minute maximum).

* For information about the date format, see the following Internet Engineering Task Force (IETF) document: JSON Web Token (JWT), page 5.

The following code snippet shows an example of how to generate a JWT in Python:

```python
payload = {
```
Chat widget script

The following image shows an example of the JavaScript that you embed on the websites where you want customers to chat with agents. This script displays the widget in the bottom-right corner of your website.

Please follow these two steps to deploy your customized chat widget.

1. An example of where to find your widgetId.

When your website loads, customers first see the **Start Chat** icon. When they choose this icon, the chat widget opens and customers are able to send a message to your agents.

To make changes to the chat widget at any time, choose **Edit**.

**Note**
Saved changes update the customer experience in a few minutes. Confirm your widget configuration before saving it.
To make changes to widget icons on the website, you will receive a new code snippet to update your website directly.

More customizations for your chat widget

See the following topics for more you can do to customize the chat experience:

- Pass the customer display name when a chat initializes (p. 252)
- Pass contact attributes when a chat initializes (p. 254)

Pass the customer display name when a chat initializes

To deliver a more personalized experience for both your customers and agents, you can customize the Amazon Connect chat widget to pass the customer display name during contact initialization. The name is visible to both the customer and agent throughout the chat interaction. This display name is recorded in the chat transcript.
1. How the customer display name may appear to the customer using the chat user interface.
2. How the customer display name may appear to the agent using the CCP.

How to pass a customer display name in the chat widget

To pass a customer display name, implement your callback function in the snippet. Amazon Connect retrieves the display name automatically.

1. Complete the steps in Add a chat user interface to your website (p. 246), if you haven't already.
2. Augment your existing widget snippet to add a `customerDisplayName` callback. It might look something like the following example:

```javascript
amazon_connect('customerDisplayName', function(callback) {
    const displayName = 'Jane Doe';
    callback(displayName);
});
```

The important thing is that the name is passed to `callback(name)`.

Things you need to know

- Only one `customerDisplayName` function can exist at a time.
- The customer display name must follow the limitations set by the `StartChatConnect API`. That is, the name must be a string between 1 and 256 characters.
- An empty string, null, or undefined is invalid input for the display name. To protect against accidentally passing of these inputs, the widget logs an error, `Invalid customerDisplayName provided`, in the browser console, and then starts the chat with the default display name, `Customer`.
- Because the snippet is in the front end of your website, do not pass sensitive data as the display name. Be sure to follow the appropriate security practices to keep your data safe and protect against attacks and bad actors.
Pass contact attributes when a chat initializes

You can use contact attributes (p. 519) to capture information about the contact who is using the chat widget. Then, you can display that information to the agent through the Contact Control Panel (CCP), or use it elsewhere in the flow.

For example, you can customize your flow to say the name of the customer in your welcome message. Or, you can use attributes specific to your business, such as account/member IDs, customer identifiers like names and emails, or other metadata associated with a contact.

How to pass contact attributes into the chat widget

1. Enable security in the chat widget as described in Add a chat user interface to your website (p. 246), if you haven’t already:
   a. In Step 2, under Add security for your chat widget, choose Yes.
   b. In Step 3, use the security key to generate JSON web tokens.
2. Add the contact attributes to the payload of your JWT as an attributes claim.

Following is an example of how you might generate a JWT with contact attributes in Python:

```python
import jwt

CONNECT_SECRET = "your-securely-stored-jwt-secret"

payload = {
    'sub': 'widget-id',
    'iat': datetime.datetime.utcnow(),
    'exp': datetime.datetime.utcnow() + datetime.timedelta(seconds=500),
    'attributes': {'name': 'Jane', 'memberID': '123456789', 'email': 'Jane@example.com',
                   'isPremiumUser': 'true', 'age': '45'}
}

header = {
    'typ': 'JWT',
    'alg': 'HS256'
}

encoded_token = jwt.encode((payload), CONNECT_SECRET, algorithm="HS256",
                           headers=header)
```

In the payload, you must create a string key attributes (as-is, all lowercase), with an object as its value. That object must have string-to-string key-value pairs. If anything other than a string is passed in any one of the attributes, the chat will fail to start.

The contact attributes must follow the limitations set by the StartChatConnect API:

- Keys must have a minimum length of 1
- Values can have a minimum length of 0

Things you need to know

- The chat widget has a 6144 bytes limit for the entire encoded token. Because JavaScript uses UTF-16 encoding, 2 bytes are used per character, so the maximum size of the encoded_token should be around 3000 characters.
- The encoded_token should be passed in to callback(data). The authenticate snippet does not need any additional changes. For example:
Add a chat user interface to your website

```javascript
amazon_connect('authenticate', function(callback) {
  window.fetch('/token').then(res => {
    res.json().then(data => {
      callback(data.data);
    });
  });
});
```

- Using a JWT to pass contact attributes ensures the integrity of the data. If you safeguard the shared secret and follow appropriate security practices, you can help ensure that the data cannot be manipulated by a bad actor.

- Contact attributes are only encoded in the JWT, not encrypted, so it's possible to decode and read the attributes. Sensitive data should not be passed in the token.

- If you want to test the chat experience with the simulated chat experience (p. 140) and include contact attributes, be sure to enclose both the key and value in quotes, as shown in the following image:

![Test Settings](image)

**Download and customize our open source example**

You can further customize the chat experience customers use to interact with agents. Use the Amazon Connect open source library on GitHub. It's a platform to help you get started quickly. Here's how it works:

- The GitHub repository links to a CloudFormation template, which starts the Amazon API Gateway endpoint that initiates a Lambda function. You can use this template as an example.

- After you create the AWS CloudFormation stack, you can call this API from your app, import the pre-built chat widget, pass the response to the widget, and start chatting.

For more information about customizing the chat experience, see:

- Amazon Connect Service API Documentation, especially the StartChatConnect API.
- Amazon Connect Participant Service API.
- Amazon Connect Streams. Use to integrate your existing apps with Amazon Connect. You can embed the Contact Control Panel (CCP) components into your app.
- Amazon Connect Chat SDK and Sample Implementations
Start chats using your own applications

You can use Amazon Connect APIs to start chats in your own applications.

The `StartChatConnect` API is used to start the chat.

When you explore the chat experience for the first time, you'll notice that chats aren't counted in the `Contacts Incoming` metric in your historical metrics report. This is because the initiation method for the chat in the contact record is API.

After a chat is transferred to an agent, the `Contacts Incoming` metric is incremented. The contact record for the transfer no longer increments the API, but it does increment `Contacts Incoming`.

Browser notifications

The chat widget supports browser notifications for your customers through their desktop devices. Specifically, your customers will receive a notification through their web browser when they receive a new message, but are not active on the webpage that contains the chat window. When your customers click or tap this notification, they are automatically redirected to the webpage containing the chat window. Your customers can enable or disable notifications at the start of each chat conversation.

The following image shows an example of the notification banner that customers receive when they are not on the webpage that contains the chat window. The banner tells your customers that they have a new message, and it displays the name of the website.

Customers also receive a notification icon—a red dot—on the chat widget when it is minimized. The following image shows an image of the notification icon that customers receive when their chat window is minimized.
Both of these features are automatically included in the chat widget. You don’t need to perform any steps to make them available to your customers.

Your customers receive a pop-up to allow/deny notification when they initiate a chat and have not yet allowed notifications from your website or domain. After they grant notification permissions, they start receiving browser notifications for any message or attachment sent by the agent when they are not on the webpage with the chat window. This behavior applies even if you've already implemented the chat widget.

**How to test**

1. After you allow notifications as a test customer and the agent is connected to the chat, minimize your chat window and then open a new browser instance so you aren't on the webpage that contains the chat window.
2. Send a message from the agent window.
3. As the test customer, you'll see the notification banner.
4. Choose or tap the notification banner. You'll automatically go to the webpage that contains the chat window.
5. Because you minimized your chat window earlier, you will also see a notification icon—a red dot—on the chat widget.

If you can't see the browser notification, check the following:

- You're using a supported browser (p. 246).
- The notification permission is allowed/enabled on your browser for the webpage with chat window.
- The agent (or you from your agent chat session) has sent a new message/attachment while you're on a webpage that is different from the one that contains the chat window. For the notification icon—a red dot—on the widget to be visible, minimize your chat window.
- Notifications from the browser are not snoozed (temporarily dismissed).

**Troubleshooting issues with your chat widget**

If you see the following **Something went wrong** error message when loading your chat widget, open the browser tools to view the error logs.
Following are common issues that cause this error.

400 Invalid request

If the logs mention a 400 invalid request, there are a few possible causes:

- Your chat widget is not being served on an allowed domain. You must specifically state the domains where you will host your widget.
- The request to the endpoint is not properly formatted. This usually occurs only if the contents of the embed snippet have been modified.

401 Unauthorized

If the logs mention a 401 unauthorized, this is a problem with the JSON Web Token (JWT) authentication. If you opt your chat widget into JWT authentication (p. 250), you must implement the callback function in the embedded snippet, as shown in the following example.

```javascript
amazon_connect('authenticate', function(callback) {
    window.fetch('/token').then(res => {
        res.json().then(data => {
            callback(data.data);
        });
    });
});
```

If you have implemented the callback already, the following scenarios may still cause a 401:

- Invalid signature
- Expired token

404 Not found

A 404 status code indicates that your widgetId cannot be found. Verify that your snippet is exactly how it was copied from the Amazon Connect website, and none of the identifiers have changed.

If the identifiers have not changed and you are seeing a 404, contact AWS Support.
Enable text formatting

500 Internal server error

This can be caused by your service-linked role not having the required permissions to start chat. This happens if your Amazon Connect instance was created before October 2018 because you don't have service-linked roles set up.

Solution: Add the connect:* policy on the role that is associated with your Amazon Connect instance. For more information, see Use service-linked roles for Amazon Connect (p. 1228).

If your service-linked role has the correct permissions, contact AWS Support.

Enable text formatting for your customer's chat experience

With Amazon Connect message formatting, you can enable your customers and agents to quickly add structure and clarity to their chat messages.

You can provide the following types of formatting on both the chat user interface and the agent application using markdown:

- Bold
- Italic
- Bulleted list
- Numbered list
- Hyperlinks
- Emoji
- Attachments. To enable attachments, follow Enable attachments to share files using chat (p. 134).

How to enable message formatting

1. When you create a new chat user interface (p. 246), rich text formatting is enabled out of the box. No additional configuration is required.
2. To add text formatting capabilities to an existing chat user interface (p. 246), update the chat widget code (p. 246) with the following code that is highlighted in bold:

```javascript
(function(w, d, x, id){
  s=d.createElement('script');
  s.src='https://d3xxxx.cloudfront.net/amazon-connect-chat-interface-client.js';
  s.async=1;
  s.id=id;
  d.getElementsByTagName('head')[0].appendChild(s);
  w[x] = w[x] || function() { (w[x].ac = w[x].ac || []).push(arguments) };
})(window, document, 'amazon_connect', 'widget-id');

amazon_connect('styles', { openChat: { color: 'white', backgroundColor: '#123456' }, closeChat: { color: 'white', backgroundColor: '#123456' } });
amazon_connect('snippetId', 'snippet-id');
amazon_connect('supportedMessagingContentTypes', [ 'text/plain', 'text/markdown' ]);}
```

The code that is highlighted in red is set to the correct values when you get the snippet from the Amazon Connect console. The only content you choose to add or remove is the last line in bold for supportedMessagingContentTypes.
3. To add text formatting capabilities to your own custom chat user interface (for example, Chat Interface or your own UI solution on top of ChatJS), follow these steps:

   a. Call the StartChatContact API. When calling StartChatContact, add the SupportedMessagingContentTypes parameter as shown in bold in the following example:

```
// Amazon Connect StartChatContact API
{
   "Attributes": {
      "string": "string"
   },
   "ClientToken": "string",
   "ContactFlowId": "your flow ID",
   "InitialMessage": {
      "Content": "string",
      "ContentType": "string"
   },
   "InstanceId": "your instance ID",
   "ParticipantDetails": {
      "DisplayName": "string"
   }
   // optional
   "SupportedMessagingContentTypes": [ "text/plain", "text/markdown" ]
}
```

   b. Import chatjs as an object, as shown in the following example:

```
import "amazon-connect-chatjs";
this.session = connect.ChatSession.create({
   ...
});
this.session.sendMessage({
   message: "message-in-markdown-format",
   contentType: "text/markdown"
});
```

   If you don't use ChatJS, see these topics for information about sending markdown text through Amazon Connect APIs: StartChatContact and SendMessage.

   c. Send messages with markdown. See the previous code snippet for importing chatjs as an object for an example of how to send messages. You can use simple markdown for formatting text in chats. If you're already using chatjs today to send plaintext messages you can modify your existing logic to call SendMessage with text/markdown as contentType instead of text/plain when you want to send markdown messages. Be sure to update the sendMessage parameter to have the markdown format of your messages. For more information, see Markdown Guide Basic Syntax.

   d. Implement your own logic in the UI package to render markdown messages in the input area and chat transcript. If you use React, you can use react-markdown as a reference.

   **Note**
   Text formatting capabilities appear to your agent only if the feature has been enabled for your customer in the chat user interface. If text formatting is not supported or enabled on the customer chat user interface, the agent will not have the ability to compose and send messages with text formatting.
Enable Apple Messages for Business

Your customers can engage directly with your contact center from within their Messages application on their iPhone, iPad, and Mac.

When you enable Apple Messages for Business, your customers can find answers to their questions and request help from agents to resolve issues — all while using the familiar Messages application they use every day to chat with friends and family. Any time customers use Search, Safari, Spotlight, Siri, or Maps to call your registered phone number, they will be provided with the option to chat with your contact center.

Apple Messages for Business integration with Amazon Connect enables you to use the same configuration, analytics, routing, and agent UI that you already use for Amazon Connect Chat (p. 13).

Step 1: Register with Apple

Integrate Apple Messages for Business with Amazon Connect by first registering with Apple as a brand. When you do, you’ll get a unique Apple Messages for Business Account ID, and you can then link your Apple Messages for Business account to Amazon Connect.

1. Go to the Apple Messages for Business page. In the box that says As a business, I want to connect with my customers in the Messages app, choose Get Started.
2. Create an Apple ID for your business, if you don’t already have one.

   An Apple ID is typically for the personal use of Apple services, such as storing personal content in iCloud and downloading apps from the App Store. If you have a personal Apple ID, we recommend that you create a separate one using your organization’s email address to administer Messages for Business. A separate administrative Apple ID lets you distinguish Messages for Business communications from personal Apple communications.

3. Register a profile for a new Messages for Business account by accepting Apple’s Terms of Service. We recommend creating a Commercial Messages for Business Account. You then provide business details, such as a logo and support hours.
4. Select Amazon Connect as your Messaging Service Provider. You can do this by selecting Amazon Connect from the drop-down or by entering the following URL:

   • https://messagingintegrations.connect.amazonaws.com/applebusinesschat

After you submit your application to Apple, you’ll see the status of your application at the top of your Messages for Business Account page.

For more information about registering with Apple, see the following articles on Apple’s website: Getting Started with Messages for Business and Messages for Business Policies and Best Practices.

Step 2: Gather required information

Gather the following information so you have it on hand when you open a support ticket in Step 3:

1. Apple Messages for Business Account ID: After you’ve been approved by Apple Messages for Business, you will be issued an Apple Messages for Business Account ID. For information about locating your Apple Messages for Business Account ID, see Find your Apple Messages for Business Account ID (p. 270).

   Note
   Your Apple Messages for Business Account ID is a randomized string of numbers and letters. It is not the same as your Apple ID.
2. **Apple Token**: This is a unique ID that authenticates your account. For help locating your Apple token, see Find your Apple token (p. 272).

3. **Amazon Connect instance ARN**: This is the identifier for the instance you want to link to your Apple business account. For information about locating your instance ID, see Find your Amazon Connect instance ID/ARN (p. 131).

   **Note**
   Make sure you have service-linked roles enabled for the integration.
   If your instance was created before **October 2018**, add the `connect:*` policy on the role that is associated with your Amazon Connect instance. For more information about service-linked roles, see Use service-linked roles for Amazon Connect (p. 1228).

4. **Amazon Connect flow ID**: This is the identifier for the flow you want to use for inbound chats. For information about locating your flow ID, see Find the flow ID (p. 272).

### Step 3: Link your Apple Messages for Business ID to Amazon Connect

In this step you create an Amazon Connect support ticket to link your Apple Messages for Business ID to Amazon Connect.

1. Create a [special AWS Support ticket](https://aws.amazon.com/support/) to link your Apple Messages for Business to Amazon Connect.

   If prompted, login using your AWS account.

   **Tip**
   Looking for technical support? [Open an AWS Support ticket here](https://aws.amazon.com/support/).

2. Choose **Account and billing**.

3. Use the dropdown box to choose **Account**. For **Category** choose **Activation**, and then choose **Next step: Additional information**.

4. For **Subject** enter **Apple Messages for Business Integration request**.

5. In the **Description** box, copy and paste the following template:

   ```
   Subject: Apple Messages for Business Integration request
   Body:
   Apple Messages for Business Account ID (required): enter your account ID
   Apple Token (required): enter your Apple token
   Amazon Connect Instance ARN (required): enter your instance ARN
   Amazon Connect Flow ID (required): enter your flow ID
   ```

   The following image shows an example of a completed ticket:
6. Choose Next step.

7. Choose Contact us, choose your Preferred contact language, and then choose Web as the contact method, if it's not selected by default.

8. Choose Submit.

9. AWS Support will work directly with the Amazon Connect team on your request and follow up with any additional questions.
Next steps

After Apple Messages for Business is enabled for your Amazon Connect instance, you can add Apple Messages for Business features (p. 265) to your messages. For example:

- Deflect calls with Apple's Message Suggest.
- Embed Apple Messages for Business buttons on your website.
- Add list pickers and time pickers to your messages.
- Use rich links for URLs.
- Route Apple Messages for Business messages using contact attributes.

Send a test message for Apple Messages for Business

After onboarding to the Apple Messages for Business account, use the following steps to send a test message to make sure the integration is set up properly.

Step 1: Add internal testers to your Messages for Business account

1. Sign in to Apple Business Register.
2. Choose Messages for Business Accounts and select the account to add testers.
3. Scroll down the page to Account Testing.
4. Add the Apple IDs of your internal testers.
5. When your list is complete and you are ready to begin testing, choose Send to new testers to send an instructional email to your testers.

An instructional email containing a link to your Messages for Business conversation is sent to the Apple ID email address of each tester. If a tester does not receive the email, then recheck that their email address is provided in the Account Testing section. It’s most likely that the email address is incorrect or it’s not an Apple ID. For security reasons, Apple cannot verify Apple ID email addresses.

Step 2: Test sending and receiving messages

When your testers get the instructional email, they will need to activate the link in it. After doing this, they can send messages to your agents, who can then reply from the Contact Control Panel (CCP).

Note the following:

1. Design a test to trigger all of your Apple Messages for Business features.
2. You should observe that messages sent from an iOS device arrive to your test business. Employees testing from your support agent desktop should be able to respond to these test messages.
3. Your testers may notice your brand colors are not visible in the Messages header. Brand color is not available while your account is in test mode. The colors for your brand will display correctly after your account goes online.
4. If you send the testing link to someone whose email is not listed in the Account Testing section, they will not be able to send messages.
5. If you provide a Redirect Page URL and your testers try to enter Messages for Business from an unsupported device, they will land either on a default or redirected page. You can set your Redirect Page URL in the Unsupported Devices section at the bottom of your Messages for Business account page.
To begin testing

1. Check that your testers are using a device with a supported iOS: iOS 11.3 and later, or macOS 10.13.4.
2. Ask your testers to doing the following:
   a. Use their supported devices to find the email sent to them.
   b. Open the email from the supported device, and then choose the link. It takes them to a Messages for Business conversation in the Messages app.

Troubleshoot

If you encounter any issues when sending a test message, follow these steps:

1. Confirm that you've allowlisted your email address/Apple ID as a tester in your Messages for Business account.
2. Confirm the following settings on your Apple device:
   • Go to Settings > Messages and check that iMessage is enabled.
   • Go to Settings > Messages > Send & Receive and check that the AppleID is correct and messages are allowed to receive.
3. Check that you're using a supported iOS. Apple devices running iOS 11.3 and later or macOS 10.13.4 and later support Messages for Business.
4. When you selected Amazon Connect as your MSP in your Apple Account, did you select Amazon Connect from the dropdown? Or did you enter the following URL:
   • https://messagingintegrations.connect.amazonaws.com/applebusinesschat

Add Apple Messages for Business features

Deflect calls with Apple’s Message Suggest

With Message Suggest you can allow users to choose between voice and messaging when tapping on your business phone number in Safari, Maps, Siri, or Search.

To enable Message Suggest, send an email to the Apple Messages for Business Team at registry@apple.com with the following information and Apple can set up the channel for you:

• Provide all of your primary phone numbers, including high call volume phone numbers.
• Provide phone contact hours to set customer expectations for your after-hours message.
• Provide intent, group, and body parameters to associate with each phone number.
• Provide an estimate of how many customers your agents can support per day. This can be increased or decreased depending on operational capacity.

To learn more about enabling Message Suggest, see Apple’s Message Suggest FAQs.

Embed Apple Messages for Business buttons

To embed Apple Messages for Business buttons on your website or mobile app, do the following:

1. Add Apple's Messages for Business JS (JavaScript) library to your webpage headers.
2. Add a `div` container to house the button.
3. Customize the banner, fallback support, and button color to meet your brand’s needs.

The Messages for Business button must contain the following, at minimum:

- A class attribute to specify the type of container: banner, phone, or message. For more information, see Messages for Business Button Class and Data.
- A `data-apple-business-id` attribute with the business ID you received when you registered your company with Messages for Business.

For information about how you can enable these buttons, see Apple’s documentation for Adding a Messages for Business Button to Your Website.

**Start a chat from a URL**

You can give your customers the ability to start a conversation with you from your website or an email message.

For example, customers may start a chat using a URL that you provide. When they click the URL, the system redirects them to Messages so they can send your business a text message.

You decide how and where to provide the URL. You can include it as a link in an email message, on your website, or use it as the action for a button in your app.

Use the URL `https://bcrw.apple.com/urn:biz:your-business-id`, replacing `your-business-id` with the business ID you received from Apple after registering with Messages for Business.

Following are optional query string parameters you can include in the URL:

- `biz-intent-id`: Use to specify the intention, or purpose, of the chat.
- `biz-group-id`: Use to indicate the group, department, or individuals best qualified to handle the customer’s specific question or problem.
- `body`: Use to prepopulate the message so the customer only presses **Send** to start the conversation.

For more information, see About Intent, Group, and Body Values on the Apple Documentation website.

Following is an example of what the URL might look like for a customer with a credit card question for the billing department:

```
```

**Add list pickers and time pickers**

A list picker prompts your customer to select an item, such as a product or the reason for their inquiry. A time picker prompts your customer to choose an available time slot, such as to schedule an appointment.

For information about how to set up list pickers and time pickers, see Add interactive messages to chat (p. 580).

**Use rich links for URLs**

Rich links show an inline preview of a URL that contains an image. Unlike normal URLs, customers can view the image immediately in a chat without choosing a “Tap to Load Preview” message.
To learn more about Apple Messages for Business rich links, see Rich Links on the Apple Developer website.

Requirements for using rich links in Amazon Connect

To use rich links in Amazon Connect chat messages, your URL and images must meet the following requirements:

- Your website must use Facebook Open Graph tags. For more information, see A Guide to Sharing for Webmasters.
- The image accompanying the URL must be .jpeg, .jpg, or .png.
- The website must be HTML.

Note
When you first use the rich link feature, we recommend that you send the URL in a message separate from your chat text, as shown in the following example.

Use Apple Messages for Business contact attributes in contact flows

Contact attributes enable you to store temporary information about the contact so you can use it in the flow.

For example, if you have different lines of business using Apple Messages for Business, you can branch to different flows based on the AppleBusinessChatGroup contact attribute. Or, if you want to route
Apple Messages for Business messages differently from other chat messages, you can branch based on MessagingPlatform.

For more information about contact attributes, see Use Amazon Connect contact attributes (p. 519).

Use the following contact attributes to route Apple Messages for Business customers.

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Type</th>
<th>JSON</th>
</tr>
</thead>
<tbody>
<tr>
<td>MessagingPlatform</td>
<td>The messaging platform from where the customer request originated.</td>
<td>User-defined</td>
<td>$.Attributes.MessagingPlatform</td>
</tr>
<tr>
<td></td>
<td>Exact value: <strong>AppleBusinessChat</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>AppleBusinessChatCustomerId</td>
<td>The customer’s opaque ID provided by Apple. This remains constant for the AppleID and a business. You can use this to identify if the message is from a new customer or a returning customer.</td>
<td>User-defined</td>
<td>$.Attributes.AppleBusinessChatCustomerId</td>
</tr>
<tr>
<td>AppleBusinessChatIntent</td>
<td>You can define the intent or purpose of the chat. This parameter is included in a URL that initiates a chat session in Messages when a customer chooses the Business Chat button.</td>
<td>User-defined</td>
<td>$.Attributes.AppleBusinessChatIntent</td>
</tr>
<tr>
<td>AppleBusinessChatGroup</td>
<td>You define the group which designates the department or individuals best qualified to handle the customer’s particular question or problem. This parameter is included in a URL that initiates a chat session in Messages when a customer chooses the Business Chat button.</td>
<td>User-defined</td>
<td>$.Attributes.AppleBusinessChatGroup</td>
</tr>
<tr>
<td>AppleBusinessChatLocale</td>
<td>Defines the language and AWS Region preferences that the user wants to see in their user interface. It consists of a language identifier (ISO 639-1) and a Region identifier.</td>
<td>User-defined</td>
<td>$.Attributes.AppleBusinessChatLocale</td>
</tr>
<tr>
<td>Attribute</td>
<td>Description</td>
<td>Type</td>
<td>JSON</td>
</tr>
<tr>
<td>-----------</td>
<td>-------------</td>
<td>------</td>
<td>------</td>
</tr>
<tr>
<td>(ISO 3166). For example, en_US.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Update an Apple Messages for Business integration**

You will need to update your Apple Messages for Business integration if you want to change the flow ID or other information.

1. **Open an AWS Support ticket.**
   
   If prompted, login using your AWS account.

2. **In the Use case description box,** copy and paste the following template to indicate this is an **update** request:

   **Subject:** Update Apple Messages for Business Integration request  
   **Body:**  
   Apple Messages for Business Account ID (required): *enter your current account ID change to new account ID*  
   Apple Token (required): *enter your token*  
   Amazon Connect Instance ARN (required): *enter your current instance ARN change to new instance ARN*  
   Amazon Connect Flow ID (required): *enter your current flow ID change to new flow ID*

   **Note**  
   If you update your Amazon Connect Instance ARN, you must also update your contact flow ID.

3. **Expand Contact options,** and then choose your **Preferred contact language,** and then choose **Web** as the contact method, if it's not selected by default.

   **Contact options**

   Preferred contact language  
   - [ ] English

   Contact methods  
   - Web  
     - Via email and Support Center

4. **Choose Submit.**

5. **AWS Support** will work directly with the Amazon Connect team on your request and follow up with any additional questions.
Delete an Apple Messages for Business integration

1. Open an AWS Support ticket.
   If prompted, log in by using your AWS account.
2. In the Use case description box, copy and paste the following template to indicate this is an delete request:
   
   **Subject:** Delete Apple Messages for Business Integration
   **Body:**
   - Apple Messages for Business Account ID (required): *enter your account ID*
   - Amazon Connect Instance ARN (required): *enter your instance ARN*
   - Amazon Connect Flow ID (required): *enter your flow ID*
   
   The following image shows an example of a completed ticket:

3. Expand Contact options, and then choose your Preferred contact language, and then choose Web as the contact method, if it's not selected by default.

4. Choose Submit.
5. AWS Support will work directly with the Amazon Connect team on your request and follow up with any additional questions.

Find your Apple Messages for Business Account ID

1. In Apple Business Register, navigate to Message Service Provider and click or tap Test your Messaging Service Provider connection.
2. Click or tap **Copy ID**.
Find your Apple token

- In Apple Business Register navigate to Messaging Service Provider and choose Copy Token.

![Screen capture of Apple Business Register showing Messaging Service Provider with Copy Token button highlighted](image)

Find the flow ID

The flow ID is the flow you want to use for inbound Apple Messages for Business messages. Flows define the experiences for your customer when they begin a new chat.

You can either reuse an existing flow that you're already using for voice or chat contacts, or create a new one specifically for Apple Messages for Business contacts. For instructions about creating a new inbound flow, see Create an inbound flow (p. 450).

For more information about flows, see Create Amazon Connect Flows (p. 307).

**To find your flow ID for Apple Messages for Business**

1. Log in to the Amazon Connect console with an Admin account, or an account assigned to a security profile that has permissions to view contact flows.
2. On the navigation menu, choose Routing, Contact flows.
3. Select the flow you want to use.

   **Note**
   Only choose flows that are type Flow (inbound). Apple Messages for Business doesn't work with other flow types, such as Customer queue, Customer hold, Customer whisper, etc.

4. In the flow designer, expand Show additional flow information.
5. Under the ARN (Amazon Resource Number), copy everything after contact-flow/. For example, in the following image, you would copy the underlined part.

1. Notice the **Type = Flow (Inbound)**.
2. The flow ID is at the end of the ARN. Only copy this end part.

**Manage Apple Messages for Business chats**

When you integrate Apple Messages for Business with your Amazon Connect instance, messages from Apple Messages for Business behave exactly like any other chat messages arriving to your contact center.
Enable real-time message streaming

Amazon Connect Chat provides APIs that enable you to subscribe to a real-time stream of chat messages. Using these APIs, you can:

- Stream chat messages in real time when a new chat contact is created.
- Extend the current Amazon Connect Chat functionality to support use cases like building integrations with SMS solutions and third-party messaging applications (for example, Facebook Messenger), enabling mobile push notifications, and creating analytics dashboards to monitor and track chat message activity.

How the message streaming APIs work

The Amazon Connect message streaming APIs are triggered when certain events occur within an Amazon Connect Chat contact. For example, when a customer sends a new chat message, the event sends a payload to a specified endpoint containing data about the message that was just sent. Messages are published using Amazon Simple Notification Service (Amazon SNS) to a specific endpoint.

This topic describes how to set up real-time message streaming using Amazon Connect and Amazon SNS. The steps are:

1. Use the Amazon SNS console to create a new standard SNS topic and set up the messages.
2. Call the StartChatContact API to initiate the chat contact.
3. Call the StartContactStreaming API to initiate message streaming.
4. Call the CreateParticipantConnection API to create the participant’s connection.

Step 1: Create a standard SNS topic

1. Go to the Amazon SNS console.
2. Create a SNS topic in your AWS account. In the Details section, for Type, choose Standard, enter a name for the topic, and then choose Create topic.

   **Note**
   Currently, the message streaming APIs only support standard SNS for real-time streaming of messages. They don’t support Amazon SNS FIFO (first in, first out) topics.

3. After you create the topic, its Amazon Resource Name (ARN) is displayed in the Details section. Copy the topic ARN to the clipboard. You’ll use the topic ARN in the next step, and in Step 3: Enable message streaming on the contact (p. 276).

The topic ARN looks similar to the following example:

```
```
4. Choose the Access policy tab, choose Edit, and then add a resource-based policy on the SNS topic so that Amazon Connect has permission to publish to it. Following is a sample SNS policy that you can copy and paste into the JSON editor, and then customize with your values:

```json
{
    "Version": "2012-10-17",
    "Statement": [
        {
            "Effect": "Allow",
            "Principal": {
                "Service": "connect.amazonaws.com"
            },
            "Action": "sns:Publish",
            "Resource": "YOUR_SNS_TOPIC_ARN",
            "Condition": {
                "StringEquals": {
                    "aws:SourceAccount": "YOUR_AWS_ACCOUNT_ID"
                },
                "ArnEquals": {
                    "aws:SourceArn": "YOUR_CONNECT_INSTANCE_ARN"
                }
            }
        }
    ]
}
```

**Note**
The default Access policy comes with conditions applied to sourceOwner such as:

```
"Condition": {
    "StringEquals": {
        "AWS:SourceOwner": "921772911154"
    }
}
```

Make sure you remove it and replace with SourceAccount, for example:

```
"Condition": {
    "StringEquals": {
        "aws:SourceAccount": "YOUR_AWS_ACCOUNT_ID"
    },
    "ArnEquals": {
        "aws:SourceArn": "YOUR_CONNECT_INSTANCE_ARN"
    }
}
```

This prevents a cross-service confused deputy (p. 1242) issue.

5. If you're using server-side encryption on SNS, verify you have connect.amazonaws.com permission enabled on the KMS key. Following is a sample policy:

```json
{
    "Version": "2012-10-17",
    "Id": "key-consolepolicy-3",
    "Statement": [
        {
            "Sid": "Enable IAM User Permissions",
            "Effect": "Allow",
            "Principal": {
                "AWS": "arn:aws:iam::your_accountId:root",
                "Service": "connect.amazonaws.com"
            }
        }
    ]
}
```
Enable real-time message streaming

Step 2: Initiate the chat contact

1. Call the Amazon Connect StartChatContact API to initiate the chat contact.

   For information about how to create the SDK client for calling Amazon Connect APIs, see the following topics:
   - Class AmazonConnectClientBuilder
   - Creating Service Clients

2. Keep track of ContactId and ParticipantToken from the StartChatContact response since these response attributes are used for calling other chat APIs required to enable streaming. This is described in the next steps.

Step 3: Enable message streaming on the contact

- Call StartContactStreaming to enable real-time message streaming to your SNS topic.

  - **Limits**: You can subscribe to up to two SNS topics per contact.

  - When you call StartContactStreaming, you'll need to provide the Amazon Resource Name (ARN) of the SNS topic (see Step 1: Create a standard SNS topic (p. 274)).

A single SNS topic ARN may be used across multiple AWS accounts, but it must be in the same Region as your Amazon Connect instance. For example, if your topic ARN is in us-east-2, your Amazon Connect instance must be in us-east-2.
Step 4: Create the participant connection

- Call CreateParticipantConnection with the ConnectParticipant attribute passed as true.
  - You must call CreateParticipantConnection within five minutes of creating the chat.
  - Calling CreateParticipantConnection with ConnectParticipant set to true only works if you enabled streaming in Step 2: Initiate the chat contact (p. 276) and caller participant is Customer.
  - This step (creating the participant connection) is optional if you have already successfully connected to the chat contact using WEBSOCKET.

Next steps

You are all set for working with the message streaming APIs.

1. To verify it is working, check that messages are published to the SNS topic you created. You can do this using Amazon CloudWatch metrics. For instructions, see Monitoring Amazon SNS topics using CloudWatch.

2. Because SNS has limited retention, we recommend that you set up Amazon Simple Queue Service (Amazon SQS) Amazon Kinesis, or another service to retain messages.

3. Using StopContactStreaming is optional and not required if the chats are being disconnected (p. 368) through a contact flow, or if the customer disconnects the chat. However, StopContactStreaming provides the option to stop the message streaming on the SNS topic, even if the chat is active and ongoing.

Amazon SNS payload used in message streaming

After you've enabled message streaming successfully, you may need to filter the message to send it to the intended participant: agent, customer, or all.

To filter by participant, read the specific SNS headers attribute—MessageVisibility—to determine whether the message is intended for customer-only, agent-only, or all.

- To send to the customer only: For all code that faces the customer, clients need to filter out messages intended for the customer and build the following logic for forwarding the message to them.

```plaintext
if ((MessageVisibility == CUSTOMER || MessageVisibility == ALL) && ParticipantRole != CUSTOMER )
```

- To send to the agent only:

```plaintext
if ((MessageVisibility == AGENT || MessageVisibility == ALL) && ParticipantRole != AGENT )
```

You can also leverage the filtering capability in Amazon SNS by building custom subscription filtering policies. This offloads the message filtering logic from the SNS topic subscriber to the SNS service itself.

Message attributes in the payload

Following is a description of each message attribute in the Amazon SNS payload:

- InitialContactId: The initial contact ID of the chat.
Enable real-time message streaming

- **ContactId**: The current contact ID of the chat. The InitialContactId and ContactId can differ if there has been a new agent in the chat or the queue-to-queue contact flow.
- **ParticipantRole**: The participant who sent the message.
- **InstanceId**: The Amazon Connect instance ID.
- **AccountId**: The AWS account ID.
- **Type**: Possible values: EVENT, MESSAGE.
- **ContentType**: Possible values: application/vnd.amazonaws.connect.event.typing, application/vnd.amazonaws.connect.event.participant.joined, application/vnd.amazonaws.connect.event.participant.left, application/vnd.amazonaws.connect.event.transfer.succeeded, application/vnd.amazonaws.connect.event.transfer.failed, application/vnd.amazonaws.connect.message.interactive, application/vnd.amazonaws.connect.event.chat.ended, and more.
- **MessageVisibility**: Possible values: AGENT, CUSTOMER, ALL.

**Example SNS payload**

```json
{
  "Type" : "Notification",
  "MessageId" : "ccccccccc-cccc-cccc-cccc-cccccccccccccc",
  "Message" : "\"AbsoluteTime\":\"2021-09-08T13:28:24.656Z\",\"Content\":\"help\",\"ContentType\":\"text/plain\",\"Id\":\"33333333-bead-4a44-889d-d2a86fc0f68c\",\"Type\":\"MESSAGE\",\"ParticipantId\":\"bbbbbbbb-c562-4d95-b76c-dcbca8b4b5f7\",\"Display Name\":\"Jane\",\"ParticipantRole\":\"CUSTOMER\",\"InitialContactId\":\"33333333-abc5-46db-9ad5-d772559ab556\",\"InstanceId\":\"33333333-abc5-46db-9ad5-d772559ab556\",\"AccountId\":\"999999999999\",\"ContentType\":\"text/plain\",\"InstanceId\":\"dddddddd-b64e-40c5-921b-109fd92499ae\",\"ContactId\":\"33333333-abc5-46db-9ad5-d772559ab556\",\"ParticipantRole\":\"CUSTOMER\"}
}
```

**Troubleshoot issues with message streaming**

**Messages are not getting published to SNS**

When this happens, we recommend checking the information in Step 1: Create a standard SNS topic (p. 274):

- Make sure you are using standard SNS and not Amazon SNS FIFO (first in, first out). Currently, the message streaming APIs support only standard SNS for real-time streaming of messages.
• Make sure an SNS resource-based permission is applied correctly in your account.
  • If server-side encryption is enabled, you need to give the same Amazon Connect service principal permission for encrypt and decrypt.

Flow doesn’t start

If you’re using the message streaming APIs in place of websockets, send a connection acknowledgment event; see Step 4: Create the participant connection (p. 277). This is synonymous to connecting to websocket. The flow begins only after that the connection acknowledgment event.

Call CreateParticipantConnection after StartContactStreaming to mark Customer as connected; see Step 3: Enable message streaming on the contact (p. 276). This ensures messages are sent after you have confirmed that the customer is ready to receive them.

Issue not resolved?

If after trying the previous solutions you still have issues with message streaming, contact AWS Support for help.

Amazon Connect administrators can choose one of the following options to contact support:

• If you have an AWS Support account, go to Support Center and submit a ticket.
• Otherwise, open the AWS Management Console and choose Amazon Connect, Support, Create case.

It is helpful to provide the following information:

• Your contact center instance ID/ARN. To find your instance ARN, see Find your Amazon Connect instance ID/ARN (p. 131).
• Your Region.
• A detailed description of the issue.

Upgrade to the latest CCP

The URL for the latest Contact Control Panel (CCP) ends with ccp-v2

You only need to upgrade to the latest CCP if you’re using one the following options:

• The URL for your CCP ends with /ccp# (p. 280)
• You use the Amazon Connect Streams API (p. 291). The URL associated with initCCP() ends with /ccp#

If you’re still unsure whether your using the latest CCP, go to Compare the earlier and latest CCP (p. 281) to see if your CCP looks like the latest one.

Upgrade on your own schedule, before your automatic upgrade date

To upgrade to the latest CCP before your automatic upgrade date, use the steps in the following sections:
Amazon Connect Administrator Guide
Upgrade later, automatically

- My CCP URL ends with /ccp# (p. 280)
- I use the Amazon Connect Streams API (p. 291)

Upgrade later, automatically

If you don't want to upgrade now, you can choose to wait until your scheduled upgrade date.

Between now and your scheduled upgrade date, we recommend the following change management steps:

- Compare how the upgraded CCP differs from the earlier one. For side-by-side visuals, see Compare the earlier and latest CCP (p. 281).
- Upgrade your CCP in a test environment. Use the latest CCP to learn how it's different, and to check your configurations.
- Communicate to your agents when the upgrade is going to take place.
- Train your agents to help them get ready.

You can see communications about your auto-upgrade date in the Personal Health Dashboard.

My CCP URL ends with /ccp#

Upgrading to the latest CCP is easy. If you want, you can try out the latest CCP and then at a later date make the switch. Here's what you do:

1. **Try it out**: Change the URL in your browser from /ccp# to /ccp-v2. The latest CCP appears automatically. If you want, change it back to /ccp# to return to the earlier CCP.
2. **Upgrade**: Change the URL in your browser from /ccp# to /ccp-v2. Bookmark the URL.
3. If you access the CCP through the Amazon Connect console by choosing the phone icon on the top right of a page, you will be re-directed according to the automatic upgrade date sent by email. Please reach out to your Amazon Solution Architect if your request is more urgent.
4. After the upgrade happens, if you use the /ccp# URL, it resolves to /ccp-v2.

Verify your network settings

We highly recommend setting up your network to use Option 1 (recommended): Replace Amazon EC2 and CloudFront IP range requirements with a domain allow list (p. 552).

Using this option helps Amazon Connect Support to quickly troubleshoot any issues you have. Specifically, using *.telemetry.connect.{region}.amazonaws.com passes more metrics to our Support team to help with troubleshooting.
Update your SAML URL to ccp-v2

If you use SAML 2.0 as your identity management system, be sure to update the destination in your relay state URL to ccp-v2.

Change destination=/connect/ccp to destination=/connect/ccp-v2.

For more information, see Use a destination in your relay state URL (p. 122)

Compare the earlier and latest CCP

The images in this section show you how the latest CCP differs from the earlier CCP for common tasks that agents perform. The images show both CCP versions in their default state.

Tip
The chat tab appears on an agent's CCP only if their routing profile includes chat.

Set status, use chat, access quick connects and number pad

1. Agents use a dropdown to set their status.
2. If you have enabled chat for the agent's routing profile, the chat tab appears.
3. Choose the Quick connects button to type and call a phone number, or select a quick connect.
4. Choose the Number pad button to type and call a phone number. This is useful when the phone number has letters.
Receive a call

Earlier CCP

Latest CCP
Miss a call

Make a call: When to use Quick connects

- Use the **Quick connects** button to type a number or select a quick connect.
Make a call: When to use Number pad

Choose the **Number pad** button to type and call a number. This is useful for corporate numbers with letters (for example, 1-800-EXAMPLE).

Make an outbound call

Earlier CCP
My CCP URL ends with /ccp#

Agent ends a call before being connected to the other party

Earlier CCP

Latest CCP
1. If an agent ends a call before being connected, they are then available for a new contact to be routed to them automatically.

2. If an agent ends a call before being connected, they are prompted to choose **Clear contact**.

### Make another call while connected on a call

1. You can see the call that you are on while typing another number or selecting a quick connect.

2. After choosing **Quick connects**, you can choose the **Number pad** button. Then on the **Number pad** page, you can enter a number.

### Enter DTMF input while connected on a call

- While on a call, only use **Number pad** to enter DTMF input.
Conference call scenario 1: Leaving a call when one party is on hold and the other is connected

1. Choose Leave call to leave the call. This automatically takes the first party off hold and connects them to the second party.
2. If instead you want to end the call, choose the x next to each party's number. This disconnects each party.
Conference call scenario 2: Leaving a call when the other parties are joined

1. Choose **Leave call** to leave the call. The other two parties stay joined.
2. If instead you want to end the call, choose the **x** next to each party's number. This disconnects each party.
Conference call scenario 3: Leaving a call when the other parties are on hold

1. Choose **Leave call** to leave the call. The other two parties are automatically taken off hold and connected.
2. If instead you want to end the call, choose the x next to each party's number. This disconnects each party.
Receive a queued callback

Earlier CCP

Miss a queued callback

Earlier CCP

Latest CCP

Latest CCP
Finish After contact work (ACW)

• During After contact work (ACW), agents can finish follow-up work, and then choose Clear contact.

I use the Amazon Connect Streams API

Note
The Amazon Connect Streams API remains the same between the earlier and latest versions of the CCP. We recommend validating custom implementations built using the Amazon Connect Streams API when upgrading versions to ensure consistency in behavior.

Use the following steps to upgrade to the latest CCP.

1. We recommend using the latest Amazon Connect Streams API.
2. Update the URL associated with initCCP() from /ccp# to /ccp-v2. For information about initCCP(), see connect.core.initCCP() in the Amazon Connect Streams API documentation on GitHub.
3. Add your domain URL to the Approved origin list:
   2. Navigate to the Amazon Connect console.
   3. Check that you're in the correct Region for your Amazon Connect instance. Choose your instance.
4. Choose **Application integration**, and then choose **Add origin**.

5. Enter your domain URL. All domains that embed the CCP for a particular instance to be explicitly added. For more information, see this article on GitHub.

   If you use Salesforce, you need to add the Salesforce domains to your allow list to prevent any issues with the CTI Adapter CCP functionality. For detailed instructions, see the Amazon Connect CTI Adapter for Salesforce Lightning installation guide or the Amazon Connect CTI Adapter for Salesforce Classic installation guide.

**Verify your network settings**

We highly recommend setting up your network to use Option 1 (recommended): Replace Amazon EC2 and CloudFront IP range requirements with a domain allow list (p. 552).

Using this option helps Amazon Connect Support to quickly troubleshoot any issues you have. Specifically, using ".telemetry.connect.{region}.amazonaws.com" passes more metrics to our Support team to help with troubleshooting.
Update your SAML URL to ccp-v2

If you use SAML 2.0 as your identity management system, be sure to update the destination in your relay state URL to ccp-v2.

Change destination=/connect/ccp to destination=/connect/ccp-v2.

For more information, see Use a destination in your relay state URL (p. 122)

Provide access to the Contact Control Panel

Agents use the Amazon Connect Contact Control Panel (CCP) to communicate with contacts. But before agents can access to the CCP and handle contacts, there are a few things you need to do:

1. Create a user name and password for agents to log into the CCP, by adding agents to your instance (p. 775).
2. At minimum, assign them the Agent security profile (p. 795). This grants them permissions to access the CCP, which they use to manage contacts.
3. Provide the user name, password, and the CCP website link to your agents so they can log in.

   The CCP website link is: https://instance name.my.connect.aws/ccp-v2/

   We recommend telling agents to bookmark the URL to the CCP so they can readily access it.

4. Train your agents on the CCP:
   • Watch Training video: How to use the CCP (p. 1249)
   • Download a quick start cheat sheet.

Agent application: Everything in one place

Want your agents to manage contacts, and access customer profiles, cases, and knowledge all in one place? Use the agent application (p. 1247)!

The agent application (p. 1247) is a single web browser interface that hosts the CCP, Customer Profiles (p. 1291), Cases (p. 1300), and Wisdom (p. 1307).

If you're using the CCP that is provided with Amazon Connect, after you enable Customer Profiles, Cases, or Wisdom, share the following URL with your agents so they can access it:

   • https://instance name.my.connect.aws/agent-app-v2/

If you access your instance using the awsapps.com domain, use the following URL:

   • https://instance name.awsapps.com/connect/agent-app-v2/

For help finding your instance name, see Find your Amazon Connect instance name (p. 131).

Grant microphone access in Chrome or Firefox

If agents experience problems with their microphone, they may need to grant microphone access in their browser. Choose one of the following articles to get the steps appropriate for your browser:

   • Use your camera and microphone in Chrome
How to get help for CCP issues

Agents: Contact your manager or the technical support provided by your company.

Amazon Connect Administrators: See Troubleshooting Issues with the Contact Control Panel (CCP) (p. 1313) for detailed troubleshooting steps. Or, log in to the AWS Management Console (https://console.aws.amazon.com/console) using your AWS account. In the upper right corner of the page, choose Support, and open a support ticket.

Agent headset and workstation requirements for the CCP

Agent headsets and workstations in the contact center vary widely. While the Amazon Connect CCP is built to handle high levels of jitter and high latency environments, the architecture of the workstations that agents use, and the location and environment in which they take contacts, can impact the quality of experience.

Headset requirements

The agent's Contact Control Panel (CCP) is compatible with all types of headsets.

For the best agent and customer experience, we recommend using a USB headset.

Alternatively, you can redirect the contact to an external number, in E.164 format, using an agent's existing telephony.

Note

If the agent's audio device does not support up to 48khz and the browser asserts a sample rate of 48khz, audio issues such as an audible humming sound may be present in the agent's outgoing audio. This has been seen with Firefox but not with Chrome.

For instructions on verifying the sample rate of the agent's headset and browser, see Humming sound in headset: Verify the headset and browser sample rates (p. 1321)

Workstation minimum requirements

Under-powered workstations can make it difficult for agents to access the tools and resources they need to service contacts. Also, keep in mind the resource requirements when scoping workstations to ensure that they can perform under load while appropriately multitasking for the use case.

Following are the minimum system requirements for the workstations using the CCP only. You'll need to scope additional memory, bandwidth, and CPU for the operating system and anything else running on the workstation to avoid resource contention.

• **Browser**—The latest three versions of Google Chrome or Mozilla Firefox
Can't hear caller or caller can't hear agent?

When the agent can't hear the caller or the caller can't hear them, it's usually because there are problems with one of the following:

- The connection between the agent's headset and computer.
- The permissions for the browser microphone.

Here's what you need to do:

- **Check that your computer recognizes your headset**—Check the settings in Device Manager to ensure that your computer recognizes the headset and allows proper headset connectivity. For example, if you're using a Windows PC:
Can't hear indicator for incoming chat?

If an agent can't hear the audio indicator for an incoming chat, the problem is likely because Google added an audio policy flag to Chrome. This flag exists in Chrome versions 71 - 75.

To fix this, add the CCP web site to the allow list in the agent's Chrome settings. For instructions, see this Google Chrome Help article.

For more information about solving audio problems, see Troubleshooting Issues with the Contact Control Panel (CCP) (p. 1313).

Embed the CCP into Salesforce

The core functionality of the Amazon Connect CTI Adapter provides a WebRTC browser-based Contact Control Panel (CCP) within Salesforce. The Amazon Connect CTI integration consists of two components:

- A managed Salesforce package
- An AWS Serverless application deployed to your AWS environment

For a detailed walk-through and setup of the full CTI Adapter capabilities for Salesforce Lightning, see the Amazon Connect CTI Adapter for Salesforce Lightning installation guide.

For the CTI Adapter for Salesforce Classic, see the Amazon Connect CTI Adapter for Salesforce Classic installation guide.

We recommend that you initially install the package into your Salesforce sandbox. After the package is installed, you can configure your Salesforce Call Center configuration within Salesforce.
Embed the CCP into Zendesk

To integrate Amazon Connect and Zendesk, you need:

- An Amazon Connect instance.
- A Zendesk Support account with a Zendesk Talk Partner Edition plan, or a Zendesk trial account.

Install and configure the Amazon Connect for Zendesk app in your Zendesk Support account, then integrate the app with Amazon Connect. After integration, you can create flows to use Amazon Connect with Zendesk ticketing.

For more information, see How do I integrate Amazon Connect with Zendesk?
Set up Amazon Connect Global Resiliency

Note
This feature is available only for Amazon Connect instances created in the US East (N. Virginia) and US West (Oregon) Regions. To obtain access to this feature, contact your Amazon Connect Solutions Architect or Technical Account Manager.

Amazon Connect Global Resiliency enables you to provide customer service anywhere in the world with the highest reliability, performance, and efficiency. With its distributed telephony features, your contact center can meet international regulatory requirements.

Amazon Connect Global Resiliency provides a set of APIs that you use to:

- Provision a linked Amazon Connect instance in another AWS Region.
- Provision and manage phone numbers that are global and accessible in both Regions.
- Distribute telephony traffic between the instances and across Regions in 10% increments.

For example, you can distribute traffic 100% in US East (N. Virginia) / 0% in US West (Oregon), or 50% in each Region.
- Access reserved capacity across Regions.

Contents

- Get started with Amazon Connect Global Resiliency (p. 298)
- Manage traffic distribution groups (p. 305)
- Manage phone numbers across Regions (p. 305)

Get started with Amazon Connect Global Resiliency

Note
This feature is available only for Amazon Connect instances created in the US East (N. Virginia) and US West (Oregon) Regions. To obtain access to this feature, contact your Amazon Connect Solutions Architect or Technical Account Manager.

You get started with Amazon Connect Global Resiliency by creating a replica of your existing Amazon Connect instance in another AWS Region, and by creating a traffic distribution group.

A traffic distribution group is an Amazon Connect resource that enables you to link Amazon Connect instances that are in different AWS Regions. Phone numbers can be attached to the traffic distribution group. Traffic to these numbers can be distributed between the instances in the traffic distribution group.

How to set up Amazon Connect Global Resiliency

1. Create a replica of your existing Amazon Connect instance (p. 299). Use the ReplicateInstance API.
2. **Create a traffic distribution group (p. 300).**
   1. Use the **CreateTrafficDistributionGroup** API.
   2. Use **DescribeTrafficDistributionGroup** API to determine whether the traffic distribution group has been created successfully (*Status must be ACTIVE*).

3. **Claim phone numbers to your traffic distribution group (p. 301).** After your traffic distribution group has been created successfully (*Status is ACTIVE*), you can claim phone numbers to it using the **ClaimPhoneNumber** API.
   
   **Note**
   The default traffic distribution for these phone numbers is set to 100% - 0%. That is, 100% of inbound telephony traffic will go to the source Amazon Connect instance that was used to create a replica.
   
   In addition, after phone numbers are claimed to an instance, you can assign them to multiple instances across AWS Regions. To do this, use the **UpdatePhoneNumber** API to assign the numbers to a traffic distribution group.

4. **Update your traffic distribution (p. 304).** Use the **UpdateTrafficDistribution** API to distribute traffic across the linked instances in 10% increments.

## Create a replica of your existing Amazon Connect instance

**Note**
This feature is available only for Amazon Connect instances created in the US East (N. Virginia) and US West (Oregon) Regions.

To obtain access to this feature, contact your Amazon Connect Solutions Architect or Technical Account Manager.

You call the **ReplicateInstance** API to create a replica of your Amazon Connect instance in another AWS Region.

Before using **ReplicateInstance** to create a replica, make sure you have the minimum required IAM permissions to create an instance. See [Required permissions for using custom IAM policies to manage access to the Amazon Connect console (p. 1190)](#).

### Characteristics of the replica instance

- The replica Amazon Connect instance is created in the same AWS account as your existing Amazon Connect instance.
- The replica instance is empty initially except for the default resources that are always created with an instance.
- The replica has the same instance ID as the Amazon Connect instance it is replicated from.

### Configure the replica instance

After your replica Amazon Connect instance is created, you need to configure it:

1. Ensure SAML is enabled in the replica Amazon Connect instance.
2. Mirror the configuration of Amazon Connect resource across Regions if needed. For example, users, routing profiles, queues, and flows.
3. Ensure redundancy for front-end and back-end integrations (for example, SSO, Lambda, Lex) across Regions.
4. Make matching manual updates across the linked instances.

Why a ReplicateInstance call fails

A ReplicateInstance API call fails with an InvalidRequestException in the following cases:

1. The Region where you are creating the replica is the same Region as your existing instance.
2. The instance was already replicated as part of a different ReplicateInstance API call.
3. The instance does not have an alias.
4. The instance is not in ACTIVE status.
5. The instance does not have SAML enabled.

Create traffic distribution groups

You can create a traffic distribution group for your existing Amazon Connect instance by using the CreateTrafficDistributionGroup API.

A traffic distribution group is an Amazon Connect resource that enables you to link Amazon Connect instances that are in different AWS Regions. Phone numbers can be attached to the traffic distribution group. Traffic to these numbers can be distributed between the instances in the traffic distribution group.

Important things to know

- When creating a traffic distribution group, it must be created in the source AWS Region. A source Region is the Region where you set up your existing Amazon Connect instance.
- When associating phone numbers to a traffic distribution group:
  - You can associate only phone numbers that are claimed in the source Region.
  - The phone number must be in the same Region as where the traffic distribution group was created.
- You can claim numbers to a traffic distribution group, or get or update traffic distribution for a traffic distribution group only when its Status is ACTIVE. Use the DescribeTrafficDistributionGroup API to determine whether it has been created successfully (Status must be ACTIVE).

Traffic distribution group statuses

Following is a description of the traffic distribution group statuses:

- CREATION_IN_PROGRESS: Traffic distribution group creation is in progress.
- ACTIVE: Traffic distribution group has been created.
- CREATION_FAILED: Traffic distribution group creation failed.
- PENDING_DELETION: Traffic distribution group deletion is in progress.
- DELETION_FAILED: Traffic distribution group deletion failed.
- UPDATE_IN_PROGRESS: Traffic distribution group update is in progress.

Why a CreateTrafficDistributionGroup call fails

A CreateTrafficDistributionGroup API call fails with an InvalidRequestException in the following cases:
• The `ReplicateInstance` API was not called before creating a traffic distribution group for the linked instances.
• The `CreateTrafficDistributionGroup` API was not called in the same Region where the `ReplicateInstance` API was called. The Region where this API is called must match the Region of the instance that was used to create a replica.

## Claim phone numbers to traffic distribution groups

**Note**
This feature is available only for Amazon Connect instances created in the US East (N. Virginia) and US West (Oregon) Regions.
To obtain access to this feature, contact your Amazon Connect Solutions Architect or Technical Account Manager.

After your traffic distribution group is created successfully (`Status` is `ACTIVE`), you can use `SearchAvailablePhoneNumbers` to search for available phone numbers and `ClaimPhoneNumber` to claim them.

Before you claim a phone number to your traffic distribution group, we recommend using the `DescribeTrafficDistributionGroup` API to verify the status of the traffic distribution group is `ACTIVE`. Assigning a phone number to a traffic distribution group that isn't `ACTIVE` results in `ResourceNotFoundException`.

You can claim a phone number to a traffic distribution group by providing the traffic distribution group ARN in the `TargetArn` parameter when calling the `ClaimPhoneNumber` API. You can also use the `UpdatePhoneNumber` API to assign a phone number previously claimed to an instance to a traffic distribution group.

**Note**
To update the `Description` field, you must use the Amazon Connect console.

### Example workflow

Following is an example workflow to claim phone numbers and use them across multiple AWS Regions:

1. Create a replica of your instance:
   - Call the `ReplicateInstance` API.
2. Create a traffic distribution group that links these instances together:
   - Call the `CreateTrafficDistributionGroup` API.
3. Find available phone numbers that can be claimed to your traffic distribution group:
   - Call the `SearchAvailablePhoneNumbers` API in the Region where the traffic distribution group was created. Provide the traffic distribution group ARN for the `TargetArn` parameter.
4. In the Region where the traffic distribution group was created, call the `ClaimPhoneNumber` API:
   a. Provide your traffic distribution group ARN for the `TargetArn` parameter.
   b. Provide the E164 phone number value that was returned by the `SearchAvailablePhoneNumbers` API call in step 3.

A `PhoneNumberId` and `PhoneNumberArn` are returned. You can use these values for follow-up operations.

5. Verify that the phone number status is `CLAIMED`:
   - Call the `DescribePhoneNumber` API.
Claim phone numbers to traffic distribution groups

(DescribePhoneNumber can also be called in the other Region associated with the traffic distribution group. It will return the same phone number details.)

The phone number can be used by follow-up operations only after its status is CLAIMED.

For a description of possible statuses, see Phone number statuses defined (p. 302).

6. Repeat steps 3-5 for all phone numbers you need to claim to your traffic distribution group.

7. Perform the following steps to associate flows to phone numbers. Do them in both Regions where the traffic distribution group operates.

These steps ensure your telephony traffic will route correctly to your flows to support your traffic distribution configuration.

a. In your existing Amazon Connect instance in the Region where the traffic distribution group was created, do the following steps:
   i. Call ListContactFlows API. Provide the InstanceId that corresponds to the instance that was replicated.
   ii. A list of flow ARNs is returned. Use these flow ARNs to associate a flow to a phone number; call the AssociatePhoneNumberContactFlow API.

b. In the replicated Amazon Connect instance in the other Region, do the following steps:
   i. Call ListContactFlows API. Provide the InstanceId that corresponds to the instance that was replicated.
   ii. A list of flow ARNs is returned. Use these flow ARNs to associate a flow to a phone number; call the AssociatePhoneNumberContactFlow API.

Why a ClaimPhoneNumber call fails

Your ClaimPhoneNumber API call will fail with a ResourceNotFoundException in the following cases:

- The specified traffic distribution group does not exist, the status of the traffic distribution group is not ACTIVE, or you do not have ownership of the traffic distribution group.
- The phone number is not available for claiming. In some cases, a phone number found from SearchAvailablePhoneNumbers may have been claimed by another customer.

ClaimPhoneNumber will fail with a InvalidParameterException error in the following case:

- The endpoint you are calling is not in the same Region where the traffic distribution group was created.

Phone number statuses defined

Following is a description of phone number statuses:

- CLAIMED means the previous ClaimPhoneNumber or UpdatePhoneNumber operation succeeded.
- IN_PROGRESS means a ClaimPhoneNumber, UpdatePhoneNumber operation is still in progress and has not yet completed. You can call DescribePhoneNumber at a later time to verify if the previous operation has completed.
- FAILED indicates that the previous ClaimPhoneNumber or UpdatePhoneNumber operation has failed. It includes a message indicating the failure reason.
A common reason for a failure is that the TargetArn value you are claiming or updating a phone number to has reached its limit of total claimed numbers.

If you received a FAILED status from a ClaimPhoneNumber API call, you have one day to retry claiming the phone number before the number is released back to the inventory for other customers to claim.

**Assign claimed phone numbers to traffic distribution groups**

- You created a new traffic distribution group and it’s status is ACTIVE. We recommend using the DescribeTrafficDistributionGroup API to verify the status.
- You have already claimed phone numbers to instances or other traffic distribution groups.

Now you can assign those claimed phone numbers to your new traffic distribution group by using the UpdatePhoneNumber API. Provide the traffic distribution group ARN in the TargetArn parameter.

**Note**
To update the Description field, you must use the Amazon Connect console.

**Example workflow**

Following is an example workflow to assign claimed phone numbers to your traffic distribution group:

1. Call the UpdatePhoneNumber API to assign the phone number to a new TargetArn.

   The TargetArn can be for another Amazon Connect instance or for a traffic distribution group created in the same Region where the phone number was initially claimed.

2. Perform the following steps to associate flows to phone numbers. Do them in both Regions where the traffic distribution group operates.

   These steps ensure your telephony traffic will route correctly to your flows to support your traffic distribution configuration.

   a. In your existing Amazon Connect instance in the Region where the traffic distribution group was created, do the following steps:

      i. Call the ListContactFlows API. Provide the InstanceId that corresponds to the instance that was replicated.

      ii. A list of flow ARNs is returned. Use these flow ARNs to associate a flow to a phone number; call the AssociatePhoneNumberContactFlow API.

   b. In the replicated Amazon Connect instance in the other Region, do the following steps:

      i. Call the ListContactFlows API. Provide the InstanceId that corresponds to the instance that was replicated.

      ii. A list of flow ARNs is returned. Use these flow ARNs to associate a flow to a phone number; call the AssociatePhoneNumberContactFlow API.

**Why an AssociatePhoneNumberContactFlow call fails**

If the number is claimed to a traffic distribution group, and you are calling AssociatePhoneNumberContactFlow using an instance in the AWS Region where the traffic distribution
group was created, you can use either a full phone number ARN or UUID value for the PhoneNumberId URI request parameter.

However, if the number is claimed to a traffic distribution group and you are calling this API using an instance in the replica AWS Region associated with the traffic distribution group, you must provide a full phone number ARN. If a UUID is provided in this scenario, you will receive a ResourceNotFoundException.

Why an UpdatePhoneNumber call fails

Your UpdatePhoneNumber API call will fail with a ResourceNotFoundException in the following case:

- The specified traffic distribution group does not exist, the status of the traffic distribution group is not ACTIVE, or you do not have ownership of the traffic distribution group.

UpdatePhoneNumber will fail with a InvalidParameterException error in the following case:

- The endpoint you are calling is not in the same Region where the traffic distribution group was created.

Phone number statuses defined

Following is a description of phone number statuses:

- CLAIMED means the previous ClaimPhoneNumber or UpdatePhoneNumber operation succeeded.
- IN_PROGRESS means a ClaimPhoneNumber, UpdatePhoneNumber operation is still in progress and has not yet completed. You can call DescribePhoneNumber at a later time to verify if the previous operation has completed.
- FAILED indicates that the previous ClaimPhoneNumber or UpdatePhoneNumber operation has failed. It includes a message indicating the failure reason. A common reason for a failure is that the TargetArn value you are claiming or updating a phone number to has reached its limit of total claimed numbers.

Update telephony traffic distribution across AWS Regions

After you have claimed phone numbers to your traffic distribution group, use the UpdateTrafficDistribution API to distribute telephony traffic across linked instances in a given traffic distribution group in 10% increments.

Requirements

If the following requirements are not met, your UpdateTrafficDistribution API call will fail with an InvalidRequestException:

- You must provide distribution for telephony traffic configuration.
- You must specify the traffic distribution for both linked instances and the total distribution must add up to 100%.
- You must specify traffic distribution in 10% increments.
- The instance ARNs specified in the telephony configuration must match the ARNs of the linked instances.
Manage traffic distribution groups

The topics in this section describe how to manage traffic distribution groups by using Amazon Connect APIs.

Contents
- List traffic distribution groups (p. 305)
- Delete traffic distribution groups (p. 305)

List traffic distribution groups

Use the ListTrafficDistributionGroups API to list all traffic distribution groups.

You may want to list traffic distribution groups as a way of determining whether a particular Amazon Connect instance is part of any traffic distribution groups.

Delete traffic distribution groups

Use the DeleteTrafficDistributionGroup API to delete a traffic distribution group that is no longer needed.

Note
You cannot delete a traffic distribution group if phone numbers are claimed to it. You must first release phone numbers from the traffic distribution group by using the ReleasePhoneNumber API. After that, you can delete the traffic distribution group.
You cannot release numbers from a traffic distribution group by using the Amazon Connect console.

Your DeleteTrafficDistributionGroup API call will fail with a ResourceInUseException if phone numbers are still claimed to the traffic distribution group.

Manage phone numbers across Regions

The topics in this section describe how to manage phone numbers across AWS Regions by using Amazon Connect APIs.

Contents
- Claim phone numbers to instances across multiple AWS Regions (p. 305)
- Move a claimed phone number to multiple instances across AWS Regions (p. 306)
- Release numbers from traffic distribution groups (p. 306)

Claim phone numbers to instances across multiple AWS Regions

Note
This feature is available only for Amazon Connect instances created in the US East (N. Virginia) and US West (Oregon) Regions.
To obtain access to this feature, contact your Amazon Connect Solutions Architect or Technical Account Manager.

To place or receive calls to a phone number across instances in multiple AWS Regions, you need to claim a phone number to a traffic distribution group.
To claim a phone number to a traffic distribution group

1. Create a traffic distribution group by using the CreateTrafficDistributionGroup API.
2. Describe your traffic distribution group by using the DescribeTrafficDistributionGroup API to determine whether it has been created successfully (Status must be ACTIVE).
3. After your traffic distribution group has been created successfully (Status is ACTIVE), you can claim phone numbers to it by using the ClaimPhoneNumber API.

Move a claimed phone number to multiple instances across AWS Regions

**Note**
This feature is available only for Amazon Connect instances created in the US East (N. Virginia) and US West (Oregon) Regions. To obtain access to this feature, contact your Amazon Connect Solutions Architect or Technical Account Manager.

You can move a phone number that was previously claimed to an instance, and instead assign it to multiple instances across AWS Regions. You do this by assigning the phone number to a traffic distribution group.

To assign a phone number to a traffic distribution group

1. Create a traffic distribution group using the CreateTrafficDistributionGroup API.
2. Describe your traffic distribution group using the DescribeTrafficDistributionGroup API to determine whether it has been created successfully (Status must be ACTIVE).
3. After your traffic distribution group is created successfully (Status is ACTIVE), you can assign phone numbers that were previously claimed to other instances or other traffic distribution groups. Use the UpdatePhoneNumber API.

Release numbers from traffic distribution groups

To release phone numbers from a traffic distribution group, use the ReleasePhoneNumber API. The number is released back to inventory for other customers to claim it.

You cannot release numbers from a traffic distribution group by using the Amazon Connect console.
Create Amazon Connect Flows

A flow defines the customer experience with your contact center from start to finish. Amazon Connect includes a set of default flows (p. 307) so you can quickly set up and run a contact center. However, you may want to create custom flows for your specific scenario.

Contents
- Permissions required to view, edit, create flows (p. 307)
- Default flows (p. 307)
- Sample flows (p. 318)
- Flow block definitions (p. 327)
- Create a new flow (p. 448)
- Copy and paste contact flows (p. 455)
- Flow version control: Roll back a contact flow (p. 455)
- Attach a claimed or ported phone number to a flow (p. 457)
- Flow modules for reusable functions (p. 457)
- Create prompts (p. 459)
- Set up contact transfers (p. 469)
- Set up recording behavior (p. 483)
- Set up queued callback (p. 485)
- Import/export flows (p. 491)
- Invoke AWS Lambda functions (p. 493)
- Encrypt customer input (p. 511)
- Track events as customers interact with flows (p. 513)
- Use Amazon Connect contact attributes (p. 519)
- Migrate flows to a different instance (p. 546)

Permissions required to view, edit, create flows

To view, edit, create, and publish flows you need Contact flows permissions added to your security profile.

By default users who are assigned to the Admin and CallCenterManager security profiles have Contact flows permissions.

Default flows

Amazon Connect includes a set of default flows that have already been published. It uses them to power your contact center.

For example, say you create a flow that includes putting the customer on hold, but you don’t create a prompt for it. The default flow, Default agent hold, will be played automatically. This is a way to help you get started with your call center quickly.

Tip
If you want to change the behavior of a default flow, we recommend creating a new customized flow based on the default. Then call the new flow intentionally in your flows rather than defaulting to it. This gives you better control over how your flows work.
To see the list of default flows in the Amazon Connect console, go to Routing, Flows. They all start with Default in their name.

Contents
- Change a default flow (p. 308)
- Default agent hold: "You are on hold" (p. 311)
- Default agent transfer: "Transferring now" (p. 313)
- Default customer queue: queue hold message and music (p. 313)
- Default customer whisper: beep sound (p. 315)
- Default agent whisper: name of the queue (p. 315)
- Set the default whisper flow for a chat conversation (p. 315)
- Default customer hold: hold music (p. 317)
- Default outbound: "This call is not being recorded" (p. 317)
- Default queue transfer: "Now transferring" (p. 317)
- Default prompts from Amazon Lex: "Sorry .. " (p. 317)

Change a default flow

You can override the way the default flows work by editing them directly.

Generally we recommend creating new flows based on the defaults, rather than editing the default flow directly. You can make a copy of the default flow, assign a name that indicates it’s a custom version, and then edit that one. This gives you more control over how your flows work.

Change how a default flow works

The following steps show how to change the default message customers hear when they are put in a queue to wait for the next available agent.

2. Choose the default flow you want to customize. For example, choose Default customer queue if you want to create your own message when a customer is put in queue instead of using the one we’ve provided.
3. To customize the message, choose the **Loop prompts** block to open the properties page.

4. Use the dropdown box to either choose different music, or set to **Text to Speech** and then type a message to be played, as shown in the following image.

5. Choose **Save** at the bottom of the properties page.
6. Choose **Publish**. Amazon Connect starts playing the new message almost immediately (it may take a few moments for it to fully take effect).

![Image of default customer queue]

**Copy a default flow before customizing it**

Use the following steps to create a new flow based on a current default.

1. On the navigation menu, choose **Routing**, **Flows**.
2. Choose the default flow you want to customize.
3. In the upper right corner of the page, choose the **Save** drop-down arrow. Choose **Save as**.

![Image of default customer hold]

4. Assign a new name for the flow, for example, **Customer hold message**.
5. Add the new flow (in this case, **Customer hold message**) to the flows you create so it’s run instead of the default.

**Default agent hold: "You are on hold"**

The **Default agent hold** flow is the experience the agent receives when placed on hold. During this flow, a **Loop prompt** block plays the message "You are on hold" to the agent every 10 seconds.
You can set **break time** to a maximum of 10 seconds. This means the maximum amount time you can specify between **You are on hold** messages is 10 seconds. To make the time between longer, add multiple prompts to the loop. For example, if you want 20 seconds between **You are on hold** messages:

- The first prompt may say **You are on hold** with **break time**="10s"
- Add another prompt with a blank message and **break time**="10s".

For instructions about how to override and change a default contact flow, see [Change a default flow](p. 308).

**Tip**

Wondering if a default flow has been changed? Use [flow version control](p. 455) to view the original version of the flow.
Default agent transfer: "Transferring now"

This default transfer flow is what the agent experiences when transferring a contact to another agent by using Create quick connects (p. 470). A Play prompt plays the message "Transferring now." Then the Transfer to agent block is used to transfer the contact to the agent.

Tip
The Transfer to Agent block is a beta feature and only works for voice interactions. To transfer a chat contact to another agent, follow these instructions: Use contact attributes to route contacts to a specific agent (p. 482).

For instructions about how to override and change a default flow, see Change a default flow (p. 308).

Tip
Wondering if a default flow has been changed? Use flow version control (p. 455) to view the original version of the flow.

Default customer queue: queue hold message and music

This default flow is played when a customer is placed in a queue.

1. The loop has a one-time voice prompt:

   Thank you for calling. Your call is very important to us and will be answered in the order it was received.

2. It plays queue music in .wav format that's been uploaded to the Amazon Connect instance.

3. The customer remains in this loop until their call is answered by an agent.

Change the default message a customer hears when they are put in queue

The following steps show how to change the default message customers hear when they are put in a queue to wait for the next available agent.


2. Choose Default customer queue.
3. To customize the message, choose the **Loop prompts** block to open the properties page.

4. Use the dropdown box to either choose different music, or set to **Text to Speech** and then type a message to be played, as shown in the following image.

5. Choose **Save** at the bottom of the properties page.
6. Choose Publish. Amazon Connect starts playing the new message almost immediately (it may take a few moments for it to fully take effect).

![Amazon Connect](image)

Default customer whisper: beep sound

This flow uses a Set whisper flow (p. 422) block to play a message for the customer when the customer and agent are joined. It uses a “beep” sound to notify a customer that their call has been connected to an agent.

Use the Set whisper flow (p. 422) block to override the default agent whisper in a voice conversation.

**Important**
For chat conversations, you need to include a Set whisper flow (p. 422) for default agent or customer whispers to play. For instructions, see Set the default whisper flow for a chat conversation (p. 315).

Default agent whisper: name of the queue

This flow uses a Set whisper flow (p. 422) block to play a message for the agent when the customer and agent are joined.

The name of the queue is played to the agent. It identifies the queue that the customer was in. The name of the queue is retrieved from the system variable $.Queue.Name.

Use the Set whisper flow (p. 422) block to override the default agent whisper in a voice conversation.

**Important**
For chat conversations, you need to include a Set whisper flow (p. 422) for default agent or customer whispers to play. For instructions, see Set the default whisper flow for a chat conversation (p. 315).

For more information about system variables, see System attributes (p. 521).

**Tip**
Wondering if a default flow has been changed? Use flow version control (p. 455) to view the original version of the flow.

Set the default whisper flow for a chat conversation

For chat conversations, you need to include a Set whisper flow block for default agent or customer whispers to play.
For example, to set the default whisper flow for chats that use the Sample inbound flow (p. 318):

1. Go to Routing, Flows, and choose the Sample inbound flow.
2. Add a Set whisper flow block after the chat channel has branched, as shown in the following image:

   ![Sample inbound flow](image)

3. In the Set whisper flow block, open the properties page, and choose the flow you want to play as the default for chat conversations. For example, you might choose Default whisper flow to show agents the name of the originating queue in the chat window. This is helpful when agents are managing more than one queue.

   ![Set whisper flow](image)

4. Choose Save.
Default customer hold: hold music

This flow starts when the customer is put on hold. It plays the audio that the customer hears while on hold.

For instructions about how to override and change a default flow, see Change a default flow (p. 308).

Tip
Wondering if a default flow has been changed? Use flow version control (p. 455) to view the original version of the flow.

Default outbound: "This call is not being recorded"

This flow is an outbound whisper that manages what the customer experiences as part of an outbound call, before being connected with an agent.

1. It starts with an optional Set recording behavior block. Then a prompt plays the following message:
   
   This call is not being recorded.

2. The flow ends.

3. The customer remains in the system (on the call) after the flows ends.

For instructions about how to override and change a default flow, see Change a default flow (p. 308).

Tip
Wondering if a default flow has been changed? Use flow version control (p. 455) to view the original version of the flow.

Default queue transfer: "Now transferring"

This flow manages what the agent experiences when they transfer a customer to another queue.

It starts with a Check hours of operation block to check the hours of operation for the current queue. The In hours option branches to the Check staffing block to determine whether agents are available, staffed, or online.

If it returns True (agents are available), the flow goes to the Transfer to queue block. If it returns False (no agents are available), the flow plays a prompt and disconnects the call.

For instructions about how to override and change a default flow, see Change a default flow (p. 308).

Tip
Wondering if a default flow has been changed? Use flow version control (p. 455) to view the original version of the flow.

Default prompts from Amazon Lex: "Sorry .. "

If you add an Amazon Lex bot to your contact center, know that it also has some default prompts that it uses for error handling. For example:

- Sorry, can you please repeat that?
- Sorry, I could not understand. Goodbye.

To change default Amazon Lex prompts

1. In Amazon Lex, go to your bot.
2. On the Editor tab, choose Error Handling.
3. Change the text as needed. Choose Save, then Build and Publish.

Sample flows

Amazon Connect includes a set of sample flows that show you how to perform common functions. They are designed to help you learn how to create your own flows that work in a similar way. For example, if you want to add a queued callback flow to your call center, take a look at the Sample queued callback (p. 324) flow.

To explore how the sample flows work

1. Claim a number if you haven't already: go to Channels, Phone numbers, Claim a number.
2. Choose the DID tab, then choose a number.
3. In Flow / IVR use the drop down to choose the sample flow you want to try. Click Save.
4. Call the number. The sample flow that you selected starts.

   We recommend opening the sample flow in the flow designer and following along to see how it works while you're experiencing it.

To open a sample flow in the flow designer

1. In Amazon Connect choose Routing, Flows.
2. On the Flows page, scroll down to the flows with names that start with Sample.
3. Choose the flow you want to view.

The topics in this section describe how each of the sample flows work.

Contents

- Sample inbound flow (first contact experience) (p. 318)
- Sample AB test (p. 319)
- Sample customer queue priority (p. 319)
- Sample disconnect flow (p. 320)
- Sample queue configurations (p. 320)
- Sample queue customer (p. 323)
- Sample queued callback (p. 324)
- Sample interruptible queue flow with callback (p. 324)
- Sample Lambda integration (p. 325)
- Sample recording behavior (p. 325)
- Sample note for screenpop (p. 326)
- Sample secure input with agent (p. 326)
- Sample secure input with no agent (p. 326)

Sample inbound flow (first contact experience)

Note

This topic explains a sample flow that is included with Amazon Connect. For information about locating the sample flows in your instance, see Sample flows (p. 318).

Type: Flow (inbound)
This sample flow is automatically assigned to the phone number that you claimed when you first set up flows. For more information, see Get started (p. 9).

It uses Check contact attributes to determine if the contact is contacting you by phone or chat, or if it is a task, and to route them accordingly.

- If the channel is chat or task, the contact is transferred to the Set disconnect flow.
- If the channel is voice, then based on user input the contact is either transferred to the other sample flows or a sample follow-up agent task is created for this contact.

**Sample AB test**

**Note**
This topic explains a sample flow that is included with Amazon Connect. For information about locating the sample flows in your instance, see Sample flows (p. 318).

Type: Flow (inbound)

This flow shows how to perform an A/B call distribution based on a percentage. Here's how it works:

1. The Play prompt block uses Amazon Polly, the text-to-speech service, to say "Amazon Connect will now simulate rolling dice by using the Distribute randomly block. Now rolling."
2. The contact reaches the Distribute by percentage block, which routes the customer randomly based on a percentage.

   Distribute by percentage simulates a dice roll, resulting in a values between 2 to 12 with different percentages. For example, there is 3 percent chance for the "2" option, 6 percent chance for the "3" option, and so on.
3. After the contact gets routed, the Play prompt tells the customer which number the dice rolled.
4. At the end of the sample, the Transfer to flow block transfers the customer back to the Sample inbound flow (p. 318).

**Sample customer queue priority**

**Note**
This sample flow is available in previous Amazon Connect instances. In new instances, you can see this functionality in Sample queue configurations (p. 320).

Type: Flow (inbound)

By default the priority for new contacts is 5. Lower values raise the priority of the contact. For example, a contact assigned a priority of 1 is routed first.

This sample shows how you can use the Change routing priority/age block to raise or lower the priority of a contact in a queue. Using this block, there are two ways you can raise or lower a customer's priority:

- Assign them a new priority value, such as 1, to raise their priority.
- Or, increase the routing age of the contact. Customers who are queued longer are routed first, when all contacts have the same queue priority value (such as 5).

**Option 1: Raise the priority**

- The Get Customer Input block prompts the customer to press 1 to move to the front of the queue. This block gets the customer's input; it doesn't actually change the customer's priority.
• If the customer presses 1, they go down the "Pressed 1" branch, which takes them to the Change routing priority/age block. This block changes their priority in the queue to 1, which is the highest priority.

Option 2: Change the routing age

• The Get Customer Input block prompts the customer to press 2 to move behind existing contacts already in queue. This block gets the customer’s input; it doesn’t actually change the customer’s priority.
• If the customer presses 2, they go down the "Pressed 2" branch, which takes them to a different Change routing priority/age block. This block increases their routing age by 10 minutes. This has the effect of moving them ahead of others in the queue who have been waiting longer.

Sample disconnect flow

Note
This topic explains a sample flow that is included with Amazon Connect. For information about locating the sample flows in your instance, see Sample flows (p. 318).

Type: Flow (inbound)

This sample works with voice, chat, and task contacts.

Chat contacts
1. The Play prompt block shows a text message that the agent has disconnected.
2. A Wait block sets the timeout period for 15 minutes. If the customer returns in 15 minutes, the customer is transferred to a queue to chat with another agent.
3. If the customer doesn’t return, the timer expires and the chat disconnects.

Voice contacts
1. Sets a user-defined attribute, DisconnectFlowRun. If it = Y, disconnect.
2. Gets customer input, whether they were happy with service.
3. Terminates flow.

Task contacts
1. Checks contact attributes, whether Agent ARN = NULL.
2. Transfers to agent’s queue.
3. If at capacity, disconnects.

For a list and description of all the disconnect reasons, see DisconnectReason in the ContactTraceRecord (p. 1068).

Sample queue configurations

Note
This topic explains a sample flow that is included with Amazon Connect. For information about locating the sample flows in your instance, see Sample flows (p. 318).
Type: Flow (inbound)

This flow shows different ways you can put a customer in queue: you can change the priority of the customer, determine the wait time in queue, and give them an option for a callback. Here's how it works:

1. The customer is put in the BasicQueue.
2. After that, the Default customer queue flow is invoked. This block runs a Loop prompts block that plays the following:

   Thank you for calling. Your call is very important to us and will be answered in the order it was received.

3. The hours of operation are checked with a Check hours of operation block.
4. The channel is checked with a Check contact attributes block:
   - If chat, we check the time in queue. If it's less than 5 minutes, the customer is placed in queue for an agent. If it's more, we check the channel again and if it's chat, put the customer in queue for an agent.
   - If voice, the customer is routed down the No Match branch, to a Play prompt block and then to a Get customer input block.

   In the Get customer input block, we give the customer the option to press 1 to move to the front of the queue or 2 to move to the end of the queue.

   The two Change routing priority / age blocks move the customer to the front or back of the queue.

   You can see this path in the following image:

5. Next we use a Check queue status block to check whether the time in queue is less than 300 seconds.
6. We use a Play prompt block to tell the customer the results.
7. We use a Check contact attributes block again to check the customer's channel: chat or voice/No Match.
These next steps apply to customers who were routed down the voice/No Match branch, as shown in the following image:

1. In the **Get customer input** block, we prompt customers to *Press 1 to go into queue or 2 to enter a callback number.*
2. If customers press 2, they are routed down the **Pressed 2** branch to the **Store customer input** block.
3. The **Store customer input** block prompts the customer for their phone number.
4. The customer's phone number is stored in the **Stored customer input attribute**, by the **Set callback number** block.
5. We use a **Transfer to queue** (p. 441) block to put the customer in a callback queue.
6. The **Transfer to queue** (p. 441) block is configured so Amazon Connect waits 5 seconds between the time the callback contact is initiated and the contact is enqueued, where it sits until it is offered to an available agent.

If the initial callback doesn't reach the customer, Amazon Connect will attempt 1 callback. If it were configured for 2 attempted callbacks, it would wait 10 minutes between each one.

Also, no special callback queue is specified. Rather, customers are in the BasicQueue, which was set at the beginning of the flow.
For information about queued callbacks, see the following topics:

- Set up queued callback (p. 485)
- Flow block: Transfer to queue (p. 441)
- About queued callbacks in metrics (p. 1082)

Sample queue customer

Note
This topic explains a sample flow that is included with Amazon Connect. For information about locating the sample flows in your instance, see Sample flows (p. 318).
Type: Flow (inbound)

This flow performs checks before placing customer into a queue. Here's how it works:

1. The **Set working queue** block determines which queue to transfer the customer to.
2. The **Check hours of operation** block perform checks to avoid the customer being queued during non-working hours.
3. The customer is transferred to the queue if it is within business hours, and the queue can handle this call. Otherwise, the customer is played a message "We are not able to take your call right now. Goodbye." And then the customer is disconnected.

**Sample queued callback**

*Note*

This sample flow is available in previous Amazon Connect instances. In new instances, you can see examples of queued callback in Sample interruptible queue flow with callback (p. 324) and Sample queue configurations (p. 320).

Type: Flow (inbound)

This flow provides callback queue logic. Here's how it works:

1. After a voice prompt, a working queue is selected and its queue status is checked.
2. A voice prompt tells the customer if the wait time for the selected queue is longer than 5 minutes. Customers are offered a choice to wait in the queue or to be placed into a callback queue.
3. If the customer decides to wait in the queue, the **Set customer queue flow** block places them in a queue flow that provides a callback option. That is, it places them in Sample interruptible queue flow with callback.
4. If the customer chooses to be placed into a callback queue, their number is stored in the **Store customer input** block. Then their callback number is set, and they are transferred to the callback queue.

For information about queued callbacks, see the following topics:

- Set up queued callback (p. 485)
- Flow block: Transfer to queue (p. 441)
- About queued callbacks in metrics (p. 1082)

**Sample interruptible queue flow with callback**

*Note*

This topic explains a sample flow that is included with Amazon Connect. For information about locating the sample flows in your instance, see Sample flows (p. 318).

Type: Customer queue

This flow shows you how to manage what the customer experiences while in queue. It uses **Check contact attributes** to determine if the customer is contacting you by phone or chat, and to route them accordingly.

If the channel is chat, the customer is transferred to the **Loop prompts**.

If the channel is voice, the customer hears a looping audio that interrupts every 30 seconds to give them two options from the **Get customer input** block:
1. The customer can press 1 to enter a callback number. Then the Get customer input block prompts the customer for their phone number. Then the flow ends.
2. Press 2 ends the flow, and the customer remains in the queue.

Sample Lambda integration

**Note**
This topic explains a sample flow that is included with Amazon Connect. For information about locating the sample flows in your instance, see Sample flows (p. 318).

Type: Flow (inbound)

This flow shows you how to invoke a Lambda function and do a data dip, that is, retrieve information about the customer. The data dip uses the caller's phone number to look up the US state they are calling from. If the customer is using chat, it returns a fun fact. Here's how it works:

1. A prompt tells the customer that a data dip is being performed.
2. The Invoke Lambda function block triggers `sampleLambdaFlowFunction`. This sample Lambda function determines the location of the phone number. The function times out in 4 seconds. If it times out, it plays a prompt that says "Sorry, we failed to find the state for your phone number's area code."
3. In the first Check contact attributes block, it checks the channel the customer is using: voice, chat, task. If chat, it returns a fun fact.
4. If voice, the second Check contact attributes block is triggered. It checks the match conditions of State, which is an external attribute. It uses an external contact attribute because it's getting data by using a process that's external to Amazon Connect
5. A prompt tells you that it's returning you back to Sample inbound flow, and then starts the Transfer flow block.
6. If the transfer fails, it plays a prompt and then disconnects the contact.

For more information about using attributes, see Lambda functions and attributes (p. 545).

Sample recording behavior

**Note**
This topic explains a sample flow that is included with Amazon Connect. For information about locating the sample flows in your instance, see Sample flows (p. 318).

Type: Flow (inbound)

This flow starts by checking the channel of the contact:

- If the contact is a task, it is transferred to the Sample inbound flow.
- If the customer is using chat, they get a prompt that the Set recording block enables managers to monitor chat conversations. (To record chats, you only need to specify an Amazon S3 bucket where the conversation will be stored.)

To monitor chats, the Set recording block is configured to record both the Agent and Customer.
- If the contact is using voice, a Get customer input block prompts them to enter the number for who they want to record. Their entry triggers the Set recording behavior block with the appropriate configuration.

It ends with the customer being transferred by to the Sample inbound flow (p. 318).
For more information, see the following topics:

- Set up recording behavior (p. 483)
- Monitor live conversations (p. 798)
- Review recorded conversations (p. 800)

**Sample note for screenpop**

**Note**
This topic explains a sample flow that is included with Amazon Connect. For information about locating the sample flows in your instance, see Sample flows (p. 318).

Type: Flow (inbound)

This flow shows you how to use Screenpop, a Contact Control Panel feature, to load a web page with parameters based on attributes.

In this sample flow, a **Set contact attributes** block is used to create an attribute from a text string. As an attribute, the text can be passed to the CCP to display a note to an agent.

**Sample secure input with agent**

**Note**
This topic explains a sample flow that is included with Amazon Connect. For information about locating the sample flows in your instance, see Sample flows (p. 318).

Type: Queue transfer

This flow shows you how to allow customers to input sensitive data while putting the agent on hold. In a production environment, we recommend using encryption (p. 511) instead of this solution.

Here's how it works:

1. This flow begins with checking the customer's channel. If they are using chat, they are put in a queue.
2. If they are using voice, the agent and customer are put in a conference call.
3. A **Play prompt** tells the customer that the agent will be put on hold while customer enters their credit card information.
4. When the prompt is finished playing, the agent is put on hold using a **Hold customer or agent** block. If an error occurs, a prompt is played that agent was unable to put on hold, after which the contact flow is ended.
5. The customer's input is stored using the **Store Customer Input** block. This block encrypts the sensitive customer information using a signing key that must be uploaded in .pem format. For a detailed walkthrough that explains how to encrypt customer input, see Creating a secure IVR solution with Amazon Connect.
6. After the customer's data is collected, the agent and customer are put back on call using the **Conference All** option in another **Hold customer or agent** block.
7. The error branch runs if there's an error while capturing the customer's data.

**Sample secure input with no agent**

**Note**
This topic explains a sample flow that is included with Amazon Connect. For information about locating the sample flows in your instance, see Sample flows (p. 318).

Type: Flow (inbound)
This flow shows you how to capture sensitive customer data and encrypt it using a key. Here's how it works:

1. It begins by checking the contact's channel. If they are using chat, a prompt is played that this doesn't work with chat, and they are transferred to the Sample inbound flow (p. 318).
2. If they are using voice, the Store customer input block prompts them to enter their credit card number. The block stores and also encrypts the data using a signing key that must be uploaded in a .pem format.

   In the Set contact attributes block, the encrypted card number is set as contact attribute.
3. After the card number is successfully set as contact attribute, the customer is transferred back to the Sample inbound flow (p. 318).

Flow block definitions

Use flow blocks to create flows in the flow designer. Drag flow blocks and drop them onto a canvas to arrange a flow.

The following table lists all available flow blocks that you can use. Choose any block name in the Block column for more information.

<table>
<thead>
<tr>
<th>Block</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Call phone number (p. 332)</td>
<td>Initiates an outbound call from an outbound whisper flow.</td>
</tr>
<tr>
<td>Amazon Connect Cases (p. 334)</td>
<td>Gets, updates, and creates cases.</td>
</tr>
<tr>
<td>Change routing priority / age (p. 346)</td>
<td>Changes the priority of the contact in queue. You may want to do this, for example, based on the contact's issue or other variable.</td>
</tr>
<tr>
<td>Check call progress (p. 348)</td>
<td>Engages with the output provided by an answering machine, and provides branches to route the contact accordingly. This block works with outbound campaigns only.</td>
</tr>
<tr>
<td>Check contact attributes (p. 349)</td>
<td>Checks the values of contact attributes.</td>
</tr>
<tr>
<td>Check hours of operation (p. 353)</td>
<td>Checks whether the contact is occurring within or outside of the hours of operation defined for the queue.</td>
</tr>
<tr>
<td>Check queue status (p. 355)</td>
<td>Checks the status of the queue based on specified conditions.</td>
</tr>
<tr>
<td>Check Voice ID (p. 357)</td>
<td>Branches based on the enrollment status, voice authentication status, or status of detection of fraudsters in a</td>
</tr>
<tr>
<td>Block</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>watchlist of the caller returned by Voice ID.</td>
<td></td>
</tr>
<tr>
<td>Check staffing (p. 360)</td>
<td>Checks the current working queue, or queue you specify in the block, for whether agents are available, staffed, or online. Staffed availability could be on call, or after contact work status.</td>
</tr>
<tr>
<td>Create task (p. 362)</td>
<td>Creates a new task, sets the tasks attributes, and initiates a contact flow to start the task. To learn more about Amazon Connect Tasks, see Tasks (p. 16).</td>
</tr>
<tr>
<td>Customer profiles (p. 365)</td>
<td>Enables you to retrieve, create, and update a customer profile.</td>
</tr>
<tr>
<td>Disconnect / hang up (p. 368)</td>
<td>Disconnects a contact.</td>
</tr>
<tr>
<td>Distribute by percentage (p. 369)</td>
<td>Routes customers randomly based on a percentage.</td>
</tr>
<tr>
<td>End flow / Resume (p. 371)</td>
<td>Ends the current flow without disconnecting the contact.</td>
</tr>
<tr>
<td>Get customer input (p. 372)</td>
<td>Branches based on customer intent.</td>
</tr>
<tr>
<td>Get queue metrics (p. 382)</td>
<td>Retrieves real-time metrics about queues and agents in your contact center and returns them as attributes.</td>
</tr>
<tr>
<td>Hold customer or agent (p. 387)</td>
<td>Places a customer or agent on or off hold.</td>
</tr>
<tr>
<td>Invoke AWS Lambda function (p. 389)</td>
<td>Calls AWS Lambda, optionally returns key-value pairs.</td>
</tr>
<tr>
<td>Invoke module (p. 391)</td>
<td>Calls a published module.</td>
</tr>
<tr>
<td>Loop (p. 392)</td>
<td>Loops through, or repeats, the Looping branch for the number of loops specified.</td>
</tr>
<tr>
<td>Loop prompts (p. 393)</td>
<td>Loops a sequence of prompts while a customer or agent is on hold or in queue.</td>
</tr>
<tr>
<td>Play prompt (p. 396)</td>
<td>Plays an interruptible audio prompt, delivers a text-to-speech message, or delivers a chat response.</td>
</tr>
<tr>
<td>Set callback number (p. 401)</td>
<td>Sets a callback number.</td>
</tr>
<tr>
<td>Block</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Set contact attributes (p. 403)</td>
<td>Stores key-value pairs as contact attributes.</td>
</tr>
<tr>
<td>Set customer queue flow (p. 405)</td>
<td>Specifies the flow to invoke when a customer is transferred to a queue.</td>
</tr>
<tr>
<td>Set disconnect flow (p. 406)</td>
<td>Sets the flow to run after a disconnect event.</td>
</tr>
<tr>
<td>Set hold flow (p. 409)</td>
<td>Links from one flow type to another.</td>
</tr>
<tr>
<td>Set logging behavior (p. 410)</td>
<td>Enables flow logs so you can track events as contacts interact with flows.</td>
</tr>
<tr>
<td>Set Voice ID (p. 415)</td>
<td>Sends audio to Amazon Connect Voice ID to verify the caller’s identity and match against fraudsters in watchlist, as soon as the call is connected to a flow.</td>
</tr>
<tr>
<td>Set recording and analytics behavior (p. 411)</td>
<td>Sets options for recording conversations.</td>
</tr>
<tr>
<td>Set voice (p. 419)</td>
<td>Sets the text-to-speech (TTS) language and voice to be used in the flow.</td>
</tr>
<tr>
<td>Set whisper flow (p. 422)</td>
<td>Overrides the default whisper by linking to a whisper flow.</td>
</tr>
<tr>
<td>Set working queue (p. 424)</td>
<td>Specifies the queue to be used when Transfer to queue is invoked.</td>
</tr>
<tr>
<td>Start media streaming (p. 429)</td>
<td>Starts capturing customer audio for a contact.</td>
</tr>
<tr>
<td>Stop media streaming (p. 431)</td>
<td>Stops capturing customer audio after it is started with a Start media streaming block.</td>
</tr>
<tr>
<td>Store customer input (p. 432)</td>
<td>Stores numerical input to a contact attribute.</td>
</tr>
<tr>
<td>Transfer to agent (beta) (p. 435)</td>
<td>Transfers the customer to an agent.</td>
</tr>
<tr>
<td>Transfer to flow (p. 437)</td>
<td>Transfers the customer to another flow.</td>
</tr>
<tr>
<td>Transfer to phone number (p. 438)</td>
<td>Transfers the customer to a phone number external to your instance.</td>
</tr>
<tr>
<td>Block</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Transfer to queue (p. 441)</td>
<td>In most flows, this block ends the current flow and places the customer in queue. When used in a customer queue flow, this block transfers a contact already in a queue to another queue.</td>
</tr>
<tr>
<td>Wait (p. 445)</td>
<td>Pauses the flow.</td>
</tr>
<tr>
<td>Wisdom (p. 446)</td>
<td>Associates a Wisdom domain to a contact to enable real-time recommendations.</td>
</tr>
</tbody>
</table>

## Supported channels for flow blocks

The following table lists all available flow blocks, and whether they support routing a contact through the specified channels.

<table>
<thead>
<tr>
<th>Block</th>
<th>Voice</th>
<th>Chat</th>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>Call phone number (p. 332)</td>
<td>Yes</td>
<td>No - Error branch</td>
<td>No - Error branch</td>
</tr>
<tr>
<td>Cases (p. 334)</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Change routing priority / age (p. 346)</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Check call progress (p. 348)</td>
<td>Yes</td>
<td>No - Error branch</td>
<td>No - Error branch</td>
</tr>
<tr>
<td>Check contact attributes (p. 349)</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Check hours of operation (p. 353)</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Check queue status (p. 355)</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Check Voice ID (p. 357)</td>
<td>Yes</td>
<td>No - Error branch</td>
<td>No - Error branch</td>
</tr>
<tr>
<td>Check staffing (p. 360)</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Create task (p. 362)</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Customer profiles (p. 365)</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Disconnect / hang up (p. 368)</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Distribute by percentage (p. 369)</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>
### Supported channels for flow blocks

<table>
<thead>
<tr>
<th>Block</th>
<th>Voice</th>
<th>Chat</th>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>End flow / Resume (p. 371)</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Get customer input (p. 372)</td>
<td>Yes</td>
<td>Yes when Amazon Lex is used Otherwise, No - Error branch</td>
<td>Yes</td>
</tr>
<tr>
<td>Get queue metrics (p. 382)</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Hold customer or agent (p. 387)</td>
<td>Yes</td>
<td>No - Error branch</td>
<td>No - Error branch</td>
</tr>
<tr>
<td>Invoke AWS Lambda function (p. 389)</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Invoke module (p. 391)</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Loop (p. 392)</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Loop prompts (p. 393)</td>
<td>Yes</td>
<td>No - Error branch</td>
<td>No - Error branch</td>
</tr>
<tr>
<td>Play prompt (p. 396)</td>
<td>Yes</td>
<td>Yes</td>
<td>No - takes the <strong>Okay</strong> branch, but it has no effect</td>
</tr>
<tr>
<td>Set callback number (p. 401)</td>
<td>Yes</td>
<td>No - Error branch</td>
<td>No - Error branch</td>
</tr>
<tr>
<td>Set contact attributes (p. 403)</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Set customer queue flow (p. 405)</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Set disconnect flow (p. 406)</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Set hold flow (p. 409)</td>
<td>Yes</td>
<td>No - Error branch</td>
<td>No - Error branch</td>
</tr>
<tr>
<td>Set logging behavior (p. 410)</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Set recording and analytics behavior (p. 411)</td>
<td>Yes</td>
<td>Yes</td>
<td>No - Error branch</td>
</tr>
<tr>
<td>Set Voice ID (p. 415)</td>
<td>Yes</td>
<td>No - Error branch</td>
<td>No - Error branch</td>
</tr>
<tr>
<td>Set voice (p. 419)</td>
<td>Yes</td>
<td>No - Success branch</td>
<td>No - Success branch</td>
</tr>
<tr>
<td>Set whisper flow (p. 422)</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Set working queue (p. 424)</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>
### Block: Call phone number

**Description**

- Use to place an outbound call from an **Outbound Whisper** flow.

**Supported channels**

The following table lists how this block routes a contact who is using the specified channel.

<table>
<thead>
<tr>
<th>Channel</th>
<th>Supported?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice</td>
<td>Yes</td>
</tr>
<tr>
<td>Chat</td>
<td>No - Error branch</td>
</tr>
<tr>
<td>Task</td>
<td>No - Error branch</td>
</tr>
</tbody>
</table>

**Flow types**

You can use this block in the following **contact flow types** (p. 448):

- Outbound Whisper flow
Outbound whisper flows run in Amazon Connect immediately after an agent accepts the call during direct dial and callback scenarios. When the flow runs:

- The caller ID number is set if one is specified in the Call phone number (p. 332) block.
- If no caller ID is specified in the Call phone number (p. 332) block, the caller ID number defined for the queue is used when the call is placed.
- When there is an error with a call that is initiated by the Call phone number (p. 332) block, the call is disconnected and the agent is placed in AfterContactWork (ACW).

Only published flows can be selected as the outbound whisper flow for a queue.
Note
To use a custom caller ID, you must open an AWS Support ticket to enable this feature. For more information, see Set up outbound caller ID.

Configured block
When this block is configured, it looks similar to the following image:

There is no error branch for the block. If a call is not successfully initiated, the flow ends and the agent is placed in an AfterContactWork (ACW).

Sample flows
See these sample flows for scenarios that use this block:

- Sample customer queue priority (p. 319)
- Sample queue configurations (p. 320)

Scenarios
See these topics for more information about caller ID works:

- Set up outbound caller ID (p. 208)

Flow block: Cases

Tip
Be sure to enable (p. 728) Amazon Connect Cases before using this block. Otherwise, you can't configure its properties.

Description

- Gets, updates, and creates cases.
- You can link a contact to a case, and then the contact will be recorded in the Activity feed of the case. When the agent accepts a contact that is linked to a case, the case automatically opens as a new tab in the agent application.
- While you can link contacts to multiple cases, there is a limit of five new case tabs automatically opening in the agent application. These will be the five most recently updated cases.
- For more information about cases, see Amazon Connect Cases (p. 727).

Supported channels

The following table lists how this block routes a contact who is using the specified channel.
Flow types

You can use this block in the following contact flow types (p. 448):

- All flows

Properties: Get case

**Tip**
The following screenshots refer to the legacy flow designer.

When configuring properties to get a case:

- You must provide at least one search criteria. Otherwise this block will take the Error branch.

  You can either use attribute in the Cases namespace or set manually. If you set manually, see to the syntax in How to persist fields throughout the flow (p. 342).

- To get cases for a given customer, add a Customer profiles (p. 365) block to the flow before creating the case.

Configure the Customer profiles (p. 365) block to get the customer profile.
In the Cases block, on the Properties page configure the Customer ID section as shown in the following image:
You can specify to get only the last updated case for any search criteria. This can be achieved by selecting **Get last updated case**.

You can persist case fields in the case namespace to make use of them in blocks that are in your flow after the **Cases** block that is configured to **Get case**. This can be achieved by making use of the **Response fields** section and selecting fields that you want to use in the other blocks.

You can either use attribute in the Cases namespace or set manually. If you set manually, see to the syntax in *How to persist fields throughout the flow* (p. 342).

- The **Get case** properties show the options for the single-select field type.
- The **Get case** properties use the Contains function for text field type.
- The **Get case** properties use the EqualTo function for fields of type: number, boolean.
- The **Get case** properties use greater than or equal to for any date field search.
- Contacts can be routed down the following branches:
  - **Success**: The case was found.
  - **Contact not linked**: If you specify to link the contact to case, then this error branch will appear. It might be that the contact was not linked after the case is retrieved (partial success/partial failure). If this happens, then the flow will follow this branch.
  - **Multiple found**: Multiple cases are found with the search criteria.
  - **None found**: No cases are found with the search criteria.
  - **Error**: An error was encountered while trying to find the case. This may be due to a system error or how **Get case** is configured.

The following images show an example of a **Get case** configuration. The first image shows how to configure the block to search for a case by Customer ID and Title. The Customer ID is being pulled in from the Profile ARN of the customer:
This next image shows the block configured to search by Late Arrival. Three fields will be shown to the agent: Status, Summary, Title.

Properties: Update case

When configuring properties to update a case:

- Add a Get case block before an Update case. Use it to find the case you want to update.
You must provide an update to at least one **Request** field. Otherwise, this block takes the **Error** branch.

You can either use an attribute in the Cases namespace, or set the **Request** field manually. If you set manually, see the syntax in *How to persist fields throughout the flow* (p. 342).

Contacts can be routed down the following branches:

- **Success**: The case was updated, and the contact was linked to the case.
- **Contact not linked**: If you specify to link the contact to case, then this error branch will appear. It might be that the case was updated, but the contact was not linked to the case (partial success/partial failure). If this happens, then the flow will follow this branch.
- **Error**: The case was not updated. The contact was not linked to the case, as the case was not updated.

The following images show an example of an **Update case** configuration. The first image shows that as part of the update the contact is going to be linked to the case. To identify which case to update, the **Case Id** is specified. (Case Id is the unique identifier of the case and the only field you can provide here. Other fields will not work and produce errors.)
Properties: Create case

When configuring properties to create a case:

- You must provide a case template. For more information, see Create case templates (p. 738).
- Fields that are required appear in the Required fields section. You must assign values to them to create a case.
- You must specify the customer to create a case.
  - We recommend adding a Customer profiles (p. 365) block to the flow before the Cases block. Use the Customer profiles (p. 365) block to get a customer profile with some prefetched data, or create a new customer profile and then use that to create a case.
  - To provide a value for Customer Id in the Cases block, configure the fields as shown in the following image:

    ![Required fields](image)

    If you are setting the value manually, you must provide the full customer profile ARN in this format:

    `arn:aws:profile:your AWS Region:your AWS account ID:domains/profiles domain name/profiles/profile ID`

    - You can specify values for fields other than the required ones in the Request fields section.
You can either use attribute in the Cases namespace or set manually. If you set manually, see to the syntax in How to persist fields throughout the flow (p. 342).

- You can specify that a contact should be linked to case. If you link the contact to the case, then the contact and a link to contact details appear on the case that the agent sees in the agent application.
- After creating a case, the case ID that is created will be persisted in the case namespace. It can be used in other blocks by accessing the case namespace case ID attribute value.
- Contacts can be routed down the following branches:
  - **Success**: The case was created, and the contact was linked to the case.
  - **Contact not linked**: If you specify to link the contact to case, then this error branch will appear. This is because it is possible that the case was created, but the contact was not linked to the case (partial success/partial failure). If this happens, then the flow will follow this branch.
  - **Error**: The case was not created. The contact was not linked to the case, as the case was not created.

The following images show an example of a Create case configuration. The first image shows the new case will be created using the General inquiry template:

The next image shows the reason for the case will be set to **Shipment delayed**.
How to persist fields throughout the flow

Let's say you want customers to be able to call into your contact center and get the status of their case without ever talking to an agent. You want the IVR to read the status to the customer. You can get the status from a system field, or you might have a custom status field, for example, named *Detailed status*.

Here's how to configure your flow to get and read the status to the customer:

1. Add a **Cases** block to your flow. Configure it to **Get case** to find the case.

   ![Cases block](image)

2. In the **Request fields** section, search for the case by the customer **Profile ARN**:
3. In the **Response fields** section, add the field that you want passed throughout the flow. For our example, choose **Status**.

<table>
<thead>
<tr>
<th>Response fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select any fields that you want to use in subsequent flow blocks</td>
</tr>
<tr>
<td><strong>Status</strong></td>
</tr>
</tbody>
</table>

4. Add a **Play prompt (p. 396)** block to your flow.

5. Configure **Play prompt (p. 396)** to set the attribute manually:
Use the following syntax for reading the status of the case to the customer:

- For system fields, you can read the syntax and understand which field it refers to. For example: 
  
  
  `.Case.status` refers to the case status. For a list of system field IDs, see the Field ID column in the System case fields (p. 734) topic.

- For custom fields, the syntax uses a UUID (unique ID) to represent the field. For example, in the following image, the ID for the custom field named Detailed status is `12345678-aaaa-bbbb-cccc-123456789012`.

  ![Play prompt](image)
Find the custom field ID

To find the UUID of a custom field:

1. In Amazon Connect, on the navigation menu choose Agent applications, Custom fields, and then choose the custom field that you want.
2. While on the details page for the custom field, look at the URL of the page. The UUID is the last portion of the URL. For example, in the following URL:

   https://instance alias.my.connect.aws/cases/configuration/fields/update/12345678-aaaa-bbbb-cccc-123456789012

   The UUID is 12345678-aaaa-bbbb-cccc-123456789012.

The following image shows where you find the custom field ID in the URL:

Configuration tips

- Be sure to check the Cases service quotas (p. 1328), and request increases. The quotas apply when this block creates cases.

Configured block

When this block is configured to create a cases, it looks similar to the following:
Flow block: Change routing priority / age

Description

- Change a customer's position in the queue. For example, move the contact to the front of the queue, or to the back of the queue.

Supported channels

The following table lists how this block routes a contact who is using the specified channel.

<table>
<thead>
<tr>
<th>Channel</th>
<th>Supported?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice</td>
<td>Yes</td>
</tr>
<tr>
<td>Chat</td>
<td>No</td>
</tr>
<tr>
<td>Task</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Flow types

You can use this block in the following contact flow types (p. 448):

- Outbound Whisper flow
- Inbound flow
- Customer queue flow
- Transfer to Agent flow
- Transfer to Queue flow

Properties

This block gives you two options for changing a customer's position in queue:
• **Set priority.** The default priority for new contacts is 5. You can raise the priority of a contact - compared to other contacts in the queue - by assigning them a higher priority, such as 1 or 2.

• **Adjust by time.** You can add or subtract seconds or minutes from the amount of time the current contact spends in queue. Contacts are routed to agents on a first-come, first-served basis. So changing their amount of time in queue compared to others also changes their position in queue.

Here’s how this block works:

1. Amazon Connect takes the actual "time in queue" for the contact (in this case, how long this specific contact has spent in queue so far), and adds the number of seconds you specified in the **Adjust by time** property.
2. The additional seconds makes this specific contact look artificially older than it is.
3. The routing system now perceives this contact's "time in queue" as longer than it actually is, which affects its position within the ranked list.

**Configuration tips**

• When using this block, it takes at least 60 seconds for a change to take effect for contacts already in queue.

• If you need a change in a contact's priority to take effect immediately, set the priority before putting the contact in queue, that is, before using a **Transfer to queue** (p. 441) block.

**Configured block**

When this block is configured, it looks similar to the following image:

![Image of configured block](image-url)

**Sample flows**

See these sample flows for scenarios that use this block:

• **Sample customer queue priority (p. 319)**
• **Sample queue configurations (p. 320)**

**Scenarios**

See these topics for more information about how routing priority works:

• **Routing profiles (p. 21)**
• **How routing works (p. 223)**
Flow block: Check call progress

**Important**
This block works with outbound campaigns (p. 217) only.

**Description**
- Engages with the output provided by an answering machine, and provides branches to route the contact accordingly.
- It supports the following branches:
  - **Call answered**: The call has been answered by a person.
  - **Voicemail (beep)**: Amazon Connect identifies that the call ended in a voicemail and it detects a beep.
  - **Voicemail (no beep)**:
    - Amazon Connect identifies that the call ended in a voicemail but it doesn't detect a beep.
    - Amazon Connect identifies that the call ended in a voicemail, but the beep is unknown.
  - **Not detected**: Could not detect whether there is voicemail. This happens when Amazon Connect is unable to make a positive determination of whether a call was answered by a live voice or an answering machine. Typical situations that land in this state include long silences or excessive background noise.
  - **Error**: If any errors are encountered due to Amazon Connect not running correctly after media has been established on the call, this is the path that will be taken by the flow. Media is established when the call is either answered by a live voice or by an answering machine. If the call is rejected by the network or encounters a system error while placing the outbound call, the flow will not be run.

**Supported channels**
The following table lists how this block routes a contact who is using the specified channel.

<table>
<thead>
<tr>
<th>Channel</th>
<th>Supported?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice</td>
<td>Yes</td>
</tr>
<tr>
<td>Chat</td>
<td>No - Error branch</td>
</tr>
<tr>
<td>Task</td>
<td>No - Error branch</td>
</tr>
</tbody>
</table>

**Flow types**
You can use this block in the following contact flow types (p. 448):
- All flow types
Properties

Check call progress

Branches on AMD (Automatic Machine Detection) to determine the next steps for handling outbound calls. Info

Configured block

When this block is configured, it looks similar to the following image:

Flow block: Check contact attributes

Description

- Branches based on a comparison to the value of a contact attribute.
- Supported comparisons include: Equals, Is Greater Than, Is Less Than, Starts With, Contains.

Supported channels

The following table lists how this block routes a contact who is using the specified channel.

<table>
<thead>
<tr>
<th>Channel</th>
<th>Supported?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice</td>
<td>Yes</td>
</tr>
<tr>
<td>Chat</td>
<td>Yes</td>
</tr>
<tr>
<td>Task</td>
<td>Yes</td>
</tr>
</tbody>
</table>
Flow types

You can use this block in the following contact flow types (p. 448):

- All flows

Properties

Conditions to check can be dynamic

You can check conditions like the following:

- `.Attributes.verificationCode`

To check for a NULL value, you need to use a Lambda.

Amazon Lex attributes

You can set attributes that are Type = Lex as follows:

- **Alternative Intents**: Usually you configure flows to branch on the winning Lex intent. However, in some situations, you might want to branch on an alternate intent. That is, what the customer might have meant.

  For example, the following alternative intent indicates that if Amazon Lex is more than 70% confident the customer meant *fraud*, the flow should branch accordingly.
1. **Intent name** is the name of an alternate intent in Lex. It's case sensitive and must match what's in Lex exactly.

2. **Intent Attribute** is what Amazon Connect is going to check. In this example, it's going to check the **Intent Confidence Score**.

3. **Conditions to check**: If Lex is 70% certain the customer meant the alternate intent instead of the winning intent, branch.
   - **Intent Confidence Score**: How confident is the bot that it understands the customer's intent. For example, if the customer says "I want to update an appointment," *update* can mean *reschedule* or *cancel*. Amazon Lex provides the confidence score on a scale of 0 to 1:
     - 0 = not at all confident
     - .5 = 50% confident
     - 1 = 100% confident
   - **Intent Name**: The user intent returned by Amazon Lex.
   - **Sentiment Label**: What is the winning sentiment, the one with the highest score. You can branch on POSITIVE, NEGATIVE, MIXED, or NEUTRAL.
   - **Sentiment Score**: Amazon Lex integrates with Amazon Comprehend to determine the sentiment expressed in an utterance:
     - Positive
     - Negative
     - Mixed: The utterance expresses both positive and negative sentiments.
     - Neutral: The utterance does not express either positive or negative sentiments.
• **Session Attributes**: Map of key-value pairs representing the session-specific context information.
• **Slots**: Map of intent slots (key/value pairs) Amazon Lex detected from the user input during the interaction.

**Configuration tips**

• If you have multiple conditions to compare, Amazon Connect checks them in the order they are listed.

For example, in the following image Amazon Connect compares the **greater than 60** condition first and compares **greater than 2** last.

• This block doesn't support case-insensitive pattern matching. For example, if you're trying to match against the word **green** and the customer types **Green**, it would fail. You would have to include every permutation of upper and lower-case letters.

**Configured**

When this block is configured, it looks similar to the following image:
Sample flows

See these sample flows for scenarios that use this block:

- Sample inbound flow (first contact experience) (p. 318)
- Sample interruptible queue flow with callback (p. 324)

Scenarios

See these topics for scenarios that use this block:

- How to reference contact attributes (p. 535)
- Route based on contact’s channel (p. 540)
- How to reference contact attributes (p. 535)

Flow block: Check hours of operation

Description

- Checks whether the contact is occurring within or outside of the hours of operation defined for the queue.
- Branches based on specified hours of operation.

Supported channels

The following table lists how this block routes a contact who is using the specified channel.

<table>
<thead>
<tr>
<th>Channel</th>
<th>Supported?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice</td>
<td>Yes</td>
</tr>
<tr>
<td>Chat</td>
<td>Yes</td>
</tr>
<tr>
<td>Task</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Flow types

You can use this block in the following contact flow types (p. 448):
• Inbound flow
• Customer queue flow
• Transfer to Agent flow
• Transfer to Queue flow

**Properties**

You can set up multiple hours of operation so you have one for various queues. For instructions, see [Set the hours of operation and timezone for a queue (p. 227)](#).

**Configuration tips**

- Agent queues (p. 22) that are automatically created for each agent in your instance do not include an hours of operation.
- If you use this block to check the hours of operation for an agent queue, the check fails and the contact is routed down the *Error* branch.

**Configured block**

When this block is configured, it looks similar to the following image:

**Related topics**

- [Set the hours of operation and timezone for a queue (p. 227)](#)

**Sample flows**

Sample inbound flow (first contact experience) (p. 318)
Scenarios

See these topics for scenarios that use this block:

• Manage contacts in a queue (p. 480)

Flow block: Check queue status

Description

• Checks the status of the queue based on specified conditions.
• Branches based on the comparison of **Time in Queue** or **Queue capacity**.
  • **Time in queue** is the amount of time the oldest contact spends in queue, before they are routed to an agent or removed from the queue.
  • **Queue capacity** is number of contacts waiting in a queue.
• If no match is found, the **No Match** branch is followed.

Supported channels

The following table lists how this block routes a contact who is using the specified channel.

<table>
<thead>
<tr>
<th>Channel</th>
<th>Supported?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice</td>
<td>Yes</td>
</tr>
<tr>
<td>Chat</td>
<td>Yes</td>
</tr>
<tr>
<td>Task</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Flow types

You can use this block in the following **contact flow types** (p. 448):

• Inbound flow
• Customer queue flow
• Transfer to Agent flow
• Transfer to Queue flow
The order in which you add conditions matters at the runtime. Results are evaluated against conditions in the same order in which you add them to the block. Contacts are routed down the first condition to match.

For example, in the following condition order, every value matches one of first two conditions. None of the other conditions are ever matched.

- Time in Queue <= 90
- Time in Queue >= 90
- Time in Queue >= 9
- Time in Queue >= 12
- Time in Queue >= 15
- Time in Queue >= 18
- Time in Queue >= 20
- Time in Queue > 21

In this next example, all contacts with a wait time in queue of 90 or less (<=90) match first condition only. This means less than or equal to 9 (<=9), <=12, <=15, <=18, <=20, <=21 are never run. Any value greater than 90 is routed down the greater than or equal to 21 (>=21) condition branch.
Time in Queue <= 90
Time in Queue <= 9
Time in Queue <= 12
Time in Queue <= 15
Time in Queue <= 18
Time in Queue <= 20
Time in Queue <= 21
Time in Queue >= 21

Configured block

When this block is configured, it looks similar to the following image:

![Check queue status](image)

Scenarios

See these topics for scenarios that use this block:

- Manage contacts in a queue (p. 480)

Flow block: Check Voice ID

Description

**Note**
The Set Voice ID (p. 415) block needs to be set in the flow before this one. That block sends audio to Amazon Connect Voice ID (p. 944) to verify the customer's identity, and returns a status.

The Check Voice ID block branches based on the results of the voice analysis and the status returned by Voice ID:

- **Enrollment status:**
  - **Enrolled:** The caller is enrolled in voice authentication.
  - **Not enrolled:** The caller has not yet been enrolled in voice authentication. When this status is returned, for example, you may want to directly route the call to an agent for enrollment.
  - **Opted out:** The caller has opted out of voice authentication.

You are not charged for checking enrollment status.

- **Voice authentication status:**
  - **Authenticated:** The caller's identity has been verified. That is, the authentication score is greater than or equal to the threshold (default threshold of 90 or your custom threshold).
  - **Not authenticated:** The authentication score is lower than threshold that you configured.
• **Inconclusive**: Unable to analyze a caller's speech for authentication. This is usually because Voice ID did not get the required 10 seconds to provide a result for authentication.

• **Not enrolled**: The caller has not yet been enrolled in voice authentication. When this status is returned, for example, you may want to directly route the call to an agent for enrollment.

• **Opted out**: The caller has opted out of voice authentication.

You are not charged if the result is **Inconclusive, Not enrolled or Opted out**.

• **Fraud detection status**:
  - **High risk**: The risk score meets or exceeds the set threshold.
  - **Low risk**: The risk score did not meet the set threshold.
  - **Inconclusive**: Unable to analyze a caller's voice for detection of fraudsters in a watchlist.

You are not charged if the result is **Inconclusive**.

**Note**
For **Enrollment status** and **Voice authentication**, the **Customer ID** (p. 521) system attribute needs to be set in **Set contact attributes** (p. 403) block because they are acting on a specific customer. You don't need to do this for **Fraud detection** because it's not acting on a specific customer but rather detecting whether the incoming caller matches a fraudster on your watchlist. This means it's possible for a customer to be successfully authenticated and still have high fraud risk.

**Supported channels**

The following table lists how this block routes a contact who is using the specified channel.

<table>
<thead>
<tr>
<th>Channel</th>
<th>Supported?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice</td>
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<td>Chat</td>
<td>No - Error branch</td>
</tr>
<tr>
<td>Task</td>
<td>No - Error branch</td>
</tr>
</tbody>
</table>

**Flow types**

You can use this block in the following **contact flow types** (p. 448):

• Inbound flow
• Customer queue flow
• Customer whisper flow
• Outbound whisper flow
• Agent whisper flow
• Transfer to Agent flow
• Transfer to Queue flow

**Properties**

This block doesn't have any properties that you set. Rather, it creates branches for you to route contacts based on the result of the authentication threshold and voiceprint evaluation that **Set Voice ID** (p. 415) returns.
The following image shows what this block looks like when it's configured to check for Enrollment status. Different status results are returned when it's configured for Voice authentication or Fraud detection.

**Configuration tips**

When you create a flow that uses this block, add these blocks in the following order:

1. Set Voice ID (p. 415) block.
2. Set contact attributes (p. 403) block: For Enrollment status and Voice authentication, the Customer ID (p. 521) system attribute needs to be set in Set contact attributes (p. 403) block because it is acting on a specific customer.
3. Check Voice ID block.

**Configured block**

The following image shows what this block looks like when it's configured to check for:

1. Enrollment status
2. Voice authentication
3. Fraud detection
More information

See the following topic for more information about this block:

- Use real-time caller authentication with Voice ID (p. 944)
- Use Voice ID (p. 1309)

Flow block: Check staffing

Description

- Checks the current working queue, or queue you specify in the block, for whether agents are available (p. 998), staffed (p. 1003), or online (p. 1002).
- Before transferring a call to agent and putting that call in a queue, use the Check hours of operation and Check staffing blocks. They verify that the call is within working hours and that agents are staffed to service.

Supported channels

The following table lists how this block routes a contact who is using the specified channel.

<table>
<thead>
<tr>
<th>Channel</th>
<th>Supported?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice</td>
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<tr>
<td>Chat</td>
<td>Yes</td>
</tr>
<tr>
<td>Task</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Flow types

You can use this block in the following contact flow types (p. 448):
Check staffing

- Inbound flow
- Customer queue flow
- Transfer to Agent flow
- Transfer to Queue flow

Properties

In the Status to check dropdown box, choose one of the following options:

- **Available (p. 998)** = Check whether the agent has **Available** slots to be routed a contact.
- **Staffed (p. 1003)** = Check whether agents have **Available** slots, or are **On call**, or are in **After Contact Work**.
- **Online (p. 1002)** = Check whether agents are **Available**, in the **Staffed** state, or in a custom state.

Configuration tips

- You must set a queue before using a **Check staffing** block in your flow. You can use a **Set working queue** (p. 424) block to set the queue.
- If a queue is not set, the contact is routed down the **Error** branch.
- When a contact is transferred from one flow to another, the queue that is set in a flow is passed from that flow to the next flow.

Configured block

When this block is configured, it looks similar to the following image:
Scenarios

See these topics for scenarios that use this block:

• Transfer contacts to a specific agent (p. 481)

Flow block: Create task

Description

Creates a new task, sets the tasks attributes, and initiates a flow to start the task immediately or schedule it for a future date and time. For more information about Amazon Connect Tasks, see Tasks (p. 16).

Note

If your Amazon Connect instance was created on or before October 2018, the contact is routed down the error branch. For the contact to be routed down the success path, create an IAM policy with the following permission and attach it to the Amazon Connect service role. You can find the Amazon Connect service role on the Account overview page for your Amazon Connect instance.

```json
{
  "Effect": "Allow",
  "Action": "connect:StartTaskContact",
  "Resource": "*"
}
```

Supported channels

The following table lists how this block routes a contact who is using the specified channel.

<table>
<thead>
<tr>
<th>Channel</th>
<th>Supported?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice</td>
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<tr>
<td>Chat</td>
<td>Yes</td>
</tr>
<tr>
<td>Task</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Flow types

You can use this block in the following contact flow types (p. 448):
• All flows

**Properties**

Create task

Creates a new task to run an assigned flow. Info

**Flow**

Select a flow to run this task.

- Set manually
  - Flow: Sample inbound flow (first contact experience)

- Set dynamically
Create task

Name
- Set manually
  - Name
    - Sample task
- Set dynamically
- Set description
  - Set manually
    - Description
      - Example of an agent task to investigate a customer issue from a sample inbound flow.
- Set dynamically
- Set references
- Schedule task
  - Set date and time using attribute
  - Set a delay
    - Set manually
      - Number
        - 2
      - Unit of time
        - Days
  - Set dynamically

Task attributes
Define and store key-value pairs as contact attributes.

- Destination key
- Type
  - Set manually
    - Value
      - inbound
  - Set dynamically
Configuration tips

- The Create task block branches based on whether the task was successfully created:
  - Success if task was created. It responds with the contact ID of the newly created task.
  - Error if task wasn’t created.
- The newly created task runs the flow that you specified in the Flow section of the block. You can reference the contact ID of the newly created task in subsequent blocks.

For example, you might want to reference the task contact ID in the Play prompt block. You can specify the task contact ID dynamically by using the following attribute:
  - Type: System
  - Attribute: Task Contact id

- To create a scheduled task, we recommend that in the Schedule task section, you use Set a delay. Provide a value that is persistently valid and doesn't become outdated.

You can Set a delay manually or use attributes.

If there are cases where Set date and time using attribute is needed, you specify an actual date and time in Epoch seconds. When the date and time have passed, contacts are always routed down the Error branch. To avoid the Error branch, be sure to keep the Epoch seconds updated to a valid date and time in the future.

- Be sure to check the service quotas (p. 1325) for tasks and API throttling, and request increases, if needed. The quotas apply when this block creates tasks.

Configured block

When this block is configured, it looks similar to the following image:

Sample flows

See these sample flows for scenarios that use this block:

- Sample inbound flow (first contact experience) (p. 318)

Flow block: Customer profiles

Description

- Enables you to retrieve, create, and update a customer profile.
- You can configure the block to retrieve profiles by phone number or email.
- When a customer profile is retrieved, the Response fields are stored in the contact attributes for that customer.
• You can also reference the **Response fields** by using the following JSONPath: `.Customer`. For example, `.Customer.City`.

• The following examples show how you might use this block:
  • Use a [Play prompt](p. 396) block after retrieving a profile to provide a personalized call or chat experience by referencing the supported profile fields.
  • Use a [Check contact attributes](p. 349) block after retrieving a profile to route a contact based on the value of the profile field.

### Supported channels

The following table lists how this block routes a contact that is using the specified channel.

<table>
<thead>
<tr>
<th>Channel</th>
<th>Supported?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice</td>
<td>Yes</td>
</tr>
<tr>
<td>Chat</td>
<td>Yes</td>
</tr>
<tr>
<td>Task</td>
<td>Yes</td>
</tr>
</tbody>
</table>

### Flow types

You can use this block in the following contact flow types (p. 448):

• All flow types
Properties

Under **Action**, choose from the following options:

- **Get profile**
- **Create a profile**
- **Update a profile**

Use the options under **Response fields** to identify objects that agents can search on when they use the agent application.

The **Action** and **Response fields** correspond to the request and response fields of the Profile API.
Configuration tips

- Before using this block, make sure Customer Profiles is enabled for your Amazon Connect instance. For instructions, see Use Customer Profiles (p. 587).
- A contact is routed down the Error branch in the following situations:
  - Customer Profiles is not enabled for your Amazon Connect instance.
  - Request data values are not valid. The request values cannot be over 255 characters.
  - The Customer Profiles API request has been throttled.
  - Customer Profiles is having availability issues.

Configured block

When this block is configured, it looks similar to the following image:

Flow block: Disconnect / hang up

Description

- Disconnects the contact.

Supported channels

The following table lists how this block routes a contact that is using the specified channel.

<table>
<thead>
<tr>
<th>Channel</th>
<th>Supported?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice</td>
<td>Yes</td>
</tr>
<tr>
<td>Chat</td>
<td>Yes</td>
</tr>
<tr>
<td>Task</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Flow types

You can use this block in the following contact flow types (p. 448):

- Inbound flow
• Customer queue flow
• Transfer to Agent flow
• Transfer to Queue flow

Flow block: Distribute by percentage

Description
• This block is useful for doing A/B testing. It routes customers randomly based on a percentage.
• Contacts are distributed randomly, so exact percentage splits may or may not occur.

Supported channels
The following table lists how this block routes a contact who is using the specified channel.

<table>
<thead>
<tr>
<th>Channel</th>
<th>Supported?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice</td>
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<tr>
<td>Chat</td>
<td>Yes</td>
</tr>
<tr>
<td>Task</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Flow types
You can use this block in the following contact flow types (p. 448):
• Inbound flow
• Customer queue flow
• Outbound Whisper flow
• Transfer to Agent flow
• Transfer to Queue flow
Properties

Distribute by percentage

Routes customers randomly based on specified percentage.
Info

Percentages to branch
50% remaining (default branch)

Add another percentage

How it works

This block creates static allocation rules based on how you configure it. Internal logic generates a random number between 1-100. This number identifies which branch to take. It doesn't use current or historical volume as part of it's logic.

For example, say a block is configure like this:

- 20% = A
- 40% = B
- 40% remaining = Default

When contact a is being routed through a flow, Amazon Connect generates the random number.

- If number is between 0-20, the contact is routed down the A branch.
- Between 21-60 it's routed down the B branch.
- Greater than 60 it's routed down the Default branch.

Configured block

When this block is configured, it looks similar to the following image:

Sample flows

See these sample flows for scenarios that use this block:
Flow block: End flow / Resume

Description

• Ends the current flow without disconnecting the contact.
• This block is often used for the Success branch of the Transfer to queue block. The flow doesn't end until the call is picked up by an agent.
• You also might use this block when a Loop prompts block is interrupted. You can return the customer to the Loop prompts block.

Supported channels

The following table lists how this block routes a contact who is using the specified channel.

<table>
<thead>
<tr>
<th>Channel</th>
<th>Supported?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice</td>
<td>Yes</td>
</tr>
<tr>
<td>Chat</td>
<td>Yes</td>
</tr>
<tr>
<td>Task</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Flow types

You can use this block in the following contact flow types (p. 448):

• Customer queue flow
• Customer whisper flow
• Outbound Whisper flow
• Agent whisper flow

Properties

End flow / Resume

Ends the flow without disconnecting the contact. However, resumes looping when the Loop prompts block is interrupted.

When End flow / return from interruption is invoked, the customer will remain connected to the system.
Configured block

When this block is configured, it looks similar to the following image:

![Flow block: Get customer input](image)

### Flow block: Get customer input

#### Description

- It plays a prompt to get a response from the customer. For example, "For Sales, press one. For Support, press two."
- When customers enter DTMF input (touch-tone keypad or telephone input), the prompt is interruptible.
- When an Amazon Lex bot plays a voice prompt, customers can interrupt it with their voice. To set this up, use the `barge-in-enabled` session attribute.
- It then branches based on the customer's input.
- This block works for chat only when Amazon Lex is used. It gathers customer input only, not agent input.

#### Supported channels

The following table lists how this block routes a contact who is using the specified channel.

<table>
<thead>
<tr>
<th>Channel</th>
<th>Supported?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice</td>
<td>Yes</td>
</tr>
<tr>
<td>Chat</td>
<td>Yes when Amazon Lex is used</td>
</tr>
<tr>
<td></td>
<td>Otherwise, No - Error branch</td>
</tr>
<tr>
<td>Task</td>
<td>Yes</td>
</tr>
</tbody>
</table>

#### Flow types

You can use this block in the following contact flow types (p. 448):

- Inbound flow
- Customer queue flow
- Transfer to Agent flow
- Transfer to Queue flow
Properties

Get customer input

Delivers an audio or chat message to solicit customer input. Based on response, the contact flow branches. Info

- Select from the prompt library (audio)
  - Set manually
    - Audio prompt
- Set dynamically
- Specify an audio file from an S3 bucket
- Text-to-speech or chat text

DTMF

Plays an audio prompt and branches based on DTMF or Amazon Lex intents. The audio prompt is interruptible when using DTMF.

Set timeout (Minimum one second)
5 seconds

Add a condition

Note

The Get Customer Input block does not currently support using a voice prompt from an S3 bucket with Amazon Lex V2.
For information about choosing a prompt from the Amazon Connect library or an S3 bucket, see the Play prompt (p. 396) block.

You can configure this block to accept DTMF input or a chat response. You can also configure it work with Amazon Lex; for example, a contact can be routed based on their utterance. To learn how to set up a Lex bot, see Tutorial 3: Create an IT help desk (p. 46).

DTMF tab properties

- Audio prompt: Select from a list of default audio prompts, or upload your own audio prompt.
- Set timeout: Specify how long to wait while the user decides how they want to respond to the prompt. The maximum timeout you can set is 179 seconds.
Amazon Lex tab properties

Amazon Lex

Note
Your language attribute in Amazon Connect must match the language model used to build your Amazon Lex V2 bot. Set the language attribute using the Set voice (p. 419) block or the Set contact attributes (p. 403) block.

- **Lex bot properties**: After you create your Lex bot, enter the name and alias of the bot here. Only built bots appear in the drop-down list.

```
<table>
<thead>
<tr>
<th>DTMF</th>
<th>Amazon Lex</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Plays an audio prompt and branches based on DTMF or Amazon Lex intents. The audio prompt is interruptible when using DTMF.</td>
</tr>
</tbody>
</table>

Lex bot

Select a Lex bot

- HelpDesk (US West: Oregon)

Alias

- PROD

Enter an ARN
```

Important
In a production environment, always use a different alias than TestBotAlias for Amazon Lex and $LATEST for Amazon Lex classic. TestBotAlias and $LATEST support a limited number of concurrent calls to an Amazon Lex bot. For more information, see Runtime Service Quotas or Runtime Service Quotas (Amazon Lex Classic).

- **Session attributes**: Specify attributes that apply to the current contact's session only.

```
<table>
<thead>
<tr>
<th>Session attributes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

- Add an attribute

- Use sentiment override: Branch based on sentiment score, before the Amazon Lex intent.
The sentiment score is based on the last utterance of the customer. It is not based on the entire conversation.

For example, a customer calls and they have an angry tone because their preferred appointment time isn’t available. You can branch the flow based on their negative sentiment score, for example, if their negative sentiment is more than 80%. Or, a customer calls and has a positive sentiment of more than 80%, you can branch to upsell them on services.

If you add both negative and positive sentiment scores, the negative score is always evaluated first.

For information about how to use sentiment score, alternative intents, and sentiment label with contact attributes, see Check contact attributes (p. 349).

Amazon Lex (Classic)

- **Lex bot properties:** After you create your Lex bot, enter the name and alias of the bot here. Only published bots appear in the drop-down list.
Important
In a production environment, always use a different alias than TestBotAlias for Amazon Lex and $LATEST for Amazon Lex classic. TestBotAlias and $LATEST support a limited number of concurrent calls to an Amazon Lex bot. For more information, see Runtime Service Quotas or Runtime Service Quotas (Amazon Lex Classic).

- Session attributes: Specify attributes that apply to the current contact's session only.

### Configurable time-outs for voice input
To configure time-out values for voice contacts, use the following session attributes in the Get customer input block that calls your Lex bot. These attributes allow you to specify how long to wait for the customer to finish speaking before Amazon Lex collects speech input from callers, such as answering a yes/no question, or providing a date or credit card number.

**Amazon Lex**

- Max Speech Duration

  x-amz-lex:audio:max-length-ms:[intentName]:[slotToElicit]
How long the customer speaks before the input is truncated and returned to Amazon Connect. You can increase the time when a lot of input is expected or you want to give customers more time to provide information.

Default = 13000 milliseconds (13 seconds). The maximum allowed value is 15000 milliseconds.

**Important**
If you set **Max Speech Duration** to more than 15000 milliseconds, the contact is routed down the **Error** branch.

- **Start Silence Threshold**

\[ \text{x-amz-lex:audio:start-timeout-ms:}\{\text{intentName}\}:\{\text{slotToElicit}\} \]

How long to wait before assuming that the customer isn't going to speak. You can increase the allotted time in situations where you'd like to allow the customer more time to find or recall information before speaking. For example, you might want to give customers more time to get out their credit card so they can enter the number.

Default = 4000 milliseconds (4 seconds).

- **End Silence Threshold**

\[ \text{x-amz-lex:audio:end-timeout-ms:}\{\text{intentName}\}:\{\text{slotToElicit}\} \]

How long to wait after the customer stops speaking before assuming the utterance has concluded. You can increase the allotted time in situations where periods of silence are expected while providing input.

Default = 600 milliseconds (0.6 seconds)

Amazon Lex (Classic)

- **Max Speech Duration**

\[ \text{x-amz-lex:max-speech-duration-ms:}\{\text{intentName}\}:\{\text{slotToElicit}\} \]

How long the customer speaks before the input is truncated and returned to Amazon Connect. You can increase the time when a lot of input is expected or you want to give customers more time to provide information.

Default = 13000 milliseconds (13 seconds). The maximum allowed value is 15000 milliseconds.

**Important**
If you set **Max Speech Duration** to more than 15000 milliseconds, the contact is routed down the **Error** branch.

- **Start Silence Threshold**

\[ \text{x-amz-lex:start-silence-threshold-ms:}\{\text{intentName}\}:\{\text{slotToElicit}\} \]

How long to wait before assuming that the customer isn't going to speak. You can increase the allotted time in situations where you'd like to allow the customer more time to find or recall information before speaking. For example, you might want to give customers more time to get out their credit card so they can enter the number.

Default = 4000 milliseconds (4 seconds).

- **End Silence Threshold**

\[ \text{x-amz-lex:end-silence-threshold-ms:}\{\text{intentName}\}:\{\text{slotToElicit}\} \]
How long to wait after the customer stops speaking before assuming the utterance has concluded. You can increase the allotted time in situations where periods of silence are expected while providing input.

Default = 600 milliseconds (0.6 seconds)

**Configurable time-outs for chat input**

Use the **Chat timeout** field under **Intents** to configure timeouts for chat input. Enter how long until inactive customers timeout in a Lex interaction.

- Minimum: 1 minute
- Maximum: 7 days

![Image of Intents showing Chat timeout configuration](image)

**Barge-in configuration and usage for Amazon Lex**

You can allow customers to interrupt the Amazon Lex bot mid-sentence using their voice, without waiting for it to finish speaking. Customers familiar with choosing from a menu of options, for example, can now do so without having to listen to the entire prompt.

Amazon Lex

- **Barge-in**

  Barge-in is enabled globally by default. You can disable it in the Amazon Lex console. For more information, see [Enabling your bot to be interrupted by your user](#).

Amazon Lex (Classic)

- **Barge-in**

  `x-amz-lex:barge-in-enabled:[intentName]:[slotToElicit]`

  Barge-in is disabled globally by default. You must set the session attribute in the **Get customer input** block that calls your Lex bot to enable it at the global, bot, or slot levels. This attribute only controls Amazon Lex barge-in; it doesn't control DTMF barge-in. For more information, see [How to use Lex session attributes](#) (p. 543).
Configurable fields for DTMF input

Use the following session attributes to specify how your Lex bot responds to DTMF input.

- **End character**
  
  \[x-amz-lex:dtmf:end-character:\[IntentName\]:\[SlotName\]]
  
  The DTMF end character that ends the utterance.
  
  Default = #

- **Deletion character**
  
  \[x-amz-lex:dtmf:deletion-character:\[IntentName\]:\[SlotName\]]
  
  The DTMF character that clears the accumulated DTMF digits and ends the utterance.
  
  Default = *

- **End timeout**
  
  \[x-amz-lex:dtmf:end-timeout-ms:\[IntentName\]:\[SlotName\]]
  
  The idle time (in milliseconds) between DTMF digits to consider the utterance as concluded.
  
  Default = 5000 milliseconds (5 seconds)

- **Max number of allow DTMF digits per utterance**
  
  \[x-amz-lex:dtmf:max-length:\[IntentName\]:\[SlotName\]]
  
  The maximum number of DTMF digits allowed in a given utterance. This cannot be increased.
  
  Default = 1024 characters

For more information, see How to use Lex session attributes (p. 543).

**Intents**

- Enter the intents you created in Amazon Lex. They are case sensitive!
When you use text, either for text-to-speech or chat, you can use a maximum of 3,000 billed characters (6,000 total characters).

- Amazon Lex bots support both spoken utterances and keypad input when used in a flow.
- For both voice and DTMF, there can be only one set of session attributes per conversation. Following is the order of precedence:
  1. Lambda provided session attributes: Overrides to session attributes during customer Lambda invocation.
  2. Amazon Connect console provided session attributes: Defined in the Get customer input block.
  3. Service defaults: These are used only if no attributes are defined.
- You can prompt contacts to end their input with a pound key # and to cancel it using the star key *. When you use a Lex bot, if you don't prompt customers to end their input with #, they will end up waiting five seconds for Lex to stop waiting for additional key presses.
- To control time-out functionality, you can use Lex session attributes in this block, or in set them in your Lex Lambda function. If you choose to set the attributes in a Lex Lambda function, the default values are used until the Lex bot is invoked. For more information, see Using Lambda Functions in the Amazon Lex Developer Guide.
- When you specify one of the session attributes described in this article, you can use wildcards. They let you set multiple slots for an intent or bots.

Following are some examples of how you can use wildcards:
- To set all slots for a specific intent, such as PasswordReset, to 2000 milliseconds:
  
  Name = x-amz-lex:max-speech-duration-ms:PasswordReset:*

  Value = 2000

- To set all slots for all bots to 4000 milliseconds:
  
  Name = x-amz-lex:max-speech-duration-ms:*:*

  Value = 4000

Wildcards apply across bots but not across blocks in a flow.

For example, you have a Get_Account_Number bot. In the flow, you have two Get customer input blocks. The first block sets the session attribute with a wildcard. The second one doesn't set the
attribute. In this scenario, the change in behavior for the bot applies only to the first Get customer input block, where the session attribute is set.

- Because you can specify that session attributes apply to the intent and slot level, you can specify that the attribute is set only when you're collecting a certain type of input. For example, you can specify a longer Start Silence Threshold when you're collecting an account number than when you're collecting a date.

- If DTMF input is provided to a Lex bot using Amazon Connect, the customer input is made available as a Lex request attribute. The attribute name is x-amz-lex:dtmf-transcript and the value can be a maximum of 1024 characters.

Following are different DTMF input scenarios:

<table>
<thead>
<tr>
<th>Customer input</th>
<th>DTMF transcript</th>
</tr>
</thead>
<tbody>
<tr>
<td>[DEL]</td>
<td>[DEL]</td>
</tr>
<tr>
<td>[END]</td>
<td>[END]</td>
</tr>
<tr>
<td>123[DEL]</td>
<td>[DEL]</td>
</tr>
<tr>
<td>123[END]</td>
<td>123</td>
</tr>
</tbody>
</table>

Where:
- [DEL] = Deletion character (Default is *)
- [END] = End character (Default is #)

**Problems with DTMF input?**

Let's say you have the following scenario with two contacts flows, each one capturing DTMF input from customers:

1. One flow uses the Get customer input block to request DTMF input from customers.
2. After the DTMF input is entered, it uses the Transfer to flow block to move the contact to the next contact flow.
3. In the next flow, there's a Store customer input block to get more DTMF input from the customer.

There's setup time between the first and second flows. This means if the customer enters DTMF input very quickly for the second flow, some of the DTMF digits might be dropped.

For example, the customer needs to press 5, then wait for a prompt from the second flow, then type 123. In this case, 123 is captured without problem. However, if they don't wait for the prompt and enter 5123 very quickly, the Store customer input block may capture only 23 or 3.

To guarantee the Store customer input block in second contact flow captures all of the digits, the customer needs to wait for the prompt to be played, and then enter their type DTMF input.

**Configured block**

When this block is configured, it looks similar to the following image:
1. **Timeout**: What to do when the time in the **Set timeout** property has elapsed.
2. **Default**: What to do if a customer enters a value other than 1 or 2.

**Sample flows**

See these sample flows for scenarios that use this block:

- Sample inbound flow (first contact experience) (p. 318)
- Sample interruptible queue flow with callback (p. 324)
- Sample queue configurations (p. 320)
- Sample recording behavior (p. 325)

**Scenarios**

See these topics for scenarios that use this block:

- Add an Amazon Lex bot to Amazon Connect (p. 564)
- How to use the same bot for voice and chat (p. 544)
- Add text-to-speech to prompts (p. 460)

**Flow block: Get queue metrics**

**Description**

- Retrieves the following real-time metrics from a queue so you can make routing decisions. If there is no current activity in your contact center, nothing is returned for these metrics.
  - Queue name (p. 1003)
  - Queue ARN.
  - Contacts in queue (p. 1001)
  - Oldest contact in queue (p. 1002)
• Agents online (p. 1002)
• Agents available (p. 998)
• Agents staffed (p. 1003)
• Agents after contact work (p. 996)
• Agents busy (p. 1002): Although this option maps to the On contact real-time metric, note that On contact includes ACW but Agents busy does not.
• Agents missed (p. 997) (Agent non-response)
• Agents non-productive (p. 1001)

You can choose to return metrics by channel, for example, voice or chat. You can also filter by queue or agent. These options enable you to know how many chat and voice contacts are in a queue and if you have agents available to handle those contacts.

You can route contacts based on queue status, such as number of contacts in queue or agents available. Queue metrics are aggregated across all channels and are returned as attributes. The current queue is used by default.

After a Get queue metrics block, use a Check contact attributes (p. 349) to check metric values and define routing logic based on them, such as number of contacts in a queue, number of available agents, and oldest contact in a queue.

**Supported channels**

The following table lists how this block routes a contact who is using the specified channel.

<table>
<thead>
<tr>
<th>Channel</th>
<th>Supported?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice</td>
<td>Yes</td>
</tr>
<tr>
<td>Chat</td>
<td>Yes</td>
</tr>
<tr>
<td>Task</td>
<td>Yes</td>
</tr>
</tbody>
</table>

**Flow types**

You can use this block in the following contact flow types (p. 448):

• All flows
Properties

You can retrieve metrics by channel, and/or by queue or agent.

- If you don’t specify a channel, it returns metrics for all channels.
- If you don’t specify a queue, it returns metrics for the current queue.
- Dynamic attributes can only return metrics for one channel.

For example, if you choose the following settings, Get queue metrics would return metrics for only the BasicQueue, filtered to include only chat contacts.
Configuration tips

Specifying a channel in the Set contact attributes block

Dynamic attributes can only return metrics for one channel.

Before you use dynamic attributes in the Get queue metrics block, you need to set the attributes in the Set contact attributes (p. 403) block, and specify which channel.

When you set a channel dynamically using text, as shown in the following image, for the attribute value enter Voice or Chat. This value is not case-sensitive.
Using the Check contact attributes block after the Get queue metrics block

After a Get queue metrics block, add a Check contact attributes (p. 349) block to branch based on the returned metrics. Use the following steps:

1. After Get queue metrics, add a Check contact attributes block.
2. In the Check contact attributes block, set Attribute to check to Queue metrics.
3. In the Attributes dropdown box, you'll see that the following queue metrics are returned by the Get queue metrics block. Choose the metric that you want to use for the routing decision.
Configured block

When this block is configured, it looks similar to the following image:

Scenarios

See these topics for scenarios that use this block:

- How to reference contact attributes (p. 535)

Flow block: Hold customer or agent

Description

- Places a customer or agent on or off hold. This is useful when, for example, you want to put the agent on hold while the customer enters their credit card information.
- If this block is triggered during a chat conversation, the contact is routed down the Error branch.
Supported channels

The following table lists how this block routes a contact who is using the specified channel.

<table>
<thead>
<tr>
<th>Channel</th>
<th>Supported?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice</td>
<td>Yes</td>
</tr>
<tr>
<td>Chat</td>
<td>No - Error branch</td>
</tr>
<tr>
<td>Task</td>
<td>No - Error branch</td>
</tr>
</tbody>
</table>

Flow types

You can use this block in the following contact flow types (p. 448):

- Inbound flow
- Outbound Whisper flow
- Transfer to Agent flow
- Transfer to Queue flow

Properties

The following settings are available:

- **Agent on hold** = customer is on the call
- **Conference all** = agent and customer are on the call
- **Customer on hold** = agent is on the call

Configured block

When this block is configured, it looks similar to the following image:
Flow block: Invoke AWS Lambda function

Description

- Calls AWS Lambda, and optionally returns key-value pairs.
- The returned key-value pairs can be used to set contact attributes.
- For an example, see Tutorial: Create a Lambda function and invoke in a flow (p. 502).

Supported channels

The following table lists how this block routes a contact who is using the specified channel.

<table>
<thead>
<tr>
<th>Channel</th>
<th>Supported?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice</td>
<td>Yes</td>
</tr>
<tr>
<td>Chat</td>
<td>Yes</td>
</tr>
<tr>
<td>Task</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Flow types

You can use this block in the following contact flow types (p. 448):

- Inbound flow
- Customer Queue flow
- Customer Hold flow
- Customer Whisper flow
- Agent Hold flow
- Agent Whisper flow
- Transfer to Agent flow
- Transfer to Queue flow
Note the following properties:

- **Timeout**: Enter how long to wait for Lambda to time out.

If your Lambda invocation gets throttled, the request is retried. It is also retried if a general service failure (500 error) happens.

When a synchronous invocation returns an error, Amazon Connect retries up to three times, for a maximum of 8 seconds. At that point, the contact is routed down the **Error** branch.

### Configuration tips

- To use an AWS Lambda function in a flow, first add the function to your instance. For more information, see [Add a Lambda function to your Amazon Connect instance](p. 493),

- After you add the function to your instance, you can select the function from the **Select a function** drop-down list in the block to use it in the flow.

### Configured block

When this block is configured, it looks similar to the following image:
Sample flows

Sample Lambda integration (p. 325)

Scenarios

See these topics for scenarios that use this block:

- Invoke AWS Lambda functions (p. 493)

Flow block: Invoke module

Description

Calls a published module, which enables you create reusable sections of a contact flow.

For more information, see Flow modules for reusable functions (p. 457).

Supported channels

The following table lists how this block routes a contact who is using the specified channel.

<table>
<thead>
<tr>
<th>Channel</th>
<th>Supported?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice</td>
<td>Yes</td>
</tr>
<tr>
<td>Chat</td>
<td>Yes</td>
</tr>
<tr>
<td>Task</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Flow types

You can use this block in the following contact flow types (p. 448):

- Inbound flow
Properties

Configured block

When this block is configured, it looks similar to the following image:

Flow block: Loop

Description

- Counts the number of times customers are looped through the Looping branch.
- After the loops are completed, the Complete branch is followed.
- This block is often used with a Get customer input block. For example, if the customer doesn't succeed in entering their account number, you can loop to give them another opportunity to enter it.

Supported channels

The following table lists how this block routes a contact who is using the specified channel.

<table>
<thead>
<tr>
<th>Channel</th>
<th>Supported?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice</td>
<td>Yes</td>
</tr>
<tr>
<td>Chat</td>
<td>Yes</td>
</tr>
<tr>
<td>Task</td>
<td>Yes</td>
</tr>
</tbody>
</table>
Flow types
You can use this block in the following contact flow types (p. 448):
• All flows

Properties

Configuration tips
• If you enter 0 for the loop count, the Complete branch is followed the first time this block runs.

Configured block
When this block is configured, it looks similar to the following image:

Flow block: Loop prompts
Description
• Loops a sequence of prompts while a customer or agent is on hold or in queue.

Supported channels
The following table lists how this block routes a contact who is using the specified channel.
Loop prompts

<table>
<thead>
<tr>
<th>Channel</th>
<th>Supported?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice</td>
<td>Yes</td>
</tr>
<tr>
<td>Chat</td>
<td>No - Error branch</td>
</tr>
<tr>
<td>Task</td>
<td>No - Error branch</td>
</tr>
</tbody>
</table>

Flow types

You can use this block in the following contact flow types (p. 448):

- Customer Queue flow
- Customer Hold flow
- Agent Hold flow

Properties

How the Interrupt option works

Let's say you have multiple prompts and you set **Interrupt** to 60 seconds. Following is what will happen:

- The block plays prompts in the order that they are listed for the entirety of the prompt length.
Loop prompts

- If the combined play time for the prompts is 75 seconds, after 60 seconds the prompt is interrupted and reset to the 0 second point again.
- It's possible your customers would never hear potentially important information that is supposed to play after 60 seconds.

This scenario is especially possible when using the default audio prompts that Amazon Connect provides since these audio prompts can be as long as 4 minutes.

Configuration tips

- The following blocks are not allowed before the Loop prompts block:
  - Get customer input (p. 372)
  - Loop (p. 392)
  - Play prompt (p. 396)
  - Start media streaming (p. 429)
  - Stop media streaming (p. 431)
  - Store customer input (p. 432)
  - Transfer to phone number (p. 438)
  - Transfer to queue (p. 441), including Transfer to callback queue
- For information about choosing a prompt from the Amazon Connect library or an S3 bucket, see the Play prompt (p. 396) block.
- When Loop prompts is used in a Queue flow, audio playback can be interrupted with a flow at preset times.
- Always use an interruption period that's greater than 20 seconds. This is the amount of time an available agent has to accept the contact. If the interruption period is less than 20 seconds, you might get contacts going down the Error branch. This is because Amazon Connect doesn't support dequeuing the customer when they are being routed to an active agent and are in the 20 second window to join.
- The internal counter for the loop is persisted for the call, not the flow. If you reuse the flow during a call, the loop counter isn't reset.
- If this block is triggered during a chat conversation, the contact is routed down the Error branch.
- Some existing flows have a version of the Loop prompts block that doesn't have an Error branch. In this case, a chat contact stops execution of the customer queue flow. The chat is routed when the next agent becomes available.

Configured block

When this block is configured to play a prompt from the Amazon Connect library, it looks similar to the following image:

![Loop prompts configuration](image)

When this block is configured to play a prompt from Amazon S3, it looks similar to the following image:
Sample flows

See these sample flows for scenarios that use this block:

- Sample interruptible queue flow with callback (p. 324)

Scenarios

See these topics for scenarios that use this block:

- Manage contacts in a queue (p. 480)

Flow block: Play prompt

Description

- This block can play an interruptible audio prompt, play a text-to-speech message, or send a chat response.
- Amazon Connect includes a set of pre-recorded prompts for you to use.
- To use your own voice prompts, you have the following options:
  - **Use the Amazon Connect library**: You can record and upload your audio prompts in using the Amazon Connect admin console. For instructions, see Create prompts (p. 459).
  - **Use Amazon S3**: You can store as many voice prompts as needed in Amazon S3 and access them in real time by using contact attributes in the Play prompt block.

  For example, based on a customer's preferred language, you can dynamically play a voice prompt with a local accent that greets them and thanks them for being a loyal member. You can even concatenate multiple attributes, such as line of business or language preference to create personalized interactions; for example, reservations + Spanish language.

Requirements

- **Supported formats**: Amazon Connect supports .wav files to use for your prompt. You must use .wav files that are 8KHz, and mono channel audio with U-Law encoding. Otherwise, the prompt won't play correctly. You can use publicly available third-party tools to convert your .wav files to U-Law encoding. After converting the files, upload them to Amazon Connect.
- **Size**: Amazon Connect supports prompts that are less than 50MB and less than five minutes long.
- **When storing prompts in an S3 bucket**: For Regions that are disabled by default (also called opt-in Regions) such as Africa (Cape Town), your bucket must be in the same Region.
Supported channels

The following table lists how this block routes a contact who is using the specified channel.

<table>
<thead>
<tr>
<th>Channel</th>
<th>Supported?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice</td>
<td>Yes</td>
</tr>
<tr>
<td>Chat</td>
<td>Yes</td>
</tr>
<tr>
<td>Task</td>
<td>No - takes the <strong>Okay</strong> branch but it has no effect</td>
</tr>
</tbody>
</table>

Flow types

You can use this block in the following contact flow types (**p. 448**):

- Inbound flow
- Customer Queue flow
- Customer Whisper flow. You can play prompts from the Amazon Connect library but not prompts stored in Amazon S3.
- Agent Whisper flow: You can play prompts from the Amazon Connect library but not prompts stored in Amazon S3.
- Transfer to Agent flow
- Transfer to Queue flow

Properties

The properties provide you different ways to choose the prompt to be played.

Prompts stored in library

**Select from the prompt library (audio):** Choose from one of the pre-recorded prompts included with Amazon Connect, or use the Amazon Connect admin console to **record and upload** (**p. 459**) your own prompt. There's no way to upload prompts in bulk.
Prompts stored in Amazon S3

**Specify an audio file from an S3 bucket**: Store as many prompts as you need in an S3 bucket and then refer to them by specifying the bucket path. For best performance, we recommend creating the S3 bucket in the same Region as your Amazon Connect instance.

The following image shows an example of how to set the file path manually.

![File path example](https://example.s3.amazonaws.com/en/lob1/welcome.wav)

The following image shows how to specify the S3 bucket path using attributes:

![Attributes example](https://example.s3.amazonaws.com/$\['Attributes'\]['Language']/$\['Attributes'\]['LOB']/1.wav)

You can provide the S3 path with concatenation, as shown in the following example. This enables you to personalize the prompt, for example, by line of business and language.

Note that only the last part of path is shown in the image but you would enter the full path, for example:

https://example.s3.amazonaws.com/$\['Attributes'\]['Language']/$\['Attributes'\]['LOB']/1.wav
The following example shows how you can specify the S3 path dynamically using a user-defined attribute.

Text-to-speech or chat text

You can enter plain text, or SSML, as shown in the following image:
SSML-enhanced input text gives you more control over how Amazon Connect generates speech from the text you provide. You can customize and control aspects of speech such as pronunciation, volume, and speed.

For a list of SSML tags you can use with Amazon Connect, see SSML tags supported by Amazon Connect (p. 468).

For more information, see Add text-to-speech to prompts (p. 460).

**Configuration tips**

- For step-by-step instructions about how to set up a dynamic prompt using contact attributes, see Dynamically select which prompts to play (p. 463).
- When playing prompts from an S3 bucket, for best performance we recommend creating the bucket in the same Region as your Amazon Connect instance.
- When you use text, either for text-to-speech or chat, you can use a maximum of 3,000 billed characters, which is 6,000 characters total. You can also specify text in a flow using a contact attribute.
- Some existing flows have a version of the Play prompt block that doesn't have an Error branch. In this case, the Okay branch will always be taken at runtime. If you update the configuration of a Play prompt block that doesn't have an Error branch, an Error branch will be added to the block automatically in the editor.
- A contact is routed down the Error branch in the following situations:
  - Amazon Connect is unable to download the prompt from S3. This may be due to an incorrect file path, or the S3 bucket policy is not set up correctly and Amazon Connect does not have access. For instructions about how to apply the policy, and a template you can use, see Set up prompts to play from an S3 bucket (p. 465).
  - Incorrect audio file format. Only .wav files are supported.
  - The audio file is larger than 50MB or longer than five minutes.
  - The SSML is incorrect.
  - The text-to-speech length exceeds 6000 characters.
  - The the Amazon Resource Name (ARN) for the prompt is incorrect.
Configured block

The following image shows what this block looks like when it's configured for text-to-speech:

The following image shows what this block looks like when it's configured for an S3 bucket:

Sample flows

All of the sample flows use the Play prompt block. Take a look at the Sample inbound flow (first contact experience) (p. 318) to see a Play prompt for chat and one for audio.

Flow block: Set callback number

Description

- Specify the attribute to set the callback number.

Supported channels

The following table lists how this block routes a contact who is using the specified channel.

<table>
<thead>
<tr>
<th>Channel</th>
<th>Supported?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice</td>
<td>Yes</td>
</tr>
<tr>
<td>Chat</td>
<td>No - Error branch</td>
</tr>
<tr>
<td>Task</td>
<td>No - Error branch</td>
</tr>
</tbody>
</table>
Flow types

You can use this block in the following contact flow types (p. 448):

- Inbound flow
- Customer Queue flow
- Transfer to Agent flow
- Transfer to Queue flow

Properties

![Set callback number block](image)

Configuration tips

- The Store customer input (p. 432) block often comes before this block. It stores the customer's callback number.

Configured block

When this block is configured, it looks similar to the following image:

![Configured block](image)

1. The customer entered phone number that is not valid.
2. Amazon Connect is unable to dial that number. For example, if your instance is not allowed to make calls to +447 prefix phone numbers, and the customer requested callback to a +447 prefix number. Even though number is valid, Amazon Connect cannot call it.

Sample flows

See these sample flows for scenarios that use this block:
- Sample queue configurations (p. 320)
- Sample queued callback (p. 324): this sample only applies to previous instances of Amazon Connect.

Scenarios

See these topics for scenarios that use this block:
- Set up queued callback (p. 485)
- About queued callbacks in metrics (p. 1082)

Flow block: Set contact attributes

Description

- Stores key-value pairs as contact attributes.
- Contact attributes are accessible by other areas of Amazon Connect, such as contact records.

For more information about how to use contact attributes, see Use Amazon Connect contact attributes (p. 519).

Supported channels

The following table lists how this block routes a contact who is using the specified channel.

<table>
<thead>
<tr>
<th>Channel</th>
<th>Supported?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice</td>
<td>Yes</td>
</tr>
<tr>
<td>Chat</td>
<td>Yes</td>
</tr>
<tr>
<td>Task</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Flow types

You can use this block in the following contact flow types (p. 448):
- All flows
Properties

Set contact attributes

Define and store key-value pairs as contact attributes. Info

Contact attributes are accessible by other areas of Amazon Connect, such as the Contact Control Panel (CCP) and Contact Trace Records (CTRs).

Properties

Namespace
User defined

Attribute
greetingPlayed

Set manually

Value
ture

Set dynamically

Add another attribute

Configuration tips

- When using a user-defined destination key, you can name it anything you want but don’t include the $ and . (period) characters. They are not allowed because they are both used in defining the attribute paths in JSONPath.
- You can use the Set contact attribute block to set the language attribute required for an Amazon Lex V2 bot. (Your language attribute in Amazon Connect must match the language model used to build your Amazon Lex V2 bot.)
Or, you can use the `Set voice (p. 419)` block to set the language required for an Amazon Lex V2 bot.

### Configured block

When this block is configured, it looks similar to the following image:

![Configured block](image)

### Sample flows

See these sample flows for scenarios that use this block:

- Sample inbound flow (first contact experience) (p. 318)

### Scenarios

See these topics for scenarios that use this block:

- How to reference contact attributes (p. 535)

### Flow block: Set customer queue flow

#### Description

- Specifies the flow to invoke when a customer is transferred to a queue.

#### Supported channels

The following table lists how this block routes a contact who is using the specified channel.

<table>
<thead>
<tr>
<th>Channel</th>
<th>Supported?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice</td>
<td>Yes</td>
</tr>
<tr>
<td>Chat</td>
<td>Yes</td>
</tr>
<tr>
<td>Task</td>
<td>Yes</td>
</tr>
</tbody>
</table>

#### Flow types

You can use this block in the following contact flow types (p. 448):
Set disconnect flow

- Inbound flow
- Transfer to Agent flow
- Transfer to Queue flow

**Properties**

![Set customer queue flow](image)

Set customer queue flow

Specifies the flow to run when a customer is transferred to a queue. Info

- Set manually
  Select a flow
- Set dynamically

For information about using attributes, see [Use Amazon Connect contact attributes](p. 519).

**Configured block**

When this block is configured, it looks similar to the following image:

![Configured block](image)

**Sample flows**

See these sample flows for scenarios that use this block:

- [Sample queued callback](p. 324)

**Flow block: Set disconnect flow**

**Description**

- Specifies which flow to run after a disconnect event during a contact.

  A disconnect event is when:
  - A call, chat, or task is disconnected by an agent.
• A task is disconnected as a result of a flow action.
• A task expires. The task is automatically disconnected if it is not completed in 7 days.

When the disconnect event occurs, the corresponding flow runs.
• Here are examples of when you might use this block:
  • Run post-contact surveys. For example, the agent asks the customer to remain on the line for a post-call survey. The agent hangs up and a disconnect flow is run. In the disconnect flow, the customer is asked a set of questions using the Get customer input (p. 372) block. Their answers are uploaded using an Invoke AWS Lambda function (p. 389) block to an external customer feedback database. The customer is thanked and disconnected.

  For more information about creating post-contact surveys, see this blog: Easily create and visualize post chat surveys with Amazon Connect and Amazon Lex. And check out this workshop: Building a contact survey solution for Amazon Connect.

  • In a chat scenario, if a customer stops responding to the chat, use this block to decide whether to run the disconnect flow and call a Wait (p. 445) block, or end the conversation.

  • In task scenarios where a task may not be completed in 7 days, use this block to run a disconnect flow to determine whether the task should be requeued, or completed/disconnected (p. 368) by a flow action.

 Supported channels

The following table lists how this block routes a contact who is using the specified channel.

<table>
<thead>
<tr>
<th>Channel</th>
<th>Supported?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice</td>
<td>Yes</td>
</tr>
<tr>
<td>Chat</td>
<td>Yes</td>
</tr>
<tr>
<td>Task</td>
<td>Yes</td>
</tr>
</tbody>
</table>

 Flow types

You can use this block in the following contact flow types (p. 448):
• All flows
Properties

Set disconnect flow

Specifies the contact flow to run when an agent disconnects the contact and the customer remains on the call. Info

Remaining participants: Customer only

Select a flow

- Set manually
  - Select a flow
- Set dynamically

Configured block

When this block is configured, it looks similar to the following image:

Sample flows

See these sample flows for scenarios that use this block:

- Sample inbound flow (first contact experience) (p. 318)

Scenarios

See these topics for scenarios that use this block:

- Example chat scenario (p. 13)
- Easily create and visualize post chat surveys with Amazon Connect and Amazon Lex
- Building a contact survey solution for Amazon Connect
Flow block: Set hold flow

**Description**

- Links from one flow type to another.
- Specifies the flow to invoke when a customer or agent is put on hold.

If this block is triggered during a chat conversation, the contact is routed down the **Error** branch.

**Supported channels**

The following table lists how this block routes a contact who is using the specified channel.

<table>
<thead>
<tr>
<th>Channel</th>
<th>Supported?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice</td>
<td>Yes</td>
</tr>
<tr>
<td>Chat</td>
<td>No - Error branch</td>
</tr>
<tr>
<td>Task</td>
<td>No - Error branch</td>
</tr>
</tbody>
</table>

**Flow types**

You can use this block in the following contact flow types (p. 448):

- Inbound flow
- Customer Queue flow
- Outbound whisper flow
- Transfer to Agent flow
- Transfer to Queue flow
Properties

For information about using attributes, see Use Amazon Connect contact attributes (p. 519).

Configured block

When this block is configured, it looks similar to the following image:

Flow block: Set logging behavior

Description

- Enables flow logs so you can track events as contacts interact with flows.
Supported channels

The following table lists how this block routes a contact who is using the specified channel.

<table>
<thead>
<tr>
<th>Channel</th>
<th>Supported?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice</td>
<td>Yes</td>
</tr>
<tr>
<td>Chat</td>
<td>Yes</td>
</tr>
<tr>
<td>Task</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Flow types

You can use this block in the following contact flow types (p. 448):

- All flows

Properties

Scenarios

See these topics for more information about flow logs:

- Track events as customers interact with flows (p. 513)

Flow block: Set recording and analytics behavior

Description

- Sets options for recording and/or monitoring (listen-in) voice and chat conversations.
- It enables features in Contact Lens for Amazon Connect. For more information, see Analyze conversations using Contact Lens for Amazon Connect (p. 807).

Supported channels

The following table lists how this block routes a contact who is using the specified channel.
<table>
<thead>
<tr>
<th>Channel</th>
<th>Supported?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice</td>
<td>Yes</td>
</tr>
<tr>
<td>Chat</td>
<td>Yes</td>
</tr>
<tr>
<td>Task</td>
<td>No - Error branch</td>
</tr>
</tbody>
</table>

**Flow types**

You can use this block in the following **contact flow types (p. 448)**:

- Inbound flow
- Customer Queue flow
- Outbound whisper flow
- Transfer to Agent flow
- Transfer to Queue flow
When configuring this block to **set up recording behavior** (p. 483), choose as follows:

- To record voice conversations, choose what you want to record: **Agent and Customer**, **Agent only**, or **Customer only**.
- To record chat conversations, you need to choose **Agent and Customer**.
- To enable monitoring of voice and/or chat conversations, you need to choose **Agent and Customer**.

For information about using this block to enable Contact Lens, see Enable Contact Lens for Amazon Connect (p. 810).
Configuration tips

- Let's say you have a flow that links to a flow that links to another flow. Each flow might have its own Set recording behavior block. The last Set recording behavior block overrides the settings of the previous two Set recording behavior blocks.

  For example, you might have a flow with Set recording behavior to record Agent and Customer. But if the next Set recording behavior block is set to Agent only, that block overrides the behavior of the previous block.

- If an agent puts a customer on hold, the agent is still recorded, but the customer is not.

- If you want to transfer a contact to another agent or queue, and you want to continue using Contact Lens to collect data, you need to add to the flow another Set recording behavior block with Enable analytics turn on. This is because a transfer generates a second contact ID and contact record. Contact Lens needs to run on that contact record as well.

Configured block

When this block is configured, it looks similar to the following image:

![Set recording and analytics behavior](image)

Sample flows

See these sample flows for scenarios that use this block:

- Sample inbound flow (first contact experience) (p. 318)

Scenarios

See these topics for scenarios that use this block:

- Set up recording behavior (p. 483)

- Monitor live conversations (p. 798)

- Review recorded conversations (p. 800)

- Analyze conversations using Contact Lens for Amazon Connect (p. 807)
Flow block: Set Voice ID

Description

- Enables audio streaming and sets thresholds for voice authentication and detection of fraudsters in a watchlist. For more information about this feature, see Use real-time caller authentication with Voice ID (p. 944).

- Sends audio to Amazon Connect Voice ID to verify the caller's identity and match against fraudsters in watchlist, as soon as the call is connected to a flow.

- Use a Play prompt (p. 396) block before Set Voice ID to stream audio properly. You can edit it to include a simple message such as "Welcome."

- Use a Set contact attributes (p. 403) block after Set Voice ID to set the customer ID for the caller.

  The CustomerId may be a customer number from your CRM, for example. You can create a Lambda function to pull the unique customer ID of the caller from your CRM system. Voice ID uses this attribute as the CustomerSpeakerId for the caller.

  CustomerId can be an alphanumeric value. It supports only _ and - (underscore and hyphen) special characters. It does not need to be UUID. For more information, see CustomerSpeakerId in the Speaker data type.

- Use a Check Voice ID (p. 357) block after Set Voice ID to branch based on the results of the enrollment check, authentication, or fraud detection.

- For information about how to use Set Voice ID in a flow, along with Check Voice ID (p. 357) and Set contact attributes (p. 403), see Step 2: Create a new Voice ID domain and encryption key (p. 949) in Enable Voice ID (p. 948).

Supported channels

The following table lists how this block routes a contact who is using the specified channel.

<table>
<thead>
<tr>
<th>Channel</th>
<th>Supported?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice</td>
<td>Yes</td>
</tr>
<tr>
<td>Chat</td>
<td>No - Error branch</td>
</tr>
<tr>
<td>Task</td>
<td>No - Error branch</td>
</tr>
</tbody>
</table>

Flow types

You can use this block in the following contact flow types (p. 448):

- Inbound flow
- Customer queue flow
- Customer whisper flow
- Outbound whisper flow
- Agent whisper flow
- Transfer to Agent flow
- Transfer to Queue flow
Properties

Set voice ID

Enables or disables voice-based security and sets thresholds for authentication and fraud detection.

This block is best placed at the beginning of a flow to start capturing customer audio for Voice ID analysis. The Check Voice ID block uses these thresholds along with caller enrollment status to provide a result.

Info

Streaming audio, Voice authentication and fraud detection cannot be disabled once it has been enabled.

Start streaming audio for Voice ID

Voice authentication

This compares a caller's voiceprint against the enrollment voiceprint to verify the caller's claimed identity that is provided by the Set contact attribute block.

Info

Enable voice authentication

Authentication Threshold

Set a value between 0-100 to set a threshold to verify a caller's identity. Scores above this threshold will authenticate callers. We recommend a threshold of 90 for optimal security.

Info

Set manually

Authentication Threshold

90

Set dynamically

Start streaming audio for Voice ID

When this option is selected, Amazon Connect begins streaming audio from the customer's channel to Voice ID.

You can add this block several places in a flow, but after Start streaming audio is selected, it cannot be disabled, even if later in the flow there are other Set Voice ID blocks that do not have it enabled.

Voice authentication

Authentication threshold: When Voice ID compares the voiceprint of the caller to the enrolled voiceprint of the claimed identity, it generates an authentication score between 0-100. This score indicates the confidence of a match. You can configure a threshold for the score which indicates whether the caller is authenticated. The default threshold of 90 provides high security for most cases.
• If the authentication score is below the configured threshold, Voice ID treats the call as not authenticated.

• If the authentication score is above the configured threshold, Voice ID treats the call as authenticated.

For example, if the person is sick and calling from a mobile device in their car, the authentication score is going to be slightly lower than when the person is well and calling from a quiet room. If an imposter is calling, the authentication score is much lower.

**Authentication response time**

You can set the authentication response time between 5 and 10 seconds, which determines how quickly you want Voice ID authentication analysis to complete. Lowering it makes the response time faster at the tradeoff of lower accuracy. When you're using self-service IVR options where callers do not talk a lot, you may want to reduce this time. You can then increase the time if the call needs to be transferred to an agent.

Choose **Set dynamically** to set the authentication threshold based on certain criteria. For example, you may want to raise the threshold based on the membership level of the customer, or the type of transaction or information they are calling about.

**Fraud detection**

The threshold you set for fraud detection is used to measure risk. Scores higher than the threshold are reported as higher risk. Scores lower than the threshold are reported as lower risk. Raising the threshold lowers false positive rates (makes result more certain), but raises false negative rates.
Choose **Set dynamically** to set the fraud threshold based on certain criteria. For example, you may want to lower the threshold for high wealth customers, or the type of transaction or information they are calling about.

**Configuration tips**

- For the **Authentication threshold**, we recommend that you start with the default of 90 and adjust until you find a good balance for your business.

  Every time you increase the value of the **Authentication threshold** beyond the default of 90, there's a tradeoff:
  
  - The higher the threshold, the greater the false reject rate (FRR), that is, the likelihood that an agent will need to verify the customer’s identity.

    For example, if you set it too high, such as greater than 95, agents will need to verify every customer’s identity.
  
  - The lower the threshold, the greater the false acceptance rate (FAR), that is, the likelihood that Voice ID will incorrectly accept an access attempt by an unauthorized caller.

- When Voice ID verifies that the voice belongs to the enrolled customer, it returns a status of **Authenticated**. Add a Check Voice ID (p. 357) block to your flow branch based on the returned status.

- For the **Fraud threshold**, we recommend that you start with the default of 50 and adjust until you find a good balance for your business.

  If the caller's score is above the threshold, it indicates there's a higher risk for fraud in that call.

**Configured block**

When this block is configured, it looks similar to the following image:
More information

See the following topic for more information about this block:

- Use real-time caller authentication with Voice ID (p. 944)
- Flow block: Check Voice ID (p. 357)
- Use Voice ID (p. 1309)

Flow block: Set voice

Description

- Sets the text-to-speech (TTS) language and voice to use for the contact flow.
- The default voice is configured to Joanna (Conversational speaking style).
- You can choose Override speaking style to make it and other voices Amazon Polly Neural Text-to-Speech (NTTS). Neural voices make automated conversations sound more lifelike by improving the pitch, inflection, intonation, and tempo.

For a list of supported neural voices, see Neural Voices in the Amazon Polly Developer Guide.
- After this block is run, any TTS invocation resolves to the neural or standard voice selected.
- If this block is triggered during a chat conversation, the contact goes down the Success branch. It has no effect on the chat experience.

Supported channels

The following table lists how this block routes a contact who is using the specified channel.

<table>
<thead>
<tr>
<th>Channel</th>
<th>Supported?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice</td>
<td>Yes</td>
</tr>
<tr>
<td>Chat</td>
<td>No - Success branch</td>
</tr>
<tr>
<td>Task</td>
<td>No - Success branch</td>
</tr>
</tbody>
</table>

Flow types

You can use this block in the following contact flow types (p. 448):

- All flows
Tip
For voices that support only neural speaking styles but not standard, the **Override speaking style** is automatically selected. You do not have the option to clear it.

### Use an Amazon Lex V2 bot with Amazon Connect

If you're using an Amazon Lex V2 bot, your language attribute in Amazon Connect must match the language model used to build your Lex bot. This is different than Amazon Lex (Classic).

- If you build an Amazon Lex V2 bot with a different language model—for example, en_AU, fr_FR, es_ES, and more—under **Voice**, choose a voice that corresponds to that language, and then must choose **Set language attribute**, as shown in the following image.

- If you're not using an en-US voice with an Amazon Lex V2 bot and don't choose **Set language attribute**, the **Get customer input** block results in an error.

- For bots with multiple languages (for example, en_AU and en_GB) choose **Set language attribute** for one of the languages.
Configuration tips

- For the Joanna and Matthew neural voices, in American English (en-US), you can also specify a Conversational speaking style or a Newscaster speaking style.

Configured block

When this block is configured, it looks similar to the following image:
Scenarios

See these topics for scenarios that use this block:

- *Add text-to-speech to prompts (p. 460)*

Flow block: Set whisper flow

Description

A *whisper flow* is what a customer or agent experiences when they are joined in a voice or chat conversation. For example:

- An agent and customer are joined in a *chat*. An agent whisper might display text to the agent telling them the name of the customer, for example, which queue the customer was in, or let the agent know they're talking to club member.
- An agent and customer are joined in a *call*. A customer whisper might tell the customer that the call is being recorded for training purposes, for example, or thank them for being a club member.
- An agent and customer are joined in a *chat*. Using a contact attribute, an agent whisper flow records which agent is being connected to the conversation. This attribute is then used in a disconnect flow to route the contact back to the same agent if the customer has a follow-up question after the agent disconnects.

A whisper flow has the following characteristics:

- It's a one-sided interaction: either the customer hears or sees it, or the agent does.
- It can be used to create personalized and automated interactions.
- It runs when a customer and agent are being connected.

For voice conversations, the *Set whisper flow* block overrides the default agent whisper flow (p. 315) or customer whisper flow (p. 315) by linking to a whisper flow you create.

**Important**

For chat conversations, you need to include a *Set whisper flow* block for default agent or customer whispers to play. For instructions, see *Set the default whisper flow for a chat conversation (p. 315)*.

How the Set whisper flow block works

- For inbound conversations (voice or chat), the *Set whisper flow* block specifies the whisper to be played to customer or the agent when they are joined.
- For outbound voice calls, it specifies the whisper to be played to customer.
- A whisper is one direction, which means only the agent or customer hears or sees it, depending on the type of whisper you selected. For example, if a customer whisper says "This call is being recorded," the agent does not hear it.
- A whisper flow is triggered after the agent accepts the contact (either auto-accept or manual accept). The agent whisper flow runs first, before the customer is taken out of queue. After this is completed, the customer is taken out of queue and the customer whisper flow runs. Both flows run to completion before the agent and customer can talk or chat with each other.
- If an agent disconnects while the agent whisper is running, the customer remains in queue in order to be re-routed to another agent.
• If a customer disconnects while the customer whisper is running, the contact ends.
• If an agent whisper flow or customer whisper flow includes a block that chat does not support, such as Start (p. 429)/Stop (p. 431) media streaming or Set voice (p. 419), chat skips these blocks and triggers an error branch. However, it doesn't prevent the flow from progressing.
• Whisper flows don't appear in transcripts.
• Whispers can be a maximum of 2 minutes long. After that point, the contact or agent is disconnected.

**Supported channels**

The following table lists how this block routes a contact who is using the specified channel.

<table>
<thead>
<tr>
<th>Channel</th>
<th>Supported?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice</td>
<td>Yes</td>
</tr>
<tr>
<td>Chat</td>
<td>Yes</td>
</tr>
<tr>
<td>Task</td>
<td>Yes</td>
</tr>
</tbody>
</table>

**Flow types**

You can use this block in the following contact flow types (p. 448):

• Inbound flow
• Customer Queue flow
• Transfer to Agent flow
• Transfer to Queue flow

**Properties**
If you choose to Select a flow, you can only select from flows that are type Agent Whisper or Customer Whisper.

For information about using attributes, see Use Amazon Connect contact attributes (p. 519).

**Configuration tips**

- In a single block, you can set either a customer whisper or an agent whisper, but not both. Instead, use multiple Set whisper flow blocks in your flow.
- If you use a Play prompt (p. 396) block instead of a Set whisper block in an agent whisper flow or customer whisper flow, in a voice conversation the prompt is audible to both the agent and the customer. In a chat, however, only the agent or customer sees the Play prompt text.
- Make sure your whispers are able to complete within two minutes. Otherwise, calls will be disconnected before being established.
- If agents appear to be stuck in the "Connecting..." state before being forcefully disconnected from calls, make sure that your configured whisper flows meet the two minute maximum.

**Configured block**

When this block is configured, it looks similar to the following image:

![Set whisper flow block](image)

**Flow block: Set working queue**

**Description**

- This block specifies the queue to be used when Transfer to queue is invoked.
- A queue must be specified before invoking Transfer to queue except when used in a customer queue flow. It's also the default queue for checking attributes, such as staffing, queue status, and hours of operation.

**Supported channels**

The following table lists how this block routes a contact who is using the specified channel.

<table>
<thead>
<tr>
<th>Channel</th>
<th>Supported?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice</td>
<td>Yes</td>
</tr>
<tr>
<td>Chat</td>
<td>Yes</td>
</tr>
<tr>
<td>Task</td>
<td>Yes</td>
</tr>
</tbody>
</table>
Flow types

You can use this block in the following contact flow types (p. 448):

- Inbound flow
- Transfer to Agent flow
- Transfer to Queue flow

Properties

Note the following properties:

- **By queue > Set dynamically.** To set the queue dynamically, you must specify the Amazon Resource Name (ARN) for the queue rather than the queue name. To find the ARN for a queue, open the queue in the queue editor. The ARN is included as the last part of the URL displayed in the browser address bar after /queue. For example, .../queue/aaaaaaaa-bbbb-cccc-dddd-111111111111.

Configured block

When this block is configured, it looks similar to the following image:
Sample flows
See these sample flows for scenarios that use this block:

- Sample queue customer (p. 323)
- Sample queue configurations (p. 320)

Scenarios
See these topics for scenarios that use this block:

- Set up agent-to-agent transfers (p. 477)
- Transfer contacts to a specific agent (p. 481)

Flow block: Show view (Preview)

This is prerelease documentation for a service in preview release. It is subject to change.

Description
Associates a Wisdom domain to a contact to enable real-time recommendations. For more information about enabling Wisdom, see Deliver information to agents using Amazon Connect Wisdom

Supported channels
The following table lists how this block routes a contact who is using the specified channel.

<table>
<thead>
<tr>
<th>Channel</th>
<th>Supported?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice</td>
<td>Yes</td>
</tr>
<tr>
<td>Chat</td>
<td>Yes</td>
</tr>
<tr>
<td>Task</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Flow types
You can use this block in the following contact flow types (p. 448):

- All flow types

For the best building experience we recommend the contact flow type.

Properties

Required properties

- Select a view resource from the drop down

Optional properties
•

**PrimaryPageNav**

- Determines the next UI page to show the agent

**Actions**

- Determines the action buttons made available to agents. After an agent chooses an action button, the ViewResultsData object that gets returned to Flows can be examined to determine the next step to perform
Flow block: Start media streaming

Description

Captures what the customer hears and says during a contact. You can then perform analysis on the audio streams to:

- Determine customer sentiment.
- Use the audio for training purposes.
- Identify and flag abusive callers.

Supported channels

The following table lists how this block routes a contact who is using the specified channel.

<table>
<thead>
<tr>
<th>Channel</th>
<th>Supported?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice</td>
<td>Yes</td>
</tr>
<tr>
<td>Chat</td>
<td>No - Error branch</td>
</tr>
<tr>
<td>Task</td>
<td>No - Error branch</td>
</tr>
</tbody>
</table>

Flow types

You can use this block in the following contact flow types (p. 448):

- Inbound flow
- Customer Queue flow
- Customer Whisper flow
- Outbound Whisper flow
- Agent Whisper flow
- Transfer to Agent flow
- Transfer to Queue flow
Properties

Start media streaming

Starts streaming media to Kinesis. Learn more
Only audio is supported

Select stream to start

- From the customer
- To the customer

Configuration tips

- You must enable live media streaming in your instance to successfully capture customer audio. For instructions, see Capture customer audio: live media streaming (p. 765).
- When selecting the stream to start, only choose one option.
- Customer audio is captured until a Stop media streaming block is invoked, even if the contact is passed to another flow.
- You must use a Stop media streaming block to stop media streaming.
- If this block is triggered during a chat conversation, the contact is routed down the Error branch.

Configured block

When this block is configured, it looks similar to the following image:

Sample flows

Example flow for testing live media streaming (p. 772)
Flow block: Stop media streaming

Description

- Stops capturing customer audio after it is started with a Start media streaming block.
- You must use a Stop media streaming block to stop media streaming.

Supported channels

The following table lists how this block routes a contact who is using the specified channel.

<table>
<thead>
<tr>
<th>Channel</th>
<th>Supported?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice</td>
<td>Yes</td>
</tr>
<tr>
<td>Chat</td>
<td>No - Error branch</td>
</tr>
<tr>
<td>Task</td>
<td>No - Error branch</td>
</tr>
</tbody>
</table>

Flow types

You can use this block in the following contact flow types (p. 448):

- Inbound flow
- Customer Queue flow
- Customer Whisper flow
- Outbound Whisper flow
- Agent Whisper flow
- Transfer to Agent flow
- Transfer to Queue flow

Properties

This block doesn't have any properties.

Configuration tips

- You must enable live media streaming in your instance to successfully capture customer audio. For instructions, see Capture customer audio: live media streaming (p. 765).
- Customer audio is captured until a Stop media streaming block is invoked, even if the contact is passed to another flow.
- If this block is triggered during a chat conversation, the contact is routed down the Error branch.

Configured block

When this block is configured, it looks similar to the following image:
Sample flows

Example flow for testing live media streaming (p. 772)

Flow block: Store customer input

Description

This block is similar to Get customer input, but this one stores the input as a contact attribute (in the Stored customer input (p. 521) system attribute) and allows you to encrypt it. This way, you can encrypt sensitive input such as credit card numbers. This block:

- Plays an interruptible prompt to get a response from the customer. For example, "Please enter your credit card number" or "Please enter the phone number we should use to call you back."
- Plays an interruptible audio prompt or play text-to-speech for a customer to respond to.
- Stores numerical input as in the Stored customer input (p. 521) system attribute.
- Allows you to specify a custom terminating keypress.
- If during a call the customer doesn't enter any input, the contact is routed down the Success branch branch with a value of Timeout. Add a Check contact attributes block to check for timeouts.

Supported channels

The following table lists how this block routes a contact who is using the specified channel.

<table>
<thead>
<tr>
<th>Channel</th>
<th>Supported?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice</td>
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<td>No - Error branch</td>
</tr>
<tr>
<td>Task</td>
<td>No - Error branch</td>
</tr>
</tbody>
</table>

Flow types

You can use this block in the following contact flow types (p. 448):

- Inbound flow
- Customer Queue flow
- Transfer to Agent flow
- Transfer to Queue flow
Properties

Store customer input

Stores numerical input to contact attribute.
Plays an interruptible audio prompt and stores digits via DTMF as a contact attribute. Info

Prompt

- Select from the prompt library (audio)
- Set manually
- Set dynamically
- Specify an audio file from an S3 bucket
- Text-to-speech or chat text

Customer input

- Custom

  Maximum Digits
  20

  Timeout before first entry (in seconds)
  5

  - Encrypt entry (recommended)
  - Specify terminating keypress
  - Disable cancel key
  - Phone number

Note the following properties:

- For information about choosing a prompt from the Amazon Connect library or an S3 bucket, see the Play prompt (p. 396) block.
- Maximum Digits: Define the maximum number of digits that a customer can enter.
- Timeout before first entry: Specify how long to wait for a customer to start entering their reply by voice. For example, you might enter 20 seconds, to give the customer time to get their credit card.

After the contact starts entering digits, Amazon Connect waits 5 seconds for each digit, by default. You cannot change this default setting.

- Encrypt entry: Encrypt the customer’s entry, such as their credit card information. For step-by-step instructions to get the keys that you use to input this information, see Creating a secure IVR solution with Amazon Connect.
• **Specify terminating keypress**: Define a custom terminating keypress that is used when your contacts complete their DTMF inputs. The terminating keypress can be up to five digits long, with #, *, and 0-9 characters, instead of just #.

  **Note**  
  To use a star (*) as part of the terminating keypress, you must also choose **Disable cancel key**.

• **Disable cancel key**: By default, when a customer enters * as input, it deletes all of the DTMF input that came before it. However, if you choose **Disable cancel key**, Amazon Connect treats the * as any other key.

If you send the DMTF input to an **Invoke AWS Lambda function** (p. 389) block, the **Disable cancel key** property affects the input, as follows:

- When **Disable cancel key** is selected, all the characters entered—including any *—are sent to the **Invoke Lambda function** block.

- When **Disable cancel key** is not selected, only the * is sent to the **Invoke Lambda function** block.

For example, let's say you chose **Disable cancel key**, and a customer entered 1#2#3*4##, where ## is the terminating keypress. The **Invoke Lambda function** block then receives the entire 1#2#3*4# as input. You could program the Lambda function to ignore the character before the * character. So, the customer input would be interpreted as 1#2#4#.

• **Phone number**: This option is useful for queued callback scenarios.

  - **Local format**: If all of your customers all calling from the same country that your instance is in, choose that country from the dropdown list. Amazon Connect then auto-populates the country code for customers so that they don't have to enter it.

  - **International format**: If you have customers calling from different countries, choose **International format**. Amazon Connect then requires customers to enter their country code.

**Problems with DTMF input?**

Let's say you have the following scenario with two contacts flows, each one capturing DTMF input from customers:

1. One flow uses the **Get customer input** block to request DTMF input from customers.
2. After the DTMF input is entered, it uses the **Transfer to flow** block to move the contact to the next contact flow.
3. In the next flow, there's a **Store customer input** block to get more DTMF input from the customer.

There's setup time between the first and second flows. This means if the customer enters DTMF input very quickly for the second flow, some of the DTMF digits might be dropped.

For example, the customer needs to press 5, then wait for a prompt from the second flow, then type 123. In this case, 123 is captured without problem. However, if they don't wait for the prompt and enter 5123 very quickly, the **Store customer input** block may capture only 23 or 3.

To guarantee the **Store customer input** block in second contact flow captures all of the digits, the customer needs to wait for the prompt to be played, and then enter their type DTMF input.

**Configured block**

When this block is configured, it looks similar to the following image:
1. **Invalid number**: What to do if the customer enters an invalid number.

**Sample flows**

See these sample flows for scenarios that use this block:

- Sample secure input with agent (p. 326)
- Sample secure input with no agent (p. 326)
- Sample queue configurations (p. 320)
- Sample queued callback (p. 324)

**Scenarios**

Creating a secure IVR solution with Amazon Connect

**Flow block: Transfer to agent (beta)**

**Description**

- Ends the current flow and transfers the customer to an agent.

  **Note**  
  If the agent is already with someone else, the contact is disconnected.  
  If the agent is in After Contact Work, they are automatically removed from ACW at the time of transfer.

- The **Transfer to Agent** block is a beta feature and works only for voice interactions.
- We recommend using the **Set working queue (p. 424)** block for agent-to-agent transfers instead of using this block. The **Set working queue** block supports omnichannel transfers such as voice and chat. For instructions, see **Set up agent-to-agent transfers (p. 477)**.

**Supported channels**

The following table lists how this block routes a contact who is using the specified channel.
Transfer to agent (beta)

<table>
<thead>
<tr>
<th>Channel</th>
<th>Supported?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice</td>
<td>Yes</td>
</tr>
<tr>
<td>Chat</td>
<td>No - Error branch</td>
</tr>
<tr>
<td>Task</td>
<td>No - Error branch</td>
</tr>
</tbody>
</table>

To transfer chats and tasks to agents, use the Set working queue (p. 424) block. Because Set working queue (p. 424) works for all channels, we recommend using it for voice calls too, instead of using Transfer to agents (beta). For instructions, see Set up agent-to-agent transfers (p. 477).

Flow types

You can use this block in the following contact flow types (p. 448):

- Transfer to Agent flow
- Transfer to Queue flow

Properties

Configured block

When this block is configured, it looks similar to the following image:

Scenarios

See these topics for scenarios that use this block:

- Set up contact transfers (p. 469)
Flow block: Transfer to flow

Description

• Ends the current flow and transfers the customer to a different flow.

Supported channels

The following table lists how this block routes a contact who is using the specified channel.

<table>
<thead>
<tr>
<th>Channel</th>
<th>Supported?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice</td>
<td>Yes</td>
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<tr>
<td>Chat</td>
<td>Yes</td>
</tr>
<tr>
<td>Task</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Flow types

You can use this block in the following contact flow types (p. 448):

• Inbound flow
• Transfer to Agent flow
• Transfer to Queue flow

Properties

Only published flows appear in the dropdown list.

Configured block

When this block is configured, it looks similar to the following image:
1. The contact is routed down the **Error** branch if the flow you have specified to transfer to isn't a valid flow, or it's not a valid flow type (Inbound, Transfer to Agent, or Transfer to Queue).

**Sample flows**
See these sample flows for scenarios that use this block:
- Sample AB test (p. 319)

**Scenarios**
See these topics for scenarios that use this block:
- Set up contact transfers (p. 469)

**Flow block: Transfer to phone number**

**Description**
- Transfers the customer to a phone number external to your instance.
- If this block is triggered during a chat conversation, the contact is routed down the **Error** branch.

**Supported channels**
The following table lists how this block routes a contact who is using the specified channel.

<table>
<thead>
<tr>
<th>Channel</th>
<th>Supported?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice</td>
<td>Yes</td>
</tr>
<tr>
<td>Chat</td>
<td>No - Error branch</td>
</tr>
<tr>
<td>Task</td>
<td>No - Error branch</td>
</tr>
</tbody>
</table>

**Flow types**
You can use this block in the following contact flow types (p. 448):
- Inbound flow
- Customer Queue flow
- Transfer to Agent flow
- Transfer to Queue flow

**Properties**

Transfer to phone number

Transfer a call to a phone number for voice interactions.

**Info**

**Transfer via**

- Phone number
  - Set manually
    - Country code
      - +1
    - Phone number
  - Set dynamically

**Set timeout**

- Set manually
  - Timeout (in seconds)
    - 30
  - Set dynamically

**Resume contact flow after disconnect**

- Adds success, call failed and timeout output branches
  - Yes
  - No

**Optional parameters**

- Send DTMF
- Caller ID number
- Caller ID name
- Voice Connector

Note the following properties:
Transfer to phone number

• **Resume flow after disconnect**: This works only if the external party disconnects, and the customer doesn't disconnect. (If the customer disconnects, the whole call disconnects.)

• **Send DTMF**: This property is useful to bypass some of the DTMF of the external party. For example, if you know you’ll need to press 1, 1, 362 to reach the external party, you can enter that here.

• **Caller ID number**: You can choose a number from your instance to appear as the caller ID. This is useful in cases where you want to use a number that’s different from the one the flow is actually using to make the call.

**Important**
If you are using Amazon Connect outside of the United States, we recommend choosing **Caller ID number** and then selecting an Amazon Connect number. Otherwise, local regulations may cause telephony providers to block or redirect non-Amazon Connect phone numbers. This will result in service-related events, such as rejected calls, poor audio quality, delay, latency, and displaying the incorrect caller ID.

**In Australia**: The caller ID must be an Amazon Connect provided DID (Direct Inward Dialing) phone number. If a toll free number or a number not provided by Amazon Connect is used in the caller ID, local telephony suppliers may reject outbound calls due to local anti-fraud requirements.

• **Caller ID name**: You can set a caller ID name, but there’s no guarantee it will appear correctly to the customer. For more information, see Why your caller ID might not appear correctly to customers (p. 210).

**Note**
When Transfer to phone number (p. 438) block is used without specifying a custom caller ID, the caller ID of the caller is passed as the caller ID. For example, if you transfer to an external number and no custom caller ID is used to specify that the call is coming from your organization, then the contact's caller ID is displayed to the external party.

**Configuration tips**

• **Submit a service quota increase request** requesting that your business be allowed to make outbound calls to the country you specified. If your business is not on the allow list for making the call, it will fail. For more information, see Countries you can call by default (p. 1336).

• If the country you want to select is not listed, you can submit a request to add countries you want to transfer calls to using the Amazon Connect service quotas increase form.

• You can choose to end the flow when the call is transferred, or choose to **Resume flow after disconnect**, which returns the caller to your instance and resumes the flow after the transferred call ends.

**Configured block**

When this block is configured, it looks similar to the following image:
Scenarios

See these topics for scenarios that use this block:

- Set up contact transfers (p. 469)
- Set up outbound caller ID (p. 208)

Flow block: Transfer to queue

Description

- In most types of flows, this block ends the current flow and places the customer in a queue.
- When used in a Customer Queue flow, however, this block transfers a contact already in a queue to another queue.
- When used in a callback scenario, Amazon Connect calls the agent first. After the agent accepts the call in the CCP, Amazon Connect calls the customer.

Supported channels

The following table lists how this block routes a contact who is using the specified channel.

<table>
<thead>
<tr>
<th>Channel</th>
<th>Supported?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice</td>
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<tr>
<td>Chat</td>
<td>Yes</td>
</tr>
<tr>
<td>Task</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Flow types

You can use this block in the following contact flow types (p. 448):

- Inbound flow
- Customer Queue flow
• Transfer to Agent flow
• Transfer to Queue flow

Properties

This block has two tabs on its properties page.

Tab 1: Transfer to queue

When the **Transfer to queue** block runs, it checks the queue capacity to determine whether the queue is at capacity (full). This check for queue capacity compares the current number of contacts in the queue to the **Maximum contacts in queue** limit, if one is set for the queue.

If no limit is set, the queue is limited to the number of concurrent contacts set in the service quota for the instance.

Tab 2: Transfer to callback queue
The following properties are available under the **Transfer to callback queue** tab:

- **Initial delay**: Specify how much time has to pass between a callback contact being initiated in the flow, and the customer is put in queue for the next available agent.

- **Maximum number of retries**: If this were set to 1, then Amazon Connect would try to callback the customer at most two times: the initial callback, and 1 retry.
  
  **Tip**
  We strongly recommend that you double-check the number entered in **Maximum number of retries**. If you accidentally enter a high number, such as 20, it's going to result in unnecessary work for the agent and too many calls for the customer.

- **Minimum time between attempts**: If the customer doesn't answer the phone, this is how long to wait until trying again.

- **Set working queue**: You can transfer a callback queue to a different queue. This is useful if you set up a special queue just for callbacks. You can then view that queue to see how many customers are waiting for callbacks.
  
  **Tip**
  If you want to specify the **Set working queue** property, you need to add a **Set customer callback number** block before this block.

If you don't set a working queue, Amazon Connect uses the queue that was set previously in the flow.
Configuration tips

- When you use this block in a Customer Queue flow, you must add a **Loop prompts** block before this one.
- To use this block in most flows, you must add a **Set working queue** block first. The one exception to this rule is when this block is used in a Customer Queue flow.
- When you use text, either for text-to-speech or chat, you can use a maximum of 3,000 billed characters (6,000 total characters).
- Amazon Lex bots support both spoken utterances and keypad input when used in a flow.
- You can prompt contacts to end their input with a pound key # and to cancel it using the star key *.

Configured block

When this block is configured to **transfer to queue**, it looks similar to the following image. If a contact is routed down the **At capacity** branch, it remains in the current working queue.

![Configured block image](image)

When this block is configured to **transfer to callback queue**, it looks similar to the following image. If a contact is routed down the **Success** branch, it's transferred to the specified queue.

![Configured block image](image)

Scenarios

See these topics for scenarios that use this block:

- Manage contacts in a queue (p. 480)
- Set up queued callback (p. 485)
- About queued callbacks in metrics (p. 1082)

Sample flows

See these sample flows for scenarios that use this block:

- Sample queue configurations (p. 320)
Flow block: Wait

Description

This block pauses the flow for the specified wait time.

For example, if a contact stops responding to a chat, the block pauses the contact flow for the specified wait time, then branches accordingly, such as to disconnect.

Supported channels

The following table lists how this block routes a contact who is using the specified channel.

<table>
<thead>
<tr>
<th>Channel</th>
<th>Supported?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice</td>
<td>No - Error branch</td>
</tr>
<tr>
<td>Chat</td>
<td>Yes</td>
</tr>
<tr>
<td>Task</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Flow types

You can use this block in the following contact flow types (p. 448):

- Inbound flow
- Customer Queue flow

Properties

Wait

Waits for a specified period of time, and optionally for specified events. This block is supported for chat and tasks only. info

Timeout

- Set manually
- Set dynamically

Optional branches

- Customer has returned
It has two properties:

- **Timeout**: Run this branch if the customer hasn't sent a message after a specified amount of time. Maximum is 7 days.
- **Customer return**: Run this branch when the customer returns and sends a message. With this branch you can route the customer to the previous (same) agent, previous (same) queue, or override and set a new working queue or agent.

**Configuration tips**

You can add multiple **Wait** blocks to your contact flows. For example:

- If the customer comes back in 5 minutes, connect them to the same agent. This is because that agent has all of the context.
- If the customer doesn't come back after 5 minutes, send a text saying "We missed you."
- If the customer comes back in 12 hours, connect to a flow that puts them in a priority queue. However, it doesn't route them to the same agent.

**Configured block**

When this block is configured, it looks similar to the following image:

![Configured block](image)

**Sample flows**

See these sample flows for scenarios that use this block:

- **Sample disconnect flow** (p. 320)

**Scenarios**

See these topics for scenarios that use this block:

- **Example chat scenario** (p. 13)

**Flow block: Wisdom**

**Description**

- Associates a Wisdom domain to a contact to enable real-time recommendations.
• For more information about enabling Wisdom, see Deliver information to agents using Amazon Connect Wisdom (p. 968).

Supported channels

The following table lists how this block routes a contact who is using the specified channel.

Note
Nothing happens if a chat or task is sent to this block, however, you will be charged. To prevent this, add a Check contact attributes (p. 349) block before this one and route chats and tasks accordingly. For instructions, see Route based on contact's channel (p. 540).

<table>
<thead>
<tr>
<th>Channel</th>
<th>Supported?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice</td>
<td>Yes</td>
</tr>
<tr>
<td>Chat</td>
<td>No</td>
</tr>
<tr>
<td>Task</td>
<td>No</td>
</tr>
</tbody>
</table>

Flow types

You can use this block in the following contact flow types (p. 448):

• Inbound flow
• Customer Queue flow
• Outbound whisper flow
• Transfer to Agent flow
• Transfer to Queue flow

Properties

Configuration tips

• Amazon Connect Wisdom, along with Contact Lens Real-Time analytics, is used to recommend content that is related to customer issues detected during the current contact. The Set recording and analytics behavior (p. 411) block with Contact Lens real-time enabled must also be set in this flow for Wisdom
recommendations to work. It doesn't matter where in the flow you add Set recording and analytics behavior (p. 411).

**Configured block**

When this block is configured, it looks similar to the following image:

![Configured block image]

**Create a new flow**

The starting point for creating all flows is the flow designer. It's a drag-and-drop work surface that enables you to link together blocks of actions. For example, when a customer first enters your contact center, you can ask for some input and then play a prompt such as "Thank you."

For descriptions of the available action blocks, see Flow block definitions (p. 327).

**Before you begin: develop a naming convention**

Chances are you're going to create tens or hundreds of flows. To help you stay organized, it's important to develop a naming convention. After you start creating flows, we strongly recommend against renaming them.

**Choose a flow type**

Amazon Connect includes a set of nine flow types. Each type has only those blocks for a specific scenario. For example, the flow type for transferring to a queue contains only the appropriate flow blocks for that type of flow.

**Important**

- When you create a flow, you need to choose the right type for your scenario. Otherwise, the blocks you need may not be available.
- You can't import flows of different types. This means if you start with one type and need to switch to another to get the right blocks, you have to start over.

The following flow types are available.

<table>
<thead>
<tr>
<th>Type</th>
<th>When to use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inbound flow</td>
<td>This is the generic flow type that's created when you choose the Create flow button, and don't select a type using the drop-down arrow. It creates an inbound flow.</td>
</tr>
<tr>
<td></td>
<td>This flow works with voice, chat, and tasks.</td>
</tr>
<tr>
<td>Type</td>
<td>When to use</td>
</tr>
<tr>
<td>-------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Customer queue flow</td>
<td>Use to manage what the customer experiences while in queue, before being joined to an agent. Customer queue flows are interruptible and can include actions such as an audio clip apologizing for a delay and offering an option to receive a callback, leveraging the <strong>Transfer to queue</strong> block. This flow works with voice, chat, and tasks.</td>
</tr>
<tr>
<td>Customer hold flow</td>
<td>Use to manage what the customer experiences while the customer is on hold. With this flow, one or more audio prompts can be played to a customer using the <strong>Loop prompts</strong> block while waiting on hold. This flow works with voice.</td>
</tr>
<tr>
<td>Customer whisper flow</td>
<td>Use to manage what the customer experiences as part of an inbound call immediately before being joined with an agent. The agent and customer whispers are played to completion, then the two are joined. This contact flow works with voice and chat.</td>
</tr>
<tr>
<td>Outbound whisper flow</td>
<td>Use to manage what the customer experiences as part of an outbound call before being connected with an agent. In this flow, the customer whisper is played to completion, then the two are joined. For example, this flow can be used to enable call recordings for outbound calls with the <strong>Set recording behavior</strong> block. This contact flow works with voice and chat.</td>
</tr>
<tr>
<td>Agent hold flow</td>
<td>Use to manage what the agent experiences when on hold with a customer. With this flow, one or more audio prompts can be played to an agent using the <strong>Loop prompts</strong> block while the customer is on hold. This flow works with voice.</td>
</tr>
<tr>
<td>Agent whisper flow</td>
<td>Use to manage what the agent experiences as part of an inbound call immediately before being joined with a customer. The agent and customer whispers are played to completion, then the two are joined. This contact flow works with voice, chat, and tasks.</td>
</tr>
<tr>
<td>Type</td>
<td>When to use</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| **Transfer to agent flow**  | Use to manage what the agent experiences when transferring to another agent. This type of flow is associated with transfer to agent quick connects, and often plays messaging, then completes the transfer using the **Transfer to agent** block.  
  This flow works with voice, chat, and tasks.  
  **Important**  
  Do not place any sensitive information in this flow. When a cold transfer occurs, the transferring agent disconnects before transfer is completed, and this flow is run on the caller. This means information in the flow is played to the caller, not the agent. |
| **Transfer to queue flow**  | Use to manage what the agent experiences when transferring to another queue. This type of flow is associated with transfer to queue quick connects, and often plays messaging, then completes the transfer using the **Transfer to queue** block.  
  This flow works with voice, chat, and tasks. |

**Create an inbound flow**

Use these steps to create an inbound flow.

1. In the left navigation menu, choose **Routing, Contact flows**.

2. Choose **Create flow**. This opens the flow designer and creates an inbound flow (Type = Flow).
3. Type a name and a description for your flow.
4. Search for a flow block using the **Search** bar, or expand the relevant group to locate the block. For descriptions of the contact blocks, see Flow block definitions (p. 327).
5. Drag and drop contract blocks onto the canvas. You can add blocks in any order or sequence, as connections between elements aren't required to be strictly linear.

   **Tip**
   You can move blocks around the canvas so the layout aligns to your preferences. To select multiple blocks at the same time, press the Ctrl key on your laptop (or the Cmd key on a Mac), choose the blocks you want, and then use your mouse to drag them as a group within the flow. You can also use the Ctrl/Cmd key to start at one point on the canvas and drag your pointer across the canvas to select all blocks included in the frame.

6. Double-click the title of the block. In the configuration pane, configure settings for that block and then choose **Save** to close the pane.

7. Back on the canvas, click on the first (the originating) block.

8. Choose the circle for the action to perform, such as Success.

9. Drag the arrow to the connector of the group that performs the next action. For groups that support multiple branches, drag the connector to the appropriate action.

10. Repeat the steps to create a flow that meets your requirements.

11. Choose **Save** to save a draft of the flow. Choose **Publish** to activate the flow immediately.

   **Note**
   All connectors must be connected to a block in order to successfully publish your flow.

---

### Delete flows

To delete flows use the **DeleteContactFlow** API.

Currently, there's no way to delete flows using the Amazon Connect admin console.

### Generate logs

After your flow is published live, you can use flow logs to help analyze flows and quickly find errors your customers encounter. If needed, you can roll back to a previous version of the flow.

For more information about using flow logs, see [Track events as customers interact with flows](#) (p. 513).

### Contact initiation methods and flow types

Every contact in your Amazon Connect contact center is initiated by one of the following methods:

- Inbound
- Outbound
- Transfer
- Callback
- API
- Queue_Transfer
- Disconnect

You can create flows appropriate for a given initiation method when you know which types of flows (p. 448) the initiation method uses.

For each initiation method, this topic explains which types of flows are run.
Inbound

The customer initiated a voice (phone) contact with your contact center.

- When the contact successfully connects with the phone number of your contact center, an Inbound flow (p. 448) is presented to caller.
- During the transition in the Inbound flow, if the customer is put in a queue, a Customer queue flow (p. 448) is played to customer.
- After the agent becomes available to handle the caller and accept the contact, an Agent whisper flow (p. 448) is played to the agent.
- After a Agent whisper flow (p. 448) completes, a Customer whisper flow (p. 448) is played to customer.
- After the both whisper flows are played successfully to the agent and the customer respectively, the caller gets connected to agent for interaction.

To summarize, for a simple inbound call, the following flow types are played before caller is connected to agent:

1. Inbound flow
2. Customer queue flow
3. Agent whisper flow
4. Customer whisper flow

Outbound

An agent initiated voice (phone) contact to an external number, by using their CCP to make the call.

- As soon as the destination party picks the call, they are presented with an Outbound whisper flow (p. 448).
- After an Outbound whisper flow successfully completes, the agent and the contact are connected for interaction.

To summarize, an Outbound flow type is the only one involved in an outbound call initiated from Amazon Connect.

Transfer

The contact was transferred by an agent to another agent or to a queue, using quick connects in the CCP. This results in a new contact record being created.

Before the agent transfers the contact to another agent or queue, all the flows involved in an INBOUND contact are run.

- Agent to Agent transfer using Agent Quick Connect
  - After the agent transfers the inbound contact to another agent:
    - A Agent transfer flow (p. 448) is played to the source agent.
    - After the destination agent accepts the call, a Agent whisper flow (p. 448) is played to destination agent, and then a Customer whisper flow (p. 448) is played to source agent.
    - After all three flows are successfully run, the interaction begins between the source and destination agents.
    - During this whole process, the inbound caller is on hold and a Customer hold flow (p. 448) is played to the inbound caller during hold time.
After the source agent is connected with destination agent, the source agent can do one of the following actions:

- Choose **Join**. This joins all parties on the call: source agent, destination agent, and the customer are joined in a conference call.
- Choose **Hold all**. This puts the destination agent and the customer on hold.
- Put destination agent on hold, so only the source agent can talk to the customer.
- Choose **End call**. The source agent leaves the call but the destination agent and the customer are directly connected and continue talking.

To summarize for an agent to agent transfer call, the following flow types are run:

1. **Agent transfer flow**
2. **Agent whisper flow** (played to the destination agent)
3. **Customer whisper flow** (played to the source agent) during whole this process
4. **Customer hold flow** played to the original caller

- Agent to Queue transfer using Queue Quick Connect
  - After the agent transfers the inbound call to another queue:
    - A **Queue transfer flow** (p. 448) is played to source agent.
    - After the agent from the transferred queue accepts the call, an **Agent whisper flow** (p. 448) is played to destination agent, and then a **Customer whisper flow** (p. 448) is played to source agent.
    - After these flows run, the source and destination agent interaction begins.
    - During this whole process, the inbound caller is on hold. A **Customer hold flow** (p. 448) is played to the inbound caller during the hold time.

After the source agent is connected with destination agent, the source agent can do one of the following:

- Choose **Join**. This joins all parties on the call: source agent, destination agent, and the customer are joined in a conference call.
- Choose **Hold all**. This puts destination agent and the customer on hold.
- Put destination agent on hold, so only the source agent can talk to the customer.
- Choose **End call**. The source agent leaves the call but the destination agent and the customer are directly connected and continue talking.

To summarize for agent to queue transfer call, the following flows are played:

1. **Queue transfer flow**
2. **Agent whisper flow** (played to the destination agent)
3. **Customer whisper flow** (played to the source agent) during whole this process
4. **Customer hold flow** played to the original caller

### Callback

The customer is contacted as part of a callback flow.

- As soon as agent accepts the callback contact, an **Agent whisper flow** (p. 448) is played to the agent.
- After the customer accepts the callback call, an **Outbound whisper flow** (p. 448) is played to customer.
- After these two flows are played, the agent and customer are connected and can interact.

To summarize, for callback contacts, the following flow types are played:
• Agent whisper flow
• Outbound whisper flow

API

The contact was initiated with Amazon Connect by API. This could be:

1. An outbound contact you created and queued to an agent using the `StartOutboundVoiceContact` API.
2. A live chat that was initiated by the customer with your contact center where you called the `StartChatConnect` API.
3. A task that was initiated by calling the `StartTaskConnect` API.

Following is an example of an API initiated contact method:

• After the outbound contact is successfully initiated using the `StartOutboundVoiceContact` API, an Inbound flow (p. 448) provided in the API request is played to the customer.
• Depending on the configuration of the Inbound flow (p. 448), additional flows are played. For example, an Inbound flow (p. 448) transfers a customer to an agent for conversation. In this case, a Customer queue flow (p. 448) is played to customer while they waiting in queue for an agent.
• When the available agent accepts the call, an Agent whisper flow (p. 448) is played to agent.
• A Customer whisper flow (p. 448) is played to customer.
• After both whisper flows are played successfully to the agent and customer respectively, the caller is connected to agent for interaction.

To summarize API initiation methods, the following flows are played before the customer is connected to agent:

• Inbound flow
• Customer queue flow
• Agent whisper flow
• Customer whisper flow

Queue_Transfer

While the customer was in one queue (listening to a Customer queue flow (p. 448)), they were transferred into another queue using a flow block.

• The customer who is waiting in the queue for an agent is presented only with a Customer queue flow (p. 448). No additional flows are involved.

Disconnect

When a Set disconnect flow (p. 406) block runs, it specifies which flow to run after a disconnect event during a contact.

• You can specify only an Inbound contact flow (p. 448) in this block. Since it occurs after the disconnect event, no additional flow is presented to customer.
Override the default contact flows

For all of the initiation methods discussed in this topic, if you don’t specify flows for Agent whisper flow, Customer whisper flow, Customer queue flow, or Outbound whisper flow, then the default flow of that type runs instead. For a list of default flows, see Default flows (p. 307).

To override the defaults and use your own flows, use the following blocks:

- Set customer queue flow (p. 405)
- Set hold flow (p. 409)
- Set whisper flow (p. 422)

For more information, see Default flows (p. 307).

Copy and paste contact flows

You can select, cut, copy, and paste a complete flow or multiple blocks within or across flows. The following information is copied:

- All configured settings in the selected flow blocks.
- The layout arrangements.
- The connections.

Windows: CTRL+C to copy, CTRL+V to paste, and CTRL+X to cut

1. To select multiple blocks at the same time, press the Ctrl key, and choose the blocks you want.
2. Press Ctrl+C to copy the blocks.
3. Press CTRL+V to paste the blocks.

Mac: Cmd+C to copy, Cmd+V to paste, and Cmd+X to cut

1. To select multiple blocks at the same time, press the Cmd key, and choose the blocks you want.
2. Press Cmd+C to copy the blocks.
3. Press Cmd+V to paste the blocks.

Tip
Amazon Connect uses the clipboard for this feature. Paste won’t work if you edit the JSON in your clipboard and introduce a typo or other error, or if you have multiple items saved to your clipboard.

Flow version control: Roll back a contact flow

View a previous version of a flow

This procedure is especially useful if you want to research how a flow has been changed over time.

1. In the contact flow designer, open the flow you want to view.
2. Choose the Latest: Published dropdown to view a list of previously published versions of the flow.

For default flows that are provided with your Amazon Connect instance, the oldest flow in the list is the original version. The date matches when your Amazon Connect instance was created. For example, in the following image, the original default flow is dated 07/21/22.

3. Choose the version of the flow to open and view it. You can view all the blocks and how they are configured.

4. Next, you can do one of the following:
   - To return to the most recently published version, choose it from the Latest: Published dropdown list.
   - Make changes to the previous version and choose Save as from the dropdown to save it with a new name. Or choose Save from the dropdown to assign the same name.
   - Or, choose Publish to return the previous version to production.

**Roll back a contact flow**

1. In the contact flow designer, open the contact flow you want to roll back.
2. Use the drop-down to choose the version of the contact flow you want to roll back to. If you choose Latest, it reverts the flow to the most recent published version. If there isn't a published version, it reverts to the most recent saved version.

   **Note**
   To see a consolidated view of all changes across all flows, click the View historical changes link at the bottom of the Contact flows page. You can filter to a specific flow by date or user name.

3. Choose Publish to push that version into production.
Attach a claimed or ported phone number to a flow

After you publish a flow, you can attach a claimed (p. 160) or ported (p. 149) phone number to it. When a contact calls the phone number that you associate with a flow, they are connected to that flow.

To associate a claimed or ported phone number with a published flow

1. Log in to your Amazon Connect instance (https://instance name.my.connect.aws/) with an Admin account or a user account that has Phone number - Edit permissions in it's security profile (p. 780). (To find the name of your instance, see Find your Amazon Connect instance ID/ARN (p. 131).)
2. On the navigation menu, choose Channels, Phone numbers.
3. Locate the phone number to associate with the flow in the list. Click the phone number to open the Edit Phone number page.
4. On the Edit Phone number page, do the following:
   a. (Optional) Edit the description for the phone number.
   b. For Contact flow / IVR, select the flow. Note that only published flows are included in this list.
   c. Choose Save.

Flow modules for reusable functions

Flow modules are reusable sections of a flow. You can create them to extract repeatable logic across your flows, and create common functions. For example:

1. You can create a module that sends SMS text messages to customers.
2. You can invoke the module in flows that handle situations where customers want to reset their passwords, check their bank balances, or receive a one-time password.

Following are the benefits of using modules:

- Simplify managing common functionality across flows. For example, an SMS module could validate the format of phone number, confirm SMS opt-in preferences, and integrate with an SMS service, such as Amazon Pinpoint.
- Makes it more efficient to maintain flows. For example, you can quickly propagate changes across all flows that invoke a flow module.
- Helps separate flow designer responsibilities. For example, you can have both technical module designers and non-technical flow designers.
Where you can use modules

You can use modules in any flow that is type (p. 448) **Inbound flow**.

The following types of flows do not support modules: **Customer queue, Customer hold, Customer whisper, Outbound whisper, Agent hold, Agent whisper, Transfer to agent, Transfer to queue**.

Limitations

- Modules do not allow overriding flow local data of the invoking flow. This means you can't use the following with modules:
  - External attributes
  - Amazon Lex attributes
  - Customer Profiles attributes
  - Wisdom attributes
  - Queue metrics
  - Stored customer input
- Modules do not allow invoking another module.

Security profile permissions for modules

Before you can add modules to Inbound flows, you must have permissions in your security profile. By default, the **Admin** and **CallCenterManager** security profiles have these permissions.

Create a module

For information about the number of modules that you can create for each Amazon Connect instance, see Amazon Connect service quotas (p. 1325).

1. Log in to the Amazon Connect console with an account assigned to a security profile that has permissions to create modules.
2. On the navigation menu, choose **Routing, Contact flows**.
3. Choose Modules, Create flow module.
4. Add the blocks that you want to your module. When finished, choose Publish. This makes the module available to use in other flows.

Add a module to a flow

1. Log in to the Amazon Connect console with an account assigned to a security profile that has permissions to create flows. You don't need permissions to create modules.
2. On the navigation menu, choose **Routing, Contact flows**.
3. Choose Create flow or select an existing contact flow that is an **Inbound** type.
4. To add a module, go to the Integrate section, and choose Invoke flow module.
5. When you're finished creating your flow, choose Publish.
Example module

This module shows how to get a random fun fact by invoking a Lambda function. The module uses a contact attribute (`.Attributes.FunFact`) to retrieve the fun fact. Flows that invoke this module can play a FunFact to customers, depending on their incoming contact type.

The inbound flows in your instance can invoke this common module and get the fun fact.

Following is an image of the FunFact module:

Following is an image of the FunFactSampleFlow that invokes the module:

Create prompts

Prompts are audio files played in call flows. For example, hold music is a prompt. Amazon Connect comes with a set of prompts that you can add to your flows. Or, you can add your own recordings.

We recommend that you align your prompts and routing policies with each other to ensure a smooth call flow for customers.

To create a prompt

1. On the navigation menu, choose Routing, Prompts.
2. On the Manage voice prompts page, choose Create new prompt.
3. Choose the following actions:
   - **Upload**—Select the file to upload.
   - **Record**—Select the red circle to begin recording. Use the red square to stop. You can choose **Crop** to cut the recorded prompt or **Discard** to record a new prompt.
4. For **Step 2: Input basic information**, enter the name of the file, and then choose **Create**.
Supported file types

You can upload a pre-recorded .wav file to use for your prompt, or record one in the web application.

We recommend using 8 KHz .wav files that are less than 50 MB and less than 5 minutes long. If you use higher rated audio libraries, such as 16 KHz or 16 bit files, Amazon Connect has to down sample them into 8 KHz samples because of PSTN limitations. This may result in low quality audio. For more information, see the following Wikipedia article: G.711.

Maximum length for prompts

Amazon Connect supports prompts that are less than 50 MB and less than 5 minutes long.

Bulk upload of prompts not supported in UI, API, or CLI

Currently, bulk uploading of prompts is not supported through the Amazon Connect console or programmatically using the API or CLI.

Add text-to-speech to prompts

You can enter text-to-speech prompts in the following flow blocks:

- Get customer input (p. 372)
- Loop prompts (p. 393)
- Play prompt (p. 396)
- Store customer input (p. 432)

Amazon Polly converts text-to-speech

To convert text-to-speech, Amazon Connect uses Amazon Polly, a service that converts text into lifelike speech using SSML.

Amazon Polly default voices are free. You are charged only for using custom voices that are associated with your account.

Amazon Polly best sounding voice

Amazon Polly periodically releases improved voices and speaking styles. You can choose to automatically resolve your text-to-speech to the most lifelike and natural sounding variant of a voice. For example, if your flows use Joanna, Amazon Connect automatically resolves to Joanna’s conversational speaking style.

Note
If no Neural version is available, Amazon Connect defaults to the standard voice.

To automatically use the best sounding voice

1. Open the Amazon Connect console at https://console.aws.amazon.com/connect/.
2. If prompted to login, enter your AWS account credentials.
3. Choose the name of the instance from the Instance alias column.
4. In the navigation pane, choose Flows.
5. In the Amazon Polly section, choose Use the best available voice.

How to add text-to-speech

1. In a flow, add the block that will play the prompt. For example, add a Play prompt (p. 396) block.
2. In the Properties, choose Text-to-speech.
3. Enter plain text, as shown in the following image.

Or enter SSML:
SSML-enhanced input text gives you more control over how Amazon Connect generates speech from the
text you provide. You can customize and control aspects of speech such as pronunciation, volume, and
speed.

For a list of SSML tags you can use with Amazon Connect, see SSML tags supported by Amazon
Connect (p. 468).

For more information about Amazon Polly, see Using SSML in the Amazon Polly Developer Guide.

Create dynamic text strings in Play prompt block

Use a Play prompt (p. 396) block to use an audio file to play as a greeting or message to callers. You
can also use contact attributes to specify the greeting or message delivered to callers. To use the values
of a contact attribute to personalize a message for a customer, include references to stored or external
contact attributes in the text-to-speech message.

For example, if you retrieved the customer’s name from a Lambda function, and it returns values
from your customer database for FirstName and LastName, you could use these attributes to say the
customer’s name in the text-to-speech block by including text similar to the following:

- Hello $.External.FirstName $.External.LastName, thank you for calling.

Alternatively, you could store the attributes returned from the Lambda function using a Set contact
attributes block, and then reference the user-defined attribute created in the text-to-speech string.
Dynamically select which prompts to play

You can dynamically select which prompt to play by using an attribute.

1. Add Set contact attributes (p. 403) blocks to your flow. Configure each one to play the appropriate audio prompt. For example, the first one might play the .wav file when your contact center is open. The second one might play the .wav file for when it’s closed.

The following image shows how you might configure a Set contact attributes (p. 403) block. In this example, the user-defined attribute is named CompanyWelcomeMessage. You can name your attribute anything you want.

If you are referencing a user-defined attribute that was previously set as a contact attribute in the flow using the API, you can reference the attribute using the $.Attributes.nameOfAttribute syntax.

For example, if the contact in question has attributes "FirstName" and "LastName" set previously, reference them as follows:

* Hello $.Attributes.FirstName $.Attributes.LastName, thank you for calling.
2. In the Play prompt (p. 396) block, choose User Defined, and then enter the name of the attribute that you created in step 1.
Set up prompts to play from an S3 bucket

When you configure prompts on the Get customer input (p. 372), Loop prompts (p. 393), Play prompt (p. 396), or Store customer input (p. 432) blocks, you can choose an S3 bucket as the source location. You can store as many voice prompts as needed in an S3 bucket and access them in real time by using contact attributes. For examples, see the Play prompt (p. 396) block.

3. Connect the Set contact attributes (p. 403) blocks to the Play prompt block. The following example shows how it might look if you added one of each block to test how this works.

Set up prompts to play from an S3 bucket

Enter the name of the user-defined attribute created in Step 1.
Requirements

- **Supported formats**: Amazon Connect supports .wav files to use for your prompt. You must use .wav files that are 8KHz, and mono channel audio with U-Law encoding. Otherwise, the prompt won’t play correctly. You can use publicly available third-party tools to convert your .wav files to U-Law encoding. After converting the files, upload them to Amazon Connect.
- **Size**: Amazon Connect supports prompts that are less than 50MB and less than five minutes long.
- **For Regions that are disabled by default** (also called opt-in Regions) such as Africa (Cape Town), your bucket must be in the same Region.

Update the S3 bucket policy

To allow Amazon Connect to play prompts from an S3 bucket, when you set up your S3 bucket, you must update the bucket policy to grant connect.amazonaws.com (the Amazon Connect service principal) permission to call s3:ListBucket and s3:GetObject.

**To update the S3 bucket policy:**

1. Go to the Amazon S3 admin console.
2. Choose the bucket that has your prompts.
3. Choose the **Permissions** tab.
4. In the **Bucket policy** box, choose **Edit**, and paste the following policy as your template. Replace the bucket name, Region, AWS account ID, and instance ID (p. 131) with your own information, and then choose **Save changes**.

```json
{
  "Version": "2012-10-17",
  "Statement": [
    {
      "Sid": "statement1",
      "Effect": "Allow",
      "Principal": {
        "Service": "connect.amazonaws.com"
      },
      "Action": [
        "s3:ListBucket",
        "s3:GetObject"
      ],
      "Resource": [
        "arn:aws:s3:::customer-prompt-example-bucket",
        "arn:aws:s3:::customer-prompt-example-bucket/*"
      ],
      "Condition": {
        "StringEquals": {
          "aws:SourceAccount": "account-id",
          "aws:SourceArn": "arn:aws:connect:region:account-id:instance/instance-id"
        }
      }
    }
  ]
}
```

5. **Encryption**: Amazon Connect cannot download and play prompts from an S3 bucket if an AWS managed key is enabled on that S3 bucket. However, you can use a customer managed key to allow the Amazon Connect service principal ("connect.amazonaws.com") that enables your Amazon Connect instance to access the S3 bucket. See the following code snippet:
Choose the voice for audio prompts

You select the text-to-speech voice and language in the Set voice (p. 419) block.

You can also use SSML in Amazon Lex bots to modify the voice used by a chat bot when interacting with your customers. For more information about using SSML in Amazon Lex bots, see Managing Messages and Managing Conversation Context in the Amazon Lex Developer Guide.

Tip
For more information about S3 buckets, including examples and limitations, see the Play prompt (p. 396) block.

Choose the voice for audio prompts

After you set up your S3 bucket with the required bucket policy, configure Get customer input (p. 372), Loop prompts (p. 393), Play prompt (p. 396), or Store customer input (p. 432) to play a prompt from the bucket.

Tip
For more information on how to find the key ID, see Finding the key ID and key ARN in the AWS Key Management Service Developer Guide.

Use SSML tags to personalize text-to-speech

When you add a prompt to a flow, you can use SSML tags to provide a more personalized experience for your customers. SSML tags are a way to control how Amazon Polly generates speech from the text you provide.

The default setting in a flow block for interpreting text-to-speech is Text. To use SSML for text to speech in your flow blocks, set the Interpret as field to SSML as shown in the following image.
SSML tags aren't interpreted in chats

If you create text-to-speech text and apply SSML tags, they won't be interpreted in a chat conversation. For example, in the following image both the text **and tags** will be printed in the chat conversation.

SSML tags supported by Amazon Connect

Amazon Connect supports the following SSML tags.
If you use an unsupported tag in your input text, it’s automatically ignored when it’s processed.

<table>
<thead>
<tr>
<th>Tag</th>
<th>Use to...</th>
</tr>
</thead>
<tbody>
<tr>
<td>speak</td>
<td>All SSML-enhanced text must be enclosed within a pair of speak tags.</td>
</tr>
<tr>
<td>break</td>
<td>Add a pause to your text. The maximum duration for a pause is 10 seconds.</td>
</tr>
<tr>
<td>lang</td>
<td>Specify another language for specific words.</td>
</tr>
<tr>
<td>mark</td>
<td>Put a custom tag within the text.</td>
</tr>
<tr>
<td>p</td>
<td>Add a pause between paragraphs in your text.</td>
</tr>
<tr>
<td>phoneme</td>
<td>Make a phonetic pronunciation for specific text.</td>
</tr>
<tr>
<td>prosody</td>
<td>Control the volume, rate, or pitch of your selected voice.</td>
</tr>
<tr>
<td>s</td>
<td>Add a pause between lines or sentences in your text.</td>
</tr>
<tr>
<td>say-as</td>
<td>Combine with the interpret-as attribute to tell Amazon Polly how to say certain characters, words, and numbers.</td>
</tr>
<tr>
<td>sub</td>
<td>Combine with the alias attribute to substitute a different word (or pronunciation) for selected text such as an acronym or abbreviation.</td>
</tr>
<tr>
<td>w</td>
<td>Customize the pronunciation of words by specifying the word’s part of speech or alternate meaning.</td>
</tr>
<tr>
<td>amazon:effect name=&quot;whispered&quot;</td>
<td>Indicate that the input text should be spoken in a whispered voice rather than as normal speech.</td>
</tr>
</tbody>
</table>

If you use an unsupported tag in your input text it is automatically ignored when it is processed.

To learn more about the SSML tags, see Supported SSML Tags in the Amazon Polly Developer Guide.

**Neural and Conversational Speaking Styles**

For the Joanna and Matthew neural voices, in American English (en-US), you can also specify a Conversational speaking style or a Newscaster speaking style.

**Set up contact transfers**

Amazon Connect enables you to set up different kinds of transfers:

- **Agent-to-agent transfers (p. 477):** For example, if you want agents to be able to transfer calls or tasks to other agents.
• Transfers to a specific agent (p. 481): For example, if you want to route contacts to the last agent the customer interacted with, or route contacts to agents who have specific responsibilities.

• Transfers to queues (p. 470): For example, if you want to transfer the contact to a sales, support, or escalation queue. To do this, create a queue quick connect (p. 476). This works with voice, chat, and task contacts.

• Transfers to phone numbers (p. 470): For example, if you want to transfer the contact to a phone number, such as an on-call pager. To do this, create an phone number quick connect.

Overview of steps

To set up call transfers and quick connects

1. Choose a flow type based on what you want to do: Transfer to agent or Transfer to queue. Phone number transfers do not require a specific type of contact flow.

2. Create and publish the flow.

3. Create a quick connect for the type of transfer to enable: Agent, Queue, or Phone number.

   When you create the Agent or Queue quick connect, select a flow that matches the type of transfer to enable. Phone number quick connects require only a phone number, and do not allow you to set a queue or flow.

4. Add the quick connect that you created to any queue used in a flow for which to enable contact transfer, such as the queue used in the flow for incoming contacts.

5. Make sure the queue is in a routing profile assigned to the agents who transfers contacts.

Create quick connects

Quick connects are a way for you to create a list of destinations for common transfers. For example, you might create a quick connect for Tier 2 support. If agents in Tier 1 support can't solve the issue, they will transfer the contact to Tier 2.

How many quick connects can I create? To view your quota of Quick connects per instance, open the Service Quotas console at https://console.aws.amazon.com/servicequotas/.

Types of quick connects

The type of a quick connect specifies the destination. You can specify one of the following destinations.

Phone number quick connect

Contacts are transferred to a phone number (such as an on-call pager).

Agent quick connect

Contacts are transferred to a specific agent as part of a flow.

   Important
   Agent and Queue quick connects only appear in the CCP when an agent goes to transfer a contact.

Queue quick connect

Contacts are transferred to a queue as part of a flow.
Important
Agent and Queue quick connects only appear in the CCP when an agent goes to transfer a contact.

Step 1: Create quick connects

Following are the instructions to add quick connects manually using the Amazon Connect console. To add quick connects programmatically, use the CreateQuickConnect API.

To add quick connects

1. Log in to your contact center at https://<instance name>.my.connect.aws/. To find the name of your instance, see Find your Amazon Connect instance ID/ARN (p. 131).
2. On the navigation menu, choose Routing, Quick connects.
3. For each quick connect, do the following:
   a. Choose Add new.
   b. Enter a name.
   c. Choose a type.
   d. Enter the destination (for example, a phone number, the name of an agent, or the name of a queue).
   e. Enter a flow, if applicable.
   f. Enter a description.
4. When you're finished adding quick connects, choose Save.

Step 2: Enable agents to see quick connects

To enable your agents to see the quick connects in the CCP when they transfer a contact

1. After you create the quick connect, go to Routing, Queues and then choose the appropriate queue for the contact to be routed to.
2. On the Edit queue page, in the Quick connect box, search for the quick connect you created.
3. Select the quick connect and then choose Save.

Tip
Agents see all of the quick connects for the queues associated with their routing profile.

Example: Create a phone number quick connect to a mobile phone

In this example, you create a phone number quick connect to a person's mobile phone. This might be for a supervisor, for example, so agents can call them if needed.

Create a quick connect for a person's mobile phone number

1. On the navigation menu, choose Routing, Quick connects, Add new.
2. Enter a name for the quick connect, for example, John Doe's cell phone.
3. For Type, select Phone number.
4. For Destination, enter the mobile phone number, starting with the country code. In the US, the country code is 1, as shown in the following image.
5. Choose Save.

Add the quick connect to a queue. Agents working this queue will see the quick connect in their CCP.

1. Go to Routing, Queues, and choose the queue you want to edit.
2. On the Edit queue page, in Outbound caller ID number, choose a number claimed for your contact center. This is required to make outbound calls.
3. At the bottom of the page, in the Quick connect box, search for the quick connect you created, for example, John Doe's cell phone.
4. Select the quick connect and then choose Save.
Test the quick connect

1. Open the Contact Control Panel.
2. Choose Quick connects.
3. Select the quick connect you created, and then choose Call.
Delete quick connects

There are two ways you can delete a quick connect:

- Use Amazon Connect console. This topic provides instructions.
- Use the `DeleteQuickConnect` API.

To delete a quick connect

1. Log in to your Amazon Connect instance (https://instance_name.my.connect.aws/) with an Admin account or a user account that has Quick connects - Delete permissions in its security profile (p. 780). (To find the name of your instance, see Find your Amazon Connect instance ID/ARN (p. 131).)

2. On the navigation menu, choose Routing, Quick connects.

3. Select the quick connect, and then choose the Delete icon.

   If you don't see the delete option, check the following:
   - You are using the latest Amazon Connect console interface.
How quick connects work

This article explains how each type of quick connect works: agent, queue, and phone number quick connects. It explains which flows are used, and what appears on the agent's Contact Control Panel (CCP).

Tip
For all three types of quick connects, when the quick connect is invoked, the contact that the agent is working on hears the Default customer hold (p. 317) flow unless you specify a different customer hold flow.

Agent quick connects

Let's say an agent named John is talking to a customer. During the conversation he needs to transfer the call to an agent named Maria. This is an agent quick connect.

Here's what John and Maria do, and what flow blocks are triggered:

1. John chooses the Quick Connect button on his CCP. (On the earlier CCP, the button is named Transfer). He selects Maria from the list of quick connects.

   When John does this, his CCP banner changes to Connected. However, the call isn't actually connected to Maria yet.

2. In our example scenario, Amazon Connect triggers an agent transfer flow that looks like the following image:

   ![Agent Transfer Flow Diagram]

   The call is not yet connected to Maria.

3. John hears the first Play prompt, "Transferring to agent."

4. Maria receives a notification in her CCP to either accept or reject the call.

5. Maria accepts the incoming call. The banner in her CCP changes to Connecting.

6. The first Set whisper flow (p. 422) block is triggered. This block sets the custom agent whisper flow. It plays the Custom_Agent_Whisper to Maria, for example, "This is an internal call transferred from another agent."
Note
If you don't create and then select a custom agent whisper flow, Amazon Connect plays the default agent whisper flow (p. 315), which says the queue name.

7. The next Set whisper flow (p. 422) block is triggered. It plays the Custom_Customer_Whisper to John, for example, "Your call is now connecting to an agent."

Note
If you don't create and then select a custom customer whisper flow, Amazon Connect plays the default customer whisper flow (p. 315), which plays a beep.

8. Maria's CCP banner shows she's Connected. John and Maria are connected and can start talking.

9. Now John can do one of the following on his CCP:
   - Choose Join. This joins all parties on the call. John, Maria, and the customer have a conference call.
   - Choose Hold all. This puts Maria and the customer on hold.
   - Put Maria on hold, so he only talks to the customer.
   - Choose End call. He leaves the call but Maria and the customer are directly connected and continue talking.

Queue quick connects

Let's say John is talking to a customer. The customer needs help resetting his password, so John needs to transfer him to the PasswordReset queue. This is a queue quick connect.

Another agent, Maria, is assigned to handle contacts in the PasswordReset queue. Her status in the CCP is Available.

Here's what John and Maria do, and what flow blocks are triggered:

1. John chooses the Quick Connect button on his CCP. (On the earlier CCP, the button is named Transfer). He chooses to transfer the contact to the PasswordReset queue. As soon as John chooses the PasswordReset quick connect, his CCP banner shows Connecting.

   Important
   Even though the status of the transferred call (internal-transfer) shows on John's CCP banner as Connecting, the contact is not yet transferred to the PasswordReset queue.

2. Amazon Connect invokes the queue transfer flow that's associated with the PasswordReset quick connect. In this flow, the Transfer to queue (p. 441) block transfers the contact to the PasswordReset queue since it's specified in the block. The contact is now in the PasswordReset queue.

3. Maria is notified in her CCP to accept or reject the incoming call.

4. Maria accepts the incoming call and her CCP banner changes to Connecting.

5. The Agent whisper flow (p. 448) is played to Maria. It says "Connecting you to PasswordReset queue."
6. The Customer whisper flow (p. 448) is played to John. It says "Connecting you to PasswordReset queue."
7. Maria's CCP banner changes to Connected. John and Maria are connected and can start talking.
8. Now John can do one of the following from his CCP:
   - Choose Join. This joins all parties on the call. John, Maria, and the customer have a conference call.
   - Choose Hold all. This puts Maria and the customer on hold.
   - Put Maria on hold, so he only talks to the customer.
   - Choose End call. He leaves the call but Maria and the customer are directly connected and continue talking.

Phone number quick connects

There are no flows involved in a phone number quick connect. When an agent invokes an phone number quick connect, the call is directly connected the destination without invoking any flows.

Because no flow is involved in phone number quick connects, you can't set the outbound caller ID. Instead, the caller ID that you specified when you created the queue (p. 224) is used.

Set up agent-to-agent transfers

We recommend using these instructions to set up agent-to-agent voice, chat, and task transfers. You use a Set working queue (p. 424) block to transfer the contact to the agent's queue. The Set working queue block supports an omnichannel experience, whereas the Transfer to agent (beta) (p. 435) block does not.

Step 1: Create the quick connect

Following are the instructions to add quick connects manually using the Amazon Connect console. To add quick connects programmatically, use the CreateQuickConnect API.

Create a quick connect

1. On the navigation menu, choose Routing, Quick connects, Add a new destination.
2. Enter a name for the connect. Choose the type, and then specify the destination (such as a phone number or the name of an agent), flow (if applicable), and description.
   - **Important**
     A description is required when you create a quick connect. If you don't add one, you'll get an error when you try to save the quick connect.
3. To add more quick connects, choose Add new.
4. Choose Save.
5. Go to the next procedure to enable your agents to see the quick connects in the Contact Control Panel (CCP).

Enable your agents to see the quick connects in the CCP when they transfer a contact

1. After you create the quick connect, go to Routing, Queues and then choose the appropriate queue for the contact to be routed to.
2. On the Edit queue page, in the Quick connect box, search for the quick connect you created.
3. Select the quick connect and then choose Save.
Tip
Agents see all of the quick connects for the queues in their routing profile.

Step 2: Set up the "Transfer to agent" flow

In this step, you create a flow that's type Transfer to agent and use a Set working queue (p. 424) block to transfer the contact to the agent.

1. On the navigation menu, choose Routing, Contact flows.
2. Use the drop-down to choose Create transfer to agent flow.
3. Type a name and a description for your flow.
4. In the left navigation menu, expand Set, and then drag the Set working queue block to the canvas.
5. Configure the Set working queue block as shown in the following image:

   1. Choose By agent.
   2. Choose Set dynamically.
   3. For Namespace, use the dropdown box to select Agent.
   4. For Value, use the dropdown box to select User name.
   6. Add a Transfer to queue (p. 441) block. You don't need to configure this block.
Resume a flow after transfer

Let's say you need to transfer a contact to an external department that's not using Amazon Connect. For example, maybe you need to transfer the caller to a shipping provider to check the status of their delivery. After the contact is disconnected from the phone number, you want them to be returned to your agent, for example, when the delivery company couldn't resolve their issue.

• For advanced creation, send tracking information as DTMF digits when the call is transferred, so that the shipment information is retrieved with the transferred call before the customer is connected.

To set up a flow for this scenario

1. Add a **Transfer to phone number** block to your contact flow.
2. In the **Transfer to phone number** block, enter the following settings:
   - **Transfer to**
     - **Phone number**—Sets the phone number to transfer the call to.
     - **Set dynamically**—Specify a contact attribute (choose a namespace and then a value) to set the phone number to transfer the call to.
   - **Set timeout**
     - **Timeout (in seconds)**—The number of seconds to wait for the recipient to answer the transferred call.
     - **Set dynamically**—Specify a contact attribute (choose a namespace and then a value) to use to set the **Timeout** duration.
   - **Resume flow after disconnect**—When you select this option, after the call is transferred, the caller is returned to the flow when the call with the third party ends. Additional branches for **Success**, **Call failed**, and **Timeout** are added to the block when you select this option so that you can appropriately route contacts when there is an issue with the transfer.
   - **Optional parameters**
• **Send DTMF**—Select **Send DTMF** to include up to 50 Dual-Tone Multi-frequency (DTMF) characters with the transferred call. You can enter the characters to include, or use an attribute. Use the DTMF characters to navigate an automated IVR system that answers the call.

• **Caller ID number**—Specify the caller ID number used for transferred call. You can select a number from your instance, or use an attribute to set the number.

• **Caller ID name**—Specify the caller ID name used for the transferred call. You can enter a name, or use an attribute to set the name.

In some cases, the caller ID information is provided by the carrier of the party you are calling. The information may not be up-to-date with that carrier, or the number may get passed differently between systems because of hardware or configuration differences. If that is the case, the person you call may not see the phone number, or may see the name of a previously registered owner of the number, instead of the name you specify in the block.

3. Connect **Transfer to phone number** to the rest of your flow.

When the block executes:

1. The call is transferred to the phone number.
2. Optionally, when the conversation with the external party ends, the contact is returned to the flow.
3. The contact then follows the **Success** branch from the block to continue the flow.
4. If the call is not successfully transferred, one of the other branches is followed: **Call failed**, **Timeout**, or **Error**, depending on the reason the caller did not return to the flow.

**Manage contacts in a queue**

For inbound contacts, you can define advanced routing decisions to minimize queue wait times, or route contacts to specific queues, using blocks in your flow. For example:

- Use a **Check queue status** block to check staffing or agent availability for a queue before sending a contact to that queue.
- Or, use a **Get queue metrics** block to retrieve queue metrics.
- Then use a **Check contact attributes** block to check specific queue metric attributes, and define conditions to determine which queue to route the contact to based on attribute values. For more information about using queue metrics, see **Route based on number of contacts in a queue** (p. 537).

After determining which queue to transfer the contact to, use a **Transfer to queue** block in a flow to transfer the contact to that queue. When the **Transfer to queue** block runs, it checks the queue capacity to determine whether or not the queue is at capacity (full). This check for queue capacity compares the current number of contacts in the queue to the **Maximum contacts in queue** (p. 226) limit, if one is set for the queue. If no limit is set, the queue is limited to the number of concurrent contacts set in the **service quota** (p. 1325) for the instance.

After the contact is placed in a queue, the contact remains there until an agent takes the contact, or until the contact is handled based on the routing decisions in your customer queue flow.

To change the queue associated with the call after it is already placed in a queue, use a **Loop prompts** block with a **Transfer to queue** block in a customer queue flow. In the block choose which queue to transfer the call to, or use an attribute to set the queue.

**To manage contacts in a queue using a Transfer to queue block**

1. In Amazon Connect, on the navigation menu choose **Routing, Flows**.
Transfer contacts to an agent queue

2. Choose the down arrow next to Create flow, then choose Create customer queue flow.
3. Under Interact, add a Loop prompts block to provide a message to the caller when the call is transferred, then every X seconds or minutes while the call is in the queue.
4. Select the Loop prompts block to display the settings for the block.
5. Choose Add another prompt to the loop.
6. Under Prompts, do one of the following:
   • Choose Audio recording in the drop-down menu, then select the audio recording to use as the prompt.
   • Choose Text to Speech in the drop-down menu, then enter text to use for the prompt in the Enter text to be spoken field.
7. To set an interrupt, choose Interrupt every, enter a value for the interrupt interval, and then choose a unit, either Minutes or Seconds. We recommend that you use an interval greater than 20 seconds to ensure that queued contacts that are being connected to an agent are not interrupted.
8. Choose Save.
9. Connect the block to the Entry point block in the contact flow.
10. Under Terminate/Transfer, drag a Transfer to queue block onto the designer.
11. Select the title of the block to display the settings for the block, then choose the Transfer to queue tab.
12. Under Queue to check, choose Select a queue, then select the queue to transfer calls to.
   Alternatively, choose Set dynamically, then reference an attribute to specify the queue. If you use an attribute to set the queue, the value must be the queue ARN.
13. Choose Save.
14. Connect the Loop prompt block to the Transfer to queue block.
15. Add additional blocks to complete the flow that you require, such as the blocks to check queue status or metrics, then choose Save.

The flow is not active until you publish it.

Important
To successfully complete the call transfer to another queue, you must include a block after the Transfer to queue block and connect the Success branch to it. For example, use an End flow / Resume block to end the flow. The flow does not end until the call is picked up by an agent.

Transfer contacts to a specific agent

Agent queues enable you to route contacts directly to a specific agent. Following are a couple of scenarios where you might want to do this:

• Route contacts to the last agent the customer interacted with. This provides a consistent customer experience.
• Route contacts to agents who have specific responsibilities. For example, you might route all billing questions to Jane.

Note
A queue is created for all users in your Amazon Connect instance, but only users who are assigned permissions to use the Contact Control Panel (CCP) can use it to receive contacts. The Agent and Admin security profiles are the only default security profiles that include permissions to use the CCP. If you route a contact to someone who doesn't have these permissions, the contact can never be handled.
To route a contact directly to a specific agent

1. In Amazon Connect, choose Routing, Contact flows.
2. In the flow designer, open an existing flow, or create a new one.
3. Add a block in which you can select a queue to transfer a contact to, such as a Set working queue block.
4. Select the title of the block to open the block settings.
5. Select By agent.
6. Under Select an agent, enter the user name of the agent, or select the agent's user name from the drop-down list.
7. Choose Save.
8. Connect the Success branch to the next block in your flow.

You can also choose to use an attribute to select the queue created for the agent user account. To do so, after you choose By agent, choose Use attribute.

Use contact attributes to route contacts to a specific agent

When you use contact attributes in a flow to route calls to an agent, the attribute value must be either the agent's user name, or the agent's user ID.

To determine the user ID for an agent so that you can use the value as an attribute, use one of these options:

- Use the Network tab of the browser debugger to retrieve the agent ID. For example:
  1. In a Chrome browser, press F12 and go to the Network tab.
  2. In Amazon Connect, in the navigation menu, choose Users, User management, and then select an agent. Monitor the content of the Network tab. In the Name list, choose the GUID.
  3. Choose the Preview tab. The agent ID is displayed next to the Id field. The following image shows an example.

- Use the ListUsers operation to retrieve the users from your instance. The agent's user ID is returned with the results from the operation as the value of the Id in the UserSummary object.
- Find the user ID for an agent by using Amazon Connect agent event streams (p. 1045). The agent events, which are included in the agent event data stream, include the agent ARN. The user ID is included in the agent ARN after agent/.
In the following agent event data, the agent ID is **87654321-4321-4321-4321-123456789012**.

```json
{
   "AWSAccountId": "123456789012",
   "CurrentAgentSnapshot": {
      "AgentStatus": {
         "Name": "Available",
         "StartTimestamp": "2019-01-02T19:16:11.011Z"
      },
      "Configuration": {
         "AgentHierarchyGroups": null,
         "FirstName": "IAM",
         "LastName": "IAM",
         "RoutingProfile": {
            "DefaultOutboundQueue": {
               "Name": "BasicQueue"
            },
            "InboundQueues": [{
               "Name": "BasicQueue"
            }],
            "Name": "Basic Routing Profile"
         },
         "Username": "agentUserName"
      },
      "Contacts": []
   }]
```

**Set up recording behavior**

Managers can monitor live conversations, and review and download recordings of past agent conversations. To set this up, you need to add the **Set recording and analytics behavior** (p. 411) block to your flows, assign managers the appropriate permissions, and show them how to monitor live conversations and access past recordings in Amazon Connect.

**When is a conversation recorded?**

A conversation is recorded only when the contact is connected to an agent. The contact is not recorded before then, when they are connected to the flow.

When a customer is on hold, the agent is still recorded.

If the agent mutes their own microphone, for example, to consult with a coworker sitting next to them, their side-bar conversation is not recorded. The customer is still recorded since their microphone hasn’t been muted.
Where are recordings and transcripts stored?

Agents and contacts are stored on separate, stereo audio channels.

- The agent audio is stored in the right channel.
- All incoming audio, including the customer and anyone conferenced in, is stored in the left channel.

Recordings are stored in the Amazon S3 bucket that are created for your instance (p. 129). Any user or application with the appropriate permissions can access the recordings in the Amazon S3 bucket.

Encryption is enabled by default for all call recordings using Amazon S3 server-side encryption with KMS. The encryption is at the object level. The reports and recording objects are encrypted; there's no encryption at the bucket level.

You shouldn’t disable encryption.

Important

- For voice conversations to be stored in an Amazon S3 bucket, you need to enable recording in the flow block using the Set recording and analytics behavior (p. 411) block.
- For chat conversations, if there's an S3 bucket for storing chat transcripts, then all chats are recorded and stored there. If no bucket exists, then no chats are recorded. However, if you want to monitor chat conversations, you still need to add the Set recording and analytics behavior (p. 411) block to the flow.

Tip

We recommend using the contact ID to search for recordings. Even though many call recordings for specific contact IDs may be named with the contact ID prefix itself (for example, 123456-aaaa-bbbb-3223-2323234.wav), there is no guarantee that the contact IDs and name of the contact recording file always match. By using Contact ID for your search on the Contact search (p. 805) page, you can find the correct recording by referring the audio file on the contact record.

When are recordings available?

When call recording is enabled, the recording is placed in your S3 bucket shortly after the contact is disconnected. Then you can review the recording (p. 800).

Important

You can also access the recording from the customer's contact record (p. 1077). The recording is available in the contact record, however, only after the contact has left the After Contact Work (ACW) state (p. 1079).

How to set up recording behavior

To view a sample flow with the Set recording behavior block configured, see Sample recording behavior (p. 325).

To set up recording behavior in your flows

1. Log in to your Amazon Connect instance using an account that has permissions to edit flows.
2. On the navigation menu, choose Routing, Contact flows.
3. Open the flow that handles customer contacts you want to monitor.

4. In the flow, before the contact is connected to an agent, add a Set recording and analytics behavior (p. 411) block to the contact flow.

5. To configure the Set recording and analytics behavior (p. 411) block, choose from the following:
   - To record voice conversations, choose what you want to record: Agent and Customer, Agent only, or Customer only.
   - To record chat conversations, you need to choose Agent and Customer.
   - To enable monitoring of voice and/or chat conversations, you need to choose Agent and Customer.

6. Choose Save and then Publish to publish the updated flow.

To set up recording behavior for outbound calls

1. Create a flow, using the outbound whisper flow type.
2. Add a Set recording and analytics behavior (p. 411) block to that contact flow.
3. Set up a queue that will be used for making outbound calls. In the Outbound whisper flow box, choose the flow that has Set recording and analytics behavior (p. 411) in it.

How to set up users to monitor conversations or review recordings

To learn what permissions managers need, and how they can monitor live conversations and review recordings of past conversations, see:

- Monitor live conversations (p. 798)
- Review recorded conversations (p. 800)

Set up queued callback

You can create flows that provide the ability for customers to leave their phone number and get a callback from an agent.
Here's how queued callback works:

1. When a customer leaves their number it's put in a queue and then routed to the next available agent.
2. After an agent accepts the callback in the CCP, Amazon Connect calls the customer.

   If no agents are available to work on callbacks, the callbacks can stay in queue for at least 7 days and up to 14 days after they are created before Amazon Connect automatically removes them.

   **Tip**
   To manually remove a callback from the queue, use the StopContact API.

3. If there is no answer when the Amazon Connect calls the customer, it retries based on the number of times you've specified.
4. If the call goes to voicemail, it's considered connected.
5. If the customer calls again while in the callback queue, it's treated as a new call and will be handled as usual. To avoid duplicate callback requests in a callback queue, see this blog: Preventing duplicate callback requests in Amazon Connect.

How queued callbacks affect queue limits

- Queued callbacks count towards the queue size limit, but they are routed to the error branch. For example, if you have a queue that handles callbacks and incoming calls, and that queue reaches the size limit:
  - The next callback is routed to the error branch.
  - The next incoming call gets a reorder tone (also known as a fast busy tone), which indicates no transmission path to the called number is available.
- Consider setting up your queued callbacks to be lower priority than your queue for incoming calls. This way, your agents only work on queued callbacks when the incoming call volume is low.

Steps to set up queued callback

Use the steps provided in the following overview to set up queued callback.

- Set up a queue (p. 224) specifically for callbacks. In your real-time metrics reports, you can look at that queue and see how many customers are waiting for callbacks.
- Set up caller ID (p. 208). When setting your callback queue, specify the caller ID name and phone number that appears to customers when you call back.
- Add the callback queue to a routing profile (p. 230). Set this up so that contacts waiting for a call are routed to agents.
- Create a flow for queued callbacks (p. 486). You offer the option for a callback to the customer.
- Associate a phone number with the inbound flow (p. 457).
- (Optional) Create an outbound whisper flow. When a queued call is placed, the customer hears this message after they pick up and before they connect to the agent. For example, "Hello, this is your scheduled callback..."
- (Optional) Create an agent whisper flow. This is what the agent hears right after they accept the contact, before they are joined to the customer. For example, "You're about to be connected to Customer John, who requested a refund for..."

Create a flow for queued callbacks

To see what a flow looks like with queued callback, in new Amazon Connect instances see Sample queue configurations (p. 320). In previous instances, see Sample queued callback (p. 324).
The following procedure shows how to:

- Request a callback number from a customer.
- Store the callback number in an attribute.
- Reference the attribute in a **Set callback number** block to set the number to dial the customer.
- Transfer the customer to the callback queue.

At the basic level, here's what this queued callback flow looks like, without any of the alternative branches or error handling configured.

Following are the steps to create this flow.

**To create a flow for queued callbacks**

1. In Amazon Connect, choose **Routing, Contact flows**.
2. Select an existing flow, or choose **Create contact flow** to create a new one.
   - **Tip**
     - You can create this flow using different flow types: Customer queue flow, Transfer to agent, Transfer to queue.
3. Add a **Get customer input** (p. 372) block.
4. Configure the block to prompt the customer for a callback:
   - **Select from the prompt library (audio)**
   - **Text-to-speech or chat text**
   - **Enter text**
     - Press 1 to receive a callback. Press 2 to stay in queue.
   - At the bottom of the block, choose **Add another condition**, and add options 1 and 2.
6. Add a Store customer input (p. 432) block.
7. Configure the block to prompt customers for their callback number, such as "Please enter your phone number."

8. In the Customer input section, select Phone number, and then choose one of the following:
   - Local format: Your customers are calling from phone numbers that are in the same country as the AWS Region where you created your Amazon Connect instance.
• **International format/Enforce E.164**: Your customers are calling from phone numbers in countries or regions other than the one where you created your instance.

9. Add a Set callback number (p. 401) block to your flow.

10. Configure the block to set Type to System. For Attribute, choose Store customer input. This attribute stores the customer’s phone number.

![Set callback number](image)

11. Add a Transfer to queue (p. 441) block.

12. In the Transfer to queue block, configure the Transfer to callback queue tab as shown in the following image:

![Transfer to callback queue](image)

The following properties are available:
• **Initial delay**: Specify how much time has to pass between a callback contact being initiated in the flow, and the customer is put in queue for the next available agent. In the previous example, the time is 99 seconds.

• **Maximum number of retries**: If this is set to 2, then Amazon Connect tries to call back the customer a maximum of three times: the initial callback, and two retries.

A retry only happens if it rings but there’s no answer. If the callback goes to voicemail, it’s considered connected and Amazon Connect does not retry again.

**Tip**
We strongly recommend that you double-check the number entered in **Maximum number of retries**. If you accidentally enter a high number, such as 20, it’s going to result in unnecessary work for the agent and too many calls for the customer.

• **Minimum time between attempts**: If the customer doesn’t answer the phone, this is how long to wait until trying again. In the previous example, we wait 10 minutes between attempts.

13. In the Optional parameters section, choose **Set working queue** if you want to transfer the contact to a queue that you set up specifically for callbacks.

Creating a queue just for callbacks lets you view in your real-time metrics reports how many customers are waiting for callbacks.

If you don’t set a working queue, Amazon Connect uses the queue that was set previously in the flow.

14. To save and test this flow, configure the other branches and add error handling. To see an example of how this is done, see **Sample queue configurations** (p. 320). For previous instances, see **Sample queued callback** (p. 324).

15. For information about how callbacks appear in real-time metrics reports and contact records, see **About queued callbacks in metrics** (p. 1082).

## Learn more about queued callbacks

See the following topics to learn more about queued callbacks:

- **About queued callbacks in metrics** (p. 1082)
- **How Initial delay affects Scheduled and In queue metrics** (p. 1084)
- **What counts as a "Failed Callback Attempt"** (p. 1085)
Import/export flows

Use the procedures described in this topic to import/export a flow from the previous flow designer to the new one, from one instance to another, or from one Region to another as you expand your customer service organization.

**Note**

To copy and paste flows and blocks in the updated flow designer, the flow must be in the new flow language. To convert a legacy flow into the new format, you have two options:

- **Option 1:** In the flow designer user interface, opt in to the updated flow designer. Your legacy flows are automatically converted.
- **Option 2:** Manually import the legacy flow using the updated flow designer.

This option is most useful for scenarios where you have stored your flows in JSON offline. For example, for configuration control, you may have flow configurations in an offline data store. To copy a part of that flow and paste it into the updated flow designer, you need to import it into the updated flow designer. The importing process converts it to the new flow language. After that, you can copy and paste within the updated flow designer. If you want to keep using your offline data store as a source of truth, update the flow with the new format.

To migrate tens or hundreds of flows, use the APIs described in Migrate flows to a different instance (p. 546).

The Flow Import/Export feature is currently in Beta status. Updates and improvements that we make could result in issues in future releases importing contact flows that are exported during the beta phase.

**Export limitations**

You can export flows that meet the following requirements:

- The flow has fewer than 100 blocks.
- The total size of the flow is less than 1MB.

We recommend dividing large flows into smaller ones to meet these requirements.

**Flows are exported to JSON files**

A flow is exported to a JSON file. It has the following characteristics:

- The JSON includes a section for each block in the flow.
- The name used for a specific block, parameter, or other element of the flow may be different than the label used for it in the user interface (UI).

By default, flow export files are created without a file name extension, and saved to the default location set for your browser. We suggest saving your exported flows to a folder that contains only exported flows.
How to import/export flows

To export a flow

1. Log in to your Amazon Connect instance using an account that is assigned a security profile that includes view permissions for flows.
2. Choose Routing, Contact flows.
3. Open the flow to export.
4. Choose Save, Export flow.
5. Provide a name for the exported file, and choose Export.

To import a flow

1. Log in to your Amazon Connect instance. The account must be assigned a security profile that includes edit permissions for flows.
2. On the navigation menu, choose Routing, Contact flows.
3. Do one of the following:
   - To replace an existing flow with the one you are importing, open the flow to replace.
   - Create a new flow of the same type as the one you are importing.
4. Choose Save, Import flow.
5. Select the file to import, and choose Import. When the flow is imported into an existing flow, the name of the existing flow is updated, too.
6. Review and update any resolved or unresolved references as necessary.
7. To save the imported flow, choose Save. To publish, choose Save and Publish.

Resolve resources in imported contact flows

When you create a flow, the resources you include in the flow, such as queues and voice prompts, are referenced within the flow using the name of the resource and the Amazon Resource Name (ARN). The ARN is a unique identifier for a resource that is specific to the service and Region in which the resource is created. When you export a flow, the name and ARN for each resource referenced in the flow is included in the exported flow.

When you import a flow, Amazon Connect attempts to resolve the references to the Amazon Connect resources used in the flow, such as queues, by using the ARN for the resource. When you import a flow into the same Amazon Connect instance that you exported it from, the resources used in the flow will resolve to the existing resources in that instance. If you delete a resource, or change the permissions for a resource, Amazon Connect may not be able to resolve the resource when you import the flow. When a resource cannot be found using the ARN, Amazon Connect attempts to resolve the resource by finding a resource with the same name as the one used in the flow. If no resource with the same name is found, a warning is displayed on the block that contains a reference to the unresolved resource.

If you import a flow into a different Amazon Connect instance than the one it was exported from, the ARNs for the resources used are different. If you create resources in the instance with the same name as the resource in the instance where the flow was exported from, the resources can be resolved by name. You can also open the blocks that contain unresolved resources, or resources that were resolved by name, and change the resource to another one in the Amazon Connect instance. You can save a flow with unresolved or missing resources, but you cannot publish it until the resources are resolved or removed.
Invoke AWS Lambda functions

Amazon Connect can interact with your own systems and take different paths in flows dynamically. To achieve this, invoke AWS Lambda functions in a flow, fetch the results, and call your own services or interact with other AWS data stores or services. For more information, see the AWS Lambda Developer Guide.

To invoke a Lambda function from a flow, complete the following tasks.

Tasks
- Create a Lambda function (p. 493)
- Add a Lambda function to your Amazon Connect instance (p. 493)
- Invoke a Lambda function from a flow (p. 494)
- Configure your Lambda function to parse the event (p. 498)
- Verify the function response (p. 498)
- Consume the Lambda function response (p. 499)
- Tutorial: Create a Lambda function and invoke in a flow (p. 502)

Create a Lambda function

Create a Lambda function, using any runtime, and configure it. For more information, see Get started with Lambda in the AWS Lambda Developer Guide.

If you create the Lambda function in the same Region as your contact center, you can use the Amazon Connect console to add the Lambda function to your instance as described in the next task, Add a Lambda function to your Amazon Connect instance (p. 493). This automatically adds resource permissions that allow Amazon Connect to invoke the Lambda function. Otherwise, if the Lambda function is in a different Region, you can add it to your flow using the flow designer and add the resource permissions using the add-permission command, with a principal of connect.amazonaws.com and the ARN of your Amazon Connect instance. For more information, see Using Resource-Based Policies for AWS Lambda in the AWS Lambda Developer Guide.

Add a Lambda function to your Amazon Connect instance

Before you can use an Lambda function in a flow, you need to add it to your Amazon Connect instance.

Add a Lambda function to your instance

1. Open the Amazon Connect console at https://console.aws.amazon.com/connect/.
2. On the instances page, choose your instance name in the Instance Alias column. This instance name appears in the URL you use to access Amazon Connect.
3. In the navigation pane, choose **Flows**.
4. In the **AWS Lambda** section, use the **Function** drop-down box to select the function to add to your instance.

   **Tip**
   The drop-down lists only those functions in the same Region as your instance. If no functions are listed, choose **Create a new Lambda function**, which opens the AWS Lambda console.

   To use a Lambda in a different Region or account, in the Invoke AWS Lambda function (p. 389), under **Select a function**, you can enter the ARN of a Lambda. Then set up the corresponding resource-based policy on that Lambda to allow the flow to call it.

   To call `lambda:AddPermission`, you need to:

   - Set the principal to `connect.amazonaws.com`
   - Set the source account to be the account your instance is in.
   - Set the source ARN to the ARN of your instance.

   For more information, see [Granting function access to other accounts](#).

5. Choose **Add Lambda Function**. Confirm that the ARN of the function is added under **Lambda Functions**.

Now you can refer to that Lambda function in your flows.

**Invoke a Lambda function from a flow**

1. Open or create a flow.
2. Add an **Invoke AWS Lambda function** (p. 389) block (in the **Integrate** group) to the grid. Connect the branches to and from the block.
3. Choose the title of the **Invoke AWS Lambda function** (p. 389) block to open its properties page.
4. Under **Select a function**, choose from the list of functions you've added to your instance.
5. (Optional) Under **Function input parameters**, choose **Add a parameter**. You can specify key-value pairs that are sent to the Lambda function when it is invoked. You can also specify a **Timeout** value for the function.
6. In **Timeout (max 8 seconds)**, specify how long to wait for Lambda to time out. After this time, the contact routes down the Error branch.

For every Lambda function invocation from a flow, you pass a default set of information related to ongoing contact, as well as any additional attributes defined in the **Function input parameters** section for the **Invoke AWS Lambda function** block added.

The following is an example JSON request to a Lambda function:
The request is divided into two parts:

- **Contact data**—This is always passed by Amazon Connect for every contact. Some parameters are optional.

  This section may include attributes that have been previously associated with a contact, such as when using a **Set contact attributes** block in a flow. This map may be empty if there aren't any saved attributes.

  The following image shows where these attributes would appear in the properties page of a **Set contact attributes**.
Parameters—These are parameters specific to this call that were defined when you created the Lambda function. The following image shows where these parameters would appear in the properties page of the Invoke AWS Lambda function block.
Invocation retry policy

If your Lambda invocation in a flow gets throttled, the request will be retried. It will also be retried if a general service failure (500 error) happens.

When a synchronous invocation returns an error, Amazon Connect retries up to 3 times, for a maximum of 8 seconds. At that point, the flow will progress down the Error branch.

To learn more about how Lambda retries, see Error Handling and Automatic Retries in AWS Lambda.
Invoke multiple Lambda functions

Customers hear silence while a Lambda function executes. We recommend adding a Play prompt block between functions to keep customers engaged and aware of the long interaction.

Configure your Lambda function to parse the event

To successfully pass attributes and parameters between your Lambda function and Amazon Connect, configure your function to correctly parse the JSON request sent from the Invoke AWS Lambda function block or Set contact attributes, and define any business logic that should be applied. How the JSON is parsed depends on the runtime you use for your function.

For example, the following code shows how to access exampleParameterKey1 from Invoke AWS Lambda function block and exampleAttributeKey1 from Set contact attributes block using Node.JS:

```javascript
exports.handler = function(event, context, callback) {
  // Example: access value from parameter (Invoke AWS Lambda function)
  let parameter1 = event['Details']['Parameters']['exampleParameterKey1'];

  // Example: access value from attribute (Set contact attributes block)
  let attribute1 = event['Details']['ContactData']['Attributes']['exampleAttributeKey1'];

  // Example: access customer's phone number from default data
  let phone = event['Details']['ContactData']['CustomerEndpoint']['Address'];

  // Apply your business logic with the values
  // ...
}
```

Verify the function response

The Lambda function response should be a simple string map. This map can be up to 32k. If you fail to reach Lambda, the function throws an exception, the response is not understood, or the Lambda function takes more time than the limit, the flow jumps to the Error label.

Test the output returned from your Lambda function to confirm that it will be correctly consumed when returned to Amazon Connect. The following example shows a sample response in Node.JS:

```javascript
exports.handler = function(event, context, callback) {
  // Extract data from the event object
  let phone = event['Details']['ContactData']['CustomerEndpoint']['Address'];

  // Get information from your APIs
  let customerAccountId = getAccountIdByPhone(phone);
  let customerBalance = getBalanceByAccountId(customerAccountId);

  let resultMap = {
    AccountId: customerAccountId,
    Balance: '$' + customerBalance,
  }

  callback(null, resultMap);
```

This example shows an example response using Python:
def lambda_handler(event, context):
    phone = event['Details']['ContactData']['CustomerEndpoint']['Address']

    customerAccountId = getAccountIdByPhone(phone)
    customerBalance = getBalanceByAccountId(customerAccountId)

    resultMap = {
        "AccountId": customerAccountId,
        "Balance": '"%s' % customerBalance
    }

    return resultMap

The output returned from the function must be a flat object of key/value pairs, with values that include only alphanumeric, dash, and underscore characters. Nested and complex objects are not supported. The size of the returned data must be less than 32 KB of UTF-8 data.

The following example shows the JSON output from these Lambda functions:

```json
{
    "AccountId": "a12345689",
    "Balance": "$1000"
}
```

You may return any result as long as they are simple key-value pairs.

### Consume the Lambda function response

There are two ways to use the function response in your flow. You can either directly reference the variables returned from Lambda, or store the values returned from the function as contact attributes and then reference the stored attributes. When you use an external reference to a response from a Lambda function, the reference will always receive the response from the most recently invoked function. To use the response from a function before a subsequent function is invoked, the response must be saved as a contact attribute, or passed as a parameter to the next function.

#### 1. Access variables directly

If you access the variables directly, you can use them in flow blocks, but they are not included in contact records. To access these variables directly in a flow block, add the block after the `Invoke AWS Lambda function` block, and then reference the attributes as shown in the following example:

```
Name - $.External.Name
Address - $.External.Address
CallerType - $.External.CallerType
```
Make sure that the name specified for the source attribute matches the key name returned from Lambda.

2. Store variables as contact attributes

If you store the variables as contact attributes, you can use them throughout your flow, and they are included in contact records.

To store the values returned as contact attributes and then reference them, use a Set contact attributes block in your flow after the Invoke AWS Lambda function block. Choose Use attribute, External for the Type. Following the example we’re using, set Destination Attribute to MyAccountId, and set the attribute to AccountId, and do the same for MyBalance and Balance.
```python
import json

def lambda_handler(event, context):
    phone = event['Details']['ContactData']['CustomerEndpoint']['Address']
    customerAccountID = getAccountIdByPhone(phone)
    customerBalance = getBalanceByAccountId(customerAccountID)

    resultMap = {
        "AccountId": customerAccountID,
        "Balance": '%%s' % customerBalance
    }

    return resultMap
```

**Set contact attributes**

Define and store key-value pairs as contact attributes. Learn more

**Destination Type**
- User Defined

**Destination Attribute**
- MyAccountId
  - Use attribute
    - Type: External

**Destination Type**
- User Defined

**Destination Attribute**
- MyBalance
  - Use attribute
    - Type: External
Add Address as a Source attribute and use returnedContactAddress as the Destination key. Then add CallerType as a Source attribute and use returnedContactType for the Destination key.

Make sure that the name specified for the source external attribute matches the key name returned from Lambda.

Tutorial: Create a Lambda function and invoke in a flow

Step 1: Create the Lambda example

1. Sign in to the AWS Management Console and open the AWS Lambda console at https://console.aws.amazon.com/lambda/.
2. In AWS Lambda, choose Create function.
3. Choose Author from scratch, if it's not selected already. Under Basic information, for Function name, enter MyFirstConnectLambda. For all other options, accept the defaults.
4. Choose **Create function**.

5. In the **Code source** box, in the *index.js* tab, delete the template code from the code editor.

6. Copy and paste the following code into the code editor as shown in the following image:

```javascript
exports.handler = async (event, context, callback) => {

  // Extract information
  const customerNumber = event.Details.ContactData.CustomerEndpoint.Address;

  // Fetch data
  let fetchBalance = async (customerNumber, companyName) => {
    const resultMap = {
      customerBalance: balance,
      websiteURL: support
    }
    callback(null, resultMap);
  }

  let fetchSupportURL = async (companyName) => {
    return 'www.GGG.com/support';
  }

  // Get data from your API Gateway or Database like DynamoDB
  return Math.floor(Math.random() * 10000);

  // Call functions
  fetchBalance(customerNumber, companyName);
  fetchSupportURL(companyName);
};
```
const companyName = event.Details.Parameters.companyName;

// Fetch data
const balance = await fetchBalance(customerNumber, companyName);
const support = await fetchSupportUrl(companyName);

// Prepare result
const resultMap = {
  customerBalance: balance,
  websiteUrl: support
}
callback(null, resultMap);

async function fetchBalance(customerPhoneNumber, companyName) {
  // Get data from your API Gateway or Database like DynamoDB
  return Math.floor(Math.random() * 1000);
}

async function fetchSupportUrl(companyName) {
  // Get data from your API Gateway or Database like DynamoDB
  return 'www.GGG.com/support';
}

This code is going to generate a random result for the customerBalance.

7. Choose Deploy.
8. After you choose Deploy, choose Test to launch the test editor.
9. In the Configure test event dialog box, select Create new event. For Event name, enter ConnectMock as the test name.
10. In the Event JSON box, delete the sample code and enter the following code instead:

```json
{
  "Details": {
    "ContactData": {
      "Attributes": {},
      "Channel": "VOICE",
      "ContactId": "4a573372-1f28-4e26-b97b-XXXXXXXXXXX",
      "CustomerEndpoint": {
        "Address": "+1234567890",
        "Type": "TELEPHONE_NUMBER"
      },
      "InitialContactId": "4a573372-1f28-4e26-b97b-XXXXXXXXXXX",
      "InitiationMethod": "INBOUND | OUTBOUND | TRANSFER | CALLBACK",
      "InstanceARN": "arn:aws:connect:aws-region:1234567890:instance/c8c0e68d-2200-4265-82c0-XXXXXXXXXXX",
      "PreviousContactId": "4a573372-1f28-4e26-b97b-XXXXXXXXXXX",
      "Queue": {
        "ARN": "arn:aws:connect:eu-west-2:1111111111:instance/cccccmmm-bbb-dddd-eeeee-
        ffffffff/layout/aaaaaaa-bbb-bcccc-dddd-eeeee
        "Name": "PasswordReset"
      },
      "SystemEndpoint": {
        "Address": "+1234567890",
        "Type": "TELEPHONE_NUMBER"
      }
    },
    "Parameters": {
      "companyName": "GGG"
    }
  },
  "Name": "ContactFlowEvent"
}
```
11. Choose Save.
12. Choose Test. You should see the following something similar to the following image:

Your balance will be different. The code generates a random number.

**Step 2: Add your Lambda to Amazon Connect**

1. Go to the Amazon Connect console, at https://console.aws.amazon.com/connect/.
2. Choose your Amazon Connect instance alias.

4. In the AWS Lambda section, use the Lambda Functions dropdown box to select MyFirstConnectLambda.
5. Choose **Add Lambda Function**.

**Step 3: Create the contact flow**

The following image is an example of the flow you are going to build using the steps in this procedure.

1. Log in to your contact center at https://*instance name*.my.connect.aws/.
2. On the navigation menu, go to **Routing, Flows, Create a contact flow**.
3. Drag a **Set contact attributes (p. 403)** block onto the grid, and configure its properties page shown in the following image:
4. Drag a Play prompt (p. 396) block onto the grid, and configure its properties page as shown in the following image:

   - **Namespace** = User defined.
   - **Attribute** = companyName.
   - Choose Set manually. **Value** = GGG.
   - Choose Save.
a. Choose **Text-to-speech or chat text, Set manually**, and set **Interpret as** to **SSML**. Enter the following text in the box for the text to be spoken:

Hello, thank you for calling $.Attributes.companyName inc.

b. Choose **Save**.

5. Drag another **Play prompt (p. 396)** block onto the grid, and configure its properties page as shown in the following image:

   ![Play prompt block](image)

   a. Choose **Text-to-speech or chat text, Set manually**, and set **Interpret as** to **Text**. Enter the following text in the box for the text to be spoken:

   Please try again later.

   b. Choose **Save**.

6. Drag a **Invoke AWS Lambda function (p. 389)** block onto the grid, and configure its properties page as shown in the following image:
a. Choose **Select manually**, and then choose **MyFirstConnectLambda** from the dropdown.

b. In the **Destination Key** box, enter **companyName**. (This is sent to Lambda.)

c. Choose **Set dynamically** box

d. For **Namespace**, select **User Defined**.

e. For **Attribute**, enter **companyName**.

f. Choose **Save**.

7. Drag a **Set contact attributes (p. 403)** block onto the grid, choose **Add another attribute**, and configure its properties page as shown in the following image:
a. **Namespace** = User Defined. **Attribute** = MyBalance.

b. Choose **Set dynamically**.

c. **Namespace** = External.

d. **Attribute** = customerBalance. This is the result from Lambda.

e. Choose **Add another attribute**.

f. **Namespace** = User-defined.

g. **Attribute** = MyURL.

h. Select **Set dynamically**. **Namespace** = External.

i. **Attribute** = websiteUrl. This is the result from Lambda.

j. Choose **Save**.

8. Drag a **Play prompt** (p. 396) block onto the grid, and configure its properties page as shown in the following image:
a. Choose **Text-to-speech or chat text**, and set **Interpret as** to **SSML**. Enter the following text in the box:

```
Your remaining balance is <say-as interpret-as="characters">$.Attributes.MyBalance</say-as>.
Thank you for calling $.Attributes.companyName.
Visit $.Attributes.MyURL for more information.
```

b. Choose **Save**.

9. Drag a **Disconnect / hang up** block onto the grid.

10. Connect the all blocks so your flow looks like the image shown at the top of this procedure.

11. Enter **MyFirstConnectFlow** as the name, and then choose **Publish**.

12. On the navigation menu, go to **Channels, Phone numbers**.

13. Select your phone number.

14. Select **MyFirstConnectFlow** and choose **Save**.

Now try it out. Call the number. You should hear a greeting message, your balance, and the website to visit.

**Encrypt customer input**

You can encrypt sensitive data that is collected by flows. To do this, you need to use public-key cryptography.
When configuring Amazon Connect, you first provide the public key. This is the key used when encrypting data. Later, you provide the X.509 certificate, which includes a signature that proves you possess the private key.

In a flow that collects data, you provide an X.509 certificate to encrypt data that's captured using the Stored customer input system attribute. You must upload the key in .pem format to use this feature. The encryption key is used to verify the signature of the certificate used within the flow.

Note
You can have up to two encryption keys active at one time to facilitate rotation.

To decrypt the data in the Stored customer input attribute, use the AWS Encryption SDK. For more information, see the AWS Encryption SDK Developer Guide.

For a detailed walkthrough, see Creating a secure IVR solution with Amazon Connect. It shows how to:

- Configure Amazon Connect to collect a credit card number.
- Encrypt the credit card digits.
- Send it to our backend AWS Lambda for decryption, using the customer supplied decryption key.

It provides two commands using OpenSSL:

- One to generate an RSA key pair and a self-signed X.509 certificate
- Another to extract the public key from the RSA key pair

### How to decrypt data encrypted by Amazon Connect

The following code sample shows how to decrypt data using the AWS Encryption SDK.

```java
package com.amazonaws;
import com.amazonaws.encryptionsdk.AwsCrypto;
import com.amazonaws.encryptionsdk.CryptoResult;
import com.amazonaws.encryptionsdk.jce.JceMasterKey;
import org.bouncycastle.jce.provider.BouncyCastleProvider;
import java.io.IOException;
import java.nio.charset.Charset;
import java.nio.file.Files;
import java.nio.file.Paths;
import java.security.GeneralSecurityException;
import java.security.KeyFactory;
import java.security.Security;
import java.security.interfaces.RSAPrivateKey;
import java.security.spec.PKCS8EncodedKeySpec;
import java.util.Base64;
public class AmazonConnectDecryptionSample {
    private static final String PROVIDER = "AmazonConnect";
    private static final String WRAPPING_ALGORITHM = "RSA/ECB/OAEPWithSHA-512AndMGF1Padding";
    // The Provider 'AmazonConnect' is used during encryption, this must be used during
decryption for key
    // to be found
    private static final String PROVIDER = "AmazonConnect";
    // The wrapping algorithm used during encryption
    private static final String WRAPPING_ALGORITHM = "RSA/ECB/OAEPWithSHA-512AndMGF1Padding";
```
Track events as customers interact with flows

Amazon Connect Flow logs provide you with real-time details about events in your flows as customers interact with them. You can also use flow logs to help debug your flows as you are creating them. If needed, you can always roll back (p. 456) to a previous version of a flow.

Contents

- Flow logs stored in an Amazon CloudWatch log group (p. 514)
- Enable flow logs (p. 514)
- Search flow logs (p. 515)
- What data is gathered in flow logs (p. 518)
• Track customers between flows (p. 518)
• Create alerts for flow log events (p. 519)

Flow logs stored in an Amazon CloudWatch log group

Flow logs are stored in an Amazon CloudWatch log group, in the same region as your Amazon Connect instance. This log group is created automatically when Enable flow logging (p. 515) is turned on for your instance.

For example, the following image shows the CloudWatch log groups for two test instances.

A log entry added as each block in your flow is triggered. You can configure CloudWatch to send alerts when unexpected events occur during active flows.

What happens if my log group is deleted? You need to manually re-create the CloudWatch log group. Otherwise, Amazon Connect won’t publish more logs.

Pricing for flow logging

You are not charged for generating flow logs, but you are charged for using CloudWatch for generating and storing the logs. Free tier customers are charged only for usage that exceeds service quotas. For details about Amazon CloudWatch pricing, see Amazon CloudWatch Pricing.

Enable flow logs

Tip
Amazon Connect delivers flow logs at least once. They may be delivered again for multiple reasons. For example, a service retry due to an unavoidable failure.
Step 1: Enable logging for your instance

By default when you create a new Amazon Connect instance, an Amazon CloudWatch log group is created automatically to store the logs for your instance.

Use the following procedure to check that logging is enabled for your instance.

1. Open the Amazon Connect console.
2. Choose the instance alias for your instance.
4. Select Enable Flow logs and choose Save.

Step 2: Add the Set logging behavior block

Logs are generated only for flows that include a Set logging behavior (p. 410) block with logging set to enabled.

You control which flows, or parts of flows, logs are generated for by including multiple Set logging behavior blocks and configuring them as needed.

When you use a Set logging behavior block to enable or disable logging for a flow, logging is also enabled or disabled for any subsequent flow that a contact is transferred to, even if the flow does not include a Set logging behavior block. To avoid logging that persists between flows, enable or disable a Set logging behavior block as needed for that specific flow.

To enable or disable flow logs for a flow

1. Add a Set logging behavior (p. 410) block and connect it to another block in the flow.
2. Open the properties for the block. Choose Enable or Disable.
3. Choose Save.
4. If you add a Set logging behavior block to a flow that is already published, you must publish it again to start generating logs for it.

Search flow logs

Before you can search flow logs, you must first enable flow logging (p. 514).

Logs will be created for conversations that occur after logging is enabled.

To search flow logs

1. Open Amazon CloudWatch console, go to Logs, Log groups. The following image shows a sample log group named mytest88.
2. Choose the log group for your instance.
   A list of log streams will be displayed.
3. To search all the log streams in the instance, choose **Search log group**, as shown in the following image.
4. In the search box, enter the string you want to search for, for example, all or a portion of the contact ID.

5. After a couple of moments (longer depending on how big your log is), Amazon CloudWatch returns results. The following image shows a sample contact ID fb3304c2, and the result.

6. You can open each event to see what happened. The following image shows the event for when a Play prompt block runs in a flow.
What data is gathered in flow logs

Log entries for flows include details about the block associated with the log entry, the contact ID, and the action taken after the steps in the block were completed. Any contact interaction that occurs outside of the flow is not logged, such as time spent in a queue or interactions with an agent.

You can set the properties of the block to disable logging during the parts of your flow that interact with or capture sensitive data or customers' personal information.

If you use Amazon Lex or AWS Lambda in your flows, the logs show the entry and exit of the flow going to them, and include any information about the interaction that is sent or received during entry or exit.

Because the logs also include the flow ID, and the flow ID stays the same when you change a flow, you can use the logs to compare the interactions with different versions of the flow.

The following example log entry shows a Set working queue block of an inbound flow.

```json
{
  "ContactId": "1111111-2222-3333-4444-55555555555",
  "ContactFlowModuleType": "SetQueue",
  "Timestamp": "2021-04-13T00:14:31.581Z",
  "Parameters": {
  }
}
```

Track customers between flows

In many cases, customers interact with multiple flows in your contact center, being passed from one flow to another to appropriately assist them with their specific issue. Flow logs help you track customers between different flows, by including the ID of the contact in each log entry.

When a customer is transferred to a different flow, the ID for the contact associated with their interaction is included with the log for the new flow. You can query the logs for the contact ID to trace the customer interaction through each flow.

In larger, high-volume contact centers, there can be multiple streams for flow logs. If a contact is transferred to a different flow, the log may be in a different stream. To make sure that you are finding all of the log data for a specific contact, you should search for the contact ID in the entire CloudWatch log group instead of in a specific log stream.
Create alerts for flow log events

You can configure CloudWatch to define a filter pattern that looks for specific events in your flow logs and then creates an alert when an entry for that event is added to the log.

For example, you can set an alert for when a flow block goes down an error path as a customer interacts with the flow. Log entries are typically available in CloudWatch within a short time, giving you near real-time notification of events in flows.

Use Amazon Connect contact attributes

One way to make your customers feel cared for is to create personalized experiences for them in your contact center. For example, you can deliver one welcome message for customers who are using a phone and another for customers using chat. To do this, you need a way to store information about the contact and then make a decision based on the value.

Contents
• What is a contact attribute? (p. 519)
• List of available contact attributes and their JSONPath reference (p. 521)
• How to reference contact attributes (p. 535)
• Display contact information to the agent in the CCP (p. 536)
• Route based on number of contacts in a queue (p. 537)
• Route based on contact's channel (p. 540)
• Use Amazon Lex and attributes (p. 541)
• Lambda functions and attributes (p. 545)

What is a contact attribute?

In Amazon Connect, each interaction with a customer is a contact. The interaction can be a phone call (voice), a chat, or an automated interaction using an Amazon Lex bot.

Each contact can have some data that is specific to a particular interaction. This data can be accessed as a contact attribute. For example:

• The name of the customer
• The name of the agent
• The channel used for the contact, such as phone or chat
• And more

A contact attribute represents this data as a key-value pair. You might think of it as a field name together with the data entered into that field.

For example, here are a couple of key-value pairs for the customer name:

<table>
<thead>
<tr>
<th>Key</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>firstname</td>
<td>Jane</td>
</tr>
<tr>
<td>lastname</td>
<td>Doe</td>
</tr>
</tbody>
</table>
The advantage of contact attributes is that they enable you to store temporary information about the contact so you can use it in the flow.

For example, in your welcome messages, you can say their name or thank them for being a member. To do this, you need a way of retrieving data about that specific customer and using it in a flow.

**Common use cases**

Here are some common use cases for where contact attributes are used:

- Use the customer phone number to schedule a queued callback.
- Identify which agent is interacting with a customer so that a post call survey can be associated with a contact.
- Identify the number of contacts in a queue to decide if the contact should be routed to a different queue.
- Get the corresponding media streaming ARN to store in a database.
- Use the customer phone number to identify the status of a customer (for example, are they a member), or the status of their order (shipped, delayed, etc.) to route them to the appropriate queue.
- Based on a customer interaction with a bot, identify the slot (for example, the type of flowers to order) to be used in a flow.

**Types of contact attributes**

To make it faster for you to find and choose the attributes you want to use, attributes are grouped into types. For each flow block, we only surface those types of attributes that work with it.

Another way to think about types of contact attributes is to categorize them based on where the value comes from. The values for contact attributes have three sources:

- Amazon Connect provides the value, such as the agent's name, during the contact interaction. This is known as providing the value at runtime.
- An external process, such as Amazon Lex or AWS Lambda, provides the value.
- **User-defined** (p. 533). In the flow, you can specify the value for an attribute.
Contact attributes in the contact record

In contact records, contact attributes are shared across all contacts with the same InitialContactId.

For example, while carrying out transfers, a contact attribute updated in the transfer flow updates the attribute's value in the contact attributes of both contact records (that is, the Inbound and Transfer contact attributes).

"$" is a special character

Amazon Connect treats the "$" character as a special character. You can't use it in a key when setting an attribute.

For example, let's say you're creating an interact block with text-to-speech. You set an attribute like this:

```
{"$one":"please read this text"}
```

When Amazon Connect reads this text, it reads "dollar sign one" to the contact instead of "please read this text." Also, if you were to include $ in a key and try to reference the value later using Amazon Connect, it wouldn't retrieve the value.

Amazon Connect does log and pass the full key:value pair ("$_one":"please read this text") to integrations such as Lambda.

List of available contact attributes and their JSONPath reference

The following tables describe the contact attributes available in Amazon Connect.

The JSONPath reference for each attribute is provided so you can create dynamic text strings (p. 462).

System attributes

These are predefined attributes in Amazon Connect. You can reference system attributes, but you cannot create them.

Not all blocks in a flow support using System attributes. For example, you cannot use a System attribute to store customer input. Instead, use a user-defined attribute (p. 533) to store the data input by a customer.

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Type</th>
<th>JSONPath Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer number</td>
<td>The customer's phone number. When used in an outbound whisper flow, this is the number that the agents dialed to reach the customer. When used in inbound flows, this is the number from which the customer placed the call. This attribute is included in contact records. When used</td>
<td>System</td>
<td>$.CustomerEndpoint.Address</td>
</tr>
<tr>
<td>Attribute</td>
<td>Description</td>
<td>Type</td>
<td>JSONPath Reference</td>
</tr>
<tr>
<td>-----------------</td>
<td>------------------------------------------------------------------------------</td>
<td>--------</td>
<td>----------------------------</td>
</tr>
<tr>
<td>Customer ID</td>
<td>The customer's identification number.</td>
<td>System</td>
<td>$.CustomerId</td>
</tr>
<tr>
<td>Dialed number</td>
<td>The number the customer dialed to call your contact center.</td>
<td>System</td>
<td>$.SystemEndpoint.Address</td>
</tr>
<tr>
<td></td>
<td>This attribute is included in contact records. When used in a Lambda function, it's included in the input object under SystemEndpoint.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Attribute</td>
<td>Description</td>
<td>Type</td>
<td>JSONPath Reference</td>
</tr>
<tr>
<td>----------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>----------</td>
<td>--------------------</td>
</tr>
<tr>
<td>Customer callback number</td>
<td>The number that Amazon Connect uses to call back the customer. This number can be the one used for a queued callback, or when an agent is dialing from the CCP. Transfer to callback queue functionality, or for an agent dialing from the CCP. The default value is the number that the customer used to call your contact center. However, it can be overwritten with the Set callback number block. This attribute is not included in contact records, and it's not accessible in Lambda input. However, you can copy the attribute to a user-defined attribute with the Set contact attribute block, which is included in contact records. You can also pass this attribute as a Lambda input parameter in an Invoke AWS Lambda function block, which is not included in contact records.</td>
<td>System</td>
<td>not applicable</td>
</tr>
<tr>
<td>Attribute</td>
<td>Description</td>
<td>Type</td>
<td>JSONPath Reference</td>
</tr>
<tr>
<td>-------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>----------</td>
<td>--------------------------</td>
</tr>
<tr>
<td>Stored customer input</td>
<td>An attribute created from the most recent invocation of a <strong>Store customer input</strong> block.</td>
<td>System</td>
<td>not applicable</td>
</tr>
<tr>
<td></td>
<td>The attribute values created from the most recent Store customer input block invocation. This attribute is not included in contact records, and is not accessible in Lambda input. You can copy the attribute to a user-defined attribute with the Set contact attribute block, which is included in contact records. You can also pass this attribute as a Lambda input parameter in an Invoke AWS Lambda function block,</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Queue name</td>
<td>The name of the queue.</td>
<td>System</td>
<td>$.Queue.Name</td>
</tr>
<tr>
<td>Queue ARN</td>
<td>The ARN for the queue.</td>
<td>System</td>
<td>$.Queue.ARN</td>
</tr>
<tr>
<td>Queue outbound number</td>
<td>The Outbound caller ID number for the selected queue. This attribute is only available in outbound whisper flows.</td>
<td>System</td>
<td></td>
</tr>
<tr>
<td>Text to speech voice</td>
<td>The name of the Amazon Polly voice to use for text-to-speech in a contact flow.</td>
<td>System</td>
<td>$.TextToSpeechVoiceId</td>
</tr>
<tr>
<td>Contact id</td>
<td>The unique identifier of the contact.</td>
<td>System</td>
<td>$.ContactId</td>
</tr>
<tr>
<td>Initial Contact id</td>
<td>The unique identifier for the contact associated with the first interaction between the customer and your contact center. Use the initial contact ID to track contacts between flows.</td>
<td>System</td>
<td>$.InitialContactId</td>
</tr>
<tr>
<td>Attribute</td>
<td>Description</td>
<td>Type</td>
<td>JSONPath Reference</td>
</tr>
<tr>
<td>------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-------</td>
<td>-----------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Task Contact id</td>
<td>The unique identifier for the task contact. Use the task contact ID to track tasks between flows.</td>
<td>System</td>
<td>$.Task.ContactId</td>
</tr>
<tr>
<td>Previous Contact id</td>
<td>The unique identifier for the contact before it was transferred. Use the previous contact ID to trace contacts between flows.</td>
<td>System</td>
<td>$.PreviousContactId</td>
</tr>
<tr>
<td>Channel</td>
<td>The method used to contact your contact center: VOICE, CHAT, TASK.</td>
<td>System</td>
<td>$.Channel</td>
</tr>
<tr>
<td>Instance ARN</td>
<td>The ARN for your Amazon Connect instance.</td>
<td>System</td>
<td>$.InstanceARN</td>
</tr>
<tr>
<td>Initiation method</td>
<td>How the contact was initiated. Valid values include: INBOUND, OUTBOUND, TRANSFER, CALLBACK, QUEUE_TRANSFER, DISCONNECT, and API. Initiation method doesn't work in Agent whisper flows or Customer whisper flows.</td>
<td>System</td>
<td>$.InitiationMethod</td>
</tr>
<tr>
<td>Name</td>
<td>The name of the task.</td>
<td>System</td>
<td>$.Name</td>
</tr>
<tr>
<td>Description</td>
<td>A description of the task.</td>
<td>System</td>
<td>$.Description</td>
</tr>
<tr>
<td>References</td>
<td>Links to other documents that are related to a contact.</td>
<td>System</td>
<td>$.ReferencesgetReferenceKey.Value and $.ReferencesREFERENCEKEY.Type where ReferenceKey is the user-defined Reference name.</td>
</tr>
</tbody>
</table>
### List of attributes and their JSONPath reference

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Type</th>
<th>JSONPath Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>System Endpoint Type</td>
<td>The type of the system endpoint. Valid value is TELEPHONE_NUMBER.</td>
<td>System</td>
<td>$.SystemEndpoint.Type</td>
</tr>
<tr>
<td>Customer Endpoint type</td>
<td>The type of the customer endpoint. Valid value is TELEPHONE_NUMBER.</td>
<td>System</td>
<td>$.CustomerEndpoint.Type</td>
</tr>
<tr>
<td>Queue Outbound Caller ID number</td>
<td>The outbound caller ID number defined for the queue. This can be useful for reverting the caller ID after setting a custom caller ID.</td>
<td>System</td>
<td>$.Queue.OutboundCallerId.Address</td>
</tr>
<tr>
<td>Queue Outbound Caller ID number type</td>
<td>The type of the outbound caller ID number. Valid value is TELEPHONE_NUMBER.</td>
<td>System</td>
<td>$.Queue.OutboundCallerId.Type</td>
</tr>
</tbody>
</table>

### Agent attributes

The following table lists the agent attributes available in Amazon Connect.

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Type</th>
<th>JSONPath Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agent User name</td>
<td>The user name an agent uses to log in to Amazon Connect.</td>
<td>System</td>
<td>$.Agent.UserName</td>
</tr>
<tr>
<td>Agent First name</td>
<td>The agent's first name as entered in their Amazon Connect user account.</td>
<td>System</td>
<td>$.Agent.FirstName</td>
</tr>
<tr>
<td>Agent Last name</td>
<td>The agent's last name as entered in their Amazon Connect user account.</td>
<td>System</td>
<td>$.Agent.LastName</td>
</tr>
<tr>
<td>Agent ARN</td>
<td>The ARN of the agent.</td>
<td>System</td>
<td>$.Agent.ARN</td>
</tr>
</tbody>
</table>

**Note**

When you use an agent contact attribute in a **Transfer to agent** flow, the agent attributes reflect the target agent, not the one who initiated the transfer.

Agent attributes are available only in the following types of flows:

- Agent whisper
- Customer whisper
- Agent hold
- Customer whisper
• Outbound whisper
• Transfer to agent. In this case, the agent attributes reflect the target agent, not the one who initiated the transfer.

Agent attributes are not available in the following flow types:
• Customer queue
• Transfer to queue
• Inbound flow

**Queue attributes**

These system attributes are returned when you use a **Get queue metrics** block in your flow.

If there is no current activity in your contact center, null values are returned for these attributes.

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Type</th>
<th>JSONPath Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Queue name</td>
<td>The name of the queue for which metrics were retrieved.</td>
<td>System</td>
<td>$.Metrics.Queue.Name</td>
</tr>
<tr>
<td>Queue ARN</td>
<td>The ARN of the queue for which metrics were retrieved.</td>
<td>System</td>
<td>$.Metrics.Queue.ARN</td>
</tr>
<tr>
<td>Contacts in queue</td>
<td>The number of contacts currently in the queue.</td>
<td>System</td>
<td>$.Metrics.Queue.Size</td>
</tr>
<tr>
<td>Oldest contact in queue</td>
<td>For the contact that has been in the queue the longest, the length of time that the contact has been in the queue, in seconds.</td>
<td>System</td>
<td>$.Metrics.Queue.OldestContactAge</td>
</tr>
<tr>
<td>Agents online</td>
<td>The number of agents currently online, which means logged in and in any state other than offline.</td>
<td>System</td>
<td>$.Metrics.Agents.Online.Count</td>
</tr>
<tr>
<td>Agents staffed</td>
<td>The number of agents currently staffed, which is agents logged in and in Available, ACW, or Busy states.</td>
<td>System</td>
<td>$.Metrics.Agents.Staffed.Count</td>
</tr>
<tr>
<td>Agents in After contact work</td>
<td>The number of agents currently in the ACW state.</td>
<td>System</td>
<td>$.Metrics.Agents.AfterContactWork.Count</td>
</tr>
</tbody>
</table>
### Attribute List

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Type</th>
<th>JSONPath Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agents busy</td>
<td>The number of agents currently active on a contact.</td>
<td>System</td>
<td>$.Metrics.Agents.Busy.Count</td>
</tr>
<tr>
<td>Agents missed count</td>
<td>The number of agents in the Missed state, which is the state an agent enters after a missed contact.</td>
<td>System</td>
<td>$.Metrics.Agents.Missed.Count</td>
</tr>
</tbody>
</table>

### Telephony call metadata attributes (call attributes)

Telephony metadata provides additional information related to call origination from telephony carriers.

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Type</th>
<th>JSONPath Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>P-Charge-Info</td>
<td>The party responsible for the charges associated with the call.</td>
<td>System</td>
<td>$.Media.Sip.Headers.P-Charge-Info</td>
</tr>
<tr>
<td>From</td>
<td>The identity of the end user associated with the request.</td>
<td>System</td>
<td>$.Media.Sip.Headers.From</td>
</tr>
<tr>
<td>To</td>
<td>Information about the called party or the recipient of the request.</td>
<td>System</td>
<td>$.Media.Sip.Headers.To</td>
</tr>
<tr>
<td>ISUP-OLI</td>
<td>Originating Line Indicator (OLI). Shows the type of line placing call (for example, PSTN, 800 service call, wireless/PCS, payphone).</td>
<td>System</td>
<td>$.Media.Sip.Headers.ISUP-OLI</td>
</tr>
<tr>
<td>Example value: 212555</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Example value: 0</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Attribute</td>
<td>Description</td>
<td>Type</td>
<td>JSONPath Reference</td>
</tr>
<tr>
<td>----------------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>--------</td>
<td>------------------------------------------</td>
</tr>
<tr>
<td>Call-Forwarding-Indicator</td>
<td>Call Forwarding Indicators (for example, Diversion header). Indicates domestic or international origin of call. Example value: sip: <a href="mailto:+15555555555@public-vip.us2.telphony-provider.com">+15555555555@public-vip.us2.telphony-provider.com</a>;reason=unconditional</td>
<td>System</td>
<td>$.Media.Sip.Headers.Call-Forwarding-Indicator</td>
</tr>
</tbody>
</table>

**Note**

The availability of telephony metadata is not consistent across all telephony providers and may not be available in all cases. This may result in empty values.

**Media streams attributes**

The following table lists the attributes that you can use to identify the location in the live media stream where the customer audio starts and stops.

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Type</th>
<th>JSONPath Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer audio stream ARN</td>
<td>The ARN of the Kinesis Video stream used for Live media streaming that includes the customer data to reference.</td>
<td>Media streams</td>
<td>$.MediaStreams.Customer.Audio.StreamARN</td>
</tr>
<tr>
<td>Customer audio start timestamp in the</td>
<td>When the customer audio stream started.</td>
<td>Media streams</td>
<td>$.MediaStreams.Customer.Audio.StartTimestamp</td>
</tr>
<tr>
<td>Attribute</td>
<td>Description</td>
<td>Type</td>
<td>JSONPath Reference</td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>--------------</td>
<td>--------------------</td>
</tr>
<tr>
<td>Kinesis video stream</td>
<td>used for Live media streaming.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Customer audio stop timestamp</td>
<td>When the customer audio stream stopped the Kinesis video stream used for Live media streaming.</td>
<td>Media streams</td>
<td>$.MediaStreams.Customer.Audio.StopTimestamp</td>
</tr>
<tr>
<td>Customer audio start fragment number</td>
<td>The number that identifies the Kinesis Video Streams fragment, in the stream used for Live media streaming, in which the customer audio stream started.</td>
<td>Media streams</td>
<td>$.MediaStreams.Customer.Audio.StartFragmentNumber</td>
</tr>
</tbody>
</table>

### Amazon Lex contact attributes

The following table lists the attributes that are returned from Amazon Lex bots.

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Type</th>
<th>JSONPath Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alternate Intents</td>
<td>List of alternate intents available from Amazon Lex. Each intent has a corresponding confidence score and slots to fill.</td>
<td>Lex</td>
<td>$.Lex.AlternateIntents.x.IntentName</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>$.Lex.AlternateIntents.x.IntentConfidence</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>$.Lex.AlternateIntents.x.Slots</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>$.Lex.AlternateIntents.y.IntentName</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>$.Lex.AlternateIntents.y.IntentConfidence</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>$.Lex.AlternateIntents.y.Slots</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>$.Lex.AlternateIntents.z.IntentName</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>$.Lex.AlternateIntents.z.IntentConfidence</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>$.Lex.AlternateIntents.z.Slots</td>
</tr>
<tr>
<td>Intent Confidence Score</td>
<td>The intent confidence score returned by Amazon Lex.</td>
<td>Lex</td>
<td>$.Lex.IntentConfidence.Score</td>
</tr>
<tr>
<td>Intent name</td>
<td>The user intent returned by Amazon Lex.</td>
<td>Lex</td>
<td>$.Lex.IntentName</td>
</tr>
<tr>
<td>Sentiment Label</td>
<td>The inferred sentiment that Amazon Comprehend has the highest confidence in.</td>
<td>Lex</td>
<td>$.Lex.SentimentResponse.Label</td>
</tr>
</tbody>
</table>
List of attributes and their JSONPath reference

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Type</th>
<th>JSONPath Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sentiment scores</td>
<td>The likelihood that the sentiment was correctly inferred.</td>
<td>Lex</td>
<td>$.Lex.SentimentResponse.Scores.Positive</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>$.Lex.SentimentResponse.Scores.Negative</td>
</tr>
<tr>
<td>Session attributes</td>
<td>Map of key-value pairs representing the session-specific context information.</td>
<td>Lex</td>
<td>$.Lex.SessionAttributes.attributeKey</td>
</tr>
<tr>
<td>Slots</td>
<td>Map of intent slots (key/value pairs) Amazon Lex detected from the user input during the interaction.</td>
<td>Lex</td>
<td>$.Lex.Slots.slotName</td>
</tr>
<tr>
<td>Dialog state</td>
<td>The last dialog state returned from an Amazon Lex bot. The value is 'Fulfilled' if an intent was returned to the flow.</td>
<td>N/A</td>
<td>$.Lex.DialogState</td>
</tr>
</tbody>
</table>

Case contact attributes

The following table lists the attributes that are used with Amazon Connect Cases.

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Type</th>
<th>JSONPath Reference</th>
<th>Where the data comes from</th>
</tr>
</thead>
<tbody>
<tr>
<td>Case ID</td>
<td>Unique Identifier of the case in UUID format (for example, 689b0beaa29-4340-896d4ca3ce9b6226)</td>
<td>text</td>
<td>$.Case.case_id</td>
<td>Amazon Connect</td>
</tr>
<tr>
<td>Case Reason</td>
<td>The reason for opening the case</td>
<td>single-select</td>
<td>$.Case.case_reason</td>
<td>Agent</td>
</tr>
<tr>
<td>Customer</td>
<td>The API is a customer profile ID. On the Cases: Fields page, the customer's name is displayed.</td>
<td>text</td>
<td>$.Case.customer_id</td>
<td>Amazon Connect</td>
</tr>
<tr>
<td>Date/Time Closed</td>
<td>The date and time the case was last closed. It does not guarantee that a case is closed. If a case is closed, the date and time is returned.</td>
<td>date-time</td>
<td>$.Case.last_closed_datetime</td>
<td>Amazon Connect</td>
</tr>
<tr>
<td>Attribute</td>
<td>Description</td>
<td>Type</td>
<td>JSONPath Reference</td>
<td>Where the data comes from</td>
</tr>
<tr>
<td>-----------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>---------</td>
<td>--------------------</td>
<td>---------------------------</td>
</tr>
<tr>
<td>Date/Time Opened</td>
<td>The date and time the case was opened.</td>
<td>date-time</td>
<td>$.Case.created_datetime</td>
<td>Amazon Connect</td>
</tr>
<tr>
<td>Date/Time Updated</td>
<td>The date and time the case was last updated.</td>
<td>date-time</td>
<td>$.Case.last_updated_datetime</td>
<td>Amazon Connect</td>
</tr>
<tr>
<td>Reference number</td>
<td>A friendly number for the case in 8-digit numeric format. Reference numbers (unlike the Case ID) are not guaranteed to be unique. We recommend that you identify the customer and then collect the reference number to correctly find the right case.</td>
<td>text</td>
<td>$.Case.reference_number</td>
<td>Agent</td>
</tr>
<tr>
<td>Status</td>
<td>Current status of the case</td>
<td>text</td>
<td>$.Case.status</td>
<td>Agent</td>
</tr>
<tr>
<td>Summary</td>
<td>Summary of the case</td>
<td>text</td>
<td>$.Case.summary</td>
<td>Agent</td>
</tr>
<tr>
<td>Title</td>
<td>Title of the case</td>
<td>text</td>
<td>$.Case.title</td>
<td>Agent</td>
</tr>
</tbody>
</table>

**Lambda contact attributes**

Lambda attributes are returned as key-value pairs from the most recent invocation of an *Invoke AWS Lambda function* block. External attributes are overwritten with each invocation of the Lambda function.

To reference external attributes in JSONPath, use:

- `$External.attributeName`

where `AttributeName` is the attribute name, or the key of the key-value pair returned from the function.
For example, if the function returns a contact ID, reference the attribute with 
$.External.ContactId. When referencing a contact ID returned from Amazon Connect, the 
JSONPath is $.ContactId.

Note

Note the inclusion of .External in the JSONPath reference when the attribute is external 
to Amazon Connect. Make sure to match the case for attribute names returned from external 
 sources.

For more information about using attributes in Lambda functions, see Invoke AWS Lambda 
functions (p. 493).

These attributes are not included in contact records, not passed to the next Lambda invocation, and not 
passed to the CCP for screenpop information. However, they can be passed as Lambda function inputs 
on an Invoke AWS Lambda function block, or copied to user-defined attributes via the Set contact 
attributes block. When used in Set contact attributes blocks, the attributes that are copied are included 
in contact records, and can be used in the CCP.

User-defined attributes

For all other attributes Amazon Connect defines the key and value. For user-defined attributes, however, 
you provide a name for the key and the value.

Use user-defined attributes in situations where you want to store values in a contact flow, and then 
refer to those values later. For example, if you integrate Amazon Connect and a CRM or other system, 
you might want to get input from the customer such as their member number. Then you can use that 
member number retrieve information about the member from the CRM, and/or use the member number 
throughout the flow, etc.

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Type</th>
<th>JSONPath Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Any name you choose</td>
<td>A user-defined attribute has two parts:</td>
<td>User-defined</td>
<td>$.Attributes.name_of_your_destination_key</td>
</tr>
<tr>
<td></td>
<td>• Destination key: this is any name you choose for the key.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Value: this is any value you choose. You can enter several paragraphs</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>value if you want! (For the Max size of the contact record attributes section, see Amazon Connect feature specifications (p. 1332)).</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

To create user-defined attributes, use the Set contact attributes (p. 403) block.
Apple Messages for Business attributes

Use the following contact attributes to route Apple Business Chat customers. For example, if you have different lines of business using Apple Business Chat, you can branch to different flows based on the AppleBusinessChatGroup contact attribute. Or, if you want to route Apple Business Chat messages differently from other chat messages, you can branch based on MessagingPlatform.

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Type</th>
<th>JSON</th>
</tr>
</thead>
<tbody>
<tr>
<td>MessagingPlatform</td>
<td>The messaging platform from where the customer request originated.</td>
<td>User-defined</td>
<td>$.Attributes.MessagingPlatform</td>
</tr>
<tr>
<td></td>
<td>Exact value: <strong>AppleBusinessChat</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>AppleBusinessChatCustomerId</td>
<td>The customer’s opaque ID provided by Apple. This remains constant for the AppleID and a business. You can use this to identify if the message is from a new customer or a returning customer.</td>
<td>User-defined</td>
<td>$.Attributes.AppleBusinessChatCustomerId</td>
</tr>
<tr>
<td>AppleBusinessChatIntent</td>
<td>You can define the intent or purpose of the chat. This parameter is included in a URL that initiates a chat session in Messages when a customer chooses the <strong>Business Chat</strong> button.</td>
<td>User-defined</td>
<td>$.Attributes.AppleBusinessChatIntent</td>
</tr>
<tr>
<td>AppleBusinessChatGroup</td>
<td>You define the group which designates the department or individuals best qualified to handle the customer’s particular question or problem. This parameter is included in a URL that initiates a chat session in Messages when a customer chooses the <strong>Business Chat</strong> button.</td>
<td>User-defined</td>
<td>$.Attributes.AppleBusinessChatGroup</td>
</tr>
<tr>
<td>AppleBusinessChatLocale</td>
<td>Defines the language and AWS Region preferences that the user wants to see in their user interface. It consists of a language identifier (ISO 639-1)</td>
<td>User-defined</td>
<td>$.Attributes.AppleBusinessChatLocale</td>
</tr>
</tbody>
</table>
## Customer Profiles attributes

Use the following contact attributes to autopopulate customer profiles in the agent app using the value of your choosing.

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Type</th>
<th>JSONPath Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>profileSearchKey</td>
<td>A user-defined attribute that has two parts:</td>
<td>User-defined</td>
<td>$.Attributes.name_of_your_destination_key</td>
</tr>
<tr>
<td></td>
<td>• Destination key: this is any name you choose for the key.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>However, the $ and . (period) characters are not allowed</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>because they are both used in defining the attribute paths in JSONPath.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Value: this is can be any value you choose.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>You can enter several paragraphs worth of text if you want!</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>(For the Max size of the contact record attributes section, see Amazon</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Connect feature specifications (p. 1332).</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## How to reference contact attributes

The way you reference contact attributes depends on how they were created and how you are accessing them.

- To reference attributes that contain spaces in their name, such as user defined attributes, place brackets and single quotations around the attribute name. For example: `$.Attributes.['user attribute name']`.
- To reference attributes in the same namespace, such as a system attribute, you use the attribute name, or the name you specified as the Destination key.
- To reference values in a different namespace, such as referencing an external attribute, you specify the JSONPath syntax to the attribute.
- To use contact attributes to access other resources, set a user-defined attribute in your flow and use the Amazon Resource Name (ARN) of the resource you want to access as the value for the attribute.
Lambda examples

- To reference a customer name from a Lambda function lookup, use $.External.AttributeKey, replacing AttributeKey with the key (or name) of the attribute returned from the Lambda function.
- To use an Amazon Connect prompt in a Lambda function, set a user-defined attribute to the ARN for the prompt, and then access that attribute from the Lambda function.

Amazon Lex examples

- To reference an attribute from an Amazon Lex bot, you use the format $.Lex. and then include the part of the Amazon Lex bot to reference, such as $.Lex.IntentName.
- To reference the customer input to an Amazon Lex bot slot, use $.Lex.Slots.slotName, replacing slotName with the name of the slot in the bot.

Set contact attribute example

Use a Set contact attributes (p. 403) block to set a value that is later referenced in a flow. For example, create a personalized greeting for customers routed to a queue based on the type of customer account. You could also define an attribute for a company name or line of business to include in the text to speech strings said to a customer. The Set contact attributes block is useful for copying attributes retrieved from external sources to user-defined attributes.

To set a contact attribute with a Set contact attributes (p. 403) block

1. In Amazon Connect, choose Routing, Contact flows.
2. Select an existing flow, or create a new one.
3. Add a Set contact attributes block.
4. Edit the Set contact attributes block, and choose Use text.
5. For the Destination key, provide a name for the attribute, such as Company. This is the value you use for the Attribute field when using or referencing attributes in other blocks. For the Value, use your company name.

You can also choose to use an existing attribute as the basis for creating the new attribute.

Display contact information to the agent in the CCP

You can use contact attributes to capture information about the contact and then present it to the agent through the Contact Control Panel (CCP). For example, you might want to do this to customize the agent experience when using the CCP integrated with a customer relationship management (CRM) application.

Also use them when integrating Amazon Connect with a custom application using the Amazon Connect Streams API or Amazon Connect API. You can use all user-defined attributes, in addition to the customer number and the dialed number, in the CCP using the Amazon Connect Streams JavaScript library. For more information, see Amazon Connect Streams API or Amazon Connect API.

When you use the Amazon Connect Streams API, you can access user-defined attributes by invoking contact.getAttributes(). You can access endpoints via contact.getConnections(), where a connection has a getEndpoint() invocation on it.

To access the attribute directly from a Lambda function, use $.External.AttributeName. If the attribute is stored to a user-defined attribute from a Set contact attributes block, use $.Attributes.AttributeName.
For example, included with your Amazon Connect instance, there is a flow named "Sample note for screenpop." In this flow, a **Set contact attributes** block is used to create an attribute from a text string. The text, as an attribute, can be passed to the CCP to display a note to an agent.

## Route based on number of contacts in a queue

Amazon Connect includes queue attributes that can help you define routing conditions in your flows based on real-time metrics about the queues and agents in your contact center. For example, here are some common usage scenarios:

- Check the number of contacts or available agents in a queue, and how long the oldest contact has been in a queue, then route accordingly.
- To route to the queue with the fewest contacts in it:
  1. Get metrics for multiple queues.
  2. Use a **Set contact attributes** block to store the metric attributes for each queue.
  3. Compare queue metric attributes using a **Check contact attributes** block, and route the contact to the queue with the fewest calls in it, or to a callback if all queues are busy.

### Using a Check contact attributes block to route a contact to a queue

1. In Amazon Connect, choose **Routing, Contact flows**.
2. Open an existing flow or create a new one.
3. Optionally, under **Interact**, add a **Play prompt** block to the designer to play a greeting to your customers. Add a connector between the **Entry point** block and the **Play prompt** block.
4. Under **Set**, drag a **Get queue metrics** block to the designer, and connect the **Okay** branch of the **Play prompt** block to it.
5. Choose the title of the **Get queue metrics** block to open the properties for the block. By default, the block retrieves metrics for the current working queue. To retrieve metrics for a different queue, choose **Set queue**.
6. Choose **Select a queue**, then select the queue to retrieve metrics for from the drop-down, then choose **Save**.
7. You can also determine which queue to retrieve metrics for using contact attributes.
8. Under **Check**, drag a **Check contact attributes** block to the designer.
9. Choose the title of the block to display the settings for the block. Then, under **Attribute to check**, select **Queue metrics** in the **Type** drop-down menu.
10. Under **Attribute**, choose **Contacts in queue**.
11. To use conditions to route the contact, choose **Add another condition**.

   By default, the **Check contact attributes** block includes a single condition, **No match**. The **No match** branch is followed when there are no matches for any of the conditions you define in the block.
12. Under **Conditions to check**, select **Is less than** as the operator for the condition in the drop-down menu, then in the value field enter 5.
13. Choose **Add another condition**, then choose **Is greater or equal** from the drop-down menu, and enter 5 in the value field.
14. Choose **Save**.

   You now see two new output branches for the **Check contact attributes** block.

You can now add additional blocks to the flow to route the contact as desired. For example, connect the < 5 branch to a **Transfer to queue** block to transfer calls to the queue when there are fewer than five calls currently in the queue. Connect the > 5 branch to a **Set customer callback number** block and then...
transfer the call to a callback queue using a **Transfer to queue** block so the customer doesn’t have to stay on hold.

## Route contacts based on queue metrics

Many contact centers route customers based on the number of contacts waiting in a queue. This topic explains how to configure a flow that looks similar to the following image.

1. Add a **Set contact attributes** (p. 403) block to your flow.
2. In the **Set contact attributes** (p. 403), specify the channel. If you set a channel dynamically using text, for the attribute value enter **Voice** or **Chat**, as shown in the following image. This value is not case-sensitive.

3. Add a **Get queue metrics** (p. 382) block to your flow.

   In the Get queue metrics block, dynamic attributes can only return metrics for one channel.
Add a Check contact attributes block after the Get queue metrics block

After a Get queue metrics block, add a Check contact attributes (p. 349) block to branch based on the returned metrics. Use the following steps:

1. After Get queue metrics, add a Check contact attributes block.
2. In the Check contact attributes block, set Attribute to check to Queue metrics.
3. In the Attributes dropdown box, you’ll see that the following queue metrics are returned by the Get queue metrics block. Choose the metric that you want to use for the routing decision.

4. Choose Add a condition to enter the comparison for your routing decision.
Route based on contact's channel

You can personalize the customer's experience based on the channel that they use to contact you. Here's what you do:

1. Add a **Check contact attributes** block to the beginning of your flow.
2. Configure the block as shown in the following image:

```
<table>
<thead>
<tr>
<th>Attribute to check</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
</tr>
<tr>
<td>Queue metrics</td>
</tr>
<tr>
<td>Attribute</td>
</tr>
<tr>
<td>Contacts in queue</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Conditions to check</th>
</tr>
</thead>
<tbody>
<tr>
<td>x  Is greater than</td>
</tr>
<tr>
<td>5</td>
</tr>
</tbody>
</table>

No Match
Add another condition
```
3. If the customer is contacting you through chat, specify what should happen next.

4. If the customer is contacting you through a call (No Match), specify the next step in the flow.

Use Amazon Lex and attributes

When you reference attributes in a Get customer input block, and choose Amazon Lex as the method of collecting the input, the attribute values are retrieved and stored from the output from the customer interaction with the Amazon Lex bot. You can use an attribute for each intent or slot used in the Amazon Lex bot, as well as the sessions attributes associated with the bot. An output branch is added to the block for each intent you include. When a customer chooses an intent when interacting with the bot, the branch associated with that intent is followed in the flow.
For a list of Amazon Lex attributes you can use and receive back from the Lex bot, see Amazon Lex contact attributes (p. 530).

**Using an Amazon Lex bot to get customer input**

1. Open an existing or create a new flow.
2. Under Interact, drag a Get customer input block to the designer.
3. Choose the title of the block to display the block settings, then select Text to speech (Ad hoc).
4. Choose Enter text, then enter text in the Enter text to be spoken field that is used as a message or greeting to your customers. For example, "Thank you for calling" followed by a request to enter information to fulfill the intents you defined in your Amazon Lex bot.
5. Choose the Amazon Lex tab, then from the drop-down menu, choose the Amazon Lex bot to use to get customer input.
6. By default, the Alias field is populated with $LATEST. To use a different alias of the bot, enter the alias value to use.
   
   **Important**
   In a production environment, always use a different alias than TestBotAlias for Amazon Lex and $LATEST for Amazon Lex classic. TestBotAlias and $LATEST support a limited number of concurrent calls to an Amazon Lex bot. For more information, see Runtime Service Quotas or Runtime Service Quotas (Amazon Lex Classic).
7. Optionally, to pass an attribute to Amazon Lex to use as a session attribute, choose Add an attribute. Specify the value to pass using either text or an attribute.
8. To create a branch from the block based on the customer intent, choose Add an intent, then enter the name of the intent exactly the same as the intent name in your bot.
9. Choose Save.

**How to use Lex alternate intent attributes**

Usually you configure flows to branch on the winning Lex intent. However, in some situations, you might want to branch on an alternate intent. That is, what the customer might have meant.
1. **Intent name** is the name of an alternate intent in Lex. It's case sensitive and must match what's in Lex exactly.

2. **Intent Attribute** is what Amazon Connect is going to check. In this example, it's going to check the **Intent Confidence Score**.

3. **Conditions to check**: If Lex is 70% certain the customer meant the alternate intent instead of the winning intent, branch.

### How to use Lex session attributes

When a customer starts a conversation with your bot, Amazon Lex creates a *session*. With *session attributes*, also known as *Lex attributes*, you can pass information between the bot and Amazon Connect during the session. For a list of Amazon Lex attributes you can use, see [Amazon Lex contact attributes](p. 530).

### Life cycle of session attributes

There's one set of session attributes per conversation. In cases where a Lambda is invoked to do some processing, following is the order of precedence:

- **Service defaults**: these attributes are only used if no attributes are defined.
- **Session attributes provided by Amazon Connect**: these attributes are defined in the [Get customer input](p. 372) block.
• Session attributes provided by Lambda override everything prior: When a Lambda function is invoked and it does some processing, it overrides any session attributes set in the Get customer input (p. 372) block.

Let’s say a customer utters that they want a car. That’s the first session attribute to go through processing. When asked what kind of car, they say luxury car, this second utterance overrides any Lambda processing that took place on the first utterance.

For an example of how to create a Lambda function that processes session attributes, see Step 1: Create a Lambda Function in the Amazon Lex Developer Guide.

For the structure of the event data that Amazon Lex provides to a Lambda function, see Lambda Function Input Event and Response Format in the Amazon Lex Developer Guide.

Flow blocks that support Lex session attributes

You can use Lex session attributes in the following blocks when a Lex bot is called:

• Get customer input
• Set contact attributes
• Set hold flow
• Set working queue
• Set customer queue flow
• Set disconnect flow
• Set logging behavior
• Set callback number
• Set whisper flow
• Change routing priority/age
• Check contact attributes
• Loop
• Wait
• Invoke AWS Lambda function
• Transfer to phone number
• Transfer to flow

More information

For more information about using Amazon Lex session attributes, see Managing Conversation Context in the Amazon Lex Developer Guide.

How to use the same bot for voice and chat

You can use the same bot for both voice and chat. However, you may want the bot to respond differently based on the channel. For example, you want to return SSML for voice so a number is read as a phone number but you want to return normal text to chat. You can do this by passing the Channel attribute.

1. In the Get customer input block, choose the Amazon Lex tab.
2. Under Session attributes, choose Add an attribute. In the Destination key box, enter phoneNumber. Choose Set dynamically. In the Namespace box, choose System, and in the Value box, choose Customer Number, as shown in the following image.
3. Choose Add an attribute again.

4. Choose Set dynamically. In the Destination key box, enter callType. In the Namespace box, choose System, and in the Value box choose Channel, as shown in the following image.

5. Choose Save.

6. In your Lambda function, you can access this value in the SessionAttributes field in the incoming event.

Lambda functions and attributes

Retrieve data from a system your organization uses internally, such as an ordering system or other database with a Lambda function, and store the values as attributes that can then be referenced in a flow.

When the Lambda function returns a response from your internal system, the response is key-value pairs of data. You can reference the values returned in the External namespace, for example $.External.attributeName. To use the attributes later in a flow, you can copy the key-value pairs to user-defined attributes using a Set contact attributes block. You can then define logic to branch your contact based on attribute values by using a Check contact attributes block. Any contact attribute retrieved
from a Lambda function is overwritten with the next invocation of a Lambda function. Make sure you store external attributes if you want to reference them later in a flow.

**To store an external value from a Lambda function as a contact attribute**

1. In Amazon Connect, choose **Routing, Contact flows**.
2. Select an existing flow, or create a new one.
3. Add a **Invoke AWS Lambda function** block, then choose the title of the block to open the settings for the block.
4. Add the **Function ARN** to your AWS Lambda function that retrieves customer data from your internal system.
5. After the **Invoke AWS Lambda function** block, add a **Set contact attributes** block and connect the **Success** branch of the **Invoke AWS Lambda function** block to it.
6. Edit the **Set contact attributes** block, and select **Use attribute**.
7. For **Destination key**, type a name to use as a reference to the attribute, such as `customerName`. This is the value you use in the **Attribute** field in other blocks to reference this attribute.
8. For **Type**, choose **External**.
9. For **Attribute**, enter the name of the attribute returned from the Lambda function. The name of the attribute returned from the function will vary depending on your internal system and the function you use.

After this block executes during a flow, the value is saved as a user-defined attribute with the name specified by the **Destination key**, in this case `customerName`. It can be accessed in any block that uses dynamic attributes.

To branch your flow based on the value of an external attribute, such as an account number, use a **Check contact attributes** block, and then add a condition to compare the value of the attribute to. Next, branch the flow based on the condition.

1. In the **Check contact attributes** block, for **Attribute to check** do one of the following:
   - Select **External** for the **Type**, then enter the key name returned from the Lambda function in the **Attribute** field.
     
     **Important**
     Any attribute returned from an AWS Lambda function is overwritten with the next function invocation. To reference them later in a flow, store them as user-defined attributes.
   - Select **User Defined** for the **Type**, and in the **Attribute** field, type the name that you specified as the **Destination key** in the **Set contact attributes** block.
2. Choose **Add another condition**.
3. Under **Conditions to check**, choose the operator for the condition, then enter a value to compare to the attribute value. A branch is created for each comparison you enter, letting you route the contact based on the conditions specified. If no condition is matched, the contact takes the **No Match** branch from the block.

**Migrate flows to a different instance**

Amazon Connect lets you efficiently migrate flows to another instance. For example, you might want to expand into new Regions, or move flows from your development environment to your production environment.

To migrate a few flows, use the **import/export feature (p. 491)** in the flow designer.
To migrate hundreds of flows, you need developer skills. You use the following procedure:

1. Source instance
   - ListContactFlow: Retrieve the Amazon Resource Number (ARN) for the flows that you want to migrate.
   - DescribeContactFlow: Get information about each flow that you want to migrate.

2. Destination instance
   - CreateContactFlow: Create the flows.
   - UpdateContactFlowContent: Update the flow content.

You must also build an ARN-to-ARN mapping for queues, flows, and prompts between the source and target Amazon Connect instances, and replace every ARN in the source flow with the corresponding ARN from the target instance. Otherwise UpdateContactFlowContent fails with InvalidContactFlow error.

You can update the information in the flows that you migrate. For more information, see Flow language in the Amazon Connect API Reference Guide.
Create Amazon Connect rules

A rule is an action that Amazon Connect automatically performs, based on conditions you specify. Contact center managers, supervisors and QA analysts can quickly create rules from the Amazon Connect console. No coding is required.

The following image shows the Rules user interface, and the actions available when you create a rule.

By creating rules, you can:

- Automatically categorize contacts.
- Send notifications about customer escalations.
- Display tips in the agent application.
- Assign supervisor tasks based on customer conversations.

Rules allow you to automate common and repeatable actions required for quality assurance, workforce management, and customer engagement. These actions are automated based on pre-defined trigger conditions that you define, such as keywords used on a contact, sentiment trend of a contact, frequent...
interruptions by agent on a contact, agents being silent for long-periods on a contact, filtering specific contact attributes or queues, and more.

Common usage scenarios

- For Contact Lens, you can create rules to automatically categorize contacts based on keywords and phrases uttered by the agent or the customer. You can also use rules with real-time contact lens to alert supervisors in real-time when a critical customer experience issue occurs and the agent requires live assistance.
- For coaching and escalation scenarios, you can create rules to automatically categorize contacts that are not meeting your compliance requirements and assign tasks for the agents to go through a certain training program on your organization’s compliance policy.

Third-party integrations

Rules also provide third-party integrations with Contact Relationship Management (CRM) and IT service management (ITSM) vendors, such as Salesforce and Zendesk.

For example, you can create rules for whenever a new case or ticket is created in the Salesforce CRM or Zendesk ticket management system. You can set up the rule to automatically assign tasks to agents or supervisors based on the new case or ticket created, and to alert them to take necessary action. If you want to use email notification, you can automatically generate an EventBridge event that runs a custom email notification application to alert agents or supervisors. This enables contact center managers to integrate their existing CRM and ITSM solutions with Amazon Connect through rules, and to monitor the creation of new cases or tickets through tasks.

More information

- To create and manage rules programmatically, see Rules actions and the Amazon Connect Rules Function language in the Amazon Connect API Reference Guide.
- Alert supervisors in real-time based on keywords and phrases (p. 830)
- Automatically categorize contacts based on uttered keywords and phrases (p. 826)
- Create a task when a contact is categorized in real-time or post-call/chat (p. 842)
- Create a Contact Lens rule that generates an EventBridge event (p. 838)
- Create rules that generate tasks for third-party integrations (p. 549)

Create rules that generate tasks for third-party integrations

After you set up an external application to generate tasks automatically, you need to build rules that tell Amazon Connect when to create tasks, and how to route them.

1. Log in to Amazon Connect with a user account that is assigned the CallCenterManager security profile, or that is enabled for Rules permissions.
2. In Amazon Connect, on the navigation menu, choose Rules.
3. On the **Rules** page, use the **Create a rule** dropdown list to choose **External application**.
4. At the **Trigger and conditions** page, assign a name to the rule.

5. Choose the event that will generate a task, and the instance of the external application where the event must occur.
1. Select the instance for the external application.
2. Choose the conditions that must be met to generate the task.
6. Choose Next.
7. On the Action page, specify the task to be generated when the rule is met.

1. The description of the task appears to the agent in their Contact Control Panel (CCP).
2. The task reference name appears to the agent as a link to the specified URL.
8. Choose Save.

Test the rule

1. Go the external application and create the event that initiates the action. For example, in Zendesk, create a ticket that's type Question.
2. Go to Analytics and optimization, Contact search.
3. Under Channel, choose Task, and then choose Search.
4. Verify the task was created.
Set up your network

Traditional VoIP solutions require you to allow both inbound and outbound for specific UDP port ranges and IPs, such as 80 and 443. These solutions also apply to TCP. In comparison, the network requirements for using the Contact Control Panel (CCP) with a softphone are less intrusive. You can establish persistent outbound send/receive connections through your web browser. As a result, you don't need to open a client-side port to listen for inbound traffic.

The following diagram shows you what each port is used for.

The following sections describe the two primary connectivity options for using the CCP.

Option 1 (recommended): Replace Amazon EC2 and CloudFront IP range requirements with a domain allow list

This first option lets you significantly reduce your blast radius.

We recommend trying Option 1 and testing it with more than 200 calls. Test for softphone errors, dropped calls, and conference/transfer functionality. If your error rate is greater than 2 percent, there might be an issue with proxy resolution. If that's the case, consider using Option 2.

To allow traffic for Amazon EC2 endpoints, allow access for the URL and port, as shown in the first row of the following table. Do this instead of allowing all of the IP address ranges listed in the ip-ranges.json file. You get the same benefit using a domain for CloudFront, as shown in the second row of the following table.
Option 1 (recommended): Replace Amazon EC2 and CloudFront IP range requirements with a domain allow list

<table>
<thead>
<tr>
<th>Domain/URL allow list</th>
<th>AWS Region</th>
<th>Ports</th>
<th>Direction</th>
<th>Traffic</th>
</tr>
</thead>
<tbody>
<tr>
<td>rtc*.connect-telecom.{region}.amazonaws.com</td>
<td>Replace {region} with the Region where your Amazon Connect instance is located</td>
<td>443 (TCP)</td>
<td>OUTBOUND</td>
<td>SEND/RECEIVE</td>
</tr>
<tr>
<td>This is used by ccp# (v1). Please see the note following this table.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>*.my.connect.aws {myInstanceName}</td>
<td>Replace {myInstanceName} with the alias of your Amazon Connect instance</td>
<td>443 (TCP)</td>
<td>OUTBOUND</td>
<td>SEND/RECEIVE</td>
</tr>
<tr>
<td>ccp-v2</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>api</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>*.static.connect.aws</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>*.cloudfront.net</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>.awsapps.com:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>{myInstanceName}.awsapps.com/connect/ccp-v2</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>{myInstanceName}.awsapps.com/connect/api</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>*.cloudfront.net</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>*.telemetry.connect.{region}.amazonaws.com</td>
<td>Replace {region} with the location of your Amazon Connect instance</td>
<td>443 (TCP)</td>
<td>OUTBOUND</td>
<td>SEND/RECEIVE</td>
</tr>
<tr>
<td>participant.connect.{region}.amazonaws.com</td>
<td>Replace {region} with the location of your Amazon Connect instance</td>
<td>443 (TCP)</td>
<td>OUTBOUND</td>
<td>SEND/RECEIVE</td>
</tr>
<tr>
<td>*.transport.connect.{region}.amazonaws.com</td>
<td>Replace {region} with the location of your Amazon Connect instance</td>
<td>443 (TCP)</td>
<td>OUTBOUND</td>
<td>SEND/RECEIVE</td>
</tr>
<tr>
<td>This is used by ccp-v2.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>{Amazon S3 bucket name}.s3.{region}.amazonaws.com</td>
<td>Replace Amazon S3 bucket name with the name of the location where you store attachments. Replace {region}</td>
<td>443 (TCP)</td>
<td>OUTBOUND</td>
<td>SEND/RECEIVE</td>
</tr>
</tbody>
</table>
Option 1 (recommended): Replace Amazon EC2 and CloudFront IP range requirements with a domain allow list

<table>
<thead>
<tr>
<th>Domain/URL allow list</th>
<th>AWS Region</th>
<th>Ports</th>
<th>Direction</th>
<th>Traffic</th>
</tr>
</thead>
<tbody>
<tr>
<td>TurnNlb-*.{region}.amazonaws.com</td>
<td>with the location of your Amazon Connect instance</td>
<td>3478 (UDP)</td>
<td>OUTBOUND</td>
<td>SEND/RECEIVE</td>
</tr>
<tr>
<td>GLOBALACCELERATOR</td>
<td>GLOBAL and Region where your Amazon Connect instance is located (add GLOBAL AND any region-specific entry to your allow list)</td>
<td>443 (HTTPS) and 80 (HTTP)</td>
<td>OUTBOUND</td>
<td>SEND/RECEIVE</td>
</tr>
</tbody>
</table>

**Note**
If you're using SAML Sign-In to your Amazon Connect instance, add the Global Accelerator domain to your allow list: *.awsglobalaccelerator.com.

**Tip**
When using rtc*.connect-telecom.{region}.amazonaws.com, *.transport.connect.{region}.amazonaws.com, and https://myInstanceName.awsapps.com, in certain proxy applications, web socket handling may impact functionality. Be sure to test and validate before deploying to a production environment.

The following table lists the CloudFront domains used for static assets if you want to add domains to your allow list instead of IP ranges:

<table>
<thead>
<tr>
<th>Region</th>
<th>CloudFront Domain</th>
</tr>
</thead>
<tbody>
<tr>
<td>us-east-1</td>
<td><a href="https://dd401jc05x2ykd.cloudfront.net/">https://dd401jc05x2ykd.cloudfront.net/</a></td>
</tr>
<tr>
<td></td>
<td><a href="https://d1fouslncy85vb.cloudfront.net/">https://d1fouslncy85vb.cloudfront.net/</a></td>
</tr>
<tr>
<td>us-west-2</td>
<td><a href="https://d38fzyjx9jg8fj.cloudfront.net/">https://d38fzyjx9jg8fj.cloudfront.net/</a></td>
</tr>
<tr>
<td></td>
<td><a href="https://d366s8lxuxwana4d.cloudfront.net/">https://d366s8lxuxwana4d.cloudfront.net/</a></td>
</tr>
<tr>
<td>ap-northeast-1</td>
<td><a href="https://d3h58onr8hrozwc.cloudfront.net/">https://d3h58onr8hrozwc.cloudfront.net/</a></td>
</tr>
<tr>
<td></td>
<td><a href="https://d13ljas036g26c.cloudfront.net/">https://d13ljas036g26c.cloudfront.net/</a></td>
</tr>
<tr>
<td>ap-southeast-1</td>
<td><a href="https://d2g7up6vqaq2o.cloudfront.net/">https://d2g7up6vqaq2o.cloudfront.net/</a></td>
</tr>
<tr>
<td></td>
<td><a href="https://d12o1dlh4w0xc.cloudfront.net/">https://d12o1dlh4w0xc.cloudfront.net/</a></td>
</tr>
<tr>
<td>ap-southeast-2</td>
<td><a href="https://d2190hlw27bb8.cloudfront.net/">https://d2190hlw27bb8.cloudfront.net/</a></td>
</tr>
</tbody>
</table>
NLB endpoints

The following table lists the specific endpoints for the Region the Amazon Connect instance is in. If you don't want to use the TurnNlb-*.elb.(region).amazonaws.com wildcard, you can add these endpoints to your allow list instead.

<table>
<thead>
<tr>
<th>Region</th>
<th>Turn Domain/URL</th>
</tr>
</thead>
<tbody>
<tr>
<td>us-west-2</td>
<td>TurnNlb-8d79b4466d82ad0e.elb.us-west-2.amazonaws.com</td>
</tr>
<tr>
<td></td>
<td>TurnNlb-dbc4ebe71307fd6a2.elb.us-west-2.amazonaws.com</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Option 2 (not recommended): Allow IP address ranges

The second option relies on using an allow list, also known as whitelisting, the IP addresses used by Amazon Connect. You create this allow list using the IP addresses in the AWS ip-ranges.json file.

For more information about this file, see About Amazon Connect IP address ranges (p. 557).

<table>
<thead>
<tr>
<th>Region</th>
<th>Turn Domain/URL</th>
</tr>
</thead>
<tbody>
<tr>
<td>us-east-1</td>
<td>TurnNlb-d76454ac48d20c1e.elb.us-east-1.amazonaws.com</td>
</tr>
<tr>
<td></td>
<td>TurnNlb-31a7fe8a79c27929.elb.us-east-1.amazonaws.com</td>
</tr>
<tr>
<td></td>
<td>TurnNlb-7a9b8e750cec315a.elb.us-east-1.amazonaws.com</td>
</tr>
<tr>
<td>af-south-1</td>
<td>TurnNlb-29b8f2824c2958b8.elb.af-south-1.amazonaws.com</td>
</tr>
<tr>
<td>ap-northeast-1</td>
<td>TurnNlb-3c6ddabcbebeb821d8.elb.ap-northeast-1.amazonaws.com</td>
</tr>
<tr>
<td>ap-northeast-2</td>
<td>TurnNlb-a2d59ac3f246f09a.elb.ap-northeast-2.amazonaws.com</td>
</tr>
<tr>
<td>ap-southeast-1</td>
<td>TurnNlb-261982506d86d300.elb.ap-southeast-1.amazonaws.com</td>
</tr>
<tr>
<td>ap-southeast-2</td>
<td>TurnNlb-93f2de0c97c4316b.elb.ap-southeast-2.amazonaws.com</td>
</tr>
<tr>
<td>ca-central-1</td>
<td>TurnNlb-b019de6142240b9f.elb.ca-central-1.amazonaws.com</td>
</tr>
<tr>
<td>eu-central-1</td>
<td>TurnNlb-ea5316ebe2759cbc.elb.eu-central-1.amazonaws.com</td>
</tr>
<tr>
<td>eu-west-2</td>
<td>TurnNlb-1dc64a459ead57ea.elb.eu-west-2.amazonaws.com</td>
</tr>
<tr>
<td>us-gov-west-1</td>
<td>TurnNlb-d7c623c23f628042.elb.us-gov-west-1.amazonaws.com</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>IP-Ranges entry</th>
<th>AWS Region</th>
<th>Ports/Protocols</th>
<th>Direction</th>
<th>Traffic</th>
</tr>
</thead>
<tbody>
<tr>
<td>AMAZON_CONNECT</td>
<td>GLOBAL and Region where your Amazon Connect instance is located (add GLOBAL AND any region-specific entry to your allow list)</td>
<td>3478 (UDP)</td>
<td>OUTBOUND</td>
<td>SEND/RECEIVE</td>
</tr>
</tbody>
</table>
### About Amazon Connect IP address ranges

In the AWS ip-ranges.json file, the whole /19 IP address range is owned by Amazon Connect. All traffic to and from the /19 range comes to and from Amazon Connect.

The /19 IP address range isn't shared with other services. It's for the exclusive use to Amazon Connect globally.

In the AWS ip-ranges.json file, you can see the same range listed twice. For example:

```json
{
  "ip_prefix": "15.193.0.0/19",
  "region": "GLOBAL",
  "service": "AMAZON"
},
{
  "ip_prefix": "15.193.0.0/19",
  "region": "GLOBAL",
  "service": "AMAZON_CONNECT"
}
```

AWS always publishes any IP range twice: one for the specific service, and one for "AMAZON" service. There could even be a third listing for a more specific use case within a service.

When there are new IP address ranges supported for Amazon Connect, they are added to the publicly available ip-ranges.json file. They are kept for a minimum of 30 days before they are used by the service.

<table>
<thead>
<tr>
<th>IP-Ranges entry</th>
<th>AWS Region</th>
<th>Ports/Protocols</th>
<th>Direction</th>
<th>Traffic</th>
</tr>
</thead>
<tbody>
<tr>
<td>EC2</td>
<td>GLOBAL and Region where your Amazon Connect instance is located (GLOBAL only if a region-specific entry doesn't exist)</td>
<td>443 (TCP)</td>
<td>OUTBOUND</td>
<td>SEND/RECEIVE</td>
</tr>
<tr>
<td>CLOUDFRONT</td>
<td>Global*</td>
<td>443 (TCP)</td>
<td>OUTBOUND</td>
<td>SEND/RECEIVE</td>
</tr>
<tr>
<td>GLOBALACCELERATOR</td>
<td>GLOBAL and Region where your Amazon Connect instance is located (add GLOBAL AND any region-specific entry to your allow list)</td>
<td>443 (HTTPS) and 80 (HTTP)</td>
<td>OUTBOUND</td>
<td>SEND/RECEIVE</td>
</tr>
</tbody>
</table>

**Note**

If you're using SAML Sign-In to your Amazon Connect instance, be sure to add the Global Accelerator domain to your allow list: *awsglobalaccelerator.com*.

*CloudFront serves static content such as images or javascript from an edge location that has the lowest latency in relation to where your agents are located. IP range allow lists for CloudFront are global and require all IP ranges associated with "service": "CLOUDFRONT" in the ip-ranges.json file.*
After 30 days, softphone traffic through the new IP address ranges increases over the subsequent two
weeks. After two weeks, traffic is routed through the new ranges equivalent to all available ranges.

For more information about this file and IP address ranges in AWS, see AWS IP Address Ranges.

Stateless firewalls

If you're using a stateless firewall for both options, use the requirements described in the previous
sections. Then you must add to your allow list the ephemeral port range used by your browser, as shown
in the following table.

<table>
<thead>
<tr>
<th>IP-Range entry</th>
<th>Port</th>
<th>Direction</th>
<th>Traffic</th>
</tr>
</thead>
<tbody>
<tr>
<td>AMAZON_CONNECT</td>
<td>49152-65535 (UDP)</td>
<td>INBOUND</td>
<td>SEND/RECEIVE</td>
</tr>
</tbody>
</table>

Allow DNS resolution for softphones

If you already added Amazon Connect IP ranges to your allow list, and you don't have any restriction
on DNS name resolution, then you don't need to add TurnNlb-*.elb.{region}.amazonaws.com to your
allow list.

- To check whether there are restrictions on DNS name resolution, while on your network, use the
  nslookup command. For example:

  nslookup TurnNlb-d76454ac48d20c1e.elb.us-east-1.amazonaws.com

If you can't resolve the DNS, you must add the TurnNLB endpoints listed above (p. 555) or TurnNlb-
*.elb.{region}.amazonaws.com to your allow list.

If you don't allow this domain, your agents will get the following error in their Contact Control Panel
(CCP) when they try to answer a call:

- Failed to establish softphone connection. Try again or contact your administrator with the
  following: Browser unable to establish media channel with turn:TurnNlb-xxxxxxxxxxxxx.elb.
  {region}.amazonaws.com:3478?transport=udp

Port and protocol considerations

Consider the following when implementing your network configuration changes for Amazon Connect:

- You need to allow traffic for all addresses and ranges for the Region in which you created your Amazon
  Connect instance.
- If you are using a proxy or firewall between the CCP and Amazon Connect, increase the SSL certificate
  cache timeout to cover the duration of an entire shift for your agents, Do this to avoid connectivity
  issues with certificate renewals during their scheduled working time. For example, if your agents are
  scheduled to work 8 hour shifts that include breaks, increase the interval to 8 hours plus time for
  breaks and lunch.
- When opening ports, Amazon EC2 and Amazon Connect require only the ports for endpoints in the
  same Region as your instance. CloudFront, however, serves static content from an edge location that
  has the lowest latency in relation to where your agents are located. IP range allow lists for CloudFront
  are global and require all IP ranges associated with "service": "CLOUDFRONT" in ip-ranges.json.
Region selection considerations

Amazon Connect Region selection is contingent upon data governance requirements, use case, services available in each Region, and latency in relation to your agents, contacts, and external transfer endpoint geography.

- **Agent location/network**—CCP connectivity traverses the public WAN, so it is important that the workstation has the lowest latency and fewest hops possible, specifically to the AWS Region where your resources and Amazon Connect instance are hosted. For example, hub and spoke networks that need to make several hops to reach an edge router can add latency and reduce the quality of experience.

  When you set up your instance and agents, make sure to create your instance in the Region that is geographically closest to the agents. If you need to set up an instance in a specific Region to comply with company policies or other regulations, choose the configuration that results in the fewest network hops between your agents' computers and your Amazon Connect instance.

- **Location of your callers**—Because calls are anchored to your Amazon Connect Region endpoint, they are subject to PSTN latency. Ideally your callers and transfer endpoints are geographically located as closely as possible to the AWS Region where your Amazon Connect instance is hosted for lowest latency.

  For optimal performance, and to limit the latency for your customers when they call in to your contact center, create your Amazon Connect instance in the Region that is geographically closest to where your customers call from. You might consider creating multiple Amazon Connect instances, and providing contact information to customers for the number that is closest to where they call from.

- **External transfers**—from Amazon Connect remain anchored to your Amazon Connect Region endpoint for the duration of the call. Per-minute usage continues to accrue until the call is disconnected by the recipient of the transferred call. The call is not recorded after the agent drops or the transfer completes. The contact record data and associated call recording of a transferred call are generated after the call is terminated. Whenever possible, don't transfer calls that could be transferred back into Amazon Connect, known as circular transfers, to avoid compounding PSTN latency.

Agents using Amazon Connect remotely

Remote agents, those that use Amazon Connect from a location other than those connected to your organization's main network, may experience issues relating to their local network if they have an unstable connection, packet loss, or high latency. This is compounded if a VPN is required to access resources. Ideally, the agents are located close to the AWS Region where your AWS resources and Amazon Connect instance are hosted, and have a stable connection to the public WAN.

Rerouting audio

When rerouting audio to an existing device, consider the location of the device in relation to your Amazon Connect Region. This is so you can account for potential additional latency. If you reroute your...
audio, whenever there is a call intended for the agent, an outbound call is placed to the configured device. When the agent answers the device, that agent is connected with the caller. If the agent does not answer their device, they are moved into a missed contact state until they or a supervisor changes their state back to available.

Using AWS Direct Connect

Contact Control Panel (CCP) network connectivity issues are most often rooted in your route to AWS via private WAN/LAN, ISP, or both. While AWS Direct Connect does not solve issues specific to private LAN/WAN traversal to your edge router, it can help solve for latency and connectivity issues between your edge router and AWS resources. AWS Direct Connect provides a durable, consistent connection rather than relying on your ISP to dynamically route requests to AWS resources. It also allows you to configure your edge router to redirect AWS traffic across dedicated fiber rather than traversing the public WAN.

Detailed network paths for Amazon Connect

Voice calls

The following diagram shows how voice calls flow through Amazon Connect.

1. Users access the Amazon Connect application using a web browser. All communications are encrypted in transit using TLS.
2. Users establish voice connectivity to Amazon Connect from their browser using WebRTC. Signaling communication is encrypted in transit using TLS. Audio is encrypted in transit using SRTP.
3. Voice connectivity to traditional phones (PSTN) is established between Amazon Connect and AWS’s telecommunications carrier partners using private network connectivity. In cases where shared network connectivity is used, signaling communication is encrypted in transit using TLS and audio is encrypted in transit using SRTP.
4. Call recordings are stored in your Amazon S3 bucket that Amazon Connect has been given permissions to access. This data is encrypted between Amazon Connect and Amazon S3 using TLS.
5. Amazon S3 server-side encryption is used to encrypt call recordings at rest using a customer-owned KMS key.

**Authentication**

The following diagram shows using the AD Connector with AWS Directory Service to connect to an existing customer Active Directory installation. The flow is similar to using AWS Managed Microsoft AD.

1. The user's web browser initiates authentication to an OAuth gateway over TLS via the public internet with user credentials (Amazon Connect login page).
2. OAuth gateway sends the authentication request over TLS to AD Connector.
3. AD Connector does LDAP authentication to Active Directory.
4. The user's web browser receives OAuth ticket back from gateway based on authentication request.
5. The client loads the Contact Control Panel (CCP). The request is over TLS and uses OAuth ticket to identify user/directory.

**Using Amazon Connect in a VDI environment**

Virtual Desktop Infrastructure (VDI) environments add another layer of complexity to your solution that warrants separate POC efforts and performance testing to optimize. The Amazon Connect Contact Control Panel (CCP) can operate in thick, thin, and zero client VDI environments as any other WebRTC based browser application does, and the configuration/support/optimization is best handled by your VDI support team. That being said, the following is a collection of considerations and best practices that have been helpful for our VDI-based customers.

- **Location of your agents**—Ideally, there are as few hops as possible with the lowest round trip time between the location from which your agents use the CCP and the VDI host location.
- **Host location of your VDI solution**—Ideally, your VDI host location is on the same network segment as your agents, with as few hops as possible from both internal resources as well as an edge router. You also want the lowest round-trip time possible to both WebRTC and Amazon EC2 range endpoints.
- **Network**—Each hop that traffic goes through between endpoints increases the possibility of failure and adds opportunity to introduce latency. VDI environments are particularly susceptible to call quality...
issues if the underlying route is not optimized or the pipe isn’t either fast or wide enough. While AWS Direct Connect can improve call quality from the edge router to AWS, it will not address internal routing issues. You may need to upgrade or optimize your private LAN/WAN, or redirect to an external device to circumvent call audio issues. In most scenarios, if this is required, the CCP is not the only application that is having issues.

• **Dedicated resources**—at the Network and desktop level are recommended to prevent an impact to available agent resources from activities, such as backups and large file transfers. One way to prevent resource contention is by restricting the desktop access to Amazon Connect users who will be using their environment similarly, instead of sharing resources with other business units who may use those resources differently.

• **Using a soft phone with remote connections**—in VDI environments can cause impact to audio quality.

  **Tip**
  If your agents connect to a remote endpoint and operates in that environment, we recommend either rerouting audio to an external E.164 endpoint or connecting the media through the local device and then signaling through the remote connection.

You can build a custom CCP with the Amazon Connect Streams API by creating a CCP with no media for call signaling. This way, the media is handled on the local desktop using standard CCP, and the signaling and call controls are handled on the remote connection with the CCP with no media. For more information about the streams API, see the GitHub repository at [https://github.com/aws/amazon-connect-streams](https://github.com/aws/amazon-connect-streams).

### CCP connectivity

When an agent logs in, the CCP attempts to connect to the Amazon EC2 signaling endpoints listed in the AWS ipranges.json file, Amazon Connect for media, and CloudFront for web artifacts such as images. When the agent logs out or the browser is closed, endpoints are reselected when the agent next logs in. If a connection to Amazon EC2 or Amazon Connect fails, errors display on the CCP. If a connection to CloudFront fails, web elements such as buttons and icons, or even the page itself fails to load correctly.

#### Outbound calls

• When an outbound call is placed, the event signal is sent to the Amazon EC2 endpoint, which then communicates with Amazon Connect to place the call. Upon a successful dial attempt, the agent is bridged in, which anchors the call to the agent’s Amazon Connect endpoint. Any external transfers or conferences also use the anchor until the call is disconnected. Anchoring can help reduce PSTN latency.

#### Inbound calls

• When an inbound call is received, the call is anchored to an Amazon Connect endpoint. Any external transfers or conferences also use this anchor until the call is disconnected.

• When an agent is available, the call is pushed through via a new Amazon EC2 connection to their browser and offered to the agent.

• When the agent accepts the call and either the external device has been answered or the CCP determines it can receive a call, a connection to Amazon Connect is established for call media to the agent.

#### Transferred calls

• When a call is transferred, the transfer event that signals to place an outbound call to the specified transfer destination is sent to Amazon EC2, which then communicates with Amazon Connect to place the call.
• When the call is connected, the agent is bridged in, anchoring the call to the agent's existing Amazon Connect endpoint. Any external transfers or conferences also use this anchor until the call is disconnected.
• If the agent hangs up after the call is bridged, the agent's connection to the call is terminated, but Amazon Connect hangs on to the call at the Amazon Connect anchor point until there is a far side disconnect. When the call is disconnected, contact records and associated recordings are generated and made available for the call.

Missed calls
• If the call is waiting on an agent, customer queue flow logic is used until an agent is available and the call has been successfully routed to that agent.
• If the agent does not accept the call, the agent moves into a Missed Call state and is unable to take calls until the agent, or a call center manager, changes their status to Available again. The caller does not hear ringing while the call is waiting for the agent, and continues to hold until connected with an agent as defined in the customer queue flow logic.

Panic logout
• If the browser window where the CCP is running is closed, the call remains connected, but opening the browser and logging back in will not allow you to re-establish the media connection. You are still able to transfer or end the call, but no audio path is established between the agent and caller.

Use an allow list for integrated applications

All domains that embed the CCP for a particular instance must be explicitly allowed for cross-domain access to the instance. For example, to integrate with Salesforce, you must place your Salesforce Visualforce domain in an allow list.

To allow a domain URL

1. Open the Amazon Connect console at https://console.aws.amazon.com/connect/.
2. Choose the name of the instance from Instance Alias.
3. In the navigation pane, choose Approved origins.
4. Choose Add origin.
5. Type the URL and choose Add.
Add an Amazon Lex bot to Amazon Connect

In this article we guide you through the steps to add an Amazon Lex bot to Amazon Connect.

With Amazon Lex, you can build conversational interactions (bots) that feel natural to your customers. Amazon Connect with Amazon Lex bots can also capture customer input as digits that customers enter on their numeric keypad when used in an Amazon Connect flow. This way customers can choose how they want to enter sensitive information such as account numbers.

To follow along with this walkthrough, you need the following:

- An active AWS account.
- An Amazon Connect instance.

**Tip**
You can also use Amazon Lex to power interactive messages for Amazon Connect chat. Interactive messages are rich messages that present a prompt and pre-configured display options that a customer can select from. These messages are powered by Amazon Lex and configured through Amazon Lex using a Lambda. For more information, see Add interactive messages to chat (p. 580).

Create an Amazon Lex bot

In this step you’ll create a custom bot to demonstrate the Press or Say integration with Amazon Connect. The bot prompts callers to press or say a number that matches the menu option for the task to complete. In this case, the input is checking their account balance.

Amazon Lex

1. Open the Amazon Lex console.
2. Choose Create bot.
3. On the Configure bot settings page, choose Create - Create a blank bot and provide the following information:
   - **Bot name** — For this walkthrough, name the bot AccountBalance.
   - **IAM permissions** — Select a role if you have one created. Otherwise, choose Create a role with basic Amazon Lex permissions.
   - **COPPA** — Choose whether the bot is subject to the Child Online Privacy Protection Act.
   - **Session timeout** — Choose how long the bot should wait to get input from a caller before ending the session.
4. Choose Next.
5. Provide language and voice specific information:
   - **Language** — Select language and locale from the list of Languages and locales supported by Amazon Lex.
Configure the Amazon Lex bot

In this step you'll determine how the bot responds to customers by providing intents, sample utterances, slots for input, and error handling.

For this example, you'll configure the bot with two intents: one to look up account information, and another to speak with an agent.

Create AccountLookup intent

Amazon Lex

1. After you created the bot, you are on the Intents page the Amazon Lex console. If you're not there, you can get there by choosing Bots, AccountBalance, Bot versions, Draft version, Intents. Choose Add intent, Add empty intent.

2. In the Intent name box, enter AccountLookup.

3. Scroll down the page to Sample utterances. In this step you enter utterances that allow the customer to elicit the AccountLookup intent. Enter the following utterances, and choose Add utterance after each one.

   - Check my account balance
   - One: This assigns the utterance of "one" or key press of "1" to the AccountLookup intent.
4. Scroll to the **Slots** section, and choose **Add slot**. Complete the box as follows:

   a. **Required for this intent** = selected.
   b. **Name** = **AccountNumber**.
   c. **Slot type** = **AMAZON.Number**.
   d. **Prompts** = the text to be spoken when the call is answered. For example, ask callers to enter their account number using their keypad: **Using your touch-tone keypad, please enter your account number.** Choose **Add**.
5. Scroll to the Closing responses section. Add a message for the bot to say to customers. For example, Your account balance is $1,234.56. (For this walkthrough, we aren’t going to actually get the data, which is what you would do in reality.)

6. Choose Save intent.

Amazon Lex (Classic)

1. In the Amazon Lex console choose the + icon next to Intents, and choose Create new intent.
2. Name the intent **AccountLookup**.

3. Add a sample utterance, such as *Check my account balance*, and choose the + icon.

4. Add a second utterance, such as *One* and choose the + icon. This assigns the utterance of "one" or key press of "1" to the **AccountLookup** intent.

   **Tip**
   You must add an utterance of "one" in the bot, and not the number "1". This is because Amazon Lex doesn't support numeric input directly. To get around this, later in this walkthrough you'll use numeric input to interact with a Lex bot invoked from a flow.

5. Under **Slots**, add a slot named **AccountNumber**.

6. For **Slot type**, use the drop-down to choose **AMAZON.NUMBER**.

7. For **Prompt**, add the text to be spoken when the call is answered. For example, ask callers to enter their account number using their keypad: *Using your touch-tone keypad, please enter your account number.*

8. Choose the + icon.

9. Make sure that the **Required** check box is selected.

10. In the **Response** section, add a message for the bot to say to customers. For example, *Your account balance is $1,234.56.*

11. Choose **Save Intent**.

---

### Create SpeakToAgent intent

**Amazon Lex**

1. Navigate to the **Intents** page: choose **Back to intents list**.

2. Choose **Add intent, Add empty intent**.

3. In the **Intent name** box, enter **SpeakToAgent**, and then choose **Add**.

4. Scroll down to the **Sample utterances** section. Enter the following utterances, which allow the customer to elicit the SpeakToAgent intent:

   - *Speak to an agent*
   - *Two*

5. Scroll down to the **Closing responses** section. Add a message for the bot to say to customers. For example, *Okay, an agent will be with you shortly.*
6. Choose **Save intent**.

**Amazon Lex (Classic)**

1. In the Amazon Lex console choose the + icon next to **Intents**, and choose **Create new intent**.
2. Name the intent **SpeakToAgent**.
3. Select **SpeakToAgent**.
4. Add a sample utterance, such as **Speak to an agent**, and choose +.
5. Add a second utterance, such as **Two**, and choose +.
6. Add a message that lets callers know that their call is being connected to an agent. For example, "Okay, an agent will be with you shortly."
7. Choose **Save Intent**.

---

**Build and test the Amazon Lex bot**

After you create your bot, make sure it works as intended.

**Amazon Lex**

1. At the bottom of the page, choose **Build**. It may take a minute or two.

2. When it's finished building, choose **Test**.
3. Let's test the **AccountLookup** intent: In the **Test Draft version** pane, in the **Type a message** box, type 1 and press Enter. Then type a fictitious account number and press Enter.
a. Clear the test box.
b. Type the intents you want to test.

4. To confirm that the **SpeakToAgent** intent is working, clear the test box, and then type 2 and press Enter.
5. Close the **Test Draft version** pane.
Amazon Lex (Classic)

1. Choose **Build**. It may take a minute or two.
2. When it's finished building, choose **Test Chatbot**.
3. Let's test the **AccountLookup** intent: In the **Test Chatbot** pane, in the **Chat with your bot** box, type 1. Then type a fictitious account number.

4. Choose **Clear chat history**.
5. To confirm that the **SpeakToAgent** intent is working, type 2.

Create a bot version (Optional)

In this step you create a new bot version to use in an alias. It's how you create an alias that can be used in a production environment. Test aliases are subject to lower throttling limits. Although this is a test walkthrough, creating a version is a best practice.

Amazon Lex

1. If you're on the **Intents** page, choose **Back to intents list**.
Create an alias for the bot

Amazon Lex

1. In the left menu, choose Aliases.
2. On the Aliases page, choose Create alias.
3. In the Alias name box, enter a name, such as Test. Later in this walkthrough you'll use this alias to specify this version of the bot in your flow.

   **Important**
   In a production environment, always use a different alias than TestBotAlias for Amazon Lex and $LATEST for Amazon Lex classic. TestBotAlias and $LATEST support a limited number of concurrent calls to an Amazon Lex bot. For more information, see Runtime Service Quotas.

4. For Associated version, choose the version you just created, such as Version 1.
5. Choose Create.

Amazon Lex (Classic)

1. Choose Publish.
2. Provide an alias for your bot. Use the alias to specify this version of the bot in the flow, for example, **Test**.

  **Important**
  In a production environment, always use a different alias than **TestBotAlias** for Amazon Lex and **$LATEST** for Amazon Lex classic. **TestBotAlias** and **$LATEST** support a limited number of concurrent calls to an Amazon Lex bot. For more information, see [Runtime Service Quotas](#).

3. Choose **Publish**.

---

**Add the Amazon Lex bot to your Amazon Connect instance**

**Amazon Lex**

1. Open the [Amazon Connect console](#).
2. Select the Amazon Connect instance that you want to integrate with your Amazon Lex bot.

3. On the navigation menu, choose **Contact flows**.
4. Under **Amazon Lex**, use the dropdown to select the Region of your Amazon Lex bot, and then select your Amazon Lex bot, **AccountBalance**.
5. Select the Amazon Lex bot alias name from the dropdown (**Test**), and then choose **+ Add Lex Bot**.
Note
Amazon Connect uses Amazon Lex resource-based policies to make calls to your Amazon Lex bot. When you associate an Amazon Lex bot with your Amazon Connect instance, the resource-based policy on the bot is updated to give Amazon Connect permission to invoke the bot. For more information on Amazon Lex resource-based policies, see How Amazon Lex works with IAM.

Amazon Lex (Classic)

1. Open the Amazon Connect console.
2. Select the Amazon Connect instance that you want to integrate with your Amazon Lex bot.
3. On the navigation menu, choose Contact flows.
4. Under Amazon Lex, select the Region of your Amazon Lex classic bot from the dropdown, and then select your Amazon Lex classic bot. It's name will have the suffix "(Classic)". Then choose Add Lex Bot.
Create a flow and add your Amazon Lex bot

**Important**
If you’re using an Amazon Lex V2 bot, your language attribute in Amazon Connect must match the language model used to build your Lex bot. This is different than Amazon Lex (Classic). Use a Set voice (p. 420) block to indicate the Amazon Connect language model, or use a Set contact attributes (p. 403) block.

Next, create a new flow that uses your Amazon Lex bot. When you create the contact flow, you configure the message played to callers.

1. Log in to your Amazon Connect instance with an account that has permissions for contact flows and Amazon Lex bots.
2. On the navigation menu, choose Routing, Flows, Create Flow, and type a name for the flow.
3. Under Interact, drag a Get customer input (p. 372) block onto the designer, and connect it to the Entry point block.
4. Click the Get customer input block to open it. Choose Text to speech or chat text, Enter text.
5. Type a message that provides callers with information about what they can do. For example, use a message that matches the intents used in the bot, such as "To check your account balance, press or say 1. To speak to an agent, press or say 2."
Get customer input

Delivers an audio or chat message to solicit customer input.

Based on response, the contact flow branches. Learn more

- Select from the prompt library (audio)
- Text-to-speech or chat text
  - Enter text
    - To check your account balance, press or say 1. To speak to an agent, press or say 2.
  - Enter dynamically
    - Interpret as
      - Text

6. Select the Amazon Lex tab.
7. In the **Name** dropdown, select the **AccountBalance** bot you created earlier.

   a. If you selected an Amazon Lex bot, under **Alias** use the dropdown menu to select the bot alias, **Test**.

   b. Amazon Lex Classic bots have the suffix "(Classic)" appended to their names. If you have selected a Classic bot, enter the alias you want to use in the **Alias** field.
c. For Amazon Lex bots, you also have the option of manually setting a bot alias ARN. Choose **Set manually**, then either type the ARN of the bot alias you want to use or set the ARN using a dynamic attribute.

8. Under **Intents**, choose **Add an intent**.
9. Type **AccountLookup** and choose **Add another intent**.

![Intents](image)

10. Type **SpeakToAgent** and choose **Save**.

**Finish the flow**

In this step you finish adding parts to the flow that run after the caller interacts with the bot:

1. If the caller presses 1 to get their account balance, use a **Prompt** block to play a message and disconnect the call.
2. If the caller presses 2 to speak to an agent, use a **Set queue** block to set the queue and transfer the caller to the queue, which ends the flow.

Here are the steps to create the flow:

1. Under **Interact**, drag a **Play prompt block** to the designer, and connect the **AccountLookup** node of the **Get customer input** block to it. After the customer gets their account balance from the Amazon Lex bot, the message in the **Play prompt** block plays.
2. Under **Terminate/Transfer**, drag a **Disconnect** block to the designer, and connect the **Play prompt** block to it. After the prompt message plays, the call is disconnected.

To complete the **SpeakToAgent** intent:

1. Add a **Set working queue** block and connect it to the **SpeakToAgent** node of the **Get customer input** block.
2. Add a **Transfer to queue** block.
3. Connect the Success node of the **Set customer queue flow** block to the **Transfer queue**.
4. Choose **Save**, then **Publish**.

Your finished flow will look something like the following one:
Assign the flow to a phone number

When customers call in to your contact center, the flow to which they are sent is the one assigned to the telephone number that they called. To make the new contact flow active, assign it to a phone number for your instance.

1. Open the Amazon Connect console.
2. Choose **Routing, Phone numbers**.
3. On the **Manage Phone numbers** page, select the phone number to assign to the flow.
4. Add a description.
5. In the **Flow/IVR** menu, choose the flow that you just created.
6. Choose **Save**.

**Try it!**

To try the bot and flow, call the number you assigned to the flow. Follow the prompts.

Add interactive messages to chat

Interactive messages are rich messages that present a prompt and pre-configured display options that a customer can select from. These messages are powered by Amazon Lex and configured through Amazon Lex using a Lambda.

**Tip**

For step-by-step instructions on how to add interactive messages through Amazon Lex and Lambda, see this blog: Set up interactive messages for your Amazon Connect chatbot.

Amazon Connect provides two message display templates: a list picker and a time picker. These templates define how the information is going to render, and what information is surfaced in the chat interface. When interactive messages are sent through chat, flows validate that the message format follows one of these templates.

Tip

If your business uses multiple locales in a single bot, add a Set contact attributes (p. 403) block to the beginning of your flow. Configure this block to use the $.LanguageCode (p. 521) system attribute.
This topic provides details about these interactive message templates.

**List picker template**

Following are examples of how the list picker template renders information in a chat.

![List picker](image1)

![List picker with images](image2)

The following code is the list picker template that you can use in your Lambda. Note the following:

- **Bold text** is a mandatory parameter.
- In some cases, if the parent element exists in the request and it isn't mandatory/bold, but the fields in it are, then the fields are mandatory. For example, see `data.replyMessage` structure in the following template. If the structure exists, `title` is mandatory. Otherwise complete `replyMessage` is optional.

**Important**

Images should be uploaded in Amazon S3 and publicly accessible.

```
{
    "templateType":"ListPicker",
    "version":"1.0",
    "data":{
        "replyMessage":{
            "title":"Thanks for selecting!",
            (mandatory)
            (mandatory)
            (mandatory)
        }
    }
}
```
"subtitle": "Produce selected",
"imageType": "URL",
"imageData": "https://interactive-msg.s3-us-west-2.amazonaws.com/fruit_34.3kb.jpg",
"imageDescription": "Select a produce to buy",

"content": {
  "title": "What produce would you like to buy?",
  "subtitle": "Tap to select option",
  "imageType": "URL",
  "imageData": "https://interactive-msg.s3-us-west-2.amazonaws.com/fruit_34.3kb.jpg",
  "imageDescription": "Select a produce to buy",
  "elements": [{
    "title": "Apple",
    "subtitle": "$1.00",
    "imageType": "URL",
    "imageData": "https://interactive-message-testing.s3-us-west-2.amazonaws.com/apple_4.2kb.jpg"
  },
  {
    "title": "Orange",
    "subtitle": "$1.50",
    "imageType": "URL",
    "imageData": "https://interactive-message-testing.s3-us-west-2.amazonaws.com/orange_17.7kb.jpg"
  },
  {
    "title": "Banana",
    "subtitle": "$10.00",
    "imageType": "URL",
    "imageData": "https://interactive-message-testing.s3-us-west-2.amazonaws.com/banana_7.9kb.jpg"
  }
]}

List picker limits

The following table lists the limits for each of the list picker elements, should you choose to build your own Lambda from scratch. The mandatory parameters are in bold.

<table>
<thead>
<tr>
<th>Parent field</th>
<th>Field</th>
<th>Required</th>
<th>Minimum characters</th>
<th>Maximum characters</th>
<th>Other requirement</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>templateType</td>
<td>Yes</td>
<td></td>
<td></td>
<td>Valid template type</td>
</tr>
<tr>
<td></td>
<td>data</td>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>version</td>
<td>Yes</td>
<td></td>
<td></td>
<td>Must be &quot;1.0&quot;</td>
</tr>
<tr>
<td>data</td>
<td>content</td>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>replyMessage</td>
<td>No</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Time picker template

Following are two examples of how the time picker template renders information in a chat.

<table>
<thead>
<tr>
<th>Parent field</th>
<th>Field</th>
<th>Required</th>
<th>Minimum characters</th>
<th>Maximum characters</th>
<th>Other requirement</th>
</tr>
</thead>
<tbody>
<tr>
<td>content</td>
<td>title</td>
<td>Yes</td>
<td>1</td>
<td>100</td>
<td>Should be a description for promptless templates</td>
</tr>
<tr>
<td>elements</td>
<td>title</td>
<td>Yes</td>
<td>1 item</td>
<td>6 items</td>
<td>This is an array of elements. Maximum 6 elements in the array.</td>
</tr>
<tr>
<td></td>
<td>subtitle</td>
<td>No</td>
<td>0</td>
<td>200</td>
<td></td>
</tr>
<tr>
<td></td>
<td>imageType</td>
<td>No</td>
<td>0</td>
<td>50</td>
<td>Must be &quot;URL&quot;</td>
</tr>
<tr>
<td></td>
<td>imageData</td>
<td>No</td>
<td>0</td>
<td>200</td>
<td>Must be a valid public Amazon S3 URL</td>
</tr>
<tr>
<td></td>
<td>imageDescription</td>
<td>No</td>
<td>0</td>
<td>50</td>
<td></td>
</tr>
<tr>
<td>elementsTitle</td>
<td>title</td>
<td>Yes</td>
<td>1</td>
<td>100</td>
<td></td>
</tr>
<tr>
<td></td>
<td>subtitle</td>
<td>No</td>
<td>0</td>
<td>200</td>
<td></td>
</tr>
<tr>
<td></td>
<td>imageType</td>
<td>No</td>
<td>0</td>
<td>50</td>
<td>Must be &quot;URL&quot;</td>
</tr>
<tr>
<td></td>
<td>imageData</td>
<td>No</td>
<td>0</td>
<td>200</td>
<td>Must be a valid public Amazon S3 URL</td>
</tr>
<tr>
<td></td>
<td>imageDescription</td>
<td>No</td>
<td>0</td>
<td>50</td>
<td>Cannot exist without an image</td>
</tr>
<tr>
<td>replyMessage</td>
<td>title</td>
<td>Yes</td>
<td>1</td>
<td>100</td>
<td></td>
</tr>
<tr>
<td></td>
<td>subtitle</td>
<td>No</td>
<td>0</td>
<td>200</td>
<td></td>
</tr>
<tr>
<td></td>
<td>imageType</td>
<td>No</td>
<td>0</td>
<td>50</td>
<td>Must be &quot;URL&quot;</td>
</tr>
<tr>
<td></td>
<td>imageData</td>
<td>No</td>
<td>0</td>
<td>200</td>
<td>Must be a valid public Amazon S3 URL</td>
</tr>
<tr>
<td></td>
<td>imageDescription</td>
<td>No</td>
<td>0</td>
<td>50</td>
<td>Cannot exist without an image</td>
</tr>
</tbody>
</table>
The following code is the time picker template that you can use in your Lambda. Note the following:

- **Bold text** is a mandatory parameter.
- In some cases, if the parent element exists in the request and it isn't mandatory/bold, but the fields in it are, then the fields are mandatory. For example, see `data.replyMessage` structure in the following template. If the structure exists, `title` is mandatory. Otherwise complete `replyMessage` is optional.

```
{
  "templateType":"TimePicker",
  "version":"1.0",
  "data":{
    "replyMessage":{
      "title":"Thanks for selecting",
      "subtitle":"Appointment selected",
    },
    "content":{
      "title":"Schedule appointment",
      "subtitle":"Tap to select option",
      "timeZoneOffset":-450
    },
    "location":{
      "latitude":47.616299,
      "longitude":-122.4311,
      "title":"Oscar",
      "radius":1,
    },
    "timeslots":[
      {
        "date": "2020-10-31T17:00+00:00",
        "duration": 60,
      },
      {
        "date": "2020-11-15T13:00+00:00",
        "duration": 60,
      }
    ]
  }
}```
## Time picker limits

The following table lists the limits for each of the time picker elements. Use this information if you choose to build your own Lambda from scratch. The mandatory parameters are in bold.

<table>
<thead>
<tr>
<th>Parent field</th>
<th>Field</th>
<th>Required</th>
<th>Minimum characters</th>
<th>Maximum characters</th>
<th>Other requirement</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>templateType</td>
<td>Yes</td>
<td></td>
<td></td>
<td>Valid template type</td>
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<td>Yes</td>
<td>1</td>
<td>100</td>
<td>Should be description for promptless templates</td>
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<td>subtitle</td>
<td>No</td>
<td>0</td>
<td>200</td>
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<td>This is an array of timeslots. Maximum of 20 elements in the array.</td>
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<tr>
<td></td>
<td>date</td>
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<td></td>
<td></td>
<td>Should be in ISO-8601 time format: YYYY-MM-DDTHH.MM+00.00 For example: &quot;2020-08-14T21:21+00.00&quot;</td>
</tr>
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<td></td>
<td>duration</td>
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<td>1</td>
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</table>
Use Customer Profiles

To help agents deliver more efficient and personalized customer service, Amazon Connect enables you to combine information from external applications, such as Salesforce, with contact history from Amazon Connect. This creates a customer profile that has all the information agents need during customer interactions in a single place.

With a single view of customer information and contact history, agents can quickly confirm the customer's identity and determine the reason for the call or chat.

Currently, Amazon Connect Customer Profiles can be used in compliance with GDPR and is pending additional certifications held by Amazon Connect.

The following image shows an agent's Contact Control Panel (CCP); for the purposes of this documentation, Amazon Connect Customer Profiles is highlighted in the red box. The agent's application is optimized for multi-tasking: working on calls, and multiple chats and tasks, with customer profile information in the same browser window.

1. **Product purchase history**: All the assets purchased by a customer can be populated here. The data is ingested from an external app such as Salesforce or Zendesk that you've integrated (p. 608) with Customer Profiles.

2. **Contact history**: Date, times, and duration when this customer contacted your contact center in the past.

3. **More information**: Additional information contained in the customer defined Attributes field of the profile, as well as further profile information such as cell phone number and shipping address. This information will be sorted alphabetically to help an agent quickly locate the information they need.

4. **Actions**: Agents can copy the contact ID, or choose to go directly to the contact's Contact record details page.
What is a customer profile?

A customer profile stores contact history combined with information about customers, such as account number, additional information, birth date, email, multiple addresses, name, and party type.

After you enable Amazon Connect Customer Profiles, a unique customer profile is created for every contact. This allows you to create a customer profile that has all the information agents need during customer interactions in a single place at no charge.

To access customer profiles in your flows, use the Customer profiles (p. 365) block. Agents access customer profiles (p. 604) in their agent application.

You can use the paid features of Customer Profiles to enrich your customer profiles by ingesting data from external applications (p. 608). See pricing for details.

You can also add custom fields and objects to the customer profiles by using the Amazon Connect Customer Profiles APIs.

How is customer profile data stored?

Amazon Connect stores contact history in unique customer profiles. It parses data ingested from external applications and stores it as customer profile attributes.

Amazon Connect does not replace or update the data in the external application. If a data source is removed, the data from the external application is no longer available in the customer profile for every voice contact.

For information about how customer profile data are secured, see Data protection in Amazon Connect (p. 1171).

For more information about how to access the data that is stored in a customer profile, see Access Customer Profiles in the agent application or Use the Customer Profiles API.

Enable Customer Profiles for your instance

Amazon Connect provides pre-built integrations so you can quickly combine customer information from multiple external applications, with contact history from Amazon Connect. This allows you to create a customer profile that has all the information agents need during customer interactions in a single place.

Before you begin

Following is an overview of key concepts and the information that you'll be prompted for during the setup process.

About the customer profiles domain

When you enable Amazon Connect Customer Profiles, you create a customer profiles domain: a container for all data, such as customer profiles, object types, profile keys, and encryption keys. Following are guidelines for creating Customer Profile domains:

- Each Amazon Connect instance can only be associated with one domain.
- You can create multiple domains, but they don't share external application integrations or customer data between each other.
• All the external application integrations you create are at a domain level. All of the Amazon Connect instances associated with a domain inherit the domain's integrations.

• You can change the association of your Amazon Connect instance from your current domain to a new domain at any time, by choosing a different domain. This isn’t recommended, however, because the customer profiles from the earlier domain won’t be moved to the new domain.

**How do you want to name your customer profiles domain?**

When you enable customer profiles, you are prompted to provide a friendly domain name that’s meaningful to you such as your organization name, for example, `CustomerProfiles-ExampleCorp`. You can change the friendly name using the API at any time.

**Do you want to use a dead-letter queue?**

A dead-letter queue is used for reporting errors associated with processing data from external applications.

Amazon AppFlow handles connecting to the external application and moving data from it to Amazon Connect Customer Profiles. Amazon Connect then processes the file.

• If an error occurs during the connection or while transporting the data to Amazon Connect, Amazon AppFlow surfaces the error but it doesn’t write the error to the dead-letter queue.

  For example, a processing error could be that the external data didn’t match the specified schema or that the format of the external data format isn’t correct (currently only JSON is supported).

• If Amazon Connect encounters an error while processing the file, it writes the error to your dead-letter queue. You can look at the queue later and try to reprocess the error.

When you enable Customer Profiles, you have the option of specifying an Amazon SQS queue as your dead-letter queue. If you select this option, add the following resource policy to Amazon SQS so Customer Profiles has permissions to send messages to that queue:

```json
{
  "Sid": "Customer Profiles SQS policy",
  "Effect": "Allow",
  "Principal": {
    "Service": "profile.amazonaws.com"
  },
  "Action": "SQS:SendMessage",
  "Resource": "arn:aws:sqs:region:accountID:YourQueueName"
}
```

To prevent a confused deputy security issue, see Amazon Connect Customer Profiles cross-service confused deputy prevention (p. 1242) for an example policy to apply.

Step-by-step instructions are provided in Enable Customer Profiles (p. 590). For general information, see Basic examples of Amazon SQS policies.

**Create a KMS key to be used by Customer Profiles to encrypt data (required)**

When you enable Customer Profiles, you are prompted to create or provide an AWS Key Management Service KMS key. Step-by-step instructions for creating a KMS key are provided in Enable Customer Profiles (p. 590).
All data at rest for Customer Profiles is encrypted under the KMS key you choose. Your customer managed key is created, owned, and managed by you. You have full control over the KMS key (AWS KMS charges apply).

If you choose to set up a KMS key where someone else is the administrator, it must have a policy that allows `kms:GenerateDataKey`, `kms:CreateGrant`, and `kms:Decrypt` permissions to the Customer Profiles service principal. For information about how to change a key policy, see Changing a key policy in the AWS Key Management Service Developer Guide. In addition, to prevent cross-service impersonation, see Cross-service confused deputy prevention (p. 1242) for sample policies that you should apply.

**Enable Customer Profiles**

1. Open the Amazon Connect console at https://console.aws.amazon.com/connect/.
2. On the instances page, choose the instance alias. The instance alias is also your **instance name**, which appears in your Amazon Connect URL.

   ![Amazon Connect console](https://console.aws.amazon.com/connect/home)

   **Amazon Connect virtual contact center instances**

<table>
<thead>
<tr>
<th>Instances</th>
<th>Access URL</th>
<th>Channels</th>
<th>Create date</th>
<th>Status</th>
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</thead>
<tbody>
<tr>
<td>mytest67</td>
<td><a href="https://mytest67.my.connect.aws">https://mytest67.my.connect.aws</a></td>
<td>Inbound, outbound telephony</td>
<td>1/12/2022</td>
<td>Active</td>
</tr>
</tbody>
</table>

3. In the navigation pane, choose **Customer profiles**.

   **The Customer profiles domain page** lists the applications that are available for integration.

   ![Amazon Connect console](https://console.aws.amazon.com/connect/home)

   **Amazon Connect**

<table>
<thead>
<tr>
<th>Overview</th>
<th>Telephony</th>
<th>Data storage</th>
<th>Data streaming</th>
<th>Analytics tools</th>
<th>Tasks</th>
<th><strong>Customer profiles</strong></th>
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</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

4. Choose **Enable customer profiles** to get started.

5. At the **Customer profiles enable** page, choose **Create new domain**. Under **Specify a domain**, enter a friendly name that's meaningful to you, such as your organization name, for example, **CustomerProfiles-ExampleCorp**.
6. Under **Specify dead-letter queue**, choose whether to send failed events to a dead-letter queue. This is helpful if you want to get visibility into data that failed to be ingested. It also gives you the option to retry these failed data ingestions in the future.

Following are the steps to create a dead-letter queue:

- On the **Customer profiles enable** page, choose **Create new or select existing SQS queue** and then choose **Create a new Dead Letter Queue**.

- A new tab in your browser opens for the Amazon SQS console. Choose **Create queue**.

- On the **Create queue** page, choose **Standard**, then assign a name to your queue.
• In the Access policy section, choose Advanced.

The Version name, policy ID, and Statement appear. If needed, update this section to give access to only the appropriate roles.

• At the end of the Statement section (line 15 in the following image) add a comma after }, and press Enter.

```
{
  "Sid": "Customer Profiles SQS policy",
```

• Then copy and paste the following code:

```
{
  "Sid": "Customer Profiles SQS policy",
```
To replace `region`, `accountId`, and `YourQueueName` with your information, copy and paste the `Resource` information from line 14.

- Choose `Create queue`.
- Return to the tab in your browser for the Amazon Connect console, `Customer profiles enable` page. Click or tap in the `Choose existing SQS queue` box to select the queue you just created from the dropdown list.

7. Under `Specify KMS key`, create or enter your own AWS KMS key for encryption. Following are the steps to create your AWS KMS key:
• On the Customer profiles enable page, choose Create an AWS KMS key.

• A new tab in your browser opens for the Key Management Service (KMS) console. On the Configure key page, choose Symmetric, and then choose Next.

• On the Add labels page, add a name and description for the key, and then choose Next.
• On the Define key administrative permissions page, choose Next.
• On the Define key usage permissions page, choose Next.
• On the Review and edit key policy page, choose Finish.

In the following example, the name of the key starts with bcb6fdd:

• Return to the tab in your browser for the Amazon Connect console, Customer profiles enable page. Click or tap in the Specify KMS key box for the key you created to appear in a dropdown list. Choose the key you created.

8. Choose Submit. The completed page looks similar to the following image.
You're done! Amazon Connect Customer Profiles is enabled. Now with every new contact that comes in, Amazon Connect creates a customer profile record. It then tracks the contact history for that phone number (voice) or email address (chat).

Your agents can create new customer profiles (p. 1297) and view contact records for your customers.

Next steps

1. Make Customer Profiles available through the agent application (p. 604).
2. Assign agents permissions to access Customer Profiles in the agent application (p. 608).
3. Integrate with external applications that profile customer profile data (optional) (p. 608).
4. Enable Identity Resolution to identify two or more similar profiles, and consolidate them (p. 596).

Use Identity Resolution to consolidate similar profiles

A similar profile is when two or more profiles are determined to be for the same contact. There can be multiple profiles when customer records are captured across multiple channels and applications for the same customer, and do not share a common unique identifier.

Identity Resolution automatically finds similar profiles and helps you consolidate them. It runs an Identity Resolution Job on a weekly basis, which performs the following steps:

1. Automatic profile matching (p. 597)
2. Automatic merging of similar profiles (p. 598) based on your consolidation criteria

Each time an Identity Resolution Job runs, it displays metrics on the Customer Profiles page. The metrics show the number of profiles it reviewed, the number of match groups found, and the number of profiles consolidated.

Additional charges may apply for enabling Identity Resolution. For more information, see Amazon Connect pricing.
How Identity Resolution works

This topic describes how Identity Resolution performs automatic profile matching, and if set up, how it automatically merges similar profiles.

Automatic profile matching

To identify similar profiles, Identity Resolution uses machine learning to review the following Personal Identifiable Information (PII) attributes in each profile:

- **Name**: All names are reviewed for similarity, including first name, middle name, and last name.
- **Email**: All email addresses are reviewed for similarity, including personal email and business email. They are not case sensitive.
- **Phone number**: All phone numbers and formats are reviewed for similarity, including home phone, mobile phone, and business phone.
- **Address**: All address types and format are reviewed for similarity, including business address, mailing address, shipping address, and billing address.
- **Date of birth**: All birth dates and formats are reviewed for similarity.
It uses this information to create match groups of similar profiles.

**Match groups**

A match group consists of all similar profiles which represents a customer. Each match group contains the following information:

- A match ID, which uniquely identifies the group of two or more similar profiles that represent a contact
- The number of profile IDs in the match group
- A confidence score associated with the match group

**Confidence scores**

After the auto-matching process runs, you can query the S3 bucket or use the `GetMatches` API to filter results based on confidence scores. For example, you can filter out high confidence matches for a further review.

A confidence score is a number between 0 and 1 that represents the confidence level of assigning profiles to a match group. A score of 1 likely indicates an exact match.

**Automatic merging of similar profiles**

After the profiles are matched, the Identity Resolution Job can optionally merge similar profiles based on your criteria. If you delete or update criteria, the updated criteria is applied to similar profiles in the next run.

**Important**

You cannot undo the consolidation process. We strongly recommend using the `GetAutoMergingPreview` API to do a dry run of the automatic merging process before running the Identity Resolution Job.

**How the auto-merging process works**

- **All selected attributes in a consolidation criteria are connected with AND criteria with exact value comparison before merging.**
  - For example, when multiple attributes are specified in the criteria, such as email address and phone number, then all similar profiles in a match group that have the exact same value of email address and phone number are merged.
  - If one or more of the similar profiles in a match group have a different value or missing value for one or more of the attributes in a criteria, the similar profiles are merged.

  For example, one match group may be five similar profiles out of which three profiles are consolidated, because these three profiles meet the criteria. The other two profiles are not merged, because they do not meet the criteria.

- **Multiple criteria are evaluated in the order of priority starting with Criteria 1.**
  - The sequence in which consolidation criteria are applied. It starts with Criteria 1 as the highest priority to Criteria 10 as the lowest priority.
  - After the Identity Resolution Job applies one criteria, it applies the next criteria to the consolidated profiles and the remaining similar profiles in a match group.
  - You can have a maximum of 10 consolidation criteria.

- **Each criteria runs independently and operates as an OR with other criteria.**
  - When you have multiple criteria, each criteria is applied individually and in the sequence of priority order before the Identity Resolution Job moves on to the next criteria.
• All criteria is applied in the sequence in which you listed them. It doesn't matter whether the criteria fails or succeeds to consolidate similar profiles in a match group.

• **By default, profile conflicts are managed by recency.**
  • When two or more similar profiles in a match group meet a consolidation criteria, the resulting consolidated profile is created by comparing each value of the profile attributes constituent similar profiles.
  • Each attribute may have an exact match in value. In this case, any value may be selected for that attribute.
  • If there is a conflict between values of two or more constituent similar profiles, the most recently updated attribute is chosen.

  For example, if Jane Doe has three different values in the Address attribute of the constituent similar profiles, Identity Resolution picks the most recent addressed to create the unified profile.

  • By default, the **Last updated timestamp** is used to determine the record that was most recently updated.

• **Profile conflicts are managed by source object type and recency.**
  • You can also change default behavior of conflict resolution to choose a similar constituent profile from a specific source as the source of truth to inform conflict resolution.
  • If you want to specify a data source to use for profile conflicts, you can choose one of your object types as a data source if you select **Source with last updated timestamp**.
  • The most recently updated record from the specified object type is used for resolving profile conflicts.

• **Last updated timestamp identifies which record was most recently updated.**
  • The timestamp attribute associated with the source record's object type is used to identify which record was most recently updated.
  • If the timestamp attribute is not available for the object type, the timestamp on which the record was ingested into your Customer Profiles domain is used.
  • If you have custom object types, you need to add timestamps. See **Missing timestamp for profile conflicts** (p. 602) for more information.

• **Consolidation is a one-way process and cannot be undone.**
  • Choose your criteria carefully before starting the consolidation process. For more information, see **Tips for creating strong criteria** (p. 601).
  • Use the **GetAutoMergingPreview** API to test the auto-merging settings of your Identity Resolution without merging your data.

For an example that shows how criteria is applied, see **Example: How sample criteria are applied** (p. 602).

### Enable Identity Resolution for your Customer Profiles domain

When you enable Identity Resolution you specify the following information:

• When the Identity Resolution Job should run on a weekly basis. By default, it runs Saturdays at 12AM UTC.

• The Amazon S3 bucket where the Identity Resolution Job should write the results of the automatic profile matching process. If you don't have an S3 bucket, you'll have the option to create one during the enablement process.

You can query the Amazon S3 bucket or use the **GetMatches** API to filter results based on **confidence scores** (p. 598).
Notes
After you enable Identity Resolution, you'll see the option to create consolidation criteria (p. 601) for the optional auto-merging process.

To enable Identity Resolution

1. You must have a Customer Profiles domain enabled for your instance. For instructions, see Enable Customer Profiles for your instance (p. 588).
2. In the navigation pane, choose Customer profiles.
3. In the Identity Resolution section, choose Enable Identity Resolution.
4. On the Enable Identity Resolution page, specify the date and time when you want the Identity Resolution Job to run.
5. If you want to review the matched profile IDs from an Amazon S3 bucket, select Write profile ID matches to Amazon S3. Otherwise, you can use the GetMatches API to review matching profiles.
   - Specify the Amazon S3 bucket where the Identity Resolution Job should write the profile matches.
We recommend applying a policy to prevent a confused deputy security issue. For more information and a sample policy, see Amazon Connect Customer Profiles cross-service confused deputy prevention (p. 1242).

6. When done, choose **Enable Identity Resolution**.

7. After you enable Identity Resolution the Identity Resolution Job runs for the first time within 24 hours.

   **Note**
   Before running an Identity Resolution Job for the first time on a new Customer Profiles domain, we recommend checking your profile metrics to make sure that profiles have been created. Otherwise, there won’t be any matching results.

8. You may want to set up consolidation criteria for auto-merging matching profiles. If so, see Set up consolidation criteria for Identity Resolution (p. 601).

### Set up consolidation criteria for Identity Resolution

**Note**
You must enable Identity Resolution (p. 601) in order to access the option to create consolidation criteria using the Amazon Connect admin console.

When similar profiles are detected by an Identity Resolution Job, the process can automatically merge them into a unified profile based on consolidation criteria that you specify.

The attributes that you select are compared across all similar profiles in a match group for exact match. For example, if you specify email as an attribute in the criteria, then all similar profiles in a match group that have exact same value of email address are merged into a unified profile.

**Tip**
If you want to set up your own merging logic, use the MergeProfiles API.

### Limits

You can select any attribute from the standard profile (p. 652) to compare similar profiles. For example, you might choose phone number, email address, and name, as well as custom attributes.

You can specify up to:

- 10 consolidation criteria
- 20 attributes per criteria

### Tips for creating strong criteria

To improve the targeting of unique profiles and to avoid consolidating profiles that are not duplicates, we recommend the following steps:

- Select attributes that can uniquely identify a customer and are not likely to be the same across customers, such as an account number or a form of government ID.
- Avoid single attribute criteria. Select multiple attributes to create a combination of attributes to improve targeting. For example:
  - **Phone number** with **First name**, **Middle name**, **Last name** is stronger criteria than
  - **Phone number** alone, or
  - The combination of **First name**, **Middle**, **name**, **Last name** alone
Set up consolidation criteria

• Select all attributes within a specific attribute group, when applicable. For example, if you want to use name, select all the related name attributes: First name, Middle name, Last name. If you want to use business address, select all the related business address attributes.

• Include one of the following attributes likely to uniquely identify a customer in combination with other attributes in the criteria:
  • Account number
  • Phone number
  • Email

How to set up automerging criteria

Before setting up your consolidation criteria for automatic merging, or automerging, we recommend reviewing How the auto-merging process works (p. 598).

1. After you enable Identity Resolution, on the Identity Resolution page you’ll have the option of setting up auto-merging criteria. Choose Create consolidation criteria.

2. If you receive a Missing timestamp dialog box, we recommend adding new timestamp attributes to your custom object types before continuing. See Missing timestamp for profile conflicts (p. 602).

3. In the Profile conflicts section, choose how profile conflicts should be resolved when two or more records have conflicts.

4. In the Consolidation criteria section, create one or more criteria. We recommend including at least two or more attributes per criteria.

Missing timestamp for profile conflicts

The Missing timestamp message is displayed if you have custom object type mappings.

Use the PutProfileObjectType API to add the following new attributes to your custom object type:

• sourceLastUpdatedTimestamp
• sourceLastUpdatedTimestampFormat

If the timestamp attribute is not specified, you can continue to create consolidation criteria, however, a default timestamp of when the records were ingested into Customer Profiles is used. We recommend adding the new attributes before creating your consolidation criteria.

If you have already defined a custom object type and want to update your custom object type, we run a scheduled backfill every week to update your existing profiles with the sourceLastUpdatedTimestamp. To opt in to the scheduled backfill:

1. Update your custom profile object type by using the PutProfileObjectType API.
2. After you update your custom profile object type, open an AWS Support ticket and we’ll schedule the backfill for you. The scheduled backfill runs until end of February 2022.

Alternatively, you can delete and then re-create the ingestion/connector you have for your domain that uses the custom object type. All of your data will be re-ingested using your updated object type and sourceLastUpdatedTimestamp will be parsed from it.

Example: How sample criteria are applied

In this example there are three criteria:
• **Resolve profile conflicts** is set to Use last updated timestamp. This means when two fields have conflicting values, Identity Resolution is going to use the last updated timestamp to determine which value to use.

• Criteria 1:
  • First name, Last name
  • Email

• Criteria 2:
  • Phone number

These criteria are applied to the following profiles:

• Profile A
  • John Doe [last updated 05:00a]
  • doefamily@anyemail.com [last updated 05:00a]
  • 555-555-5555 [last updated 07:00a]

• Profile B
  • John Doe [last updated 04:00a]
  • doefamily@anyemail.com [last updated 06:00a]
  • 555-555-5556 [last updated 04:00a]

• Profile C
  • Jane Doe [last updated 06:00a]
  • doefamily@anyemail.com [last updated 07:00a]
  • 555-555-5555 [last updated 06:00a]

Following are the results when Criteria 1 is applied:

• Profile A and B are merged = Profile AB

This results in ProfileAB, which looks like the following:

• John Doe [last updated 05:00a]
• doefamily@anyemail.com [last updated 07:00a]
• 555-555-5555 [last updated 06:00a]

Because there's a conflict between the phone numbers, Identity Resolution uses the last timestamp to choose the 555-555-555 number.

Next, Criteria 2 is applied. Following are the results:

• Profile AB and C are merged = Profile ABC

This results in ProfileABC, which looks like the following:

• Jane Doe [last updated 06:00a]
• doefamily@anyemail.com [last updated 07:00a]
• 555-555-5555 [last updated 07:00a]

Identity Resolution uses the First name, Last name, and Email from Profile C because they have the most recent timestamps.
Identity Resolution metrics

Each time an Identity Resolution Job completes, metrics about the process are displayed on the Customer Profiles dashboard. You can review historic metrics for past runs by choosing the Run history tab on the Identity Resolution page.

The following metrics are generated each time the Identity Resolution Job runs:

- **Profiles reviewed**: The number of profiles that the Identity Resolution Job reviewed for matches.
- **Match groups found**: The number of match groups that were found.
- **Profiles consolidated**: The number of profiles that were consolidated based on the specified consolidation criteria.

Disable Identity Resolution

You can disable Identity Resolution when you no longer want it to automatically find similar profiles. If you have consolidation criteria, all your criteria will be deleted and your profiles will no longer be automatically consolidated. Profiles that have already been consolidated will remain consolidated.

Access Customer Profiles in the agent application

After you enable Amazon Connect Customer Profiles, agents can begin interacting with customers and access customer information to provide personalized service. This topic explains how to access the Connect Agent Application.

**Tip**
Make sure your agents have Customer profiles permissions in their security profile so they can access Customer Profiles. For more information, see Security profile permissions for Customer Profiles (p. 608).

Option 1: Use Customer Profiles with the CCP out-of-the-box

Customer Profiles is already embedded alongside the Contact Control Panel (CCP). Your agents will access the CCP and Customer Profiles in the same browser window using a link that looks like this:

- `https://instance name.my.connect.aws/agent-app-v2/

If you access your instance using the awsapps.com domain, use the following URL:

- `https://instance name.awsapps.com/connect/agent-app-v2/

For help finding your instance name, see Find your Amazon Connect instance name (p. 131).

Following is an example of what the CCP and Customer Profiles look like in the same browser window.
Option 2: Embed Customer Profiles into a custom agent application

When you embed your Contact Control Panel (CCP), you have the option of showing or hiding the pre-built CCP user interface. For example, you may want to develop a custom agent application that has a user interface you design, with customized buttons to accept and reject calls. Or, you may want to embed the pre-built CCP that's included with Amazon Connect into another custom app.

Regardless of whether you display the pre-built CCP user interface, or hide it and build your own, you use the Amazon Connect Streams library to embed the CCP and Customer Profiles into the agent's application. This way, Amazon Connect Streams is initialized, and the agent can connect and authenticate to Amazon Connect, and Customer Profiles.

For information about embedding Customer Profiles, see Initialization for CCP, Customer Profiles, and Wisdom.

To build your own widget while using raw data from Customer Profiles, see the Github documentation about how to use the CustomerProfilesJS open source library.

Tip
When you customize the agent's application, you determine the URL agents will use to access their agent application, and it might very different from the one provided by Amazon Connect. For example, your URL could be https://example-corp.com/agent-support-app.

Use contact attributes to autopopulate customer profiles

By default, Amazon Connect Customer Profiles uses the following values to search for and autopopulate a customer profile in its user interface:
- For voice contacts: Phone number
- For chat contacts: Customer name

To customize this behavior, use the following contact attributes:

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Type</th>
<th>JSONPath Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>profileSearchKey</td>
<td>The name of the attribute you want to use to search for a profile.</td>
<td>User-defined</td>
<td>Not applicable</td>
</tr>
<tr>
<td>profileSearchValue</td>
<td>The value of the key you want to search for, such as customer name or account number.</td>
<td>User-defined</td>
<td>Not applicable</td>
</tr>
</tbody>
</table>

For example, to search by email for chat contacts, you can set the `profileSearchKey` attribute to the `_email` search key, and provide the email value as the `profileSearchValue`. If you have defined custom keys in your profile objects, you can search by those search keys as well. To make sure your custom keys are searchable, see Key definition details (p. 648).

The following image shows how you might use these attributes in the Set contact attributes (p. 403) block.
Automatically associate a customer profile with a contact

By default, agents need to manually associate a customer profile with a contact based after they've verified the customer's identity. To change this behavior to automatically associate contacts with a profile based on the phone number, see Automatically associate the Contact Record with one profile found using the _phone key (p. 686).

If multiple profiles match a contact's phone number, the multiple matched profiles are shown to the agent. The agent needs to choose which profile to associate with the contact.
Security profile permissions for Customer Profiles

Assign the following Customer profiles permissions as needed to the agent's security profile:

- **View**: Enables agents to see the Customer profiles application. They can:
  - View profiles that are autopopulated in the agent app.
  - Search for profiles.
  - View details stored in customer profiles (for example, Name, Address).
  - Associate contact records to profiles, as shown in the following image.

- **Edit**: Enables agents to edit details in the customer profile (for example, change address). They inherit View permissions by default.

- **Create**: Enables agents to create and save a new profile. They inherit View permissions by default, but don't inherit Edit permissions.

For information about how add more permissions to an existing security profile, see Update security profiles (p. 797).

By default, the Admin security profile already has permissions to perform all Customer profiles activities.

Integrate external applications with Customer Profiles

Amazon Connect provides a set of pre-built integrations powered by Amazon AppFlow and Amazon EventBridge. After you enable Amazon Connect Customer Profiles, you can use these integrations to combine information from external applications such as Salesforce or Zendesk, with contact history from Amazon Connect. This creates a customer profile that has all the information agents need during customer interactions in a single place.

You can also use Customer Profiles in Amazon AppFlow. Amazon AppFlow supports CustomerProfiles as a destination. You can use Amazon AppFlow APIs to send data into Customer Profiles using CustomerProfiles as the destination name.
Before you begin, make sure you are using a customer managed key. For more information about configuring KMS keys, see Create a KMS key to be used by Customer Profiles to encrypt data (required) (p. 589).

Set up integrations

You can setup an integration using either featured applications in Amazon Connect or external applications using Amazon AppFlow by choosing the method that best fits your use-case below. For more detailed information on the integration of ServiceNow and Slack, see the blog post Combine data from multiple sources using Amazon AppFlow and build a unified Amazon Connect Customer profile for contact center agents.

Contents
- Set up integration for featured applications in Amazon Connect (p. 609)
- Set up integration for external applications using Amazon AppFlow (p. 629)
- Delete/stop Customer Profiles integrations (p. 640)

Set up integration for featured applications in Amazon Connect

These integrations use Amazon Connect featured applications to provide periodic updates to Amazon Connect Customer Profiles.

Before you begin

Bulk ingestion of data

When you set up your integration, you are prompted to enter a date how far back you want to go to ingest data. If you choose a date that is more than two months ago, Customer Profiles automatically enables bulk ingestion by creating multiple flows. It does this so you don't have to calculate how many flows you need to ingest data.

When automatic bulk ingestion is enabled, Customer Profiles does the following:

- Sets the batch size to two months.
- Retries on transient failures up to three times before failing.

You can use the CreateIntegrationWorkflowRequest API to call your own batch size.

Why am I asked to select or create an IAM role?

For Salesforce, Marketo, and ServiceNow, Customer Profiles helps improve the historical ingestion of these sources by using your IAM role to create several workflows to ingest your data quickly and efficiently.

For these sources, if you select more than 60 days back in the Date for importing records date picker, you will be prompted to create a new IAM role or select an existing one. This role allows Customer Profiles to manage your integration. It provides Customer Profiles with the necessary permissions to update and create a workflow to ingest your data. After the workflow is complete, Customer Profiles creates a standard, continuous integration that ingests your new data as it is updated in your source.

The role created in the console is only useable by the domain it was created on. This is because Amazon Connect limits the access of the role to only the KMS key used by the domain.

For more information, see Grant least privilege access to your Customer Profiles execution role (p. 610).
Grant least privilege access to your Customer Profiles execution role

If you want to create your own IAM role, we recommend using the permissions shown in the following code to limit the role to the least permissions needed. Use the snippet below to create your role manually. Use your own KMS key and specify your Region where needed.

```
{
  "Version": "2012-10-17",
  "Statement": [
    {
      "Condition": {
        "ForAnyValue:StringEquals": {
          "aws:RequestTag/awsOwningService": "customer-profiles-integration-workflow"
        }
      },
      "Action": [
        "appflow:CreateFlow",
        "appflow:TagResource",
        "profile:TagResource",
        "profile:PutIntegration"
      ],
      "Resource": "*",
      "Effect": "Allow",
      "Sid": "CreateFlowResources"
    },
    {
      "Condition": {
        "ForAnyValue:StringEquals": {
          "aws:ResourceTag/awsOwningService": "customer-profiles-integration-workflow"
        }
      },
      "Action": [
        "appflow:UseConnectorProfile"
      ],
      "Resource": "*",
      "Effect": "Allow",
      "Sid": "UseConnectorResources"
    },
    {
      "Condition": {
        "ForAnyValue:StringEquals": {
          "aws:ResourceTag/awsOwningService": "customer-profiles-integration-workflow"
        }
      },
      "Action": [
        "appflow:DescribeFlow",
        "appflow:DescribeFlowExecutionRecords",
        "appflow:DeleteFlow",
        "appflow:StartFlow",
        "appflow:StopFlow",
        "appflow:UpdateFlow",
        "profile:DeleteIntegration"
      ],
      "Resource": "*",
      "Effect": "Allow",
      "Sid": "AccessFlowResources"
    },
    {
      "Action": [
        "kms:CreateGrant",
        "kms:ListGrants"
      ],
      "Resource": "{{YourKMSKeyConsumedByTheDomain}}",
      "Condition": {
        "StringEquals": {
```

610
Monitor your Customer Profiles integrations

After your connection is established, if it stops working, delete the integration and then re-establish it.

What to do if objects aren't being sent

If an object fails to be sent, choose Flow details to learn more about what's gone wrong.

You may need to delete the configuration and re-connect to the external application.

Set up integration for Salesforce, ServiceNow, Marketo, or Zendesk

To provide periodic updates to Amazon Connect Customer Profiles, you can integrate with Salesforce, ServiceNow, Marketo, or Zendesk using Amazon AppFlow. You first set up the connection in Amazon Connect and the application of your choice, and then verify the integration.

Set up the connection in Amazon Connect and Salesforce, ServiceNow, Marketo, or Zendesk

1. Open the Amazon Connect console at https://console.aws.amazon.com/connect/.
2. On the instances page, choose the instance alias. The instance alias is also your instance name, which appears in your Amazon Connect URL.
3. In the navigation pane, choose Customer profiles.

5. On the Select source page, choose which external application you want to get customer profiles data from. You can view the integration requirements to better understand the connection requirements needed for your application.

6. On the Establish connection page, choose one of the following:
   - Use existing connection: This allows you to reuse existing Amazon AppFlow resources you may have created in your AWS account.
   - Create new connection: Enter the information required by the external application.
7. On the **Integration options** page, choose which source objects you want to ingest and select their object type.

Object types store your ingested data. They also define how objects from your integrations are mapped to profiles when they are ingested. Customer Profiles provides default object type templates you can use that define how attributes in your source objects are mapped to the standard objects in Customer Profiles. You can also use the object mappings that you’ve created from the `PutProfileObjectType`. When adding or creating the Salesforce integration for the user created data mapping, you need to specify the specific data mapping, otherwise it will choose the Salesforce default data mapping for object type. You can create your data mapping and use it when setting up a featured data connector.
8. For the **Ingestion start date**, Customer Profiles starts ingesting records created after this date. By default, the date for importing records is set at 30 days prior.

9. On the **Review and integrate** page, check that the **Connection status** says **Connected**, and then choose **Create integration**.

10. After the integration is set up, back on the **Customer profiles configuration** page, choose **View objects** to see what data is being batched and sent. Currently, this process ingests records that were created or modified in the last 30 days.
Set up integration for Segment

To provide periodic updates to Amazon Connect Customer Profiles, you can integrate with Segment using Amazon AppFlow. You first set up the connection in Amazon Connect and Segment, and then verify the Segment integration.

Set up the connection in Amazon Connect and Segment

1. Open the Amazon Connect console at https://console.aws.amazon.com/connect/.
2. On the instances page, choose the instance alias. The instance alias is also your instance name, which appears in your Amazon Connect URL.
3. In the navigation pane, choose Customer profiles.
5. On the **Select source** page, choose **Segment**. Review the application requirements that are listed on the **Select application** page.

6. On the **Establish connection** page, choose one of the following:
   - **Use existing connection**: This allows you to reuse existing Amazon EventBridge resources that you may have created in your AWS account.
   - **Create new connection**: Enter the information required by the external application.
### Establish a connection with Segment

Customer Profiles uses Amazon EventBridge to integrate with this data source.

#### Connection method

- **Use existing connection**: Reuse an existing connection to ingest objects from this data source.
- **Create new connection**: Create a new connection to ingest objects from this data source.

#### Connection name

The connection name will be referenced by integrations that use this connection.

#### Connection URL

The location of your data source that you want Customer Profiles to ingest your objects from.

#### Client ID

This value distinguishes multiple clients in the same location from one another.

#### Connection name

Provide a name for your connection. The connection name is referenced by integrations that use this connection.

#### Connection URL

Enter your application connection URL. This URL is used for deep-linking into the objects created in your external application. The connection URL is the Segment workspace URL available on the application website.

To find your workspace URL:

1. Log in to your segment.com account.
2. Go to **Settings, General settings**.
3. Copy the URL from your browser.

#### Client ID

Enter your application client ID. This is a string that uniquely distinguishes the client in your external application. This client ID is the Source Name available on the application website. You use the ID that you specify here to identify the client that you want Customer Profiles to ingest your objects from.

To find your source ID:

1. Log in to your segment.com account.
2. Go to **Sources**, and choose a source.
3. Go to **Settings, API Keys**.
4. Copy your **Source ID**.

7. Customer Profiles uses Amazon EventBridge for integrations with Segment. Log in to your application to continue setting up the Amazon EventBridge event source.
8. On the **Source set up** page, copy your AWS account ID to your clipboard, and then choose **Log in to Segment** to configure Amazon EventBridge.

9. Use the following instructions to set up Segment:
   
a. Log in to Segment.
   
b. In your application, select a source to set up the destination to Customer Profiles.
   
c. Paste in your AWS account ID and select your AWS Region.
   
d. Toggle **ON**, to activate your partner event source.
   
e. Go to **Event Tester**, and send a test event to complete activating your partner event source.
   
f. After you set up the event source destination, return to Customer Profiles. You will see an alert that indicates Amazon Connect has successfully connected with Segment.

10. On the **Integration options** page, choose which source objects you want to ingest and select their object type.

    Object types store your ingested data. They also define how objects from your integrations are mapped to profiles when they are ingested. Customer Profiles provides default object type templates you can use that define how attributes in your source objects are mapped to the standard objects in Customer Profiles. You can also use the object mappings that you’ve created from the **PutProfileObjectType**.

11. For the **Ingestion start date**, Customer Profiles starts ingesting records created after the integration is added.

    **Note**
    
    If you need historical records, you can use Amazon S3 as an integration source to import them (p. 690).

12. On the **Review and integrate** page, check that the **Connection status** says **Connected**, and then choose **Add integration**.

13. After the integration is set up, back on the **Customer profiles configuration** page, the **Integrations** page displays which integrations are currently set up. The **Last run** and **Integration health** are not currently available for this type of integration.
To see what data is being sent, choose the integration and then choose **View objects**.

### Verify your Segment integration

To perform this step you need the following prerequisites:

- Access to your Segment workspace.
- Access to the Amazon Connect Contact Control Panel (p. 293).

### To verify your Segment integration

1. Go to your Segment workspace dashboard and choose **Destinations**.
2. You will see a list of destinations where that Segment sends data. Choose the EventBridge destination for Customer Profiles.

3. Choose the Event Tester tab. From this page you will send a test event to Customer Profiles. The event is ingested and turned into a customer profile that you can view in the Amazon Connect agent application.
4. Select **Identify** as the event type, and select **Event Builder** as your input method.

5. You can specify a **User ID** and some traits. Agents can search for these traits in the agent application.

6. Choose **Send Event**.

7. The event delivery should be almost instantaneous but allow it a minute for it to be delivered and create a customer profile.

8. Open the Amazon Connect agent application. Search for the user ID you entered in the **Event Builder**. You should be able to see the customer profile with the user ID and the traits you entered.

9. If you cannot see the customer profile, then there is a problem with your integration. To troubleshoot:
   1. Go to the Amazon EventBridge console.
   2. Check whether the EventSource is Active and the matching EventBus exists and is running.

   If these are working, contact AWS Support for assistance investigating the issue.

**Monitor your Customer Profiles integrations**

After your connection is established, if it stops working, delete the integration and then re-establish it.

**What to do if objects aren't being sent**

If an object fails to be sent, choose **Flow details** to learn more about what's gone wrong.

You may need to delete the configuration and re-connect to the external application.
Set up integration for Shopify

To provide periodic updates to Amazon Connect Customer Profiles, you can integrate with Shopify using Amazon AppIntegrations. You first set up the connection in Amazon Connect and Shopify, and then verify the Shopify integration.

Set up the connection in Amazon Connect and Shopify

1. Open the Amazon Connect console at https://console.aws.amazon.com/connect/.
2. On the instances page, choose the instance alias. The instance alias is also your instance name, which appears in your Amazon Connect URL.

3. In the navigation pane, choose Customer profiles.

5. On the Select source page, choose Shopify. Review the application requirements that are listed on the Select application page.
6. On the **Establish connection** page, choose one of the following:

- **Use existing connection**: This allows you to reuse existing Amazon EventBridge resources that you may have created in your AWS account.
- **Create new connection**: Enter the information required by the external application.
• **Connection name**: Provide a name for your connection. The connection name is referenced by integrations that use this connection.

• **Connection URL**: Enter your application connection URL. This URL is used for deep-linking into the objects created in your external application. The connection URL is the Shopify Partner app URL available on the application website.

To find your Shopify Partner app URL:
• Log in to your partners.shopify.com account.
• Go to your app.
• Copy the URL from your browser.

• **Client ID**: Enter your application client ID. This is a string that uniquely distinguishes the client in your external application. This client ID is the Source Name available on the application website. You use the ID that you specify here to identify the client that you want Customer Profiles to ingest your objects from. Your client ID may be available after following the Source setup steps.

To find your source name:
• Log in to your partners.shopify.com account.
• Go to your app.
• Copy the source name from your Amazon EventBridge event source.

7. On the **Source set up** page, copy your AWS account ID to your clipboard, and then choose **Log in to Shopify**.

8. Use the following instructions to set up Shopify:
   b. Under Amazon EventBridge, choose **Create source**.
   c. Paste in your AWS account ID and select your AWS Region.
   d. After you set up the event source destination, return to Customer Profiles. You will see an alert that indicates Amazon Connect has successfully connected with Shopify.

9. On the **Integration options** page, choose which source objects you want to ingest and select their object type.

Object types store your ingested data. They also define how objects from your integrations are mapped to profiles when they are ingested. Customer Profiles provides default object type templates you can use that define how attributes in your source objects are mapped to the standard objects in Customer Profiles. You can also use the object mappings that you've created from the `PutProfileObjectType`. 
10. For the **Ingestion start date**, Customer Profiles starts ingesting records created after the integration is added.

   **Note**
   If you need historical records, you can use Amazon S3 as an integration source to import them (p. 690).

11. On the **Review and integrate** page, check that the **Connection status** says **Connected**, and then choose **Add integration**.

   **Note**
   After adding this integration, you need to set up webhook subscriptions (p. 627) to allow events to start flowing into this integration.
12. After the integration is set up, back on the Customer profiles configuration page, the Integrations page displays which integrations are currently set up. The Last run and Integration health are not currently available for this type of integration.

To see what data is being sent, choose the integration and then choose View objects.

13. Go to the next step to use the API to set up webhook subscriptions so events can start flowing into this integration.
Set up integration for featured applications in Amazon Connect

Set up webhook subscriptions

1. Use the following URL to make sure your app has the required permissions:

   https://{shop}.myshopify.com/admin/oauth/authorize?
   client_id={api_key}&scope={scopes}&redirect_uri={redirect_uri}&state={nonce}

   Where:
   - shop is the name of your Shopify store.
   - api_key is the API Key of your Shopify app. You can find this on the Shopify App details page.
   - scopes should have the value read_customers, read_orders, read_draft_orders.
   - redirect_uri is the redirect URI you specified for your app when you created it. For our purposes it can be any valid URL.
   - nonce can be any unique value to identify a given authorization request from others. We recommend using a timestamp.

   After you have constructed the URL, paste it into your browser. An installation/authorization page similar to the following image is displayed, asking the store owner to give permissions for the defined scope.

2. Choose Install unlisted app to install and authorize the app on behalf of your store.

   You will be taken to the redirect URI that you entered with an authorization code appended to redirect URI as a query parameter. For example:

   https://example.org/some/redirect/uri?
   code={authorization_code}&hmac=da9d83c171a00a41f8db91a950508985&host={base64_encoded_hostname}&timestamp=1409617544&state={nonce}&shop={shop_origin}&host={host}

3. Copy the authorization_code from this URI. You're going to use it to get a permanent access token in the next steps.

4. Go to whatever tool you use to make API calls. For example, CURL or POSTMAN.
5. To get a permanent access token, make a POST request to the Shopify Admin API to this endpoint:

```
https://{shop}.myshopify.com/admin/oauth/access_token
```

with the following request body:

```
{
  "code": "authorization_code_received_from_redirect_uri",
  "client_id": "your_app_api_key",
  "client_secret": "your_app_api_secret"
}
```

This request returns the following response:

```
{
  "access_token": "permanent_access_token",
  "scope": "read_customers,read_orders,read_draft_orders"
}
```

6. Note the access_token. This is a permanent token that has the provided scope from a previous step. Now you are ready to create webhook subscriptions.

7. For the following API calls, make sure you set the HTTP header key X-Shopify-Access-Token to the access_token you received from the earlier call's response.

8. To setup webhook subscriptions, make the following POST request for each of the topic values listed in the next step:

   Endpoint: https://{shop}.myshopify.com/admin/api/2021-04/webhooks.json
   
   Request Body:

   ```
   {
     "webhook": {
       "topic": "replace_this_with_one_of_the_topics_in_the_list_below",
       "address": "this_is_the_event_source_arn_generated_when_you_created_the_event_integration",
       "format": "json"
     }
   }
   ```

9. For each subscription replace the value for topic with the following values:

   - customers/create
   - customers/enable
   - customers/update
   - draft_orders/create
   - draft_orders/update
   - orders/cancelled
   - orders/create
   - orders/fulfilled
   - orders/paid
   - orders/partially_fulfilled
   - orders/updated

You're now all set to receive events from your Shopify store. Next, verify your Shopify integration.
Verify your Shopify integration

1. Sign in as Admin to your Shopify Store.
2. In the left navigation menu, choose Customers.
3. Select Add Customer.
4. Enter your customer details. Be sure to enter a phone number and email. These don't have to belong to a real customer. You will delete this customer entry after verifying the integration.
5. Save the customer object.
6. The event delivery should be almost instantaneous but allow a minute for it to be delivered and to create a customer profile.
7. Open the Amazon Connect agent experience and look up the user by the email or phone number you entered into the Shopify Store. You should be able to see the customer profile with the same email or phone number.
8. If you cannot see the customer profile, then there is a problem with your integration. To troubleshoot:
   1. Go to the Amazon EventBridge console.
   2. Check whether the EventSource is Active and the matching EventBus exists and is running.

   If these are working, contact AWS Support for assistance investigating the issue.

Monitor your Customer Profiles integrations

After your connection is established, if it stops working, delete the integration and then re-establish it.

What to do if objects aren't being sent

If an object fails to be sent, choose Flow details to learn more about what's gone wrong.

You may need to delete the configuration and re-connect to the external application.

Set up integration for external applications using Amazon AppFlow

These integrations use Amazon AppFlow to provide periodic updates to Amazon Connect Customer Profiles. The below steps provide guidance on configuring a connector of your choosing using Amazon AppFlow, configure data mappings, and configure integrations to ingest your customer data.

For more information on Amazon AppFlow pricing, see Amazon AppFlow pricing.

For more information on Amazon AppFlow supported connectors see Supported source and destination applications.

Before you begin

When you enable Amazon Connect Customer Profiles you create a Customer Profiles domain, which is a container for all data, such as customer profiles, object types, profile keys, and encryption keys. The following are guidelines for creating Customer Profile domains:

- Each Amazon Connect instance can only be associated with one domain.
- You can create multiple domains, but they don't share external application integrations or customer data between each other.
• All the external application integrations you create are at a domain level. All of the Amazon Connect instances associated with a domain inherit the domain's integrations.

Prerequisite: Enable Customer profiles in your Amazon Connect instance

1. Open the Amazon Connect console at https://console.aws.amazon.com/connect/.
2. On the instances page, choose the instance alias. The instance alias is also your instance name, which appears in your Amazon Connect URL.
3. In the navigation pane, choose Customer profiles.
4. Choose enable Customer Profiles

In the form, you will be required to complete all the mandatory fields to create a Customer Profiles domain by following the steps below:

1. **Domain Setup.** You can Create New Domain and provide a name.
2. **Encryption.** Under Specify KMS key, you can enable encryption by either selecting an existing AWS KMS key, creating a new AWS KMS key, or you can choose Select existing domain.
3. **Error Reporting.** You can provide a Dead letter queue, which is an SQS queue to handle customer profile errors
4. Choose Submit and Customer Profiles will be get created using the Contact History information of your instance.

Set up an external application using Amazon AppFlow

You can add an external application integration to an Amazon Connect Customer Profiles domain via Amazon AppFlow by following steps below. You must create a flow for your data source in the Amazon AppFlow console and set Amazon Connect Customer Profiles as the destination prior to continuing in the Customer Profiles console. If you created a flow more than 14 days ago, it has expired and you will need to create a new flow for your integration.

You can optionally perform data transformations such as Arithmetic, Filter, Map, Map_all, Mask, Merge, Truncate, and Validate when using the AWS CloudFormation AWS::AppFlow::Flow Task resource prior to ingestion.

1. Log into your AWS Management Console, select Amazon AppFlow, and choose Create flow.

2. Enter the flow name and an optional flow description.
3. You can leave the **Data encryption** section as it is since your Amazon Connect Customer Profiles domain already has an existing AWS KMS key that will be used for this Flow. You can optionally create tags and then choose **Next**.

4. Select an external application of your choice in the **Source name** dropdown and then select the next relevant field. For example, if you wish to configure Slack, select Slack from the **Source name** dropdown. You can then either select an existing Slack flow or create a new connection.

5. If you chose to create a new connection, you can then enter the external application's details such as user name, password and subdomain. You can also select the AWS KMS key for data encryption and enter the connection name to identify this connection.
6. If you choose to use an existing connection you can select the specific external application object from dropdown. For example, if choosing an existing Slack connection, you can select Conversations as the object and then choose the specific Slack channel that will be used.

7. In the Destination details section, select Amazon Connect as the Destination name in the dropdown and select the Customer profile domain created in the previous prerequisite step.
8. You can select **Run on demand** which runs the flow only when you trigger it. You also have the option to run the flow at a specific time by setting a schedule. Choose **Next**.

<table>
<thead>
<tr>
<th>Flow trigger Info</th>
</tr>
</thead>
<tbody>
<tr>
<td>Choose how to trigger the flow</td>
</tr>
<tr>
<td>Trigger a flow by an event, run on a schedule, or run manually by choosing the Run flow button.</td>
</tr>
<tr>
<td><img src="https://example.com/run-on-demand" alt="Run on demand" /> Flow will run immediately when you trigger it.</td>
</tr>
<tr>
<td><img src="https://example.com/run-flow-on-schedule" alt="Run flow on schedule" /> Flow will run at specified times.</td>
</tr>
<tr>
<td><img src="https://example.com/run-flow-on-event" alt="Run flow on event" /> Flow will run when an event occurs.</td>
</tr>
<tr>
<td><img src="https://example.com/your-flow-will-run" alt="Your flow will run when you choose the Run flow button on the Flow details page." /></td>
</tr>
</tbody>
</table>

9. Choose **Manually map fields** under **Mapping method**. Choose the source fields from external application and then choose **Map fields directly**.
10. Review and choose **Create flow**.

For more information on creating flows in the Amazon AppFlow console, see [Creating flows in Amazon AppFlow](#).

For more information on the setup of external application and many other supported applications in Amazon AppFlow, see [Supported Amazon AppFlow source and destination applications](#).

**Set up data mappings to define how external application data is mapped to a Customer Profile**

Once Amazon AppFlow integration has been set up, you need to set up data mappings in Customer Profiles to define how data from the external application will be mapped to the Customer Profile. This will allow you to customize the data that you want to use to build your unified customer profile. Choose your mapping carefully, as you will not be able to choose a different mapping after creating the integration.

For more detailed information on data mappings, see [Object type mapping](#).

1. Log into your AWS Management Console, select **Amazon Connect** and choose Customer Profiles under your connect instance alias.
2. Choose **Data mappings** and then choose **Create data mapping**. Provide a Data Mapping name and a description.

3. Under **Mapping options**, you can choose your **Data source** as the external application, the **Flow name** that you created in the previous section, and the **Data definition method** as **Mapping destination**. Under **Mapping destination** you can choose the types of customer data that wish to define for your unified customer profiles. Choose **Next**.
4. Add customer, product, case and order attributes with source, destination, and content type, then choose Next.

5. Under Specify identifiers, you can select various attributes from your data source object that helps distinguish your data from other data source objects. You can select attributes from unique, customer, product, case and order identifiers. To learn more about identifiers, see Standard identifiers.
Set up integrations to ingest your customer data from an external application

Once the data mapping set up is done for an external application, you will set up the Data source integration to ingest your customer data.

1. Log into your AWS Management Console, select Amazon Connect. and choose Customer Profiles under your connect instance alias.
2. Under the Data source integrations section choose Add data source integration.
3. Under the **Data source** dropdown, select the external application and choose **Next**. You also have the option to choose **Create new flow** which will open the Amazon AppFlow console in a new tab.

4. Under the **Flow name** dropdown, select the flow you want to use from your data source and choose **Next**.

5. Under the **Data Mapping** dropdown, select the external application data mapping for the object to define how your data source is mapped to profiles. Choose **Next**.
6. Review and choose **Add data Source Integration**. The datasource integration of the external application will initially show as pending before moving to an active state.

View the unified customer profile in **Amazon Connect Customer Profile Agent CCP**

Your agents will now be able to view customer data that has been imported from an external application by logging in to the Amazon Connect Agent CCP using the following URL.

https://instance_name.my.connect.aws/ccp-v2/
Your agent will need to have the appropriate security profile permissions in order to view Customer Profiles and will be able to perform searches using a key name and value in the profiles search bar.

For more information on security profile permissions, see Security profiles.

Advanced users that wish to build their own custom agent application and embedded customer profiles can use StreamsJS which will provide more customization over the agent application.

Delete/stop Customer Profiles integrations

Note
Using the Amazon Connect console to delete mapping will only delete objects and data associated with that specific mapping. If there are multiple objects associated with a profile, then deleting a specific mapping may not clear the profile data. If you want to delete specific data, then you would delete the mapping, but your profiles may still exist if they contain data from other mappings. This could result in additional charges for the existing profiles. The preferred way to delete a domain and all data from Customer Profiles, including all profiles, is to use the DeleteDomain API.

Console method

If at any time you want to stop the ingestion of customer profile data, choose the integration/mapping and then choose Delete.

API method

• To delete customer profiles data for a specific integration, use the DeleteObjectType API.
• To delete the integrations, customer profiles, and all the customer profile data, use the DeleteDomain API.

To re-enable the ingestion of customer profile data, go through the setup steps again.

Object type mapping

Contents

• Concepts and terminology for customer object type mappings (p. 640)
• Create an object type mapping (p. 641)
• Object type mapping definition details (p. 647)
• Additional properties of object types (p. 685)
• Inferred profiles (p. 686)
• Automatically associate the Contact Record with one profile found using the _phone key (p. 686)
• Examples of object type mappings (p. 687)
• Implicit profile object types (p. 689)

Concepts and terminology for customer object type mappings

The following terminology and concepts are central to your understanding of custom object type mappings.
Standard profile object

A standard profile object is a predefined object that all profiles contain.

A standard profile object contains standard fields, such as phone numbers, email addresses, name and other standard data. This data can be retrieved in a standard format regardless of the source (for example, Salesforce, ServiceNow, or Marketo).

Profile object

A profile object is a single unit of information known about a profile. For example, the information about a phone call, a ticket, a case, or even a click-stream record from a web site.

A single profile object can be up to 250 KB and can be any structured JSON document.

- Every profile object has a type. For example, the profile object can be an Amazon Connect contact record, ServiceNow Users, or Marketo Leads.
- The type refers to the object type mapping.
- The object type mapping defines how that specific object should be ingested into Customer Profiles.

Profile

A profile contains all the information known about a specific customer or contact. It includes a single standard profile object and any number of additional profile objects.

Object type mapping

The object type mapping tells Customer Profiles how to ingest a specific type of data. It provides Customer Profiles with the following information:

- How data should be populated from the object and ingested into the standard profile object.
- What fields should be indexed in the object and how those fields should then be used to assign objects of this type to a specific profile.

Mapping template

A mapping template is a predefined object type mapping included with the Customer Profiles service.

Customer Profiles includes mapping templates for Amazon Connect contact records, Salesforce Accounts, ServiceNow Users, and Marketo Leads. For a complete list of available mapping templates, use the ListProfileObjectTypeTemplates API.

With mapping templates you can quickly ingest data from well known sources without having to specify any additional information.

Create an object type mapping

An object type mapping tells Customer Profiles how to ingest a specific type of data from a source application—such as Salesforce, Zendesk, or S3—into a unified standard profile object. You can then display data in that object (for example, customer address and email) to your agents using the Connect Agent Application.

The object type mapping provides Customer Profiles with the following information:

- How data should be populated from the object and ingested into the standard profile object.
- What fields should be indexed in the object and how those fields should then be used to assign objects of this type to a specific profile.
There are two ways you can create an object type mapping:

- Use the Amazon Connect console. The user interface makes data mapping features readily accessible. For example, you can add custom attributes, and define search and unique identifiers for contact models. No coding required!
- Use the Customer Profiles API. For more information, see the Amazon Connect Customer Profiles API Reference.

This topic explains how to create a mapping using the Amazon Connect console.

Create a data mapping using the Amazon Connect console

Amazon Connect provides a no-code experience for mapping customer data from homegrown and third-party applications with Amazon S3, Salesforce, ServiceNow, Zendesk, and Marketo.

To create a data mapping, you define an object type mapping that describes what the custom profile object looks like. This mapping defines how fields from your data can be used to either populate fields in the standard profile or how they can be used to assign the data to a specific profile.

Step 1: Set up data mapping

1. Open the Amazon Connect console at https://console.aws.amazon.com/connect/.
2. On the instances page, choose the instance alias. The instance alias is also your instance name, which appears in your Amazon Connect URL.

3. In the navigation pane, choose Customer profiles, Data mappings.
4. Choose Create data mapping to get started.
5. At the Set up data mapping page, in the Description section, add a name that will help you identify the source or purpose of this mapping. This is the meta-data of the object type.
6. In the Data source section:
   a. Choose where the data is coming from, such as Salesforce or Zendesk. Based on your selection, Amazon Connect automatically selects the available destinations based on the predefined template.
   b. Choose the source object. This is used for you to build your unified profile.
   c. In the Mapping destination section, choose the data that you want to use to build your unified customer profile. This information can be surfaced to your flows and agents to personalize the interactions with contacts.

       For more information about supported mapping destinations, see About mapping destinations (p. 645).
   d. In the Additional options section, you can choose when to opt out of creating new profiles, and how long to retain them. These options help you manage costs.
Note
By default the domain retention period is 366 days. To change the retention period set on your domain, use the UpdateDomain API.

7. If you chose a source other than S3, in the Establish a connection with application section, choose an existing Amazon AppFlow or Amazon EventBridge connection to connect your data, or create a new connection. You can create a new connection by entering details about your account for this data source.

After the connection is established, you will choose the objects that you want to ingest from your data source.

8. Choose Next.

Step 2: Map attributes

On the Map type attributes page, you’ll see the field mappings table filled with the predefined template, based on the mapping destination. For example, it's filled with customer, product, case, or order attributes. You can change the predefined template by choosing an attribute (such as AccountNumber) and then selecting a different destination, or enter one of your own custom attributes.

The following image shows an example of the page filled with customer attributes from the template.

You can remove what you don’t want populated in the customer profile, change the source, and add custom attributes.

This mapping uses your data source to populate customer contact information, such as a phone number in the customer profile. It uses attributes from the standard profile template.

Tip

- If you choose to add custom attributes, the destination will always have the prefix Attributes. added to it. This enables Amazon Connect to recognize that it is a custom attribute.
Agents can now view custom attributes in the Connect Agent Application under the **Additional Information** tab sorted in alphabetical order. You can create the name of your choice for each attribute that will be displayed to agents by using the following format: `/^Attributes\.[a-zA-Z0-9]+(?:\_[a-zA-Z0-9]+)*$/`

All ingested custom attributes will be displayed in the Connect Agent Application. If you do not wish to show certain information to your agents, do not ingest custom attributes at this time.

### Step 3: Specify identifiers

On the **Specify identifiers** page, complete the following sections. Depending on what data you're mapping, it's possible not all of these will appear on your page.

- **Unique identifier**: You must have a unique identifier for your data in order to avoid an error when it is ingested. This identifier is also known as the unique key. Customer Profiles uses it to distinguish this data from other data source objects, and to index for search and update data.

  There can be only one unique identifier.

- **Customer identifier**: You must have at least one customer identifier for your data in order to avoid an error when it is ingested. The identifier is also known as the profile key.

  Customer Profiles uses it to determine if the data case be associated to an existing profile or used to create a new profile by searching other profiles for this identifier.

  You can have multiple customer identifiers.

- **Product identifier**: You must have at least one product identifier for your data in order to avoid an error when it is ingested. The identifier is also known as the asset key.

  Customer Profiles uses it to distinguish this data from other customer product purchase data. It is also used to determine if the data can be associated to an existing profile or used to create a new profile by searching other profiles for this identifier.

  You can have multiple product identifiers.

- **Case identifier**: You must have at least one case identifier for your data in order to avoid an error when it is ingested. The identifier is also known as the case key.
Customer Profiles uses it to distinguish this data from other customer case data. It is also used to determine if the data can be associated to an existing profile or used to create a new profile by searching other profiles for this identifier.

You can have multiple case identifiers.

- **Order identifier**: You must have at least one order identifier for your data in order to avoid an error when it is ingested. The identifier is also known as the order key.

Customer Profiles uses it to distinguish this data from other customer order data. It is also used to determine if the data can be associated to an existing profile or used to create a new profile by searching other profiles for this identifier.

You can have multiple order identifiers.

- **Additional search attributes - optional**: You can choose attributes in your data source object that you want to index to be searchable. By default, all your identifiers are indexed.

- **Data object timestamp**: The data object timestamp is used to resolve profile conflicts when Identity Resolution is enabled for consolidating similar profiles. When two or more similar profiles have conflicting records, the records from the profile with the most recently updated timestamp will be used.

You can choose an attribute in your object to reference for when your object was last updated.

### Step 4: Review and create

After the data mapping is created, you can choose **Add data source integration** to use this object type.

### About mapping destinations

A mapping destination is your mapping from a source to a standard definition that is already defined in Amazon Connect.

The following table lists the supported mapping destinations.
<table>
<thead>
<tr>
<th>Source object</th>
<th>Destination: Customer, Product, Order, Case</th>
</tr>
</thead>
<tbody>
<tr>
<td>S3</td>
<td>Any</td>
</tr>
<tr>
<td>Salesforce-Account</td>
<td>Customer</td>
</tr>
<tr>
<td>Salesforce-Contact</td>
<td>Customer</td>
</tr>
<tr>
<td>Zendesk-users</td>
<td>Customer</td>
</tr>
<tr>
<td>Marketo-leads</td>
<td>Customer</td>
</tr>
<tr>
<td>Servicenow-sys_user</td>
<td>Customer</td>
</tr>
<tr>
<td>Segment-Identify</td>
<td>Customer</td>
</tr>
<tr>
<td>Segment-Customer</td>
<td>Customer</td>
</tr>
<tr>
<td>Shopify-Customer</td>
<td>Customer</td>
</tr>
<tr>
<td>Shopify-DraftOrder</td>
<td>Order</td>
</tr>
<tr>
<td>Salesforce-Asset</td>
<td>Product</td>
</tr>
<tr>
<td>Zendesk-tickets</td>
<td>Case</td>
</tr>
<tr>
<td>Servicenow-task</td>
<td>Case</td>
</tr>
<tr>
<td>Servicenow-incident</td>
<td>Case</td>
</tr>
</tbody>
</table>

**Object type mapping requirements**

The following information needs to be in your object type mapping so Customer Profiles can process the incoming data:

- A definition of all the fields in the ingested object that should be mapped to the standard profile, or used for assigning the data to a profile. This tells Customer Profiles which fields in the ingested source object should be mapped to given fields in the standard profile object.
- Which fields in the source object from your custom data should be indexed and how.

When the source data is ingested by Customer Profiles, the indexed fields determine:

- Which profile a specific object belongs to.
- Which objects are related to each other and should be placed in the same profile. For example, an account number or a contact ID in a contact record.
- What values can be used to find a profile. For example, the contact's name can be indexed. This would allow agents to find all profiles that belong to customers with a specific name.

**Key requirements**

You must define at least one key. Customer Profiles uses this key to map your custom profile object to a profile.

The custom profile object mapping also needs at least one key that uniquely identifies the object so that it can be updated by specifying the same value of this field (these requirements can be satisfied with a single key).

Each key can be made up of one or more fields.
Field requirements

A field definition specifies how to read a value for that field name from a source object. The field definition also specifies what kind of data is stored in the field.

Object type names can be any alpha numerical string or the '-' and '_' character, they also cannot start with a '_' character, which is used for reserved standard object types.

Object type mapping definition details

The object type mapping definition has two parts: the field definition and the key definition.

Tip
To learn how to create an object type mapper, see this blog post: Unify and organize customer information with Amazon Connect Customer Profiles with the pre-built Amazon S3 connector. Or, check out this video on YouTube: How to Integrate Customer Profile Data into your Contact Center Experiences.

Field definition details

The field definition defines the source, destination (target), and type of field. For example:

```json
"Fields": {
  "{fieldName}": {
    "Source": "{source}",
    "Target": "{target}",
    "ContentType": "{contentType}"
  }, ...
}, ...
```

- **Source**: This can be a JSON accessor for the field or a Handlebar macro for generating the value of the field.

  The source object being parsed is named `_source` so all fields in the source fields need to be prefaced by this string. Only the `_source` object is supported.

  Use the Handlebar macro solution for generating constants and combining multiple source object fields into a single field. This is useful for indexing.

- **Target**: Specifies where in a standard object type the data of this field should be mapped.

  Populating the standard profile allows you to use data ingested from any data source with applications built on top of Customer Profiles without any specific knowledge of the format of the data being ingested.

  This field is optional. You might want to define fields solely for the purpose of including them in a key.

  The format of this field is always a JSON accessor. The only supported target object is `_profile`.

- **ContentType**: The following values are supported STRING, NUMBER, PHONE_NUMBER, EMAIL_ADDRESS, NAME. If no ContentType is specified STRING is assumed.

  ContentType is used to determine how to index the value so agents can search for it. For example, if ContentType is set to PHONE_NUMBER, a phone number is processed so agents can search for it in any format: the string "+15551234567" matches "(555)-123-4567".
Key definition details

A key contains one or more fields that together define a key that can be used to search for objects (or the profiles they belong to) using the SearchProfiles API. The key can also be defined to uniquely identify a profile or uniquely identify the object itself.

```
"Keys": {
    "{keyName}": [{
        "StandardIdentifiers": [...],
        "FieldNames": [ "{fieldname}", ...
    }], ...
}, ...
```

Key names are global to a domain. If you have two keys, with the same name in two different object type mappings:

- Those keys should occupy the same namespace
- They can be used to potentially link profiles together between different objects. If they match between the objects, Customer Profiles places the two objects in the same profile.

To phrase this in another way: keys should have the same key name in a domain if, and only if, the same value means that they are related. For example, a phone number specified in one type of object would be related to the same phone number specified in another type of object. An internal identifier specified for an imported object from Salesforce might not be related to another object imported from Marketo, even if they have exactly the same value.

Keys definitions are used in two ways:

- Inside of Customer Profiles during ingestion, they are used to figure out what profile the object should be assigned to.
- They allow you to use the SearchProfiles API to search for the key value and find the profile.

Standard identifiers

Standard identifiers allow you to set attributes on the key. Decide which identifiers to use based on how you want the data to be ingested in the profiles. For example, you mark phone number with the identifier PROFILE. This means phone number is to be treated as unique identifier. If Customer Profiles gets two contacts with the same phone number, the contacts are going to be merged into a single profile.

<table>
<thead>
<tr>
<th>Identifier name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>UNIQUE</td>
<td>This identifier must be specified by exactly one index for each object type. This key is used to uniquely identify objects of the object type for either fetching them or if needed update a submitted object at a later date.</td>
</tr>
<tr>
<td></td>
<td>All the fields that make up the UNIQUE keys are required to be specified when submitting a new object or it is rejected.</td>
</tr>
<tr>
<td>PROFILE</td>
<td>This identifier means that this key uniquely identifies a profile. When this identifier is</td>
</tr>
<tr>
<td>Identifier name</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------</td>
<td>-------------</td>
</tr>
<tr>
<td></td>
<td>specified, it means that during ingestion, Customer Profiles looks for any profile that has this key associated with it.</td>
</tr>
<tr>
<td></td>
<td>• If a profile is found, then the object is assigned to that profile.</td>
</tr>
<tr>
<td></td>
<td>• If more than one profile is found when searching for this key, the match is rejected. (Only keys that uniquely identify a profile should be used as unique keys except for special circumstances.)</td>
</tr>
<tr>
<td>LOOKUP_ONLY</td>
<td>This identifier indicates the key is not stored after ingesting the object. The key is only to be used for determining the profile during ingestion.</td>
</tr>
<tr>
<td></td>
<td>The key value is not associated with the profile during ingestion, which means it can't be used to allow searching for it or matching later ingested objects to the same key.</td>
</tr>
<tr>
<td>NEW_ONLY</td>
<td>If the profile does not already exist before the object is ingested, the key is associated with the profile. Otherwise the key is only used for matching objects to profiles.</td>
</tr>
<tr>
<td>SECONDARY</td>
<td>During the matching of an object to a profile, Customer Profiles first looks up all PROFILE keys that do not have the SECONDARY identifier. These are considered first. SECONDARY keys are only considered if no matching profile is found using these keys.</td>
</tr>
</tbody>
</table>

**How profile assignment works using key definitions**

When Customer Profiles ingests the custom object mappings, it processes the key definitions. The following diagram shows how it processes standard identifiers in key definitions to determine which profile to assign the object to.
How keys are added to the index for future look ups

The following diagram shows how Customer Profiles processes the standard identifiers to determine whether to persist the key.
Object type mapping for the standard profile

The topics in this section provide the standard profile definition, and the object type mapping from external applications to the standard profile.

Contents
- Amazon AppFlow access requirements (p. 652)
- Amazon AppIntegrations access requirements (p. 652)
- Amazon EventBridge access requirements (p. 652)
- Standard profile definition (p. 652)
- Mapping Salesforce objects to the standard profile (p. 654)
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Object type mapping definition details

- Mapping Zendesk objects to the standard profile (p. 660)
- Mapping Marketo objects to the standard profile (p. 662)
- Mapping ServiceNow objects to the standard profile object (p. 664)
- Mapping Segment objects to the standard profile object (p. 666)
- Mapping Shopify objects to the standard profile object (p. 668)

Amazon AppFlow access requirements

Following are the Amazon AppFlow access requirements to create and delete Zendesk, Marketo, Salesforce, and ServiceNow integrations:

- appflow:CreateFlow
- appflow:DeleteFlow

Amazon AppIntegrations access requirements

Following are the Amazon AppIntegrations access requirements to create and delete Segment and Shopify integrations:

- app-integrations:GetEventIntegration
- app-integrations:ListEventIntegrationAssociations
- app-integrations:CreateEventIntegrationAssociation
- app-integrations:DeleteEventIntegrationAssociation

Amazon EventBridge access requirements

Following are the Amazon EventBridge access requirements to create and delete Segment and Shopify integrations:

- events:ListTargetsByRule
- events:PutRule
- events:PutTargets
- events:DeleteRule
- events:RemoveTargets

Standard profile definition

The following table lists all the fields in the Customer Profiles standard profile object.

<table>
<thead>
<tr>
<th>Standard profile field</th>
<th>Data type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ProfileId</td>
<td>String</td>
<td>The unique identifier of a customer profile.</td>
</tr>
<tr>
<td>AccountNumber</td>
<td>String</td>
<td>A unique account number that you have given to the customer.</td>
</tr>
<tr>
<td>AdditionalInformation</td>
<td>String</td>
<td>Any additional information relevant to the customer’s profile.</td>
</tr>
</tbody>
</table>
## Standard profile field

<table>
<thead>
<tr>
<th>Field</th>
<th>Data type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PartyType</td>
<td>String</td>
<td>The type of profile used to describe the customer. Valid values: INDIVIDUAL</td>
</tr>
<tr>
<td>BusinessName</td>
<td>String</td>
<td>The name of the customer's business.</td>
</tr>
<tr>
<td>FirstName</td>
<td>String</td>
<td>The customer's first name.</td>
</tr>
<tr>
<td>MiddleName</td>
<td>String</td>
<td>The customer's middle name.</td>
</tr>
<tr>
<td>LastName</td>
<td>String</td>
<td>The customer's last name.</td>
</tr>
<tr>
<td>BirthDate</td>
<td>String</td>
<td>The customer's birth date.</td>
</tr>
<tr>
<td>Gender</td>
<td>String</td>
<td>The gender with which the customer identifies.</td>
</tr>
<tr>
<td>PhoneNumber</td>
<td>String</td>
<td>The customer's phone number, which has not been specified as a mobile, home, or business number.</td>
</tr>
<tr>
<td>MobilePhoneNumber</td>
<td>String</td>
<td>The customer's mobile phone number.</td>
</tr>
<tr>
<td>HomePhoneNumber</td>
<td>String</td>
<td>The customer's home phone number.</td>
</tr>
<tr>
<td>BusinessPhoneNumber</td>
<td>String</td>
<td>The customer's business phone number.</td>
</tr>
<tr>
<td>EmailAddress</td>
<td>String</td>
<td>The customer's email address, which has not been specified as a personal or business address.</td>
</tr>
<tr>
<td>BusinessEmailAddress</td>
<td>String</td>
<td>The customer's business email address.</td>
</tr>
<tr>
<td>Address</td>
<td>Address</td>
<td>A generic address associated with the customer that is not mailing, shipping, or billing.</td>
</tr>
<tr>
<td>ShippingAddress</td>
<td>Address</td>
<td>The customer's shipping address.</td>
</tr>
<tr>
<td>MailingAddress</td>
<td>Address</td>
<td>The customer's mailing address.</td>
</tr>
<tr>
<td>BillingAddress</td>
<td>Address</td>
<td>The customer's billing address.</td>
</tr>
<tr>
<td>Attributes</td>
<td>String-to-string map</td>
<td>Key-value pair of attributes of a customer profile.</td>
</tr>
</tbody>
</table>
Address data type

<table>
<thead>
<tr>
<th>Standard profile field</th>
<th>Data type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address1</td>
<td>String</td>
<td>The first line of a customer address.</td>
</tr>
<tr>
<td>Address2</td>
<td>String</td>
<td>The second line of a customer address.</td>
</tr>
<tr>
<td>Address3</td>
<td>String</td>
<td>The third line of a customer address.</td>
</tr>
<tr>
<td>Address4</td>
<td>String</td>
<td>The fourth line of a customer address.</td>
</tr>
<tr>
<td>City</td>
<td>String</td>
<td>The city in which the customer lives.</td>
</tr>
<tr>
<td>Country</td>
<td>String</td>
<td>The country in which the customer lives.</td>
</tr>
<tr>
<td>County</td>
<td>String</td>
<td>The county in which the customer lives.</td>
</tr>
<tr>
<td>PostalCode</td>
<td>String</td>
<td>The postal code of the customer address.</td>
</tr>
<tr>
<td>Province</td>
<td>String</td>
<td>The province in which the customer lives.</td>
</tr>
<tr>
<td>State</td>
<td>String</td>
<td>The state in which the customer lives.</td>
</tr>
</tbody>
</table>

Mapping Salesforce objects to the standard profile

This topic lists which fields in Salesforce objects map to fields in the standard profile object in Customer Profiles.

Salesforce-Account object

Following is a list of all the fields in a Salesforce-Account object. The fields in your Salesforce-Account object may vary depending on the configuration of your Salesforce instance.

- Id
- IsDeleted
- MasterRecordId
- Name
- Type
- ParentId
- BillingStreet
- BillingCity
- BillingState
- BillingPostalCode
• BillingCountry
• BillingLatitude
• BillingLongitude
• BillingGeocodeAccuracy
• BillingAddress.City
• BillingAddress.Country
• BillingAddress.geocodeAccuracy
• BillingAddress.latitude
• BillingAddress.longitude
• BillingAddress.postalCode
• BillingAddress.state
• BillingAddress.street
• ShippingStreet
• ShippingCity
• ShippingState
• ShippingPostalCode
• ShippingCountry
• ShippingLatitude
• ShippingLongitude
• ShippingGeocodeAccuracy
• ShippingAddress.city
• ShippingAddress.country
• ShippingAddress.latitude
• ShippingAddress.longitude
• ShippingAddress.postalCode
• ShippingAddress.state
• ShippingAddress.street
• Phone
• Fax
• AccountNumber
• Website
• PhotoUrl
• Sic
• Industry
• AnnualRevenue
• NumberOfEmployees
• Ownership
• TickerSymbol
• Description
• Rating
• Site
• OwnerId
• CreatedDate
• CreatedById
• LastModifiedDate
• LastModifiedId
• SystemModstamp
• LastActivityDate
• LastViewedDate
• LastReferencedDate
• Jigsaw
• JigsawCompanyId
• CleanStatus
• AccountSource
• DunsNumber
• Tradestyle
• NaicsCode
• NaicsDesc
• YearStarted
• SicDesc
• DandbCompanyId
• IsBuyer

### Mapping a Salesforce-Account object to a standard profile

A subset of the fields in the Salesforce-Account object map to the standard profile object in Customer Profiles.

The following table lists which fields can be mapped from the Salesforce-Account object to the standard profile. (The table includes the mapping for a Salesforce instance that has been configured to include Person fields.)

<table>
<thead>
<tr>
<th>Salesforce-Account source field</th>
<th>Standard profile target field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Attributes.sfdcAccountId</td>
</tr>
<tr>
<td>Name</td>
<td>BusinessName</td>
</tr>
<tr>
<td>Phone</td>
<td>PhoneNumber</td>
</tr>
<tr>
<td>BillingStreet</td>
<td>BillingAddress.Address1</td>
</tr>
<tr>
<td>BillingCity</td>
<td>BillingAddress.City</td>
</tr>
<tr>
<td>BillingState</td>
<td>BillingAddress.State</td>
</tr>
<tr>
<td>ShippingStreet</td>
<td>ShippingAddress.Address1</td>
</tr>
<tr>
<td>ShippingCity</td>
<td>ShippingAddress.City</td>
</tr>
<tr>
<td>Salesforce-Account source field</td>
<td>Standard profile target field</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>------------------------------</td>
</tr>
<tr>
<td>ShippingState</td>
<td>ShippingAddress.State</td>
</tr>
<tr>
<td>ShippingCountry</td>
<td>ShippingAddress.Country</td>
</tr>
<tr>
<td>ShippingPostalCode</td>
<td>ShippingAddress.PostalCode</td>
</tr>
<tr>
<td>IsPersonAccount</td>
<td>PartyType</td>
</tr>
<tr>
<td>PersonMobilePhone</td>
<td>MobilePhoneNumber</td>
</tr>
<tr>
<td>PersonHomePhone</td>
<td>HomePhoneNumber</td>
</tr>
<tr>
<td>PersonEmail</td>
<td>PersonalEmailAddress</td>
</tr>
<tr>
<td>PersonMailingAddress.Street</td>
<td>MailingAddress.Address1</td>
</tr>
<tr>
<td>PersonMailingAddress.City</td>
<td>MailingAddress.City</td>
</tr>
<tr>
<td>PersonMailingAddress.State</td>
<td>MailingAddress.State</td>
</tr>
<tr>
<td>PersonMailingAddress.Country</td>
<td>MailingAddress.Country</td>
</tr>
<tr>
<td>PersonMailingAddress.PostalCode</td>
<td>MailingAddress.PostalCode</td>
</tr>
<tr>
<td>PersonBirthDate</td>
<td>BirthDate</td>
</tr>
<tr>
<td>PersonOtherStreet</td>
<td>Address.Address1</td>
</tr>
<tr>
<td>PersonOtherCity</td>
<td>Address.City</td>
</tr>
<tr>
<td>PersonOtherState</td>
<td>Address.State</td>
</tr>
<tr>
<td>PersonOtherCountry</td>
<td>Address.Country</td>
</tr>
<tr>
<td>PersonOtherPostalCode</td>
<td>Address.PostalCode</td>
</tr>
<tr>
<td>FirstName</td>
<td>FirstName</td>
</tr>
<tr>
<td>LastName</td>
<td>LastName</td>
</tr>
<tr>
<td>MiddleName</td>
<td>MiddleName</td>
</tr>
<tr>
<td>AccountNumber</td>
<td>AccountNumber</td>
</tr>
</tbody>
</table>

The Salesforce-Account customer data from the Salesforce object is associated with an Amazon Connect customer profile using the indexes in the following table.

<table>
<thead>
<tr>
<th>Standard Index Name</th>
<th>Salesforce-Account source field</th>
</tr>
</thead>
<tbody>
<tr>
<td>_salesforceAccountId</td>
<td>Id</td>
</tr>
</tbody>
</table>

For example, you can use _salesforceAccountId as a key name with the SearchProfiles API to find a profile. You can find the Salesforce-Account objects associated with a specific profile by using the ListProfileObjects API with the ProfileId and ObjectTypeNam set to Salesforce-Account.

**Salesforce-Contact object**

Following is a list of all the fields in a Salesforce-Contact object.
• Id
• IsDeleted
• MasterRecordId
• AccountId
• LastName
• FirstName
• Salutation
• Name
• OtherStreet
• OtherCity
• OtherState
• OtherPostalCode
• OtherCountry
• OtherLatitude
• OtherLongitude
• OtherGeocodeAccuracy
• OtherAddress.city
• OtherAddress.country
• OtherAddress.geocodeAccuracy
• OtherAddress.latitude
• OtherAddress.postalCode
• OtherAddress.state
• OtherAddress.street
• MailingStreet
• MailingCity
• MailingState
• MailingPostalCode
• MailingCountry
• MailingLatitude
• MailingLongitude
• MailingGeocodeAccuracy
• MailingAddress.city
• MailingAddress.country
• MailingAddress.geocodeAccuracy
• MailingAddress.latitude
• MailingAddress.longitude
• MailingAddress.postalCode
• MailingAddress.state
• MailingAddress.street
• Phone
• Fax
• MobilePhone
• HomePhone
• OtherPhone
• AssistantPhone
• ReportsTold
• Email
• Title
• Department
• AssistantName
• LeadSource
• Birthdate
• Description
• OwnerId
• CreatedDate
• CreatedById
• LastModifiedDate
• LastModifiedById
• SystemModstamp
• LastActivityDate
• LastCURequestDate
• LastCUUpdateDate
• LastViewedDate
• LastReferencedDate
• EmailBouncedReason
• EmailBouncedDate
• IsEmailBounced
• PhotoUrl
• Jigsaw
• JigsawContactId
• CleanStatus
• IndividualId

Mapping a Salesforce-Contact object to a standard profile

A subset of the fields in the Salesforce-Contact object map to the standard profile object in Customer Profiles. The following table lists which fields can be mapped from the Salesforce-Contact object to the standard profile object.

<table>
<thead>
<tr>
<th>Salesforce-Contact source field</th>
<th>Standard profile target field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Attributes.sfdcContactId</td>
</tr>
<tr>
<td>AccountId</td>
<td>Attributes.sfdcAccountId</td>
</tr>
<tr>
<td>LastName</td>
<td>LastName</td>
</tr>
<tr>
<td>Salesforce-Contact source field</td>
<td>Standard profile target field</td>
</tr>
<tr>
<td>---------------------------------</td>
<td>------------------------------</td>
</tr>
<tr>
<td>FirstName</td>
<td>FirstName</td>
</tr>
<tr>
<td>MiddleName</td>
<td>MiddleName</td>
</tr>
<tr>
<td>OtherStreet</td>
<td>Address.Address1</td>
</tr>
<tr>
<td>OtherCity</td>
<td>Address.City</td>
</tr>
<tr>
<td>OtherState</td>
<td>Address.State</td>
</tr>
<tr>
<td>OtherCountry</td>
<td>Address.Country</td>
</tr>
<tr>
<td>OtherPostalCode</td>
<td>Address.PostalCode</td>
</tr>
<tr>
<td>MailingStreet</td>
<td>MailingAddress.Address1</td>
</tr>
<tr>
<td>MailingCity</td>
<td>MailingAddress.City</td>
</tr>
<tr>
<td>MailingState</td>
<td>MailingAddress.State</td>
</tr>
<tr>
<td>MailingCountry</td>
<td>MailingAddress.Country</td>
</tr>
<tr>
<td>MailingPostalCode</td>
<td>MailingAddress.PostalCode</td>
</tr>
<tr>
<td>Phone</td>
<td>PhoneNumber</td>
</tr>
<tr>
<td>HomePhone</td>
<td>HomePhoneNumber</td>
</tr>
<tr>
<td>MobilePhone</td>
<td>MobilePhoneNumber</td>
</tr>
<tr>
<td>Email</td>
<td>EmailAddress</td>
</tr>
<tr>
<td>Birthdate</td>
<td>BirthDate</td>
</tr>
</tbody>
</table>

The Salesforce-Contact customer data from a Salesforce object is associated with an Amazon Connect customer profile using the indexes in the following table.

<table>
<thead>
<tr>
<th>Standard Index Name</th>
<th>Salesforce-Contact source field</th>
</tr>
</thead>
<tbody>
<tr>
<td>_salesforceContactId</td>
<td>Id</td>
</tr>
<tr>
<td>_salesforceAccountId</td>
<td>AccountId</td>
</tr>
</tbody>
</table>

For example, you can use _salesforceAccountId and _salesforceContactId as a key name with the SearchProfiles API to find a profile. You can find the Salesforce-Contact objects associated with a specific profile by using the ListProfileObjects API with the ProfileId and ObjectType set to Salesforce-Contact.

**Mapping Zendesk objects to the standard profile**

This topic lists which fields in Zendesk objects map to fields in the standard profile in Customer Profiles.

**Zendesk-users object**

Following is a list of all the fields in a Zendesk-users object.

- id
• url
• external_id
• email
• active
• chat_only
• customer_role_id
• role_type
• details
• last_login_at
• locale
• locale_id
• moderator
• notes
• only_private_comments
• default_group_id
• phone
• shared_phone_number
• photo
• restricted_agent
• role
• shared
• tags
• signature
• suspended
• ticket_restriction
• time_zone
• two_factor_auth_enabled
• user_fields
• verified
• report_csv
• created_at
• updated_at

Mapping Zendesk users to a standard profile

A subset of the fields in the Zendesk-users object map to the standard profile in Customer Profiles. The following table lists which fields can be mapped from the Zendesk-users object to the standard profile.

<table>
<thead>
<tr>
<th>Zendesk-users source field</th>
<th>Standard profile target field</th>
</tr>
</thead>
<tbody>
<tr>
<td>id</td>
<td>Attributes.ZendeskUserId</td>
</tr>
<tr>
<td>external_id</td>
<td>Attributes.ZendeskExternalId</td>
</tr>
</tbody>
</table>

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<table>
<thead>
<tr>
<th>Zendesk-users source field</th>
<th>Standard profile target field</th>
</tr>
</thead>
<tbody>
<tr>
<td>email</td>
<td>EmailAddress</td>
</tr>
<tr>
<td>phone</td>
<td>PhoneNumber</td>
</tr>
</tbody>
</table>

The Zendesk-users customer data from the Zendesk object is associated with a Amazon Connect customer profile using the following indexes.

<table>
<thead>
<tr>
<th>Standard Index Name</th>
<th>Zendesk-user source field</th>
</tr>
</thead>
<tbody>
<tr>
<td>_zendeskUserId</td>
<td>Id</td>
</tr>
<tr>
<td>_zendeskExternalId</td>
<td>external_id</td>
</tr>
</tbody>
</table>

For example, you can use _zendeskUserId and _zendeskExternalId as a key name with the SearchProfiles API to find an Amazon Connect customer profile. You can find the Zendesk-users objects associated with a specific customer profile by using the ListProfileObjects API with the ProfileId and ObjectTypeName set to Zendesk-users.

**Mapping Marketo objects to the standard profile**

This topic lists which fields in Marketo objects map to fields in the standard profile object in Customer Profiles.

**Marketo-leads object**

Following is a list of all the fields in a Marketo-leads object

- id
- firstName
- lastName
- middleName
- email
- phone
- mobilePhone
- billingStreet
- billingCity
- billingState
- billingCountry
- billingPostalCode
- address
- city
- state
- country
- postcode
- gender
- dateOfBirth

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Mapping Marketo-leads to a standard profile

A subset of fields in the Marketo-leads object map to the standard profile.

<table>
<thead>
<tr>
<th>Marketo-leads source field</th>
<th>Standard profile target field</th>
</tr>
</thead>
<tbody>
<tr>
<td>id</td>
<td>Attributes.MarketoLeadId</td>
</tr>
<tr>
<td>sfdcAccountId</td>
<td>Attributes.sfdcAccountId</td>
</tr>
<tr>
<td>sfdcContactId</td>
<td>Attributes.sfdcContactId</td>
</tr>
<tr>
<td>firstName</td>
<td>FirstName</td>
</tr>
<tr>
<td>lastName</td>
<td>LastName</td>
</tr>
<tr>
<td>middleName</td>
<td>MiddleName</td>
</tr>
<tr>
<td>email</td>
<td>EmailAddress</td>
</tr>
<tr>
<td>phone</td>
<td>PhoneNumber</td>
</tr>
<tr>
<td>mobilePhone</td>
<td>MobilePhoneNumber</td>
</tr>
<tr>
<td>billingStreet</td>
<td>BillingAddress.Address1</td>
</tr>
<tr>
<td>billingCity</td>
<td>BillingAddress.City</td>
</tr>
<tr>
<td>billingState</td>
<td>BillingAddress.State</td>
</tr>
<tr>
<td>billingCountry</td>
<td>BillingAddress.Country</td>
</tr>
<tr>
<td>billingPostalCode</td>
<td>BillingAddress.PostalCode</td>
</tr>
<tr>
<td>address</td>
<td>Address.Address1</td>
</tr>
<tr>
<td>city</td>
<td>Address.City</td>
</tr>
<tr>
<td>state</td>
<td>Address.State</td>
</tr>
<tr>
<td>country</td>
<td>Address.Country</td>
</tr>
<tr>
<td>postalcode</td>
<td>Address.PostalCode</td>
</tr>
<tr>
<td>gender</td>
<td>Gender</td>
</tr>
<tr>
<td>dataOfBirth</td>
<td>BirthDate</td>
</tr>
</tbody>
</table>

The Marketo-leads customer data from Marketo is associated with an Amazon Connect customer profile using the indexes in the following table.

<table>
<thead>
<tr>
<th>Standard Index Name</th>
<th>Marketo-leads source field</th>
</tr>
</thead>
<tbody>
<tr>
<td>_marketoLeadId</td>
<td>id</td>
</tr>
<tr>
<td>_salesforceAccountld</td>
<td>sfdcAccountId</td>
</tr>
<tr>
<td>_salesforceContactld</td>
<td>sfdcContactId</td>
</tr>
</tbody>
</table>
For example, you can use _marketoLeadId, _salesforceAccount1d, and _salesforceContactId as a key name with the SearchProfiles API to find an Amazon Connect customer profile. You can find the Marketo-leads objects associated with a specific customer profile by using the ListProfileObjects API with the ProfileId and ObjectTypeName set to Marketo-leads.

**Mapping ServiceNow objects to the standard profile object**

This topic lists which fields in ServiceNow objects map to fields in the standard profile object in Amazon Connect Customer Profiles.

**Servicenow-sys_user object**

Following is a list of all the fields in a Servicenow-sys_user object:

- sys_id
- active
- building
- calendar_integration
- city
- company
- cost_center
- country
- date_format
- default_perspective
- department
- edu_status
- email
- employee_number
- enable_multifactor_authn
- failed_attempts
- first_name
- gender
- home_phone
- internal_integration_user
- introduction
- last_login
- last_login_device
- last_login_time
- last_name
- last_password
- ldap_server
- location
- locked_out
- manager
- middle_name
- mobile_phone
• name
• notification
• password_needs_reset
• phone
• photo
• preferred_language
• roles
• schedule
• source
• state
• street
• sys_class_name
• sys_created_by
• sys_created_on
• sys_domain.link
• sys_domain.value
• sys_domain_path
• sys_id
• sys_mod_count
• sys_updated_by
• sys_updated_on
• time_format
• time_zone
• title
• user_name
• user_password
• web_service_access_only
• zip

**Mapping Servicenow-sys_users to a standard profile object**

A subset of the fields in the Servicenow-sys_users object map to the standard profile object in Customer Profiles.

The following table lists which fields can be mapped from the Servicenow-sys_users object to the standard profile.

<table>
<thead>
<tr>
<th>Servicenow-sys_users source field</th>
<th>Customer profiles target field</th>
</tr>
</thead>
<tbody>
<tr>
<td>sys_id</td>
<td>Attributes.ServiceNowSystemId</td>
</tr>
<tr>
<td>first_name</td>
<td>FirstName</td>
</tr>
<tr>
<td>last_name</td>
<td>LastName</td>
</tr>
<tr>
<td>middle_name</td>
<td>MiddleName</td>
</tr>
</tbody>
</table>
The Servicenow-sys_user customer data from Servicenow object is associated with an Amazon Connect customer profile using the indexes in the following table.

<table>
<thead>
<tr>
<th>Standard Index Name</th>
<th>Servicenow-sys_user source field</th>
</tr>
</thead>
<tbody>
<tr>
<td>_serviceNowSystemId</td>
<td>sys_id</td>
</tr>
</tbody>
</table>

For example, you can use _serviceNowSystemId and _serviceNowIncidentId as a key name with the SearchProfiles API to find an Amazon Connect customer profile. You can find the Servicenow-sys_user objects associated with a specific profile by using the ListProfileObjects API with the ProfileId and ObjectTypeName set to Servicenow-sys_user.

**Mapping Segment objects to the standard profile object**

This topic lists which fields in Segment objects map to fields in the standard profile object in Amazon Connect Customer Profiles.

**Segment-Identify object**

Following is a list of all the fields in a Segment-Identify object.

- userId
- common fields - see Spec: Common Fields in the Segment documentation
- Segment reserved traits - see Traits in the Segment documentation
- traits.address.street
- traits.address.city
- traits.address.state
- traits.address.postalCode
- traits.address.country
- traits.age
- traits.avatar
• traits.birthday
• traits.company.name
• traits.company.id
• traits.company.industry
• traits.company.employee_count
• traits.company.plan
• traits.createdAt
• traits.description
• traits.email
• traits.firstName
• traits.gender
• traits.id
• traits.lastName
• traits.name
• traits.phone
• traits.title
• traits.username
• traits.website

Mapping a Segment-Identify to a standard profile object

A subset of the fields in the Segment-Identify object map to the standard profile object in Customer Profiles.

The following table lists which fields can be mapped from the Segment-Identify object to the standard profile.

<table>
<thead>
<tr>
<th>Segment-Identify source field</th>
<th>Standard profile target field</th>
</tr>
</thead>
<tbody>
<tr>
<td>userId</td>
<td>Attributes.SegmentUserId</td>
</tr>
<tr>
<td>traits.company.name</td>
<td>BusinessName</td>
</tr>
<tr>
<td>traits.firstName</td>
<td>FirstName</td>
</tr>
<tr>
<td>traits.lastName</td>
<td>LastName</td>
</tr>
<tr>
<td>traits.birthday</td>
<td>BirthDate</td>
</tr>
<tr>
<td>traits.gender</td>
<td>Gender</td>
</tr>
<tr>
<td>traits.phone</td>
<td>PhoneNumber</td>
</tr>
<tr>
<td>traits.email</td>
<td>EmailAddress</td>
</tr>
<tr>
<td>traits.address.street</td>
<td>Address.Address1</td>
</tr>
<tr>
<td>traits.address.city</td>
<td>Address.City</td>
</tr>
<tr>
<td>traits.address.state</td>
<td>Address.State</td>
</tr>
<tr>
<td>traits.address.country</td>
<td>Address.Country</td>
</tr>
</tbody>
</table>
Example

The following example shows how to map a source field to a target field.

```
"segmentUserId": {
    "Source": "_source.detail.event.detail.userId",
    "Target": "_profile.Attributes.SegmentUserId"
}
```

The Segment-Identify customer data from the Segment object is associated with an Amazon Connect customer profile using the following index.

<table>
<thead>
<tr>
<th>Standard Index Name</th>
<th>Segment-Identify source field</th>
</tr>
</thead>
<tbody>
<tr>
<td>_segmentUserId</td>
<td>userId</td>
</tr>
</tbody>
</table>

For example, you can use _segmentUserId as a key name with the SearchProfiles API to find an Amazon Connect customer profile. You can find the Segment-Identify objects associated with a specific profile by using the ListProfileObjects API with the ProfileId and ObjectType set to Segment-Identify.

Mapping Shopify objects to the standard profile object

This topic lists which fields in Shopify objects map to fields in the standard profile object in Amazon Connect Customer Profiles.

Shopify-Customer object

Following is a list of all the fields in a Shopify-Customer object.

- accepts_marketing
- accepts_marketing_updated_at
- addresses
- currency
- created_at
- default_address.address1
- default_address.address2
- default_address.city
- default_address.company
- default_address.country
- default_address.country_code
- default_address.country_name
- default_address.customer_id
- default_address.default
- default_address.first_name
• default_address.id
• default_address.last_name
• default_address.name
• default_address.phone
• default_address.province
• default_address.province_code
• default_address.zip
• email
• first_name
• id
• last_name
• last_order_id
• last_order_name
• metafield.key
• metafield.value
• metafield.namespace
• metafield.value_type
• marketing_opt_in_level
• multipass_identifier
• note
• orders_count
• phone
• sms_marketing_consent.state
• sms_marketing_consent.opt_in_level
• sms_marketing_consent.consent_updated_at
• sms_marketing_consent.consent_collected_from
• state
• tags
• tax_exempt
• tax_exemptions
• total_spent
• updated_at
• verified_email

Mapping a Shopify-Customer object to a standard profile

A subset of the fields in the Shopify-Customer object map to the standard profile object in Customer Profiles.

The following table lists which fields can be mapped from the Shopify-Customer object to the standard profile.

<table>
<thead>
<tr>
<th>Shopify-Customer source field</th>
<th>Standard profile target field</th>
</tr>
</thead>
</table>

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## Object type mapping definition details

<table>
<thead>
<tr>
<th>id</th>
<th>Attributes.ShopifyCustomerId</th>
</tr>
</thead>
<tbody>
<tr>
<td>email</td>
<td>EmailAddress</td>
</tr>
<tr>
<td>first_name</td>
<td>FirstName</td>
</tr>
<tr>
<td>last_name</td>
<td>LastName</td>
</tr>
<tr>
<td>note</td>
<td>AdditionalInformation</td>
</tr>
<tr>
<td>phone</td>
<td>PhoneNumber</td>
</tr>
<tr>
<td>default_address.address1</td>
<td>Address.Address1</td>
</tr>
<tr>
<td>default_address.address2</td>
<td>Address.Address2</td>
</tr>
<tr>
<td>default_address.city</td>
<td>Address.City</td>
</tr>
<tr>
<td>default_address.province</td>
<td>Address.Province</td>
</tr>
<tr>
<td>default_address.country</td>
<td>Address.Country</td>
</tr>
<tr>
<td>default_address.zip</td>
<td>Address.PostalCode</td>
</tr>
</tbody>
</table>

### Example

The following example shows how to map a source field to a target field.

```json
"shopifyCustomerId": {
    "Source": "_source.detail.event.detail.payload.id",
    "Target": "_profile.Attributes.ShopifyCustomerId"
}
```

The Shopify-Customer customer data from the Shopify object is associated with an Amazon Connect customer profile using the following index.

<table>
<thead>
<tr>
<th>Standard Index Name</th>
<th>Shopify-Customer source field</th>
</tr>
</thead>
<tbody>
<tr>
<td>_shopifyCustomerId</td>
<td>id</td>
</tr>
</tbody>
</table>

For example, you can use _shopifyCustomerId as a key name with the SearchProfiles API to find an Amazon Connect customer profile. You can find the Shopify-Customer objects associated with a specific profile by using the ListProfileObjects API with the ProfileId and ObjectTypeName set to Shopify-Customer.

### Object type mapping for the standard order

The topics in this section provide the standard order definition, and the object type mapping from external applications to the standard order.

**Contents**

- Amazon AppIntegrations access requirements (p. 671)
- Amazon EventBridge access requirements (p. 671)
- Standard order definition (p. 671)
- Mapping Shopify objects to the standard order (p. 673)
Amazon AppIntegrations access requirements

Following are the Amazon AppIntegrations access requirements to create and delete Shopify integrations:

- app-integrations:GetEventIntegration
- app-integrations:ListEventIntegrationAssociations
- app-integrations:CreateEventIntegrationAssociation
- app-integrations:DeleteEventIntegrationAssociation

Amazon EventBridge access requirements

Following are the Amazon EventBridge access requirements to create and delete Shopify integrations:

- events:ListTargetsByRule
- events:PutRule
- events:PutTargets
- events:DeleteRule
- events:RemoveTargets

Standard order definition

The following table lists all the fields in the Customer Profiles standard order object.

<table>
<thead>
<tr>
<th>Standard order field</th>
<th>Data type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>OrderId</td>
<td>String</td>
<td>The unique identifier of a standard order.</td>
</tr>
<tr>
<td>CustomerEmail</td>
<td>String</td>
<td>The customer's email address.</td>
</tr>
<tr>
<td>CustomerPhone</td>
<td>String</td>
<td>The customer's phone number.</td>
</tr>
<tr>
<td>CreatedDate</td>
<td>String</td>
<td>The order's date created.</td>
</tr>
<tr>
<td>UpdatedDate</td>
<td>String</td>
<td>The order's date updated.</td>
</tr>
<tr>
<td>ProcessedDate</td>
<td>String</td>
<td>The order's date processed.</td>
</tr>
<tr>
<td>ClosedDate</td>
<td>String</td>
<td>The order's date closed.</td>
</tr>
<tr>
<td>CancelledDate</td>
<td>String</td>
<td>The order's date cancelled.</td>
</tr>
<tr>
<td>CancelReason</td>
<td>String</td>
<td>The order's cancel reason.</td>
</tr>
<tr>
<td>Name</td>
<td>String</td>
<td>The order's name.</td>
</tr>
<tr>
<td>AdditionalInformation</td>
<td>String</td>
<td>Any additional information relevant to the order.</td>
</tr>
<tr>
<td>Gateway</td>
<td>String</td>
<td>The order's payment gateway.</td>
</tr>
<tr>
<td>Status</td>
<td>String</td>
<td>The order's status.</td>
</tr>
<tr>
<td>StatusCode</td>
<td>String</td>
<td>The order's status code. Valid values: DRAFT</td>
</tr>
<tr>
<td>Field</td>
<td>Data type</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------</td>
<td>---------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>StatusUrl</td>
<td>String</td>
<td>The order's status URL.</td>
</tr>
<tr>
<td>CreditCardNumber</td>
<td>String</td>
<td>The customer's credit card last four digits.</td>
</tr>
<tr>
<td>CreditCardCompany</td>
<td>String</td>
<td>The customer's credit card company.</td>
</tr>
<tr>
<td>FulfillmentStatus</td>
<td>String</td>
<td>The order's fulfillment status.</td>
</tr>
<tr>
<td>TotalPrice</td>
<td>String</td>
<td>The order's total price.</td>
</tr>
<tr>
<td>TotalTax</td>
<td>String</td>
<td>The order's total tax.</td>
</tr>
<tr>
<td>TotalDiscounts</td>
<td>String</td>
<td>The order's total discounts.</td>
</tr>
<tr>
<td>TotalItemsPrice</td>
<td>String</td>
<td>The order's total items price.</td>
</tr>
<tr>
<td>TotalShippingPrice</td>
<td>String</td>
<td>The order's total shipping price.</td>
</tr>
<tr>
<td>TotalTipReceived</td>
<td>String</td>
<td>The order's total tip received.</td>
</tr>
<tr>
<td>Currency</td>
<td>String</td>
<td>The order's currency.</td>
</tr>
<tr>
<td>TotalWeight</td>
<td>String</td>
<td>The order's total weight.</td>
</tr>
<tr>
<td>BillingAddress</td>
<td>OrderAddress</td>
<td>The customer's billing address.</td>
</tr>
<tr>
<td>ShippingAddress</td>
<td>OrderAddress</td>
<td>The customer's shipping address.</td>
</tr>
<tr>
<td>OrderItems</td>
<td>OrderItem list</td>
<td>The order's items.</td>
</tr>
<tr>
<td>Attributes</td>
<td>String-to-string map</td>
<td>Key-value pair of attributes of a standard order.</td>
</tr>
</tbody>
</table>

**OrderAddress data type**

<table>
<thead>
<tr>
<th>Standard order field</th>
<th>Data type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>String</td>
<td>The name associated with an order address.</td>
</tr>
<tr>
<td>Address1</td>
<td>String</td>
<td>The first line of an order address.</td>
</tr>
<tr>
<td>Address2</td>
<td>String</td>
<td>The second line of an order address.</td>
</tr>
<tr>
<td>Address3</td>
<td>String</td>
<td>The third line of an order address.</td>
</tr>
<tr>
<td>Address4</td>
<td>String</td>
<td>The fourth line of an order address.</td>
</tr>
<tr>
<td>City</td>
<td>String</td>
<td>The city of an order address.</td>
</tr>
<tr>
<td>County</td>
<td>String</td>
<td>The county of an order address.</td>
</tr>
<tr>
<td>State</td>
<td>String</td>
<td>The state of an order address.</td>
</tr>
<tr>
<td>Province</td>
<td>String</td>
<td>The province of an order address.</td>
</tr>
</tbody>
</table>
Object type mapping definition details

<table>
<thead>
<tr>
<th>Field</th>
<th>Data type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Country</td>
<td>String</td>
<td>The country of an order address.</td>
</tr>
<tr>
<td>PostalCode</td>
<td>String</td>
<td>The postal code of an order address.</td>
</tr>
</tbody>
</table>

OrderItem data type

<table>
<thead>
<tr>
<th>Standard order field</th>
<th>Data type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>String</td>
<td>The title of an order item.</td>
</tr>
<tr>
<td>Price</td>
<td>String</td>
<td>The price of an order item.</td>
</tr>
<tr>
<td>Quantity</td>
<td>String</td>
<td>The quantity of an order item.</td>
</tr>
</tbody>
</table>

Mapping Shopify objects to the standard order

This topic lists which fields in Shopify objects map to fields in the standard order object in Customer Profiles.

**Shopify-DraftOrder object**

For a list of all the fields in a Shopify-DraftOrder object see The DraftOrder object in the Shopify documentation.

**Mapping a Shopify-DraftOrder object to a standard order**

A subset of the fields in the Shopify-DraftOrder object map to the standard order object in Customer Profiles.

The following table lists which fields can be mapped from the Shopify-DraftOrder object to the standard order.

The **StatusCode** is ACTIVATED if `order_status_url` exists in the source. Otherwise, the **StatusCode** is DRAFT.

<table>
<thead>
<tr>
<th>Shopify-DraftOrder source field</th>
<th>Standard order target field</th>
</tr>
</thead>
<tbody>
<tr>
<td>id</td>
<td>Attributes.ShopifyOrderId</td>
</tr>
<tr>
<td>customer.id</td>
<td>Attributes.ShopifyCustomerId</td>
</tr>
<tr>
<td>note</td>
<td>AdditionalInformation</td>
</tr>
<tr>
<td>email</td>
<td>CustomerEmail</td>
</tr>
<tr>
<td>currency</td>
<td>Currency</td>
</tr>
<tr>
<td>created_at</td>
<td>CreatedDate</td>
</tr>
<tr>
<td>updated_at</td>
<td>UpdatedDate</td>
</tr>
<tr>
<td>name</td>
<td>Name</td>
</tr>
<tr>
<td>status</td>
<td>Status</td>
</tr>
<tr>
<td>order_status_url</td>
<td>StatusCode</td>
</tr>
<tr>
<td>Source Field</td>
<td>Target Field</td>
</tr>
<tr>
<td>------------------------------</td>
<td>-------------------------------</td>
</tr>
<tr>
<td>billing_address.address1</td>
<td>BillingAddress.Address1</td>
</tr>
<tr>
<td>billing_address.address2</td>
<td>BillingAddress.Address2</td>
</tr>
<tr>
<td>billing_address.city</td>
<td>BillingAddress.City</td>
</tr>
<tr>
<td>billing_address.zip</td>
<td>BillingAddress.PostalCode</td>
</tr>
<tr>
<td>billing_address.province</td>
<td>BillingAddress.Province</td>
</tr>
<tr>
<td>billing_address.country</td>
<td>BillingAddress.Country</td>
</tr>
<tr>
<td>billing_address.name</td>
<td>BillingAddress.Name</td>
</tr>
<tr>
<td>shipping_address.address1</td>
<td>ShippingAddress.Address1</td>
</tr>
<tr>
<td>shipping_address.address2</td>
<td>ShippingAddress.Address2</td>
</tr>
<tr>
<td>shipping_address.city</td>
<td>ShippingAddress.City</td>
</tr>
<tr>
<td>shipping_address.zip</td>
<td>ShippingAddress.PostalCode</td>
</tr>
<tr>
<td>shipping_address.province</td>
<td>ShippingAddress.Province</td>
</tr>
<tr>
<td>shipping_address.country</td>
<td>ShippingAddress.Country</td>
</tr>
<tr>
<td>shipping_address.name</td>
<td>ShippingAddress.Name</td>
</tr>
<tr>
<td>invoice_url</td>
<td>StatusUrl</td>
</tr>
<tr>
<td>total_price</td>
<td>TotalPrice</td>
</tr>
<tr>
<td>total_tax</td>
<td>TotalTax</td>
</tr>
<tr>
<td>line_items[].title</td>
<td>OrderItems[].Title</td>
</tr>
<tr>
<td>line_items[].price</td>
<td>OrderItems[].Price</td>
</tr>
<tr>
<td>line_items[].quantity</td>
<td>OrderItems[].Quantity</td>
</tr>
</tbody>
</table>

**Example**

The following example shows how to map a source field to a target field.

```
"shopifyOrderId": {
    "Source": "_source.detail.event.detail.payload.id",
    "Target": "_order.Attributes.ShopifyOrderId"
}
```

The Shopify-DraftOrder customer data from the Shopify object is associated with an Amazon Connect standard order using the following index.

<table>
<thead>
<tr>
<th>Standard Index Name</th>
<th>Shopify-DraftOrder source field</th>
</tr>
</thead>
<tbody>
<tr>
<td>_shopifyOrderId</td>
<td>id</td>
</tr>
</tbody>
</table>

For example, you can use _shopifyOrderId as an ObjectFilter.KeyName with the the ListProfileObjects API to find a standard order. You can find the Shopify-DraftOrder objects associated with a specific profile by using the ListProfileObjects API with the ProfileId and ObjectTypeNamte set to Shopify-DraftOrder.
Shopify-Order object

For a list of all the fields in a Shopify-Order object see The Order object in the Shopify documentation.

Mapping a Shopify-Order object to a standard order

A subset of the fields in the Shopify-Order object map to the standard order object in Customer Profiles.

The following table lists which fields can be mapped from the Shopify-Order object to the standard order.

The StatusCode is ACTIVATED if order_status_url exists in the source. Otherwise, the StatusCode is DRAFT.

<table>
<thead>
<tr>
<th>Shopify-Order source field</th>
<th>Standard order target field</th>
</tr>
</thead>
<tbody>
<tr>
<td>id</td>
<td>Attributes.ShopifyOrderId</td>
</tr>
<tr>
<td>customer.id</td>
<td>Attributes.ShopifyCustomerId</td>
</tr>
<tr>
<td>cancelled_at</td>
<td>CancelledDate</td>
</tr>
<tr>
<td>cancel_reason</td>
<td>CancelReason</td>
</tr>
<tr>
<td>closed_at</td>
<td>ClosedDate</td>
</tr>
<tr>
<td>created_at</td>
<td>CreatedDate</td>
</tr>
<tr>
<td>currency</td>
<td>Currency</td>
</tr>
<tr>
<td>email</td>
<td>CustomerEmail</td>
</tr>
<tr>
<td>financial_status</td>
<td>Status</td>
</tr>
<tr>
<td>order_status_url</td>
<td>StatusCode</td>
</tr>
<tr>
<td>fulfillment_status</td>
<td>FulfillmentStatus</td>
</tr>
<tr>
<td>gateway</td>
<td>Gateway</td>
</tr>
<tr>
<td>name</td>
<td>Name</td>
</tr>
<tr>
<td>note</td>
<td>AdditionalInformation</td>
</tr>
<tr>
<td>order_status_url</td>
<td>StatusUrl</td>
</tr>
<tr>
<td>phone</td>
<td>CustomerPhone</td>
</tr>
<tr>
<td>processed_at</td>
<td>ProcessedDate</td>
</tr>
<tr>
<td>total_discounts</td>
<td>TotalDiscounts</td>
</tr>
<tr>
<td>total_line_items_price</td>
<td>TotalItemsPrice</td>
</tr>
<tr>
<td>total_price</td>
<td>TotalPrice</td>
</tr>
<tr>
<td>total_shipping_price_set.shop_money.amount</td>
<td>TotalShippingPrice</td>
</tr>
<tr>
<td>total_tax</td>
<td>TotalTax</td>
</tr>
<tr>
<td>total_tip_received</td>
<td>TotalTipReceived</td>
</tr>
<tr>
<td>total_weight</td>
<td>TotalWeight</td>
</tr>
</tbody>
</table>
Example

The following example shows how to map a source field to a target field.

```
"shopifyOrderId": {
   "Source": "_source.detail.event.detail.payload.id",
   "Target": "_order.Attributes.ShopifyOrderId"
}
```

The Shopify-Order customer data from the Shopify object is associated with an Amazon Connect standard order using the following index.

<table>
<thead>
<tr>
<th>Standard Index Name</th>
<th>Shopify-Order source field</th>
</tr>
</thead>
<tbody>
<tr>
<td>_shopifyOrderId</td>
<td>id</td>
</tr>
</tbody>
</table>

For example, you can use _shopifyOrderId as an ObjectFilter.KeyName with the the ListProfileObjects API to find a standard order. You can find the Shopify-Order objects associated with a specific profile by using the ListProfileObjects API with the ProfileId and ObjectType set to Shopify-Order.
Object type mapping for the standard asset

The topics in this section provide the standard asset definition, and the object type mapping from external applications to the standard asset.

Contents

- Amazon AppFlow access requirements (p. 677)
- Standard asset definition (p. 677)
- Mapping Salesforce objects to the standard asset (p. 678)

Amazon AppFlow access requirements

Following are the Amazon AppFlow access requirements to create and delete Salesforce integrations:

- appflow:CreateFlow
- appflow:DeleteFlow

Standard asset definition

The following table lists all the fields in the Customer Profiles standard asset object.

<table>
<thead>
<tr>
<th>Standard asset field</th>
<th>Data type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AssetId</td>
<td>String</td>
<td>The unique identifier of a standard asset.</td>
</tr>
<tr>
<td>AssetName</td>
<td>String</td>
<td>The asset's name.</td>
</tr>
<tr>
<td>SerialNumber</td>
<td>String</td>
<td>The asset's serial number.</td>
</tr>
<tr>
<td>ModelNumber</td>
<td>String</td>
<td>The asset's model number.</td>
</tr>
<tr>
<td>ModelName</td>
<td>String</td>
<td>The asset's model name.</td>
</tr>
<tr>
<td>ProductSKU</td>
<td>String</td>
<td>The asset's stock keeping unit.</td>
</tr>
<tr>
<td>PurchaseDate</td>
<td>String</td>
<td>The asset's purchase date.</td>
</tr>
<tr>
<td>UsageEndDate</td>
<td>String</td>
<td>The asset's usage end date.</td>
</tr>
<tr>
<td>Status</td>
<td>String</td>
<td>The asset's status.</td>
</tr>
<tr>
<td>Price</td>
<td>String</td>
<td>The asset's price.</td>
</tr>
<tr>
<td>Quantity</td>
<td>String</td>
<td>The asset's quantity.</td>
</tr>
<tr>
<td>Description</td>
<td>String</td>
<td>The asset's description.</td>
</tr>
<tr>
<td>Additional information</td>
<td>String</td>
<td>Any additional information relevant to the asset.</td>
</tr>
<tr>
<td>DataSource</td>
<td>String</td>
<td>The asset's data source.</td>
</tr>
<tr>
<td>Attributes</td>
<td>String-to-string map</td>
<td>Key-value pair of attributes of a standard asset.</td>
</tr>
</tbody>
</table>
Mapping Salesforce objects to the standard asset

This topic lists which fields in Salesforce objects map to fields in the standard asset object in Customer Profiles.

Salesforce-Asset object

Following is a list of all the fields in a Salesforce-Asset object.

- Id
- ContactId
- AccountId
- ParentId
- RootAssetId
- Product2Id
- ProductCode
- IsCompetitorProduct
- CreatedDate
- CreatedById
- LastModifiedDate
- LastModifiedById
- SystemModstamp
- IsDeleted
- Name
- SerialNumber
- InstallDate
- PurchaseDate
- UsageEndDate
- LifecycleStartDate
- LifecycleEndDate
- Status
- Price
- Quantity
- Description
- OwnerId
- AssetProvidedByld
- AssetServiceById
- IsInternal
- AssetLevel
- StockKeepingUnit
- HasLifecycleManagement
- CurrentMrr
- CurrentLifecycleEndDate
- CurrentQuantity
- CurrentAmount
- LastViewedDate
- LastReferencedDate
Mapping a Salesforce-Asset object to a standard asset

A subset of the fields in the Salesforce-Asset object map to the standard asset object in Customer Profiles.

The following table lists which fields can be mapped from the Salesforce-Asset object to the standard asset.

<table>
<thead>
<tr>
<th>Salesforce-Asset source field</th>
<th>Standard asset target field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>Attributes.sfdcAssetId</td>
</tr>
<tr>
<td>ContactId</td>
<td>Attributes.sfdcContactId</td>
</tr>
<tr>
<td>AccountId</td>
<td>Attributes.sfdcAccountId</td>
</tr>
<tr>
<td>SerialNumber</td>
<td>SerialNumber</td>
</tr>
<tr>
<td>StockKeepingUnit</td>
<td>ProductSKU</td>
</tr>
<tr>
<td>UsageEndDate</td>
<td>UsageEndDate</td>
</tr>
<tr>
<td>Status</td>
<td>Status</td>
</tr>
<tr>
<td>Price</td>
<td>Price</td>
</tr>
<tr>
<td>Quantity</td>
<td>Quantity</td>
</tr>
<tr>
<td>Description</td>
<td>Description</td>
</tr>
</tbody>
</table>

The Salesforce-Asset customer data from the Salesforce object is associated with an Amazon Connect standard asset using the indexes in the following table.

<table>
<thead>
<tr>
<th>Standard Index Name</th>
<th>Salesforce-Asset source field</th>
</tr>
</thead>
<tbody>
<tr>
<td>_salesforceAssetId</td>
<td>Id</td>
</tr>
<tr>
<td>_salesforceContactId</td>
<td>ContactId</td>
</tr>
<tr>
<td>_salesforceAccountId</td>
<td>AccountId</td>
</tr>
</tbody>
</table>

For example, you can use _salesforceAssetId and _salesforceAccountId as an ObjectFilter.KeyName with the ListProfileObjects API to find a standard asset. You can find the Salesforce-Asset objects associated with a specific profile by using the ListProfileObjects API with the ProfileId and ObjectTypeName set to Salesforce-Asset.

Object type mapping for the standard case

The topics in this section provide the standard case definition, and the object type mapping from external applications to the standard case.

Contents
- Amazon AppFlow access requirements (p. 680)
- Standard case definition (p. 680)
- Mapping Zendesk objects to the standard case (p. 680)
- Mapping ServiceNow objects to the standard case (p. 682)
Amazon AppFlow access requirements

Following are the Amazon AppFlow access requirements to create and delete Zendesk and ServiceNow integrations:

- `appflow:CreateFlow`
- `appflow:DeleteFlow`

Standard case definition

The following table lists all the fields in the Customer Profiles standard case object.

<table>
<thead>
<tr>
<th>Standard case field</th>
<th>Data type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CaseId</td>
<td>String</td>
<td>The unique identifier of a standard case.</td>
</tr>
<tr>
<td>Title</td>
<td>String</td>
<td>The case's title</td>
</tr>
<tr>
<td>Summary</td>
<td>String</td>
<td>The case's summary.</td>
</tr>
<tr>
<td>Status</td>
<td>String</td>
<td>The case's status.</td>
</tr>
<tr>
<td>Reason</td>
<td>String</td>
<td>The case's reason.</td>
</tr>
<tr>
<td>CreatedBy</td>
<td>String</td>
<td>The case's creator.</td>
</tr>
<tr>
<td>CreatedDate</td>
<td>String</td>
<td>The case's date created.</td>
</tr>
<tr>
<td>UpdatedDate</td>
<td>String</td>
<td>The case's date updated.</td>
</tr>
<tr>
<td>ClosedDate</td>
<td>String</td>
<td>The case's date closed.</td>
</tr>
<tr>
<td>AdditionalInformation</td>
<td>String</td>
<td>Any additional information relevant to the case.</td>
</tr>
<tr>
<td>DataSource</td>
<td>String</td>
<td>The case's data source.</td>
</tr>
<tr>
<td>Attributes</td>
<td>String-to-string map</td>
<td>Key-value pair of attributes of a standard case.</td>
</tr>
</tbody>
</table>

Mapping Zendesk objects to the standard case

This topic lists which fields in Zendesk objects map to fields in the standard case in Customer Profiles.

Zendesk-tickets object

Following is a list of all the fields in a Zendesk-tickets object.

- id
- url
- type
- subject
- raw_subject
- description
- priority
• status
• recipient
• requester_id
• submitter_id
• assignee_id
• organization_id
• group_id
• collaborator_ids
• email_cc_ids
• follower_ids
• forum_topic_id
• problem_id
• has_incidents
• due_at
• tags
• via.channel
• custom_fields
• satisfaction_rating
• sharing_agreement_ids
• followup_ids
• ticket_form_id
• brand_id
• allow_channelback
• allow_attachments
• is_public
• created_at
• updated_at

Mapping Zendesk-tickets object to a standard case

A subset of the fields in the Zendesk-tickets object map to the standard case in Customer Profiles. The following table lists which fields can be mapped from the Zendesk-tickets object to the standard case.

<table>
<thead>
<tr>
<th>Zendesk-tickets source field</th>
<th>Standard case target field</th>
</tr>
</thead>
<tbody>
<tr>
<td>requester_id</td>
<td>Attributes.ZendeskUserId</td>
</tr>
<tr>
<td>id</td>
<td>Attributes.ZendeskTicketId</td>
</tr>
<tr>
<td>subject</td>
<td>Title</td>
</tr>
<tr>
<td>description</td>
<td>Summary</td>
</tr>
<tr>
<td>status</td>
<td>Status</td>
</tr>
<tr>
<td>requester_id</td>
<td>CreatedBy</td>
</tr>
<tr>
<td>created_at</td>
<td>CreatedDate</td>
</tr>
<tr>
<td>updated_at</td>
<td>UpdatedDate</td>
</tr>
</tbody>
</table>
The Zendesk-tickets customer data from the Zendesk object is associated with an Amazon Connect standard case using the following indexes.

<table>
<thead>
<tr>
<th>Standard Index Name</th>
<th>Zendesk-tickets source field</th>
</tr>
</thead>
<tbody>
<tr>
<td>_zendeskUserId</td>
<td>requester_id</td>
</tr>
<tr>
<td>_zendeskTicketId</td>
<td>id</td>
</tr>
</tbody>
</table>

For example, you can use _zendeskUserId and _zendeskTicketId as an ObjectFilter.KeyName with the ListProfileObjects API to find a standard case. You can find the Zendesk-tickets objects associated with a specific profile by using the ListProfileObjects API with the ProfileId and ObjectTypeName set to Zendesk-tickets.

### Mapping ServiceNow objects to the standard case

This topic lists which fields in ServiceNow objects map to fields in the standard case in Amazon Connect Customer Profiles.

#### Servicenow-task object

Following is a list of all the fields in a Servicenow-task object.

- sys_id
- active
- activity_due
- additional_assignee_list
- approval
- approval_history
- approval_set
- assigned_to
- assignment_group
- business_duration
- business_service
- calendar_duration
- closed_at
- closed_by
- cmdb_ci.display_value
- cmdb_ci.link
- comments
- comments_and_work_notes
- company
- contact_type
- contract
- correlation_display
- active
- correlation_id
- delivery_plan
- delivery_task
• description
• due_date
• escalation
• expected_start
• follow_up
• group_list
• impact
• knowledge
• location
• made_sla
• number
• opened_at
• opened_by.display_value
• order
• parent
• priority
• reassignment_count
• service_offering
• short_description
• sla_due
• state
• sys_class_name
• sys_created_by
• sys_created_on
• active
• sys_domain.global
• sys_domain.link
• sys_domain_path
• sys_mod_count
• sys_updated_by
• sys_updated_on
• time_worked
• upon_approval
• upon_reject
• urgency
• user_input
• watch_list
• work_end
• work_notes
• work_notes_list
• work_start

**Mapping Servicenow-task to a standard case**

A subset of the fields in the Servicenow-task object map to the standard case in Customer Profiles.
The following table lists which fields can be mapped from the Servicenow-task object to the standard case.

<table>
<thead>
<tr>
<th>Servicenow-task source field</th>
<th>Standard case target field</th>
</tr>
</thead>
<tbody>
<tr>
<td>sys_id</td>
<td>Attributes.ServiceNowTaskId</td>
</tr>
<tr>
<td>opened_by.link</td>
<td>Attributes.ServiceNowSystemUserId</td>
</tr>
<tr>
<td>short_description</td>
<td>Title</td>
</tr>
<tr>
<td>description</td>
<td>Summary</td>
</tr>
<tr>
<td>status</td>
<td>Status</td>
</tr>
<tr>
<td>sys_created_by</td>
<td>CreatedBy</td>
</tr>
<tr>
<td>sys_created_on</td>
<td>CreatedDate</td>
</tr>
<tr>
<td>sys_updated_on</td>
<td>UpdatedDate</td>
</tr>
</tbody>
</table>

The Servicenow-task customer data from Servicenow is associated with an Amazon Connect standard case using the indexes in the following table.

<table>
<thead>
<tr>
<th>Standard Index Name</th>
<th>Servicenow-task source field</th>
</tr>
</thead>
<tbody>
<tr>
<td>_serviceNowTaskId</td>
<td>sys_id</td>
</tr>
<tr>
<td>_serviceNowSystemId</td>
<td>open_by.link</td>
</tr>
</tbody>
</table>

For example, you can use _serviceNowTaskId and _serviceNowSystemId as an ObjectFilter.KeyName with the ListProfileObjects API to find a standard case. You can find the Servicenow-task objects associated with a specific profile by using the ListProfileObjects API with the ProfileId and ObjectTypeName set to Servicenow-task.

**Servicenow-incident object**

Following is a list of all the fields in a Servicenow-incident object.

- sys_id
- business_stc
- calendar_stc
- caller_id.link
- caller_id.value
- category
- caused_by
- child_incidents
- close_code
- hold_reason
- incident_state
- notify
- parent_incident

684
• problem_id
• reopened_by
• reopened_time
• reopen_count
• resolved_at
• resolved_by.link
• resolved_by.value
• rfc
• severity
• subcategory

**Mapping Servicenow-incident to a standard case**

A subset of the fields in the Servicenow-incident object map to the standard case in Customer Profiles. The following table lists which fields can be mapped from the Servicenow-incident object to the standard case.

<table>
<thead>
<tr>
<th>Servicenow-Incident source field</th>
<th>Standard case target field</th>
</tr>
</thead>
<tbody>
<tr>
<td>sys_id</td>
<td>Attributes_ServiceNowIncidentId</td>
</tr>
<tr>
<td>caller_id.link</td>
<td>Attributes_ServiceNowSystemUserId</td>
</tr>
<tr>
<td>incident_status</td>
<td>Status</td>
</tr>
<tr>
<td>caller_id.link</td>
<td>CreatedBy</td>
</tr>
<tr>
<td>resolved_at</td>
<td>ClosedDate</td>
</tr>
<tr>
<td>category</td>
<td>Reason</td>
</tr>
</tbody>
</table>

The Servicenow-incident customer data from the Servicenow object is associated with an Amazon Connect standard case using the indexes in the following table.

<table>
<thead>
<tr>
<th>Standard Index Name</th>
<th>Servicenow source field</th>
</tr>
</thead>
<tbody>
<tr>
<td>_serviceNowIncidentId</td>
<td>sys_id</td>
</tr>
<tr>
<td>_serviceNowSystemId</td>
<td>caller_id.link</td>
</tr>
</tbody>
</table>

For example, you can use _serviceNowIncidentId and _serviceNowSystemId as a ObjectFilter.KeyName with the ListProfileObjects API to find a standard case. You can find the Servicenow-incident objects associated with a specific profile by using the ListProfileObjects API with the ProfileId and ObjectTypeName set to Servicenow-incident.

**Additional properties of object types**

A property type defines which key should be used to encrypt any data of the object type.

There is an option that defines if new profiles can be created by the ingestion of this object. Normally when an object is ingested that cannot be matched to an existing profile, a new profile is created as long
as this option is true. If it is not true then the ingested object is created and written to the domain dead-letter queue.

It also contains how long data of this object type should be retained in Customer Profiles.

**Note**
Retention on individual objects is set at the time of ingestion of data. Changing the retention for a specific object type only applies to new data being ingested. It does not apply to existing data already ingested.

### Inferred profiles

When a profile is created by the ingestion of an object that has no fields, the standard profile object of this new profile is empty. This empty standard profile object is an **inferred profile**.

When creating an inferred profile, the following two fields are populated in the standard object from the profile object, if available.

- If there is any field defined with the content type of `EMAIL_ADDRESS` in the ingested object then this value will be populated into the `EmailAddress` field of the standard profile.
- If there is any field with the content type of `PHONE_NUMBER` in the ingested object then this value will be populated into the `PhoneNumber` field of the standard profile.

Values for these fields are populated into the standard profile even if the fields do not have a target defined in the field definition.

### Automatically associate the Contact Record with one profile found using the `_phone` key

You can automatically associate the Contact Record with one profile found using the `_phone` key.

**Example**

In the domain, the following profile is created by the `CreateProfile` API:

```json
{
    "FirstName": "John",
    "LastName": "Doe",
    "PhoneNumber": "+11234567890"
}
```

When a call is received from the `PhoneNumber` +11234567890 using the default CTR template, the Contact Record will not be automatically associated with the above profile unless an agent has already manually associated the Contact Record with the same caller to the above profile. If the Contact Record was not associated manually or automatically, Customer Profiles will create an inferred profile with the information from the Contact Record.

To automatically associate the above profile with contact records without manual agent intervention, you can use the `CTR-NoInferred` template. When a call is received from the `PhoneNumber` +11234567890 using the `CTR-NoInferred` template, the Contact Record will automatically associate with the above profile using the `_phone` profile key.

There are two scenarios in which Customer Profiles will not be able to automatically associate Contact Records to a profile:
• If more than one profile is found using the \_phone profile key, Customer Profiles cannot associate the Contact Record to a unique profile and the request will be rejected.
• If no profile is found for the \_phone profile key, Customer Profiles will create an inferred profile.

To use the CTR-NoInferred template to replace the default CTR template, run the following command on the CLI:

```
aws customer-profiles put-profile-object-type --domain-name {domain} --object-type-name CTR --description "No inferred contact record profiles" --template-id CTR-NoInferred
```

To revert to the default behavior, run the following command on the CLI:

```
aws customer-profiles put-profile-object-type --domain-name {domain} --object-type-name CTR --description "Revert to inferred contact record profiles" --template-id CTR
```

Examples of object type mappings

An object type mapping that generates a profile

The following example shows data that populates the standard profile.

Following is the incoming object:

```json
{
    "account": 1234,
    "email": "john@examplecorp.com",
    "address": {
        "address1": "Street",
        "zip": "Zip",
        "city": "City"
    },
    "firstName": "John",
    "lastName": "Doe"
}
```

The following code shows that incoming object mapping into a standard profile object and indexing PersonalEmailAddress, fullName, and accountId, which is a unique key.

```json
{
    "Fields": {
        "accountId": {
            "Source": "\_source.account",
            "Target": "\_profile.AccountNumber",
            "ContentType": "NUMBER"
        },
        "shippingAddress.address1": {
            "Source": "\_source.address.address1",
            "Target": "\_profile.ShippingAddress.Address1"
        },
        "shippingAddress.postalCode": {
            "Source": "\_source.address.zip",
            "Target": "\_profile.ShippingAddress.PostalCode"
        },
        "shippingAddress.city": {
            "Source": "\_source.address.city",
            "Target": "\_profile.ShippingAddress.City"
        }
    }
}
```
Note that email and fullname are indexed, but they aren't used to search for the profile. The account is the unique key. It is required to specify the object. Any time an object with the same account ID is ingested it overwrites the previous object with the same account ID.

Several fields are populated in the standard profile object (see the fields that have Target defined).

An object type mapping that doesn't populate the standard profile

This example shows a more complicated use case. It ingests data related to a profile but it doesn't necessarily populate the standard profile object.

Following is the incoming object:

```
{
  "email": "john@examplecorp.com",
  "timestamp": "2010-01-01T12:34:56Z",
  "subject": "Whatever this is about",
  "body": "Body of ticket"
}
```

Following is one way of mapping this data:
Implicit profile object types

You can use any object type that matches the name of a template ID (as returned by the ListProfileObjectTypeTemplates API) without explicitly defining it. The object type will exactly match the definition of the template definition of this object type. If an explicit object type is defined, it replaces the implicit one.

Implicit object types are included in the ListProfileObjectTypes API or returned by GetProfileObjectType operations, but they can still be deleted if you want to remove all data ingested from that object type.
Create and ingest customer data into Customer Profiles by using Amazon S3

You can define data from any source using Amazon S3 and seamlessly enrich a customer profile without the need for custom or pre-built integrations. For example, say you want to provide agents with relevant purchase history information. You can import purchase transaction data from an internal application into a spreadsheet file on S3 and then link it to a customer profile.

To set this up, you need to define an object type mapping (p. 640) that describes what the custom profile object looks like. This mapping defines how fields from your data can be used to either populate fields in the standard profile or how it can be used to assign the data to a specific profile.

After you create the object type mapping, you can use the PutProfileObject API to upload the custom profile data from your CRM into the custom profile object.

Use the Customer Profiles API

For information about how to programmatically manage domains and profiles, see the Amazon Connect Customer Profiles API Reference.

We recommend using the CustomerProfileJS open source library when integrating Customer Profiles into your own agent application. For more information, see the CustomerProfilesJS repo on Github.

For more information about how to integrate your existing apps with Amazon Connect use Amazon Connect Streams. You can embed the Contact Control Panel (CCP) components into your app.

Example: Programatically integrate S3 with Customer Profiles

Using the Customer Profiles PutIntegration API, you can programmatically create integrations for S3, Salesforce, Marketo, and more.

In this topic we show how to create an S3 integration with a sync interval of 15 minutes, the minimum value currently supported.

Step 1: Create a JSON file

Create a JSON file with the following contents:

```json
{
    "DomainName": "YOUR-DOMAIN",
    "ObjectTypeName": "YOUR-OBJECT-NAME",
    "FlowDefinition": {
        "FlowName": "YOUR-FLOW-NAME",
        "KmsArn": "THE KEY ARN IS THE SAME AS YOUR DOMAIN'S KEY",
        "Description": "Created by Customer Profiles",
        "TriggerConfig": {
            "TriggerType": "Scheduled",
            "TriggerProperties": {
                "Scheduled": {
                    "ScheduleExpression": "rate(15minutes)",
                    "DataPullMode": "Incremental",
                    "ScheduleStartTime": 1634244800.435,
                    "FirstExecutionFrom": 1594166400
                }
            }
        }
    }
}
```
Example: Integrate with S3

```json
{
  "SourceFlowConfig": {
    "ConnectorType": "S3",
    "SourceConnectorProperties": {
      "S3": {
        "BucketName": "YOUR-BUCKET",
        "BucketPrefix": "YOUR-PREFIX"
      }
    }
  },
  "Tasks": [
    {
      "TaskType": "Filter",
      "SourceFields": ["colA", "colB"],
      "ConnectorOperator": {
        "S3": "PROJECTION"
      },
      "ConnectorOperator": {"S3": "NO_OP"},
      "DestinationField": "colA",
      "TaskProperties": {},
      "SourceFields": ["colA"],
      "TaskType": "Map"
    },
    {
      "ConnectorOperator": {"S3": "NO_OP"},
      "DestinationField": "colB",
      "TaskProperties": {},
      "SourceFields": ["colB"],
      "TaskType": "Map"
    }
  ]
}
```

To customize the JSON with your own values, follow these guidelines:

- FlowName: Can be STRING [a-zA-Z0-9][\w@#.-]*
- ScheduleStartTime: Set to the current DateTime + 5 minutes in epoch time.
- FirstExecutionFrom: Go to S3, look at the file date, and use a date that is before the oldest date.
- Tasks: Define TaskType. In the SourceFields field you have to supply ALL the columns you have in your CSV in that array. Then, for each of the items in that array, you need to specify the ConnectorOperator. This example is for a CSV document with two columns: colA and colB.

**Step 2: Call the PutIntegration API**

After you have created and customized the JSON file with your values, call the `PutIntegration` API, as shown in the following example:

```bash
aws customer-profiles put-integration --cli-input-json file:///put_integration_s3_cli.json --region us-west-2
```

The response from `PutIntegration` returns a flow URI. For example:

```json
{
  "DomainName": "testDomain",
  "ObjectName": "your objec type",
  "CreatedAt": "2021-10-14T13:51:57.748000-07:00",
  "LastUpdatedAt": "2021-10-14T13:51:57.748000-07:00",
  "Tags": {}
}
```

**Step 3: Call the Amazon AppFlow StartFlow API**

Use the flow URI to call the Amazon AppFlow `StartFlow` API. For example:

```bash
aws appflow start-flow --flow-name uri --region us-west-2
```
Use Amazon Connect Agent Workspace

Amazon Connect agent workspace is a single, intuitive application that provides your agents with the tools and step-by-step guidance needed to onboard quickly, resolve issues efficiently, and improve customer experiences. Currently contact center agents might be required to use multiple applications to handle each customer interaction by digging through various tools to handle simple requests, which can lead to increased customer frustration while they are on hold. Out-of-the-box, agent workspace integrates all of your agent tools on one screen. When an agent accepts a call, chat, or task, they’re given necessary information about the case and customer, plus real-time recommendations. Furthermore, the agent is presented with one-step actions to resolve the customer’s issue more efficiently. For more information on providing access to the agent workspace for your agents, see the Agent training guide.

To learn more about Amazon Connect Cases, Customer Profiles and Wisdom, see Cases, Customer Profiles, and Wisdom.

Contents

- Agent Workspace guided experience (Preview) (p. 694)
- Enable guided experiences (Preview) (p. 694)
- View resource (Preview) (p. 695)
- User interface component library (Preview) (p. 721)
- How to invoke a flow at the start of a contact (Preview) (p. 722)
Agent Workspace guided experience (Preview)

This is prerelease documentation for a service in preview release. It is subject to change.

You can now create workflows that walk agents through custom UI pages that suggest what to do at a given moment during a customer interaction. Detailed step-by-step guides increase agent productivity and decrease training time. Step-by-step guides within an agent workspace programmatically infer customer intent and recommend discrete next actions for agents within a guided experience.

For more information on getting access to this Preview, see Enable guided experiences (Preview) (p. 694).

Enable guided experiences (Preview)

This is prerelease documentation for a service in preview release. It is subject to change.

To request access to the Step-by-step guided experience preview, please reach out to AWS Support or your AWS point of contact in order to be added to the allow-list for this feature. Once you've been added to the allow-list, you can follow the steps below in order to grant your users access to guides and the guide creation process.

1. Enable admins to create guides

   In the security profiles section of the admin website, you give managers and business analysts access to the Views permission in order to grant them the ability to configure step-by-step guides in Flows. Since guides are created using Flows, it is also necessary that this user has access to Contact flows edit and create permissions so that they can create any type of flow.
2. Enable agents to view guides

In the security profiles section of the admin website, you can grant agents the ability to see step-by-step guides in their agent workspace by enabling the **Custom views** permission located under the **Agent Applications** section.

<table>
<thead>
<tr>
<th>All</th>
<th>Access</th>
<th>View</th>
<th>Edit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Custom views</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
</tbody>
</table>

**View resource (Preview)**

*This is prerelease documentation for a service in preview release. It is subject to change.*

Views are UI templates that you can use to customize your agent's workspace. For example, you can use Views to display contact attributes to an agent, provide forms for entering disposition codes, provide call notes, and present UI pages for walking agents through step-by-step guides. Amazon Connect comes with a set of Views that you can add to your agent's workspace by using the Show View block in Connect Flows. Each View is configurable and you can see how by clicking on the below tabs.

For the best data mapping experience, we recommend using the **Set JSON** option in the Show View flow block. All namespaces in Flows can be referenced in the Show View block, including `$ .External`, so you will be able to share data from external systems to your agent in whichever View you create. You can mix and match data from Amazon Connect and other sources in order to create a consolidated UI for your agent.

For more information on the Flows **Show view** block, see **Show view (Preview)**.

**Details view**

The detail view is for displaying information to the agent and providing them with a list of actions that they can take. A common use case of the **Detail view** is to surface a screen-pop to the agent at the start of a call. Actions in this view can be used to let an agent continue to the next step in a step-by-step guide or the actions can be used to invoke entirely new workflows. Optional components such as the **AttributeBar** are supported by this view, but the only required component is **Sections** which is where you can configure the body of the page you want to show to your agent.
Sections

- Optional, if provided will display the sections provided.
- Content can be a static string, a Template String or a key-value pair. It can be a single data point or a list.

AttributeBar

- Optional, if provided will display the Attribute bar at the top of the view.
- Is a list of objects with required properties, Label, Value, and optional properties LinkType, Resourceld, Copyable and Url.
  - LinkType can be external or connect application such as case.
    - When it is external, a user can navigate to a new browser page, which is configured with Url.
    - When it is case, a user can navigate to a new case detail on the Agent workspace, which configured with Resourceld.
  - Copyable allows users to copy the Resourceld by choosing it with your input device.

Back

- Optional, but required if no actions are included. if provided will display the back navigation link.
- Is an object with a Label which will control what is displayed in the link text.

Heading

- Optional, if provided will display Text as the title.

Description

- Optional, if provided will display description text under the title.

Actions

- Optional. If provided, will display a list of action at the bottom of the page.

Input data

```json
{
    "AttributeBar": [
        {
            "Label": "Example", "Value": "Attribute"},
        {
            "Label": "Example 2", "Value": "Attribute 3", "LinkType": "case", "ResourceId": "123456", "Copyable": true
        }
    ],
    "Back": {
        "Label": "Back"
    },
    "Heading": "Hello world",
    "Description": "This view is showing off the wonders of a detail page",
    "Sections": [{
        "TemplateString": "This is an intro paragraph"
    }, "abc"],
    "Actions": ["Do thing!", "Update thing 2!"]
}
```
Output data

```json
{
  Action: "ActionSelected",
  Output: {
    actionName: "Update thing 2!"
  }
}
```

Input data schema

```json
{
  "AttributeBar": [
    {"Label": "Queue", "Value": "Sales"},
    {"Label": "Case ID", "Value": { "ExternalLink": {"Url": "https://...", "Label": "1234567"}}},
    {"Label": "Case", "Value": "New reservation"}
  ],
  "PrimaryPageNav": { "Label": "Back to Home" },
  "Title": "Page Title",
  "Description": "Description of package or ...",
  "Content": { "TemplateString": ... },
}
```

List view

The list view is for displaying information as a list of items with titles and descriptions. Items may also act as links, with actions attached. It also optionally supports the standard back navigation and persistent context header.

**Items**

- Required, will display these items as a list.
- Each item may have a Heading, Description, Icon, and Id.
  - All properties are optional.
  - When Id is defined, the output will include the value as part of output.

**AttributeBar**
• Optional, if provided will display the Attribute bar at the top of the view.
• Is a list of objects with required properties, Label, Value, and optional properties LinkType, Resourceld, Copyable and Url.
  • LinkType can be external or connect application such as case.
    • When it is external, a user can navigate to a new browser page, which is configured with Url.
    • When it is case, a user can navigate to a new case detail on the Agent workspace, which configured with Resourceld.
  • Copyable allows users to copy the Resourceld by choosing it with your input device.

Back
• Optional, but required if no actions are included. if provided will display the back navigation link.
• Is an object with a Label which will control what is displayed in the link text.

Heading
• Optional, if provided will display Text as the title.

SubHeading
• Optional, if provided will display Text as the title of list.

Input data Schema

```json
{
    "AttributeBar": [
        {"Label": "Queue", "Value": "Sales"},
        {"Label": "Case ID", "Value": { "Externallink": {"Url": "https://...", "Label": "1234567"}}},
        {"Label": "Case", "Value": "New reservation"}
    ],
    "PrimaryPageNav": {
        "Label": "Back to Home"
    },
    "Title": "List Title",
    "Items": [
        {
            "header": "Item 1",
            "subHeader": "This is a description",
            "icon": "Hospital",
            "action": "Click_Item1"
        },
        {
            "header": "Item 2",
            "subHeader": "This is a description"
        },
        {
            "header": "Item 3",
            "action": "Click_Item3"
        }
    ],
    "Actions": ["Action 1", "Action 2", "Action 3"]
}
```
Form view

The Form view allows you to provide your agents with custom forms that meet your unique use cases. Basic types of input fields are supported and you’ll be able to submit data to homegrown or 3rd party systems by integrating with the Lambda flow block in the Flows editor.

<table>
<thead>
<tr>
<th>Queue</th>
<th>Case ID</th>
<th>Case</th>
<th>Attribute 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales</td>
<td>1234567</td>
<td>New reservation</td>
<td>Attribute</td>
</tr>
</tbody>
</table>

**Pick up details**
- Location: New York City JFK Airport
- Day: 07/23/2022
- Time: 10AM - 12PM

**Drop off details**
- Search for location
- Day: 07/28/2022
- Time: 10AM - 12PM

**Heading**
- String, Form view main title.

**SubHeading**
- String, Form view subtitle shown just below *Title*.

**Sections**
- Section layout information, object with _id, Type, Items, Heading.
  - **_Id**
    - Unique identifier for the group.
  - **Heading**
    - Title of the group of forms or attributes.
  - **Type**
    - Type of Form: either *FormSection* (forms handling user's input) or *Attributes* (displaying a list of label and value).
  - **Items**
• Array of Form Section objects. Each Form Section object will have _id, Heading and Items along with default LayoutConfiguration.

  • **LayoutConfiguration** Object which accepts Grids.
    • Grid will be a list of colspan (each columns information).
      • colspan includes the column size per screen size. (Supported screen size: default, xs)
  • **Items** Array of Form Field items that are two dimensional.
    • Type - type of the form field, Allowed fields include DatePicker, TimePicker, Dropdown and more.
    • Label - label of the form field.
    • Name - Form field name, when the value is returned, it will be the key of the value.
    • DefaultValue - Initial Value set for the form field set.
    • Fluid - Optional, whether or not the input has full width. The default is false.
    • Required - Optional, whether or not the input is required. The label will have "*".
    • ShowErrors - Optional, whether or not it shows an error message.
    • InputType - when Type is FormInput, it sets the type of form input. The default is text.
      • supported values: number, text, password, email, tel, url.
    • Options - a list of options for multiple choices such as Dropdown, CheckboxGroup, or RadioGroup. Should be a list of objects (Label and Value)
    • MultiSelect - when Type is Dropdown, it allows a user to select multiple options. The default is false.

**Next**

  • Type Object, expects optional Label String and optional Details object which is a free form Object that gets sent in parallel with Form dynamic data using the Action Name **Submit**.

**Cancel**

  • Type Object, expects optional Label String and optional Details object which is a free form Object that gets sent in parallel with the **Cancel** action.

**Back**

  • Required
  • Object with keys:
    • Label - string label for the navigation button.

**AttributeBar**

  • Optional, if provided will display the Attribute bar at the top of the view.
  • Is a list of objects with required properties, **Label**, **Value**, and optional properties **LinkType**, **ResourceId**, **Copyable** and **Url**.
    • **LinkType** can be external or connect application such as case.
      • When it is external, a user can navigate to a new browser page, which is configured with **Url**.
      • When it is case, a user can navigate to a new case detail on the Agent workspace, which configured with ResourceId.
    • **Copyable** allows users to copy the ResourceId by choosing it with your input device.
ErrorText

- Optional, shows server-side error messages.
- Expect Heading and Content.

Input data Schema

```json
{
    "PrimaryPageNav": {
        "Label": "Back Home"
    },
    "Submit": {
        "Label": "Confirm Reservation",
        "Details": {
            "endpoint": "awesomecustomer.com/submit",
            "additionalparams": {
                "Agent": "jagadeey"
            }
        }
    },
    "Cancel": {
        "Label": "Cancel"
    },
    "AttributeBar": [
        {
            "Label": "Attribute1",
            "Value": "Value1"
        },
        {
            "Label": "Attribute2",
            "Value": "Value2"
        },
        {
            "Label": "Attribute3",
            "Value": "Value3"
        },
        {
            "Label": "Attribute4",
            "Value": "Value4"
        }
    ],
    "Title": "Modify Reservation",
    "SubTitle": "Cadillac XT5",
    "ErrorText": {
        "Header": "Modify reservation failed",
        "Content": "Internal Server Error, please try again"
    },
    "Sections": [
        {
            "_id": "pickup",
            "Title": "Pickup Details",
            "Items": [
                {
                    "LayoutConfiguration": {
                        "Grid": {
                            "colspan": {
                                "default": 12,
                                "xs": 6
                            }
                        }
                    }
                }
            ]
        }
    ]
}
```
Amazon Connect Administrator Guide
View resource (Preview)
},
"Items": [
{
"Type": "FormInput",
"Fluid": true,
"InputType": "search",
"Label": "Location",
"Name": "pickup-location",
"DefaultValue": "Seattle",
"Values": [
{},
{},
{}
],
"Required": true
}
]
},
{
"LayoutConfiguration": {
"Grid": [
{
"colspan": {
"default": 6,
"xs": 4
}
},
{
"colspan": {
"default": 6,
"xs": 4
}
}
]
},
"Items": [
{
"Label": "Day",
"Type": "FormInput",
"InputType": "date",
"Fluid": true,
"DefaultValue": "2022-10-10",
"Name": "pickup-day",
"Required": true
},
{
"Label": "Time",
"Type": "FormInput",
"InputType": "time",
"Fluid": true,
"DefaultValue": "13:00",
"Name": "pickup-time"
}
]
}

]
},
{
"_id": "dropoff",
"Title": "Drop off details",
"Items": [
{
"LayoutConfiguration": {
"Grid": [
{
"colspan": {

702


Wizard view

The Wizard view lets you create a multi-step process for your agents. One example use case would be to create a multi-page form that lets your agent focus on one task at a time as they gather information from an end-customer. Just like the Form view, you will be able to enable input fields
unique to your use case. All data submitted by a Wizard form can also be sent to homegrown and 3rd party solutions via the Lambda block in Flows.

Example UI

<table>
<thead>
<tr>
<th>Queue</th>
<th>Case ID</th>
<th>Case</th>
<th>Attribute 1</th>
<th>Attribute 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales</td>
<td>1234567</td>
<td>New reservation</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

![Example UI Image]

**Heading**
- String, Wizard view, main title.

**Steps**
- Required, will display ProgressTracker at the left side of the View.
- Is a list of objects with Heading, Selected, Optional and _id.
  - Heading, shows along side with content.
  - Selected, shows current stage of wizard, if not given defaults to false.
  - Optional, shows flag for optional.

**StepSection**
- Current step view information.
- Required, Object with _id, Title and Content
  - _id Unique identifier for the section, shows the relationship between step and stepSection.
    - When the _id points to the last step, action button shows "Submit" for the next view, not "Next".
    - when the _id doesn't point to the last step, action button shows "Next" for the next view.
  - Heading Title of the section.
- **Content** Section layout information, object with _id, Type, Items, Heading.
- **_id** Unique identifier for the group.
- **Heading** Title of the group of forms or attributes.
- **Type** Type of Form: either FormSection(form handling user's input) or Attributes(displaying a list of label and value).

**Input Data Example**

```
{
    "AttributeBar": [{
        "Label": "Queue",
        "Value": "Sales"
    }, {
        "Label": "Case ID",
        "Value": "1234567"
    }, {
        "Label": "Case",
        "Value": "New reservation"
    }, {
        "Label": "Attribute 3",
        "Value": "Attribute"
    }],
    "Steps": [{
        "Heading": "Pick up and drop off",
        "_id": "pickup_dropoff",
        "Selected": true
    }, {
        "Heading": "Review and submit",
        "_id": "review_submit"
    }],
    "StepSection": {
        "Heading": "Pick up and drop off",
        "_id": "pickup_dropoff",
        "Content": [{
            "_id": "pickup",
            "Type": "FormSection",
            "Heading": "Pickup Details",
            "Items": [{
                "LayoutConfiguration": {
                    "Grid": {
                        "Grid": {
                            "colspan": {
                                "default": "12",
                                "xs": "6"
                            }
                        }
                    }
                }, {
                    "Items": [{
                        "Type": "FormInput",
                        "Fluid": true,
                        "InputType": "text",
                        "Label": "Location",
                        "Name": "pickup-location",
                        "DefaultValue": "Seattle"
                    }
                ]
            }]
        }],
        "Items": [{
            "Type": "FormInput",
            "Fluid": true,
            "InputType": "text",
            "Label": "Location",
            "Name": "pickup-location",
            "DefaultValue": "Seattle"
        }]
    }
}
```
{  
  "_id": "pickup",  
  "Heading": "Pickup details",  
  "Type": "FormSection",  
  "Items": [{  
    "LayoutConfiguration": {  
      "grid": [{  
        "colspan": {  
          "default": "6",  
          "xs": "4"  
        }  
      },  
      },  
    }  
  },  
  "Items": [{  
    "Label": "Day",  
    "Type": "DatePicker",  
    "Fluid": true,  
    "DefaultValue": "2022-11-02",  
    "Name": "pickup-day"  
  },  
  },  
  "Items": [{  
    "Label": "Time",  
    "Type": "TimeInput",  
    "Fluid": true,  
    "DefaultValue": "13:00",  
    "Name": "pickup-time"  
  }
  ]
},
{  
  "_id": "dropoff",  
  "Heading": "Drop off details",  
  "Type": "FormSection",  
  "Items": [{  
    "LayoutConfiguration": {  
      "grid": [{  
        "colspan": {  
          "default": "12",  
          "xs": "6"  
        }  
      },  
      },  
    }  
  },  
  "Items": [{  
    "Label": "Location",  
    "Type": "FormInput",  
    "Fluid": true,  
    "DefaultValue": "Lynnwood",  
    "Name": "dropoff-location"  
  }],  
  "LayoutConfiguration": {  
    "grid": [{  
      "colspan": {  
        "default": "6",  
        "xs": "4"  
      }  
    },  
    ],  
    "colspan": {  
      "default": "6",  
      "xs": "4"  
    }  
  }  
},  
  "Items": [{  
    "Label": "Day",  
    "Type": "DatePicker",  
    "Fluid": true,  
    "DefaultValue": "2022-11-10",  
    "Name": "dropoff-day"  
  },  
  },  
  "Items": [{  
    "Label": "Time",  
    "Type": "TimeInput",  
    "Fluid": true,  
    "DefaultValue": "01:00",  
    "Name": "pick-up-time"  
  }
  ]
}
"Name": "dropoff-time"
}}
]]
},
"Next": {
  "Label": "Next"
},
"Previous": {
  "Label": "Previous"
},
"Edit": {
  "Label": "Edit"
}
"Heading": "Hotel reservation",
}

Output Data Example

{
  Action: "Next",
  Output: {
    ActionOutput: {
      formData: {
        "dropoff-day": "2022-10-15",
        "dropoff-location": "Lynnwood",
        "dropoff-time": "01:00",
        "pickup-day": "2022-10-10",
        "pickup-location": "Seattle",
        "pickup-time": "13:00"
      }
    },
    Label: "Submit"
  }
}

Input Data Schema

{
  "type": "object",
  "properties": {
    "AttributeBar": {
      "type": "array",
      "items": {
        "type": "object",
        "properties": {
          "Label": {
            "type": "string",
            "description": "Label for attribute bar item"
          }
        }
      }
    }
  }
}
"type":"string"
 },
 "Value":{
   "type":"string"
 }
 },
 "required":[
   "Label",
   "Value"
  ]
 },
 "Heading":{
   "type":"string"
 },
 "Back":{
   "$ref":#/$defs/Action
 },
 "Previous":{
   "$ref":#/$defs/Action
 },
 "Cancel":{
   "$ref":#/$defs/Action
 },
 "Edit":{
   "$ref":#/$defs/Action
 },
 "Next":{
   "$ref":#/$defs/Action
 },
 "Steps":{
   "type":"array",
   "items":{
     "type":"object",
     "properties":{
       "Heading":{
         "type":"string"
       },
       "Selected":{
         "type":"boolean"
       },
       "_id":{
         "type":"string"
       },
       "required":[
         "Heading",
         "_id"
       ]
     }
   }
 },
 "StepSection":{
   "type":"object",
   "properties":{
     "Heading":{
       "type":"string"
     },
     "_id":{
       "type":"string"
     },
     "Content":{
       "type":"array",
       "items":{
         "type":"object",
         "properties":{
           "_id":{
             "type":"string"
           }
         }
       }
     }
   }
 }
"required": [
  "Heading",
  "_id",
  "Content"
],
"ErrorText": {
  "anyOf": [
    { "type": "string" },
    { "type": "object",
      "properties": {
        "Heading": {
          "type": "string"
        },
        "Content": {
          "type": "string"
        }
      },
      "required": [
        "Heading",
        "Content"
      ]
    }
  ]
},
"$defs": {
  "FormItem": {
    "anyOf": [
      { "$ref": "/$defs/BasicInputFields" },
      { "$ref": "/$defs/Checkbox" },
      { "$ref": "/$defs/RadioCheckboxGroup" },
      { "$ref": "/$defs/Dropdown" },
      { "$ref": "/$defs/Address" },
      { "$ref": "/$defs/Toggle" },
      { "$ref": "/$defs/TextArea" }
    ]
  },
  "AttributeItem": {
    "type": "object",
    "properties": {
      "Label": {
        "type": "string"
      },
      "Value": {
        "type": "string"
      },
      "Name": {
        "type": "string"
      }
    }
  }
}
BasicInputFields: {
  type: "object",
  properties: {
    Label: {
      type: "string"
    },
    Name: {
      type: "string"
    },
    DefaultValue: {
      type: "string"
    },
    HelperText: {
      type: "string"
    },
    Required: {
      type: "boolean"
    },
    showErrors: {
      type: "boolean"
    },
    Fluid: {
      type: "boolean"
    },
    Type: {
      type: "string",
      enum: [
        "DatePicker",
        "TimeInput",
        "FormInput"
      ]
    },
    InputType: {
      type: "string",
      enum: [
        "number",
        "text",
        "password",
        "email",
        "tel",
        "url"
      ]
    }
  },
  required: [
    "Label",
    "Name"
  ],
}
Checkbox: {
  type: "object",
  properties: {
    name: {
      type: "string"
    },
    Type: {
      type: "string",
      enum: [
        "Checkbox"
      ]
    },
    label: {
      type: "string"
    }
  }
},

},
"value":{
  "type": "boolean"
}
},
"required": [
  "name",
  "label"
],
"RadioCheckboxGroup": {
  "type": "object",
  "properties": {
    "Name": {
      "type": "string"
    },
    "Type": {
      "type": "string",
      "enum": [
        "CheckboxGroup",
        "RadioGroup"
      ]
    },
    "Label": {
      "type": "string"
    },
    "DefaultValue": {
      "type": "string"
    },
    "Options": {
      "type": "array",
      "items": {
        "type": "object",
        "properties": {
          "Value": {
            "type": "string"
          },
          "Label": {
            "type": "string"
          },
          "Description": {
            "type": "string"
          }
        }
      }
    }
  }
},
"required": [
  "Name",
  "Label"
],
"Dropdown": {
  "type": "object",
  "properties": {
    "Name": {
      "type": "string"
    },
    "Label": {
      "type": "string"
    },
    "DefaultValue": {
      "type": "array"
    },
    "MultiSelect": {
      "type": "boolean"
    }
  }
}
"Options":{
  "type":"array",
  "items":{
    "type":"object",
    "properties":{
      "Value":{
        "type":"string"
      },
      "Label":{
        "type":"string"
      }
    }
  }
},
"Required":{
  "type":"boolean"
},
"showErrors":{
  "type":"boolean"
},
"required":[
  "Name",
  "Label",
  "Options"
],
"Address":{
  "type":"object",
  "properties":{
    "Name":{
      "type":"string"
    },
    "DefaultValue":{
      "type":"object",
      "properties":{
        "Address":{
          "type":"string"
        },
        "City":{
          "type":"string"
        },
        "State":{
          "type":"string"
        },
        "Country":{
          "type":"string"
        },
        "Zip":{
          "type":"string"
        }
      }
    },
    "showErrors":{
      "type":"boolean"
    },
    "required":[
      "Name"
    ]
  }
},
"Action":{
  "type":"object",
  "properties":{
    "Label":{
      "type":"string"
    }
  }
}
"type":"string"
},
"Details":{
}
},
"required": [
"Label"
],
"LayoutConfiguration":{
"type":"object",
"properties":{
"Grid":{
"anyOf": [
{"type":"array",
"items":{
"type":"object",
"properties":{
"colspan":{
"type":"string"
}
}
},
"type":"array",
"items":{
"type":"object",
"properties":{
"colspan":{
"type":"object",
"properties":{
"default":{
"type":"string"
},
"xxs":{
"type":"string"
},
"xs":{
"type":"string"
},
"s":{
"type":"string"
},
"m":{
"type":"string"
},
"l":{
"type":"string"
},
"xl":{
"type":"string"
},
"xxl":{
"type":"string"
}
}
}
}
}
},
"ColumnLayout":{

}
"type":"object",
"properties":{
  "columns":{
    "type":"string"
  },
  "borders":{
    "type":"string",
    "enum":[
      "vertical",
      "horizontal",
      "all"
    ]
  },
  "variant":{
    "type":"string",
    "enum":[
      "default",
      "text-grid"
    ]
  }
},
"required":[
  "columns"
]
},
"Toggle":{
  "type":"object",
  "properties":{
    "Name":{
      "type":"string"
    },
    "Label":{
      "type":"string"
    },
    "DefaultValue":{
      "type":"boolean"
    }
  },
  "required":[
    "Name"
  ]
},
"TextArea":{
  "type":"object",
  "properties":{
    "Name":{
      "type":"string"
    },
    "Label":{
      "type":"string"
    },
    "DefaultValue":{
      "type":"string"
    },
    "Required":{
      "type":"boolean"
    },
    "showErrors":{
      "type":"boolean"
    }
  },
  "required":[
    "Name"
  ]
}
Confirmation view

The confirmation page view is a page to show users after a form has been submitted or an action has been completed that summarizes what has happened, any next steps, or prompts. Confirmation page supports the persistent attribute bar, an icon / image, Headline and sub-headline, along with a back to home navigation button.

Input Data Example

```
I have updated your car rental reservation for pickup on July 22.
You will be receiving a confirmation shortly. Is there anything else I can help with today?
```

Heading

Next

AttributeBar

Graphic

SubHeading

Back to Home
Output Data Example

```json
{
    "Action": "Next",
    "Output": {
        "Label": "Go Home"
    }
}
```

Input Data Schema

```json
{
    "AttributeBar": [
        { "Label": "Queue", "Value": "Sales" },
        { "Label": "Case ID", "Value": { "ExternalLink": { "Url": "https://...", "Label": "1234567" } } },
        { "Label": "Case", "Value": "New reservation" }
    ],
    "Graphic": {
        "Include": true
    },
    "Headline": "I have updated your car reservation ....",
    "SubHeadline": "You will be receiving a confirmation ...",
    "PrimaryPageNav": {
        "Label": "Back to Home"
    }
}
```

Cards view

The Cards view allows you to present a set of topics to your agent to choose from in order to dive deeper into a solution. You can organize your topics as either entities (e.g., products, reservations, orders) that when clicked on reveal more info, or as the beginning of new workflows (e.g., make a reservation).

*Present cards to your agents.*
When you choose a card, more info is revealed.

Cards
AttributeBar
Back
Title
NoMatchFound
Input Data Example

```json
{
    "AttributeBar": [
        {
            "Label": "Queue",
            "Value": "Sales"
        },
        {
            "Label": "Case ID",
            "Value": "1234567"
        },
        {
            "Label": "Case"
        }
    ]
}
```
"Value": "New reservation"
},
{
"Label": "Attribute 3",
"Value": "Attribute"
}
],
"Back": {
"Label": "Back"
},
"Heading": "Customer may be contacting about...",
"Cards": [{
"Summary": {
"Icon": "plus",
"Heading": "Make new reservation"
},
"Detail": {
"Heading": "Make new reservation",
"Description": "You can make a single reservation or include multiple items to get access to discounts. Reservations usually takes 10 - 15 minutes."
},
"Sections": {
},
"Actions": ["Flight reservation", "Hotel reservation", "New car reservation", "It’s something else"]
}
}, {
"Summary": {
"Icon": "Car Side View",
"Heading": "Car rental - New York",
"Status": "Upcoming Dec 5, 2022"
},
"Detail": {
"Heading": "Car rental - New York",
"Content": "There is no additional information."
}
}, {
"Summary": {
"Icon": "Suitcase",
"Heading": "Trip to Mexico",
"Status": "Upcoming Dec 5, 2022",
"Description": "This was booked by third provider, Stargate."
},
"Detail": {
"Heading": "Trip to Mexico",
"Description": "The trip includes the list below."
},
"Sections": {
"TemplateString": "Scuba diving in Maya Riviera. Touring in Acapulco."
},
"Actions": ["Add another tour", "Update the trip", "Cancel the trip"]
}
}, {
"Summary": {
"Icon": "Airplane",
"Title": "Flight to France",
"Status": "Upcoming Dec 15, 2022"
},
"Detail": {
"Heading": "Flight to France",
"Description": "Description of the information on the view",
"Actions": ["Update the flight", "Cancel the flight"]
},
"Sections": {
"TemplateString": "The customer purchased the flight with other travel package together. Disney cruise. Helicopter tour."}
Output Data Example

```json
{
    Action: "ActionSelected",
    Output: {
        actionName: "Update the trip"
    }
}
```

Input Data Schema

```json
{
    "AttributeBar": [
        {
            "Label": "Queue", "Value": "Sales"},
        {
            "Label": "Case ID", "Value": { "ExternalLink": { "Url": "https://...", "Label": "1234567"} },
            "Label": "Case", "Value": "New reservation"}
    
    "PrimaryPageNav": {
        "Label": "Back"
    },
    "Title": "José may be contating about...",
    "Cards": [
        {
            "Match": {
                "id": "newReservation",
                "Icon": "plus",
                "Title": "Make new reservation"}]
    }
}
```
User interface component library (Preview)

This is prerelease documentation for a service in preview release. It is subject to change.

Supported Components

- Address
- Alert
- Attributes Bar
- Button
- Card
- Contact
- Checkbox
- Checkbox Group
- Collapsible Container
How to invoke a flow at the start of a contact (Preview)

This is prerelease documentation for a service in preview release. It is subject to change.

After you've created your flows, you will be able to dynamically determine which ones to surface when by setting the DefaultFlowForAgentUI as a custom attribute in your contact flows. As long as this attribute is set before a contact gets routed to a queue, the agent UI will show this flow once the agent accepts the contact.

For example, by checking the IVR responses, Queue Name, and Customer info you can create branching logic in flows that determines which flow id to set. Just use the Check attribute block to set your conditional logic and the set attribute block to set the flow you want to send to your agent.

Example Flow Id
Set contact attributes

Define and store key-value pairs as contact attributes. Info

Contact attributes are accessible by other areas of Amazon Connect, such as the Contact Control Panel (CCP) and Contact Trace Records (CTRs).

- **Namespace:** User defined

- **Value:** `DefaultFlowForAgentUI`

  - Set manually
    - Value: `658fdcca-295d-4151-a16b-3c08d2991`

  - Set dynamically
Display contact attributes in the agent interface (Preview)

This is prerelease documentation for a service in preview release. It is subject to change.

A simple use case of step-by-step guides is to surface contact attributes to your agents at the start of a contact in order to give them the context they need at the start of the contact so they can dive right into problem solving. This feature is sometimes referred to as a Screen Pop. To implement this use case, follow the example of how to deploy a Details view. For more information see View resource.

Disposition codes (Preview)

This is prerelease documentation for a service in preview release. It is subject to change.

A simple use case of step-by-step guides is to have an agent enter a disposition code at the end of the contact. To give your agents the ability to set disposition codes at the end of a contact or complete other post-call work, you can create a flow that has one Show View block and one Set Attributes block. You can use the Show View block to create a Form view that gives the agents the required input field, and then you can use the Set contact attributes block to save the response as contact attributes. In addition, you can also use a Lambda flow block to send the entered data to an external system.

After you've created your flow, you will be able to dynamically determine which one to surface at the end of a contact by setting the DisconnectFlowForAgentUI as a custom attribute in your contact flows. As long as this attribute is set before a contact ends, the agent UI will surface this form once a contact ends.
Set contact attributes

Define and store key-value pairs as contact attributes. Info

Contact attributes are accessible by other areas of Amazon Connect, such as the Contact Control Panel (CCP) and Contact Trace Records (CTRs).

Namespace
User defined

Value
DisconnectFlowForAgentUI

Set manually

Value
78598a99-2c07-4627-af8e-6d8ab28fd6

Set dynamically
Customize views (Preview)

This is prerelease documentation for a service in preview release. It is subject to change.

You can customize the look and feel of the layouts of View resources by leveraging JSK when you pass in input parameters to the show view block.

As a simple example, create a flow with 1 show view block and select the Details view. In the Sections field use the below JSON to see how JSX expressions get processed.

**JSX example**

```json
{
  "TemplateString":
  "Please provide an introduction to the customers. Ask them how their day is going
  Things to say:
  Hello, how are you today? My name is Bob, who am I speaking to?"
}
```
Amazon Connect Cases

Amazon Connect Cases enables your customer service organization to track, collaborate, and resolve customer cases.

A case represents a customer’s issue. It is created to record the customer’s issue, the steps and interactions taken to resolve the customer’s issue, and the outcome.

Without doing any integration work, you can enable Cases for your contact center. You can set up cases to be created when contacts come in, and collect information from the customer to display on the case. Alternatively, agents can manually create cases. When an agent accepts a contact, they have context about an issue and can immediately start solving it. You can create tasks to track and route follow up steps to resolve the case.

The following image shows an example case as it appears in the agent application.

Getting started with Cases

We recommend reviewing these topics to help you get started:

- Enable Cases (p. 728)
- Assign permissions (p. 729)
- Create case fields (p. 734) and case templates (p. 738)
- Use Cases (p. 1300) in the agent application
- Cases block (p. 334)
- Case event streams (p. 741)
- Cases quotas (p. 1328)
Enable Cases

This topic explains how to enable Amazon Connect Cases using the Amazon Connect console. To use the API, see Amazon Connect Cases API Reference.

**Tip**
A case is always associated with a customer profile. You must have Customer Profiles enabled. Check your instance settings in the Amazon Connect console, and if a Customer Profiles domain does not yet exist, see Enable Customer Profiles for your instance (p. 588).

**Requirements**

If you're using custom IAM policies to manage access to the Amazon Connect Cases, your users need the following IAM permissions to onboard to Cases using the Amazon Connect console:

- `connect:ListInstances`
- `ds:DescribeDirectories`
- `connect:ListIntegrationAssociations`
- `cases:GetDomain`
- `cases:CreateDomain`
- `connect:CreateIntegrationAssociation`
- `connect:DescribeInstance`
- `iam:PutRolePolicy`

For more information, see Required permissions for using custom IAM policies to manage Cases (p. 730).

**How to enable Amazon Connect Cases**

1. Open the Amazon Connect console at https://console.aws.amazon.com/connect/.
2. On the instances page, choose the instance alias. The instance alias is also your **instance name**, which appears in your Amazon Connect URL.
3. On the left navigation menu, choose **Cases**. This option is currently available in the US East (N. Virginia) and US West (Oregon) Regions.
4. Choose **Enable cases** to get started.
5. On the **Cases** page, choose **Add domain**.
6. On the **Add domain** page, enter a unique, friendly name that's meaningful to you, such as your organization name.
7. Choose **Add domain**. The domain is created.
If the domain is not created, choose **Try again**. If that doesn't work, contact AWS Support.

**Next steps**

After your cases domain is created, do the following:

1. **Assign security profile permissions (p. 729)** to agents and call center managers.
2. **Create case fields (p. 734).** Fields are the building blocks of your case templates.
3. **Create case templates (p. 738).** Case templates are forms that agents complete and reference in the agent application. Templates ensure the right information is collected and referenced for different types of customer issues.
4. Optionally, add the **Cases (p. 334)** block to your flows. This block enables you to get, update, or create cases automatically.
5. Optionally, set up **case event streams (p. 741)** to get near real-time updates when cases are created or modified.

**Security profile permissions for Cases**

The following image shows the security permissions used to manage access to Amazon Connect Cases (p. 727) functionality:

![Cases Permissions Table]

Also, to use Amazon Connect Cases, your users also need permissions to Customer Profiles permissions.

![Customer Profiles Permissions Table]

Assign the following permissions to manage who can create, view, and edit cases, case fields, and case templates:

- **Cases**: Manage who can access cases by using the agent application.
- **View case**: Allows the user to view and search cases in the agent application. This includes viewing case data (for example, status, title, summary), contact history (for example, calls, chats, tasks with information such as start time, end time, duration, etc.), and comments.
- **Edit case**: Allows the user to edit cases, which includes editing case data (for example, update case status), add comments, and associate contacts to cases.
• **Create case**: Allows the user to create new cases, and associate contacts to cases.

• **Case Fields**: Manage who can configure case fields by using the Amazon Connect console.

• **View Case Fields**: Allows users to view the case fields page and all of the existing case fields (could be system or custom).

• **Edit Case Fields**: Allows users to edit any of the case fields (for example, change title, description, single-select options).

• **Create Case Fields**: Allows users to create new case fields.

• **Case Templates**: Manage who can configure case templates by using the Amazon Connect console.

• **View Case Fields**: Allows users to view the case fields page and all of the existing case fields (could be system or custom).

• **Edit Case Fields**: Allows users to edit any of the case fields (for example, change title, description, single-select options).

• **Create Case Fields**: Allows users to create new case fields.

When users have permissions to **View Case Fields** and **View Case Templates**, they will see the **Case fields** and **Case templates** options in their left navigation menu, as shown in the following image:

---

**Required permissions for using custom IAM policies to manage Cases**

If you're using custom IAM policies to manage access to the Amazon Connect Cases, your users need some or all of the permissions listed in this article, depending on the tasks they need to do.

**View Cases domain details**

There are two options for granting users IAM permissions to view Cases domain details on the Amazon Connect console.
Option 1: Minimum required IAM permissions

To view Cases domain details in the Amazon Connect console, users must have the following IAM permissions:

- `connect:ListInstances`
- `ds:DescribeDirectories`
- `connect:ListIntegrationAssociations`
- `cases:GetDomain`

Following is a sample IAM policy with these permissions:

```json
{
    "Version": "2012-10-17",
    "Statement": [
        {
            "Sid": "AllowsViewingConnectConsole",
            "Effect": "Allow",
            "Action": [
                "connect:ListInstances",
                "ds:DescribeDirectories"
            ],
            "Resource": "*"
        },
        {
            "Sid": "ListIntegrationAssociations",
            "Effect": "Allow",
            "Action": [
                "connect:ListIntegrationAssociations"
            ],
            "Resource": "*"
        },
        {
            "Sid": "CasesGetDomain",
            "Effect": "Allow",
            "Action": [
                "cases:GetDomain"
            ],
            "Resource": "*"
        }
    ]
}
```

Note the following:

- `cases:GetDomain` Action is required on Resource *
- `connect:ListIntegrationAssociations` action supports the instance resource type. See the table in Actions defined by Amazon Connect.

Option 2: Update the existing Amazon Connect policy with `cases:GetDomain`

Include the `AmazonConnectReadOnlyAccess` (p. 1191) policy, and add the following `cases:GetDomain` policy:

```json
{
    "Version": "2012-10-17",
    "Statement": [
        {
            "Sid": "AllowsViewingConnectConsole",
            "Effect": "Allow",
            "Action": [
                "connect:ListInstances",
                "ds:DescribeDirectories"
            ],
            "Resource": "*"
        },
        {
            "Sid": "ListIntegrationAssociations",
            "Effect": "Allow",
            "Action": [
                "connect:ListIntegrationAssociations"
            ],
            "Resource": "*"
        },
        {
            "Sid": "CasesGetDomain",
            "Effect": "Allow",
            "Action": [
                "cases:GetDomain"
            ],
            "Resource": "*"
        }
    ]
}
```
Onboard to Cases

There are two options for granting users IAM permissions to onboard to Cases using the Amazon Connect console.

Option 1: Minimum required permissions

To onboard to Cases by using the Amazon Connect console, users must have the following IAM permissions:

- connect:ListInstances
- ds:DescribeDirectories
- connect:ListIntegrationAssociations
- cases:GetDomain
- cases:CreateDomain
- connect:CreateIntegrationAssociation
- connect:DescribeInstance
- iam:PutRolePolicy

Following is a sample IAM policy with these permissions:

```json
{
  "Version": "2012-10-17",
  "Statement": [
    {
      "Sid": "AllowsViewingConnectConsole",
      "Effect": "Allow",
      "Action": [
        "connect:ListInstances",
        "ds:DescribeDirectories"
      ],
      "Resource": "*"
    },
    {
      "Sid": "ListIntegrationAssociations",
      "Effect": "Allow",
      "Action": [
        "connect:ListIntegrationAssociations"
      ],
      "Resource": "*"
    },
    {
      "Sid": "CasesGetDomain",
      "Effect": "Allow",
      "Action": [
    
```
Note the following:

- `cases:GetDomain` action is required on Resource `*`.
- You can scope the permissions to specific Amazon Connect tasks by using the information in Actions, resources, and condition keys for Amazon Connect.

**Option 2: Use a combination of existing policies**

The following combination of policies will also work:

- **AmazonConnect_FullAccess** policy
- `iam:PutRolePolicy` to modify the service-linked role. For an example, see AmazonConnect_FullAccess policy (p. 1190).

  The following IAM policy:

```json
{
  "Version": "2012-10-17",
  "Statement": [
    {
      "Sid": "CasesGetDomain",
      "Effect": "Allow",
      "Action": [
        "cases:GetDomain",
        "cases:CreateDomain"
      ],
      "Resource": "*"
    }
  ]
}
```
Create case fields

Case fields are the building blocks for case templates. You create all of the possible fields of information (for example, VIN number, policy number, make/model of car) that you want agents to collect for a given customer issue.

After you create case fields, you can create case templates.

There are two types of case fields:

- **System case fields** (p. 734): Amazon Connect provides system fields. You cannot change the name or description.
- **Custom case fields** (p. 736): You can create custom case fields that are specific for your business. You must name the case field, and optionally provide a description. Note that the description appears only in the Amazon Connect console. It doesn’t appear to agents.

**How to create case fields**

1. Log in to the Amazon Connect console with an Admin account, or an account assigned to a security profile that has permissions to create fields. For a list of required permissions, see Security profile permissions for Cases (p. 729).
2. Verify the quota for case fields and request an increase if needed. For more information, see Amazon Connect Cases service quotas (p. 1328).
3. On the left navigation menu, choose Agent applications, Case fields.
4. The first time you create new fields, you’ll notice several system fields (p. 734) are already present. You cannot change the name of these fields, but in some cases you can edit them.

   For example, Case Id is a system field. When a case is created, Amazon Connect adds a case ID automatically, and you cannot change it. Case reason is also a system field but you can edit it and enter reasons that are specific to your contact center.

5. Choose + New field.
6. Select the type of field you want to create. For example, you might choose Text if you want agents to be able to enter free form notes.
7. Assign a name to the field. It will appear to agents in the agent application.
8. Optionally, provide a description. It will only appear to admins on the Amazon Connect console. It does not appear to agents in the agent application.
9. Choose Save.
10. When you’re done adding fields, you’re ready to create a template (p. 738).

**System case fields**

Amazon Connect provides system fields. You cannot change the name or description of a system field.

The following table lists the system case fields:

<table>
<thead>
<tr>
<th>Field name</th>
<th>Field ID (how you call the field in the API)</th>
<th>Field type</th>
<th>Description</th>
<th>Where the data comes from</th>
</tr>
</thead>
<tbody>
<tr>
<td>Case ID</td>
<td>case_id</td>
<td>text</td>
<td>Unique Identifier of the case in</td>
<td>Amazon Connect</td>
</tr>
<tr>
<td>Field name</td>
<td>Field ID (how you call the field in the API)</td>
<td>Field type</td>
<td>Description</td>
<td>Where the data comes from</td>
</tr>
<tr>
<td>--------------------------</td>
<td>---------------------------------------------</td>
<td>---------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>---------------------------</td>
</tr>
<tr>
<td>Case Reason</td>
<td>case_reason</td>
<td>single-select</td>
<td>The reason for opening the case</td>
<td>Agent</td>
</tr>
<tr>
<td>Customer</td>
<td>customer_id</td>
<td>text</td>
<td>The full ARN of the customer profile identified for the case is required when using the API. On the Cases: Fields page, the customer's name is displayed.</td>
<td>Amazon Connect</td>
</tr>
<tr>
<td>Date/Time Closed</td>
<td>last_closed_datetime</td>
<td>date-time</td>
<td>The date and time the case was last closed. It does not guarantee that a case is closed. If a case is reopened, this field contains the date/time stamp of the last time the status was changed to closed.</td>
<td>Amazon Connect</td>
</tr>
<tr>
<td>Date/Time Opened</td>
<td>created_datetime</td>
<td>date-time</td>
<td>The date and time the case was opened.</td>
<td>Amazon Connect</td>
</tr>
<tr>
<td>Date/Time Updated</td>
<td>last_updated_datetime</td>
<td>date-time</td>
<td>The date and time the case was last updated.</td>
<td>Amazon Connect</td>
</tr>
</tbody>
</table>
### Custom case fields

You can create custom case fields that are specific for your business. You must name the case field, and optionally provide a description. Note that the description appears only in the Amazon Connect console. It doesn't appear to agents.

You can create fields that are type: number, text, single-select, or true/false.

#### Single-select fields

For single-select case fields, whether system or custom, you can add value options that the field can take. For example, you can add options to the single-select system field Case reason such as **General inquiry**, **Billing issue**, or **Product defect**, that reflect the types of issues in your contact center.

#### About the Status field

You can add options to the single-select **Status** field, such as **Investigating** or **Escalated to manager**. The field comes with two options, **Open** and **Closed**, which cannot be changed.

#### Active/inactive field options

Single-select case fields can be active or inactive.
• **Active**: If a field option is active, it means that the field can be given that option. For example, based on the following image, the Status field can be set to **Closed, Open, or Pending**, as these are the only active options.

• **Inactive**: If you make the **Pending** option inactive, then the field can no longer be given that option. Any existing cases remain unchanged and can still have the status as **Pending**.

Single-select options have two parts:

1. **Option name (shown to agents)**: The label that is displayed to agents in the agent application.
2. **Option value (internal reference)**: The data that's collected. For example, for AWS Region, you may want to display **US West (Oregon)** but collect the data as **PDX**.

   Field options appear to the agent in alphabetical order.
Create case templates

Case templates are forms that ensure agents collect and reference the right information for different types of customer issues. For example, you can create a case template for vehicle damage issues, and require agents complete certain fields when they talk to a customer filing an insurance claim.

When you create a case template, you choose the name that appears to agents, the fields on the form, and the order of the fields.

**Important**
Cases are always created based on a template.

How case templates look in the agent application

In the agent application, the agent sees the case fields in a Z-formation: case fields are displayed in two columns from left to right, top to bottom.

When you're building a case template, think of the information in the agent application as being divided into two sections where case fields are displayed to the agent:
How to create a template

1. Log in to the Amazon Connect console with an Admin account, or an account assigned to a security profile that has permissions to create templates. For a list of required permissions, see Security profile permissions for Cases (p. 729).
2. Verify the quota for case templates and request an increase if needed. For more information, see Amazon Connect Cases service quotas (p. 1328).
3. Verify the case fields (p. 734) you want to add to your case template have already been created.
4. On the left navigation menu, choose Agent applications, Case templates.
6. Assign a name to the template. It will appear to agents in the agent application. The following image shows an example of how templates appear, by default in alphabetical order:
7. In the Top fields section, you’ll see some system fields already there. Choose Add fields, and use the dropdown to choose the field. Fields that are gray-out are already a part of the template. If you want agents to complete the field in order to save the form, choose Required.

8. In the More information section, choose the fields you want to appear.

9. When you’re done, choose Save. The template is immediately made available to agents in the agent application.

Case layouts

This topic is intended for developers who are using the Amazon Connect Cases APIs.

There is an underlying resource called a case layout that is linked to the case template. Technically, it is the case layout that holds the display elements for a case, such as:

- Which fields to display.
- The section, either Top panel or More information.
- The order within a section to display these fields

Whereas it's the case template that mandates a particular schema, such as required case fields.

The case layout is linked to a case template.

**Note**
You can create a case template and not link it to a case layout. Any case created with a case template that is not linked to a case layout will display system fields in a default order.

Access Cases in the agent application

After you enable Amazon Connect Cases, you need to take steps to make the functionality available through the agent application. This topic explains your options.
Tip
Make sure your agents have Cases permissions in their security profile so they can access Cases. For more information, see Security profile permissions for Cases (p. 729).

Option 1: Use Customer Profiles with the CCP out-of-the-box

Cases is already embedded alongside the Contact Control Panel (CCP). Your agents will access the CCP and Cases in the same browser window using a link that looks like this:

- https://instance name.my.connect.aws/agent-app-v2/

If you access your instance using the awsapps.com domain, use the following URL:

- https://instance name.awsapps.com/connect/agent-app-v2/

For help finding your instance name, see Find your Amazon Connect instance name (p. 131).

Option 2: Embed Cases into a custom agent application

When you embed your Contact Control Panel (CCP), you have the option of showing or hiding the pre-built CCP user interface. For example, you may want to develop a custom agent application that has a user interface you design, with customized buttons to accept and reject calls. Or, you may want to embed the pre-built CCP that's included with Amazon Connect into another custom app.

You can display the pre-built CCP user interface, or hide it and build your own. In both scenarios, you can incorporate Cases into your agent application by using public APIs provided by Amazon Connect. These APIs are built to provide you the flexibility to create the functionality and user experience that you want. For more information, see the Cases API documentation.

For information about embedding Cases, see Initialization for CCP, Customer Profiles, and Wisdom.

Tip
When you customize the agent's application, you determine what URL agents will use to access their agent application. This might be very different from the one provided by Amazon Connect. For example, your URL could be https://example-corp.com/agent-support-app.

Case event streams

Amazon Connect Cases event streams provide you with near real-time updates when cases are created or modified within your Amazon Connect Cases domain. The events published to the stream include these resource events:

- Case created
- Cases modified
- Related items (Comments, Calls, Chats, Tasks) are added to a case

You can use the case event streams to integrate streams into your data lake solutions, create dashboards that display case performance metrics, implement business rules or automated actions based on case events, and configure alerting tools to trigger custom notifications of specific case activity.
Set up case event streams

This topic explains how to set up and use case event streams. Some of the onboarding steps require you to call Amazon Connect Cases APIs.

**Step 1: Create an Amazon Connect instance and enable Customer Profiles**

1. Ensure you have an working Amazon Connect instance in the US East (N. Virginia) or US West (Oregon) AWS Region. Cases is available only in US East (N. Virginia) and US West (Oregon).

   For information about creating an instance, see Create an Amazon Connect instance (p. 127).

2. Enable Amazon Connect Customer Profiles. For instructions, see Enable Customer Profiles for your instance (p. 588).

   Amazon Connect Cases requires Customer Profiles because each case must be associated with a customer profile from the Customer Profiles service.

**Step 2: Add a Cases domain to your Amazon Connect instance**

For instructions, see Enable Cases (p. 728).

If you want to add a case domain using the API, see the CreateDomain API in the Amazon Connect Cases API Reference.

**Step 3: Create a case template**

Create a case template (p. 738). In Step 6: Test case event streams, you'll use the template.

If you want to create a case template using the API, see the CreateTemplate API in the Amazon Connect Cases API Reference.

**Step 4: Enable case event streams and setup to receive events into an SQS queue**

Run the following command to enable case event streams for your Cases domain. After this command runs, when cases are created or updated, an event is published to the default-bus of the EventBridge service in your account (it must be in the same AWS Region as your Cases domain).

```bash
aws connectcases put-case-event-configuration --domain-id dad5efb6-8485-4a55-8241-98a88EXAMPLE --event-bridge enabled=true
```

By default, the events published by Amazon Connect Cases only contain metadata about the case, such as templateId, caseId, caseArn, approximateChangeTime, and more. You can run the following command to get more information about the case (at the time the event was generated) to be included in the event.
Set up case event streams

Note
If you want to include a custom field in the event, use the custom field ID. For instructions about how to locate the custom field ID, see Find the custom field ID (p. 345).

# You can include any other field defined in your cases domain in the fields section.
# To list the fields that are defined in your cases domain, call the Cases ListFields API.
# To include case fields that you create (custom fields) in the event, enter the custom field ID.

```bash
aws connectcases put-case-event-configuration --domain-id YOUR_CASES_DOMAIN_ID --event-bridge "{
  "enabled": true,
  "includedData": {
    "caseData": {
      "fields": [
        { "id": "status" },
        { "id": "title" },
        { "id": "customer_id" },
        { "id": "your custom field ID" }
      ],
    },
    "relatedItemData": {
      "includeContent": true
    }
  }
}
```

Next, create an Amazon SQS queue and set that as a target for the Amazon Connect Cases events on your EventBridge bus so that all the case events are delivered to the SQS queue for later processing.

```bash
# Create an SQS queue

# Create an rule on the EventBridge defualt bus that represents the case events
aws events put-rule --name case-events-to-sqs-queue --event-pattern "{"source": ["aws.cases"]}" --state ENABLED

# Ask event bridge to publish case events to the SQS queue.
aws events put-targets --rule case-events-to-sqs-queue --target "[{
  "Id": "target-1",
  "Arn": "arn:aws:sqs:The AWS Region of your Amazon Connect instance:your AWS account ID:case-events-queue"
}]
```

Step 5: Test case event streams

Use the Amazon Connect agent application to:

1. Accept a chat contact.
2. Create a customer profile and associate that to the chat contact.
3. Create a case.

   **Note**
   The Create case button on the Cases tab is inactive until you accept a contact and associate that contact with a customer profile.

   Navigate to the Amazon SQS console and check that a case event (type: CASE.CREATED) for the newly created case is available in your SQS Queue. Similarly, you can modify the case created above and get a corresponding case event (type: CASE.UPDATED) in your SQS queue. You can associate the contact to the case, and leave a comment on the case to get case events for those actions, too.

**Step 6: Use cases for the case event streams**

Case event streams publish events every time a case is created, case is updated, contact is associated to the case, and comment is added on a case. You can use these events for:

- Metrics, analytics and dashboards
- Build Apps that notify users (for example, send emails)
- Automated actions that are triggered based on certain type of case updates

For example, you can use the SQS target on EventBridge (as shown on step 4) to temporarily store the case events in the SQS queue, and use Lambda functions to process events in the SQS to build custom applications such as sending emails to the customer when their case is updated, automatically resolving any tasks linked to the case, and more. Similarly, you can use the Kinesis Data Firehose target on the EventBridge to store the case events into an S3 bucket and then use the AWS Glue for ETL, Athena for ad-hoc analytics, and Amazon QuickSight for dashboards.

**Case event payload and schema**

When you request to include case data in the event payload, the data reflects the version of the case after that particular edit.

Amazon Connect Cases default limits guarantee that the payload will be less than 256KB (the maximum size of an EventBus event). Since you can customize the case object model (for example, you can define custom fields on case objects to capture business specific information), case event schema reflect the customizations made to the case object as shown in the following examples (for example, see how customer-specific UUIDs are being use as JSON properties).

**Example case event payload for the case resource**

```json
// Given the limits on the "includedData" configuration
// this payload is guaranteed to less than 256KB at launch.
{
   "version": "0",
   "id": "event ID",
   "detail-type": "Amazon Connect Cases Event",
   "source": "aws.cases",
   "account": "your AWS account ID",
   "time": "2022-03-16T23:43:26Z",
   "region": "The AWS Region of your Amazon Connect instance",
   "resources": [
      "arn:aws:cases:your Amazon Connect AWS Region:your AWS account ID:domain/case domain ID",
      "arn:aws:cases:your Amazon Connect AWS Region:your AWS account ID:domain/case domain ID/case/case ID"
   ],
   "detail": {
```
Example case event payload for the related-item resource

// Given the limits on the "includedData" configuration
// this payload is guaranteed to less than 256KB
{
    "version": "0",
    "id": "event ID",
    "detail-type": "Amazon Connect Cases Event",
    "source": "aws.cases",
    "account": "your AWS account ID",
    "time": "2022-03-16T23:43:26Z",
    "region": "The AWS Region of your Amazon Connect instance",
    "resources": [
        "arn:aws:cases:your Amazon Connect AWS Region:your AWS account ID:domain/case domain ID",
        "arn:aws:cases:your Amazon Connect AWS Region:your AWS account ID:domain/case domain ID/case/case ID/related-item/related-item ID"
    ],
    "detail": {
        "version": "0",
        "eventType": "RELATED_ITEM.CREATED", //(or "RELATED_ITEM.UPDATED" or "CASE.RELATED_ITEM.DELETED")
        "approximateChangeTime": "2022-03-16T23:43:26Z",
        "changedAttributes": ["comment.commentText"],
        "relatedItem": {
            "relatedItemType": "Comment", // (OR Contact)
        }
    }
}
"relatedItemID": "related-item ID",
"caseId": "case id that this related item is a sub-resource of",
"createdDateTime": "2022-03-16T23:16:57.893Z",

// This section includes any attributes that customers have configured
// in the "includedData" configuration.
"comment": {
   "body": "Gave a $5 refund to customer to make them happy",
},

// if the related item was of type contact.
// "contact": {
//   "contactArn": ".......",
// }
Set up pre-built integrations

Use pre-built integrations to generate tasks based on events in external applications, or create customer profiles based on data in external applications. These integrations are built on top of Amazon AppFlow and Amazon EventBridge to enable easy access to your data that’s stored outside of Amazon Connect.

For more information about Amazon AppFlow and Amazon EventBridge, see the documentation: Amazon AppFlow User Guide and Amazon EventBridge User Guide.

In addition, check out the Amazon AppIntegrations Service API Reference, which enables you to access and configure AppIntegrations associations programmatically with Amazon Connect instances.

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Set up applications for task creation

You can set up applications for task creation in just a few steps, no coding required. Amazon Connect uses Amazon EventBridge to pull data from your external application.

Tip
If your organization is using custom IAM policies to manage access to the Amazon Connect console, make sure users have the appropriate permissions to set up applications for task creation. For a list of required permissions, see Tasks page (p. 1198).
If your instance was created before October 2018, for information about how to configure your service-linked roles (SLR), see For instances created before October 2018 (p. 1229).

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• Set up application integration for Zendesk (p. 753)
• Monitor task creation (p. 761)
• Disassociate an Amazon Connect connection (p. 763)

Set up application integration for Salesforce

If you integrate with Salesforce for event creation, Amazon Connect also uses Amazon AppFlow to put the data into EventBridge. This is because of how Salesforce sends events through the Amazon AppFlow APIs. To learn more about how Amazon Connect uses EventBridge and Amazon AppFlow resources to power Salesforce integrations, see this blog post: Building Salesforce integrations with Amazon EventBridge and Amazon AppFlow.

Note
If you use custom AWS Identity and Access Management (IAM) policies, for a list of the required IAM permissions to set up Amazon Connect Tasks, see Tasks page (p. 1198).

To integrate Salesforce for task creation

1. Open the Amazon Connect console at https://console.aws.amazon.com/connect/.
2. On the instances page, choose the instance alias. The instance alias is also your instance name, which appears in your Amazon Connect URL.
3. Choose **Tasks**, and then choose **Add an application**.

4. On the **Select application** page, choose **Salesforce**.
5. Review the application requirements that are listed on the **Select application** page.

The following image shows the requirements for Salesforce.

1. To verify that Salesforce is compatible with Amazon AppFlow, log in to Salesforce, for example, https://[instance_name].my.salesforce.com.
Important
Verify that you have enabled Change Data Capture in Salesforce. The following image shows an example Change Data Capture page in Salesforce where you select the Case entities:

6. After you verify Salesforce requirements, on the Select application page, choose Next.
7. On the Establish connection page, choose one of the following:
   - Use an existing connection. This allows you to reuse existing EventBridge resources that are linked to Amazon AppFlow flows that you may have created in your AWS account.
   - Create a new connection: Enter the information required by the external application.
     1. Enter your application instance URL. This URL is used for deep-linking into the tasks created in your external application.
     2. Provide a friendly name for your connection, for example, Salesforce - Test instance. Later, when you add rules (p. 549), you’ll refer to this friendly name.
     3. Specify whether this is a production or sandbox environment.
8. Choose **Log in to Salesforce**.

9. In Salesforce, choose to allow access to Amazon Connect Embedded Login App [Region].
10. After Amazon Connect has successfully connected with the Salesforce, go to Salesforce and verify that the refresh token policy for Amazon Connect Embedded Login App is set to **Refresh token is valid until revoked**. This grants Amazon AppFlow access to pull data from your Salesforce account without re-authenticating.

11. On the **Establish connection** page, select the box shown in the following image, and choose **Next**.

12. On the **Review and integrate** page, check that the **Connection status** says **Connected**, and then choose **Complete integration**.
13. On the **Tasks** page, the new connection is listed.

You're done! Next, add rules that tell Amazon Connect when to create a task and how to route it. For instructions, see [Create rules that generate tasks for third-party integrations](p. 549).

**What to do when is a connection isn't successfully established**

A connection might fail to be established for Salesforce if you didn't follow the instructions next to the check boxes to verify that it's compatible with Amazon AppFlow.
A common error is not setting up the Case entity in the Change Data Capture settings to capture these events. To fix:

1. Log in to Salesforce, go to the Change Data Capture, and select the Case entity.

2. Open the Amazon AppFlow console at https://console.aws.amazon.com/appflow) to select the flow that was just created, and then choose Activate flow.

Alternatively, you might need to delete the Amazon AppFlow Salesforce connection and flow, and start again.

Set up application integration for Zendesk

Step 1: Enable the events connector for Amazon EventBridge

If you don’t already have the EventBridge connector for Zendesk enabled, you need to set it up first. Otherwise, go to Step 2: Integrate Zendesk with Amazon Connect for task creation (p. 754).

1. Copy your AWS account number:
   a. In the Amazon EventBridge console, go to Partner event sources.
   b. Search for or scroll to Zendesk, and choose Set up.
   c. Choose Copy to copy your AWS account information.

2. Go to Setting up the events connector for Amazon EventBridge in the Zendesk Help and follow the instructions.
Step 2: Integrate Zendesk with Amazon Connect for task creation

Note
If you use custom AWS Identity and Access Management (IAM) policies, for a list of the required IAM permissions to set up Amazon Connect Tasks, see Tasks page (p. 1198).

1. Open the Amazon Connect console at https://console.aws.amazon.com/connect/.
2. On the instances page, choose the instance alias. The instance alias is also your instance name, which appears in your Amazon Connect URL.

3. Choose Tasks, and then choose Add an application.

4. On the Select application page, choose Zendesk.
5. After you choose to integrate with Zendesk, the application requirements are listed on the page.

The following image shows the requirements for Zendesk. In this procedure, we walk you through the steps to select the "Support ticket" event type in Zendesk. Acknowledge the steps and choose Next.
6. On the **Establish connection** page, choose one of the following:

   - **Use an existing connection.** This allows you to reuse existing EventBridge resources you may have created in your AWS account.

   - **Create a new connection:** Enter the information required by the external application.
     1. Enter your application instance URL. This URL is used for deep-linking into the tasks created in your external application.
     2. Provide a friendly name for your connection, for example, **Zendesk - Test instance.** Later, when you add rules (p. 549), you’ll refer to this friendly name.
7. Choose Copy to copy your AWS account ID, and then choose Login to Zendesk. This takes you away from the Establish connection page for now, but you return to it shortly.

8. After you're logged in to Zendesk, choose Connect to connect the Events Connector for Amazon EventBridge.
9. In Zendesk, on the **Amazon Web Services** page, paste in your Amazon Web Service account ID, choose your Region, choose **Support ticket**, acknowledge the terms of use, and then choose **Connect**. Zendesk creates a resource in Amazon EventBridge.
10. Return to the **Establish connection** page in Amazon Connect choose **Next**.
11. On the **Establish** page, you’ll see the message that Amazon Connect has successfully connected with Zendesk. Choose **Next**.
12. On the **Review and integrate** page, check that the **Connection status** says **Connected**, and then choose **Complete integration**.

This creates a connection that associates the EventBridge resource for Zendesk to Amazon Connect.

13. On the **Tasks** page, the new connection is listed.
You're done! Next, add rules that tell Amazon Connect when to create a task and how to route it. For instructions, see Create rules that generate tasks for third-party integrations (p. 549).

**What to do when is a connection isn't successfully established**

A connection might fail to create a task if you do not correctly select the **Support ticket** event type when setting up the connection in Zendesk, after being prompted to do so in the flow. To fix this, log in to Zendesk, and update that setting, as shown in the following image.
There is also another case where you may not have selected the correct AWS Region that the Amazon Connect instance is in, when setting up EventBridge. To fix:

2. Disconnect your EventBridge connection.
3. In the Amazon Connect console, restart the flow.

Monitor task creation

After your connection is established, if it stops working, in Amazon Connect disassociate the connection, and then re-establish it. If that doesn't solve the issue, do the following:
**Zendesk**

2. Check the status of the event source connection to see if it is active.

**Salesforce**

2. Monitor the flow that was created for the account that was set up.

The following image shows what a flow looks like in the Amazon AppFlow console for Salesforce. It contains information about the status of the connection, and when it was last run.

For both Zendesk and Salesforce, you can go to the EventBridge console at [https://console.aws.amazon.com/events/](https://console.aws.amazon.com/events/) to see your connection state and see if it is active, pending, or deleted.

The following image shows an example EventBridge console.
Disassociate an Amazon Connect connection

At any time you can disassociate a connection, and stop the automatic generation of tasks based on events from the external application.

To stop the automatic generation of tasks

1. Choose the application, and then choose Remove connection.

2. Type Remove, and then choose Remove.

If you need to debug, you are still able to go to Amazon AppFlow (Salesforce) or EventBridge.

To remove the connection altogether from Zendesk

1. Log in to Zendesk, and navigate to https://[subdomain].zendesk.com/admin/platform/integrations.
2. Disconnect the EventBridge connection.
To remove the connection altogether from Salesforce

- Open the Amazon AppFlow console at https://console.aws.amazon.com/appflow, and delete the Salesforce connection and flow that were created in Amazon Connect.

  Flows are created with the name pattern of amazon-connect-salesforce-to-eventbridge-[subdomain].

  Connections are created with the name pattern of amazon-connect-salesforce-[subdomain]

To re-enable the automatic generation of tasks, repeat the setup steps.
Capture customer audio: live media streaming

In Amazon Connect, you can capture customer audio during an interaction with your contact center by sending the audio to a Kinesis video stream. Depending on your settings, audio can be captured for the entire interaction—until the interaction with the agent is complete—or only one direction:

- What the customer hears, including what the agent says and system prompts.
- What the customer says, including when they are on hold.

The customer audio streams also include interactions with an Amazon Lex bot, if you're using one in your flow.

You can perform analysis on the audio streams to determine customer sentiment, use the audio for training purposes, or to later review the audio to identify and flag abusive callers.

Contents

- Plan for live media streaming (p. 765)
- Enable live media streaming in your instance (p. 766)
- How to access Kinesis Video Streams data (p. 766)
- Example flow for testing live media streaming (p. 772)
- Contact attributes for live media streaming (p. 773)

Plan for live media streaming

You can send all audio to and from the customer to Kinesis Video Streams. Media streaming leverages Kinesis Video Streams multi-track support so that what the customer says is on a separate track from what the customer hears.

Audio sent to Kinesis uses a sampling rate of 8 Khz.

Do you need to increase your service quotas?

When you enable media streaming in Amazon Connect, one Kinesis video stream is used per active call. By default we allocate 50 streams per instance to your account. We automatically create additional streams as needed to keep pace with active calls, unless your account reaches the Kinesis Video Streams service quota.

Contact AWS Support to request an increase to Number of Streams.

To request an increase to your service quota, in the AWS Support Center, choose Create Case and then choose Service Quota Increase.

Tip
We make sure that PutMedia requests always stay within the 5 TPS quota. You don't need to request an increase.
How long do you need to store audio?

Customer audio is stored in Kinesis for the time defined by your retention settings in an Amazon Connect instance. For instructions for setting this value, see Enable live media streaming in your instance (p. 766).

**Tip**
If you want to use the audio streaming feature, you need to retain the streams that are created by Amazon Connect. Don't delete them, unless you're going to stop using the streaming feature.

Do you need to change the audio streams?

We recommend that you refrain from modifying the streams. Doing so can cause unexpected behavior.

Who requires IAM permissions to retrieve data?

If your business is using IAM policies and permissions, the IAM admin will need to grant permissions to people who are going to retrieve data from Kinesis Video Streams. They'll need to grant them full access permissions for Kinesis Video Streams and AWS Key Management Service.

Enable live media streaming in your instance

Live media streaming (customer audio streams) is not enabled by default. You can enable customer audio streams from the settings page for your instance.

**To enable live media streaming**

1. Open the Amazon Connect console at https://console.aws.amazon.com/connect/.
2. On the instances page, choose the instance alias. The instance alias is also your instance name, which appears in your Amazon Connect URL.
3. In the navigation pane, choose Data storage.
5. Enter a prefix for the Kinesis Video Streams created for your customer audio. This prefix makes it easier for you to identify the stream with the data.
6. Choose the KMS key to use to encrypt the data sent to Kinesis. The KMS key must be in the same Region as the instance.
7. Specify a number and unit for the Data retention period. If you select No data retention, data is not retained and can be used only for immediate consumption.
8. Choose Save under Live media streaming, and then choose Save at the bottom of the page.

After you enable live media streaming, add Start media streaming and Stop media streaming blocks to your flow. Configure those blocks to specify what audio you want to capture. For instructions and an example, see Example flow for testing live media streaming (p. 772).

How to access Kinesis Video Streams data

You must have developer skills to work with Kinesis Video Streams data. Use the steps and code samples in this section to interact with the customer audio data sent to Kinesis Video Streams.
Get started with a sample

There's an example project on GitHub to help you to get started using Amazon Connect live audio streaming and real-time transcription using Amazon Transcribe. See Amazon Connect Real-time Transcription Lambda.

This project provides a code example and a fully functional Lambda function. They help you get started capturing and transcribing Amazon Connect phone calls using Kinesis Video Streams and Amazon Transcribe.

You can use the Lambda function in this project to create other solutions, such as:

- Capturing audio in the IVR.
- Providing real-time transcription to agents.
- Creating a voicemail solution for Amazon Connect.

Build your own implementation

You may want to implement a solution other than the one provided by the previously-described sample. If so, this section describes how to make the proper API calls against the Kinesis Video Streams so you can build your own solution from scratch.

1. Go to this GitHub page, and read about the Amazon Connect Real-time Transcription Lambda project.
2. Choose the deployment folder, and download the cloudformation.template.
3. Use the following example Java classes, which are built on top of the Kinesis video parser library using the AWS SDK for Java.
   - LMSDemo is a class with a main method that invokes LMSEample.
   - LMSEample is similar to the examples provided in the Kinesis Video Streams Parser library. It gets media from the specified Kinesis Video Streams with the specified fragment number. This code sample includes frame processing to separate the tracks.
   - LMSFrameProcessor is invoked by LMSEample to save data from Kinesis Video Streams to the specified output stream. Use a file output stream to save the output to a file. This code sample also includes frame processing to separate the tracks.
4. Use Audacity, or other audio tool, to import the .raw audio file, which is in a 16-bit signed PCM Mono format.

Code samples to access Kinesis Video Streams data

LMSDemo.java

```java
package com.amazonaws.kinesisvideo.parser.demo;
import com.amazonaws.auth.AWSSessionCredentials;
import com.amazonaws.auth.AWSSessionCredentialsProvider;
import com.amazonaws.regions.Regions;
import java.io.FileOutputStream;
import java.io.IOException;
import java.io.FileOutputStream;
import java.io.IOException;
```
public class LMSDemo {
    public static void main(String args[]) throws InterruptedException, IOException {
        LMSExample example = new LMSExample(Regions.US_WEST_2,
        "<<StreamName>>",
        "<<FragmentNumber>>",
        new AWSSessionCredentialsProvider() {
            @Override
            public AWSSessionCredentials getCredentials() {
                return new AWSSessionCredentials() {
                    @Override
                    public String getSessionToken() {
                        return "<<AWSSessionToken>>";
                    }
                    @Override
                    public String getAWSAccessKeyId() {
                        return "<<AWSAccessKey>>";
                    }
                    @Override
                    public String getAWSSecretKey() {
                        return "<<AWSSecretKey>>";
                    }
                };
            }
            @Override
            public void refresh() {
                }
        },
        new FileOutputStream("<<FileName>>.raw"));
        example.execute();
    }
}

LMSExample.java

package com.amazonaws.kinesisvideo.parser.examples;

import com.amazonaws.auth.AWSCredentialsProvider;
import com.amazonaws.kinesisvideo.parser.ebml.MkvTypeInfos;
import com.amazonaws.kinesisvideo.parser.mkv.MkvDataElement;
import com.amazonaws.kinesisvideo.parser.mkv.MkvElementVisitException;
import com.amazonaws.kinesisvideo.parser.mkv.MkvElementVisitor;
import com.amazonaws.kinesisvideo.parser.mkv.MkvEndMasterElement;
import com.amazonaws.kinesisvideo.parser.mkv.MkvStartMasterElement;
import com.amazonaws.kinesisvideo.parser_utilities.FragmentMetadataVisitor;
import com.amazonaws.kinesisvideo.parser_utilities.FrameVisitor;
import com.amazonaws.kinesisvideo.parser_utilities.LMSFrameProcessor;
import com.amazonaws.regions.Regions;
import com.amazonaws.services.kinesisvideo.model.StartSelector;
import com.amazonaws.services.kinesisvideo.model.StartSelectorType;
import java.io.Closeable;
import java.io.FileNotFoundException;
import java.io.FileOutputStream;
import java.io.IOException;
import java.io.OutputStream;
import java.io.PipedInputStream;
import java.io.PipedOutputStream;
import java.util.concurrent.ExecutorService;
import java.util.concurrent.Executors;
import java.util.concurrent.TimeUnit;

public class LMSExample extends KinesisVideoCommon {
    private final ExecutorService executorService;
    private GetMediaProcessingArguments getMediaProcessingArguments;
    private final StreamOps streamOps;
    private final OutputStream outputStreamFromCustomer;
    private final OutputStream outputStreamToCustomer;
    private final String fragmentNumber;
    public LMSExample(Regions region,
        String streamName,
        String fragmentNumber,
        AWSCredentialsProvider credentialsProvider,
        OutputStream outputStreamFromCustomer,
        OutputStream outputStreamToCustomer) throws IOException {
        super(region, credentialsProvider, streamName);
        this.streamOps = new StreamOps(region, streamName, credentialsProvider);
        this.executorService = Executors.newFixedThreadPool(2);
        this.outputStreamFromCustomer = outputStreamFromCustomer;
        this.outputStreamToCustomer = outputStreamToCustomer;
        this.fragmentNumber = fragmentNumber;
    }
    public void execute () throws InterruptedException, IOException {
        getMediaProcessingArguments = GetMediaProcessingArguments.create(outputStreamFromCustomer, outputStreamToCustomer);
        try (GetMediaProcessingArguments getMediaProcessingArgumentsLocal = getMediaProcessingArguments) {
            //Start a GetMedia worker to read and process data from the Kinesis Video Stream.
            GetMediaWorker getMediaWorker = GetMediaWorker.create(getRegion(),
                getCredentialsProvider(),
                getStreamName(),
                new StartSelector().withStartSelectorType(StartSelectorType.FRAGMENT_NUMBER).withAfterFragmentNumber(fragmentNumber),
                streamOps.amazonKinesisVideo,
                getMediaProcessingArgumentsLocal.getFrameVisitor());
            executorService.submit(getMediaWorker);
            //Wait for the workers to finish.
            executorService.shutdown();
            executorService.awaitTermination(120, TimeUnit.SECONDS);
            if (!executorService.isTerminated()) {
                System.out.println("Shutting down executor service by force");
                executorService.shutdownNow();
            } else {
                System.out.println("Executor service is shutdown");
            }
        } finally {
            outputStream.close();
        }
    }
    private static class LogVisitor extends MkvElementVisitor {
        private final FragmentMetadataVisitor fragmentMetadataVisitor;
        private LogVisitor(FragmentMetadataVisitor fragmentMetadataVisitor) {
            this.fragmentMetadataVisitor = fragmentMetadataVisitor;
        }
        }
    private static class LogVisitor extends MkvElementVisitor {
        private final FragmentMetadataVisitor fragmentMetadataVisitor;
        private LogVisitor(FragmentMetadataVisitor fragmentMetadataVisitor) {
            this.fragmentMetadataVisitor = fragmentMetadataVisitor;
        }
    }
}
public long getFragmentCount() {
    return fragmentCount;
}

private long fragmentCount = 0;

@Override
public void visit(MkvStartMasterElement startMasterElement) throws MkvElementVisitException {
    if (MkvTypeInfos.EBML.equals(startMasterElement.getElementMetaData().getTypeInfo())) {
        fragmentCount++;
        System.out.println("Start of segment");
    }
}

@Override
public void visit(MkvEndMasterElement endMasterElement) throws MkvElementVisitException {
    if (MkvTypeInfos.SEGMENT.equals(endMasterElement.getElementMetaData().getTypeInfo())) {
        System.out.println("End of segment");
    }
}

@Override
public void visit(MkvDataElement dataElement) throws MkvElementVisitException {
}

private static class GetMediaProcessingArguments implements Closeable {
    public FrameVisitor getFrameVisitor() {
        return frameVisitor;
    }

    private final FrameVisitor frameVisitor;

    public GetMediaProcessingArguments(FrameVisitor frameVisitor) {
        this.frameVisitor = frameVisitor;
    }

    public static GetMediaProcessingArguments create(OutputStream outputStreamFromCustomer,
                                          OutputStream outputStreamToCustomer) throws IOException {
        // Fragment metadata visitor to extract Kinesis Video fragment metadata from the GetMedia stream.
        FragmentMetadataVisitor fragmentMetadataVisitor = FragmentMetadataVisitor.create();

        // A visitor used to log as the GetMedia stream is processed.
        LogVisitor logVisitor = new LogVisitor(fragmentMetadataVisitor);

        // A composite visitor to encapsulate the three visitors.
        FrameVisitor frameVisitor = FrameVisitor.create(LMSFrameProcessor.create(outputStreamFromCustomer,
                                                                              outputStreamToCustomer,
                                                                              fragmentMetadataVisitor));

        return new GetMediaProcessingArguments(frameVisitor);
    }

    @Override
    public void close() throws IOException {
    }
}
LMSFrameProcessor.java

```java
package com.amazonaws.kinesisvideo.parser.utilities;

import com.amazonaws.kinesisvideo.parser.mkv.Frame;
import com.amazonaws.kinesisvideo.parser.utilities.FragmentMetadataVisitor;
import com.amazonaws.kinesisvideo.parser.utilities.MkvTrackMetadata;

import java.io.IOException;
import java.io.OutputStream;
import java.nio.ByteBuffer;

public class LMSFrameProcessor implements FrameVisitor.FrameProcessor {
    private OutputStream outputStreamFromCustomer;
    private OutputStream outputStreamToCustomer;
    private FragmentMetadataVisitor fragmentMetadataVisitor;

    protected LMSFrameProcessor(OutputStream outputStreamFromCustomer, OutputStream outputStreamToCustomer, FragmentMetadataVisitor fragmentMetadataVisitor) {
        this.outputStreamFromCustomer = outputStreamFromCustomer;
        this.outputStreamToCustomer = outputStreamToCustomer;
        this.fragmentMetadataVisitor = fragmentMetadataVisitor;
    }

    public static LMSFrameProcessor create(OutputStream outputStreamFromCustomer, OutputStream outputStreamToCustomer, FragmentMetadataVisitor fragmentMetadataVisitor) {
        return new LMSFrameProcessor(outputStreamFromCustomer, outputStreamToCustomer, fragmentMetadataVisitor);
    }

    @Override
    public void process(Frame frame, MkvTrackMetadata trackMetadata) {
        saveToOutputStream(frame);
    }

    private void saveToOutputStream(final Frame frame) {
        ByteBuffer frameBuffer = frame.getFrameData();
        long trackNumber = frame.getTrackNumber();
        FragmentMetadataVisitor fragmentMetadataVisitor = fragmentMetadataVisitor;
        MkvTrackMetadata metadata = fragmentMetadataVisitor.getMkvTrackMetadata(trackNumber);
        String trackName = metadata.getTrackName();
        try {
            byte[] frameBytes = new byte[frameBuffer.remaining()];
            frameBuffer.get(frameBytes);
            if (Strings.isNullOrEmpty(trackName) ||
                "AUDIO_FROM_CUSTOMER".equals(trackName)) {
                outputStreamFromCustomer.write(frameBytes);
            } else if ("AUDIO_TO_CUSTOMER".equals(trackName)) {
                outputStreamToCustomer.write(frameBytes);
            } else {
                // Unknown track name. Not writing to output stream.
            }
        } catch (IOException e) {
            e.printStackTrace();
        }
    }
}
```
Example flow for testing live media streaming

Here's how you can set up a flow to test live media streaming:

1. Add a Start media streaming block at the point where you want to enable customer audio streaming.
2. Connect the Success branch to the rest of your flow.
3. Add a Stop media streaming block to where you want to stop streaming.
4. Configure both blocks to specify what you want to stream: From the customer and/or To the customer.

Customer audio is captured until a Stop media streaming block is invoked, even if the contact is passed to another flow.

Use the contact attributes for media streaming in your flow so that the contact record includes the attributes. You can then view the contact record to determine the media streaming data associated with a specific contact. You can also pass the attributes to an AWS Lambda function.

The following example flow shows how you might use media streaming with attributes for testing purposes.
After the audio is successfully streamed to Kinesis Video Streams, the contact attributes are populated from the **Invoke AWS Lambda function** block. You can use the attributes to identify the location in the stream where the customer audio starts. For instructions, see Contact attributes for live media streaming (p. 773).

**Contact attributes for live media streaming**

The attributes are displayed when you select **Media streams** for the **Type** in a flow block that supports attributes, such as the **Start media streaming** block. They include the following:

- **Customer audio stream ARN**
  - The ARN of the Kinesis video stream that includes the customer data to reference.

- **Customer audio start timestamp**
  - The time at which the customer audio stream started.

- **Customer audio stop timestamp**
  - The time at which the customer audio stream stopped.

- **Customer audio start fragment number**
  - The number that identifies the Kinesis Video Streams fragment in which the customer audio stream started.
  - **JSONPath format**: `.MediaStreams.Customer.Audio.StartFragmentNumber`
For more information about Amazon Kinesis Video Streams fragments, see Fragment in the Amazon Kinesis Video Streams Developer Guide.
Manage users in Amazon Connect

As the admin one of your key responsibilities is to manage users, add users to Amazon Connect, give them their credentials, and assign the appropriate permissions so they can access the features needed to do their job.

Contents
• Add users to Amazon Connect (p. 775)
• Delete users from your Amazon Connect instance (p. 777)
• Reset a user’s password for Amazon Connect (p. 779)
• Security profiles (p. 780)

Add users to Amazon Connect

You can add users and configure them with permissions that are appropriate to their roles (for example, agents or managers). For more information, see Security profiles (p. 780). Contacts can be routed based on the skills required of the agents. For more information, see Create a routing profile (p. 230).

Required permissions for adding users

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

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

For information about how add more permissions to an existing security profile, see Update security profiles (p. 797).

Add a user individually

1. Log in to the Amazon Connect console with an Admin account, or an account assigned to a security profile that has permissions to create users.
2. Choose Users, User management.
3. Choose Add new users.
4. Choose Create and set up a new user and then choose Next.
5. Enter the name, email address, secondary email address, mobile number, and password for the user.

   If you provide a secondary email, the user receives email notifications - other than password reset notifications - to this email address instead of to their primary email address.

   Tip
   Mobile number is not currently used by Amazon Connect.
Add users in bulk

6. Choose a routing profile and a security profile.
7. Choose Save. If the Save button isn't active, it means you're logged in with an Amazon Connect account that doesn't have the required security profile permissions.
   
   To fix this issue, log in with an account that is assigned to the Amazon Connect Admin security profile. Or, ask another Admin to help.
8. For information about adding agents, see Configure agent settings: routing profile, phone type, and auto-accept calls (p. 235).

Add users in bulk from a .csv file

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

1. Log in to the Amazon Connect console with an Admin account, or an account assigned to a security profile that has permissions to create users.
2. Choose Users, User management.
3. Choose Add new users.
4. Choose Upload my users from a template (.csv) and then choose Next.

The .csv template has the following columns in the first row:

- first name
- last name
- email address
- secondary email address
- mobile: This is not currently used by Amazon Connect.
- password
- user login
- routing profile name
- security_profile_name_1|security_profile_name_2
- phone type (soft/desk)
- phone number
- soft phone auto accept yes/no)
- ACW timeout (seconds)

The following image shows a sample of what the .csv template looks like in an Excel spreadsheet:

5. Choose Download template.
6. Add your users to the template and upload it to Amazon Connect.

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

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

Delete users from your Amazon Connect instance

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

What happens to the user's metrics?

The user's data in contact records and reports is retained. The data is preserved for the consistency of the historical metrics. For example, when you search for contact records, you'll still see the agent's username, any contact recordings involving the agent, etc.

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

Required permissions to delete users

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

# How to delete users

You can't undo a deletion.

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

3. Confirm you want to delete that account.

4. Note the status of account. If the status is **error**, as shown in the following image...

Then check whether there's a quick connect associated with the user:

1. Choose **Routing, Quick connects**.
2. If there's a quick connect for the user, you can either delete the quick connect or replace it with a quick connect for another user:
Reset passwords

- To delete the quick connect, select the quick connect, and then choose the **Delete** icon. For more information, see [Delete quick connects](p. 474).

- To replace the quick connect with one for another user, under **Destination** use the dropdown box to select another user, and then choose **Save**. When agents select this quick connect in the future, they will be transferred to the new destination.

3. Return to the **User management** page and delete the user account.

5. The following image shows an example of the message when a user is deleted successfully. Choose **Close** to return to the **User management** page.

![Delete user alert](image)

**Reset a user's password for Amazon Connect**

**To reset a password for a user**

1. Log in to your contact center at `https://instance name.my.connect.aws/`.
2. Choose **Users, User management**.
3. Select the user and choose **Edit**.
4. Choose **reset password**. Specify a new password and then choose **Submit**.

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

5. Communicate the new password to the user.

**Reset your own lost or forgotten Amazon Connect admin password**

- See [Emergency admin login](p. 138).

**Reset your agent or manager password**

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

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

- To reset the password you used when you first created your AWS account, see Resetting a Lost or Forgotten Root User Password in the IAM User Guide.

Security profiles

A security profile is a group of permissions that map to a common role in a contact center. For example, the Agent security profile contains permissions needed to access the Contact Control Panel (CCP).

Security profiles help you manage who can access the Amazon Connect dashboard and Contact Control Panel (CCP), and who can perform specific tasks.

Contents

- Best practices for security profiles (p. 780)
- About inherited permissions (p. 781)
- List of security profile permissions (p. 783)
- Default security profiles (p. 795)
- Assign a security profile to a user (p. 795)
- Create a security profile (p. 796)
- Update security profiles (p. 797)

Best practices for security profiles

- Limit who has Users - Edit or Create permissions

  People with these permissions pose a risk to your contact center because they can do the following:
  - Reset passwords, including that of the administrator.
  - Grant other users permission to the Admin security profile. People assigned to the Admin security profile have full access to your contact center.

  Doing these things would enable someone to lock out those who need to access Amazon Connect, and allow in others who can steal customer data and damage your business.

  To reduce the risk, as a best practice we recommend limiting the number of people who have Users - Edit or Create permissions.

  - Use AWS CloudTrail (p. 1109) to log the requests and responses of UpdateUserIdentityInfo. This enables you to track changes made to user information. Someone who has the ability to call the UpdateUserIdentityInfo API can change a user's email address to one owned by an attacker, and then reset the password through email.

  - Understand inherited permissions (p. 781)

    Some security profiles included inherited permissions: when you assign dedicated permissions to one object, by default permissions are granted to sub-objects. For example, when you grant dedicated permission to edit users, you also grant them permission to list all security profiles for your Amazon Connect instance. This because to edit users, the person has access to drop-down list of security profiles.

    Before assigning security profiles, review the list of inherited permissions.

- Track who accesses recordings.
In the **Analytics and Optimization** permission group, you can enable a download icon for recorded conversations. When members of this group go to **Analytics and optimization, Contact search**, and then search contacts, they will see an icon to download recordings.

**Important**
This setting isn't a security feature. **Users who don't have this permission can still download recordings using other less-discoverable ways.**

We recommend that you track who in your organization accesses recordings.

## About inherited permissions

Some security profiles included inherited permissions: when you give a user explicit permissions to **View** or **Edit** one resource type, such as queues, they implicitly inherit permissions to **View** another resource type, such as phone numbers.

For example, assume you explicitly grant someone permission to **Edit/View** queues, as shown in the following image:

![Security profile permissions](image.png)

By doing this you also implicitly grant them permissions to **View** a list of all phone numbers and hours of operation in your Amazon Connect instance, **when they add them to the queue**. On the **Add new queue** page, the phone numbers and hours of operation appear in the drop-down lists, as shown in the following image:
However, the user doesn't have permissions to Edit the phone numbers and hours of operation.

In this case, they also don't inherit permissions to View contact flows (the outbound whisper flow) and quick connects because those resources are optional.

**List of inherited permissions**

The following table lists permissions that are implicitly inherited when you assign dedicated permissions.

**Tip**

When a user has only explicit View permissions and not also Edit permissions, the objects are retrieved but Amazon Connect doesn't surface them in drop-down lists for the user to peruse.

<table>
<thead>
<tr>
<th>Dedicated permission</th>
<th>Inherited permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Users - View or Edit</td>
<td>When someone edits a user's information in the Amazon Connect console, they can view the following information in drop-down boxes when they add it to the user's account:</td>
</tr>
<tr>
<td></td>
<td>• All security profiles in the instance</td>
</tr>
<tr>
<td></td>
<td>• All routing profiles in the instance</td>
</tr>
<tr>
<td></td>
<td>• All agent hierarchies in the instance</td>
</tr>
<tr>
<td>Queues - View or Edit</td>
<td>When someone edits queues in the Amazon Connect console, they can view the following information in drop-down and search boxes when they add it to the queue:</td>
</tr>
<tr>
<td></td>
<td>• All quick connects in the instance</td>
</tr>
<tr>
<td></td>
<td>• All phone numbers in the instance</td>
</tr>
<tr>
<td></td>
<td>• All operating hours in the instance</td>
</tr>
</tbody>
</table>
List of security profile permissions

The security profile permissions in Amazon Connect allow users access to perform particular tasks in Amazon Connect.

The following tables list:

- **UI name**: The name of the permission as it appears on the Security profiles page in Amazon Connect.
- **API name**: The name of the permission when it is returned by the ListSecurityProfilePermissions API.
- **Use**: The functionality granted by the permission.

### Dedicated permission

<table>
<thead>
<tr>
<th>UI name</th>
<th>API name</th>
<th>Use</th>
</tr>
</thead>
</table>
| Quick connects - View    |                           | All queues in the instance
|                          |                           | All flows in the instance
|                          |                           | All users in the instance

<table>
<thead>
<tr>
<th>UI name</th>
<th>API name</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phone numbers - View or Edit</td>
<td></td>
<td>When someone edits phone numbers in the Amazon Connect console (not the CCP), they can view the following information in a drop-down box when they associate it with the phone number:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>All flows in the instance</td>
</tr>
</tbody>
</table>

### Routing

<table>
<thead>
<tr>
<th>UI name</th>
<th>API name</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quick connects - Create</td>
<td>TransferDestinations.Create</td>
<td>Create quick connects (p. 470).</td>
</tr>
<tr>
<td>Quick connects - Delete</td>
<td>TransferDestinations.Delete</td>
<td>Delete quick connects (p. 474).</td>
</tr>
<tr>
<td>Quick connects - Edit</td>
<td>TransferDestinations.Edit</td>
<td>Edit quick connects.</td>
</tr>
<tr>
<td>Quick connects - View</td>
<td>TransferDestinations.View</td>
<td>View quick connects. Agents need this permission so they can view quick connects in the agent application to transfer calls.</td>
</tr>
<tr>
<td>Hours of operation - Create</td>
<td>HoursOfOperation.Create</td>
<td>Set hours of operation and timezone for a queue (p. 227).</td>
</tr>
</tbody>
</table>
## List of security profile permissions

<table>
<thead>
<tr>
<th>UI name</th>
<th>API name</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>HoursOfOperation - Delete</td>
<td>HoursOfOperation.Delete</td>
<td>Delete hours of operation and timezone for a queue.</td>
</tr>
<tr>
<td>HoursOfOperation - Edit</td>
<td>HoursOfOperation.Edit</td>
<td>Edit hours of operation and timezone for a queue.</td>
</tr>
<tr>
<td>HoursOfOperation - View</td>
<td>HoursOfOperation.View</td>
<td>View hours of operation and timezone for a queue.</td>
</tr>
<tr>
<td>Queues - Create</td>
<td>Queues.Create</td>
<td>Create queues (p. 224).</td>
</tr>
<tr>
<td>Queues - Edit</td>
<td>Queues.Edit</td>
<td>Edit information for a queue, such as name, description, and hours of operation.</td>
</tr>
<tr>
<td>Queues - Enable / Disable</td>
<td>Queues.EnableAndDisable</td>
<td>Enable and disable queues (p. 225) to quickly control the flow of contacts to queues temporarily.</td>
</tr>
<tr>
<td>Queues - View</td>
<td>Queues.View</td>
<td>View a list of queues in your Amazon Connect instance.</td>
</tr>
<tr>
<td>Task templates - Create</td>
<td>TaskTemplates.Create</td>
<td>Create task templates (p. 240).</td>
</tr>
<tr>
<td>Task templates - Delete</td>
<td>TaskTemplates.Delete</td>
<td>Delete task templates.</td>
</tr>
<tr>
<td>Task templates - Edit</td>
<td>TaskTemplates.Edit</td>
<td>Edit task templates.</td>
</tr>
<tr>
<td>Task templates - View</td>
<td>Task templates.View</td>
<td>View task templates.</td>
</tr>
</tbody>
</table>

### Numbers and flows

<table>
<thead>
<tr>
<th>UI name</th>
<th>API name</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prompts - Create</td>
<td>Prompts.Create</td>
<td>Create prompts (p. 459).</td>
</tr>
<tr>
<td>Prompts - Delete</td>
<td>Prompts.Delete</td>
<td>Delete prompts.</td>
</tr>
<tr>
<td>Prompts - View</td>
<td>Prompts.View</td>
<td>View a list of available prompts.</td>
</tr>
<tr>
<td>ContactFlows - Create</td>
<td>ContactFlows.Create</td>
<td>Create flows (p. 448).</td>
</tr>
<tr>
<td>ContactFlows - Delete</td>
<td>ContactFlows.Delete</td>
<td>Delete flows (p. 451).</td>
</tr>
<tr>
<td>UI name</td>
<td>API name</td>
<td>Use</td>
</tr>
<tr>
<td>---------------------------------------------</td>
<td>---------------------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>ContactFlows - Edit</td>
<td>ContactFlows.Edit</td>
<td>Edit flows.</td>
</tr>
<tr>
<td>ContactFlows - Publish</td>
<td>ContactFlows.Publish</td>
<td>Publish flows.</td>
</tr>
<tr>
<td>ContactFlows - View</td>
<td>ContactFlows.View</td>
<td>View flows.</td>
</tr>
<tr>
<td>Contact flow modules - Create</td>
<td>ContactFlowModules.Create</td>
<td>Create flow modules for reusable functions (p. 457).</td>
</tr>
<tr>
<td>Contact flow modules - Delete</td>
<td>ContactFlowModules.Delete</td>
<td>Delete flow modules.</td>
</tr>
<tr>
<td>Contact flow modules - Edit</td>
<td>ContactFlowModules.Edit</td>
<td>Edit flow modules.</td>
</tr>
<tr>
<td>Contact flow modules - Publish</td>
<td>ContactFlowModules.Publish</td>
<td>Publish flow modules.</td>
</tr>
<tr>
<td>Contact flow modules - View</td>
<td>ContactFlowModules.View</td>
<td>View flow modules.</td>
</tr>
<tr>
<td>Phone numbers - Claim</td>
<td>PhoneNumbers.Claim</td>
<td>Claim phone numbers (p. 160).</td>
</tr>
<tr>
<td>Phone numbers - Edit</td>
<td>PhoneNumbers.Edit</td>
<td>Edit phone numbers. Attach a claimed or ported phone number to a flow (p. 457).</td>
</tr>
<tr>
<td>Phone numbers - Release</td>
<td>PhoneNumbers.Release</td>
<td>Release phone numbers back to inventory (p. 164).</td>
</tr>
<tr>
<td>Phone numbers - View</td>
<td>PhoneNumbers.View</td>
<td>View a list of phone numbers that have been claimed or ported to your Amazon Connect instance.</td>
</tr>
<tr>
<td>Chat test mode - Enable/Disable</td>
<td>ChatTestMode</td>
<td>Access a simulated web page so users can test the chat experience (p. 140). Also grants them the permission to view a list of flows, which is exposed through the Test settings option.</td>
</tr>
</tbody>
</table>

**Users and permissions**

<table>
<thead>
<tr>
<th>UI name</th>
<th>API name</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Users - Create</td>
<td>Users.Create</td>
<td>Add users to Amazon Connect (p. 775).</td>
</tr>
</tbody>
</table>
We recommend you limit who has these permissions. They pose a risk to your contact center because they can do the following:

- Reset passwords, including that of the administrator.
- Grant other users permission to the Admin security profile. People assigned to the Admin security profile have full access to your contact center.

Doing these things would enable someone to lock out those who need to access Amazon Connect, and allow in others who can steal customer data and damage your business.

<table>
<thead>
<tr>
<th>UI name</th>
<th>API name</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Users - Delete</td>
<td>Users.Delete</td>
<td>Delete users from Amazon Connect (p. 777).</td>
</tr>
<tr>
<td>Users - Edit</td>
<td>Users.Edit</td>
<td>View and edit user records. As with Users - Create, limit who has these permissions because they pose a risk to your contact center.</td>
</tr>
<tr>
<td>Users - Edit permission</td>
<td>Users.EditPermission</td>
<td>View and edit user records. As with Users - Create, limit who has these permissions because they pose a risk to your contact center.</td>
</tr>
<tr>
<td>Users - View</td>
<td>Users.View</td>
<td>View user records.</td>
</tr>
<tr>
<td>Agent hierarchy - Create</td>
<td>AgentGrouping.Create</td>
<td>Create agent hierarchies (p. 233). Add groups, teams, and agents.</td>
</tr>
<tr>
<td>Agent hierarchy - Edit</td>
<td>AgentGrouping.Edit</td>
<td>Edit agent hierarchies.</td>
</tr>
<tr>
<td>UI name</td>
<td>API name</td>
<td>Use</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>---------------------------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>Agent hierarchy - Enable/Disable</td>
<td>AgentGrouping.EnableAndDisable</td>
<td>Edit agent hierarchy information.</td>
</tr>
<tr>
<td>Agent hierarchy - View</td>
<td>AgentGrouping.View</td>
<td>View the agent’s hierarchy information in a real-time metrics report, which can include their location and skill set data.</td>
</tr>
<tr>
<td>Agent status - Create</td>
<td>AgentStates.Create</td>
<td>Create a custom agent status (p. 234). The status appears in the Contact Control Panel (CCP), such as Break, Lunch, or Training.</td>
</tr>
<tr>
<td>Agent status - Edit</td>
<td>AgentStates.Edit</td>
<td>Edit a custom agent status.</td>
</tr>
<tr>
<td>Agent status - Enable/Disable</td>
<td>AgentStates.EnableAndDisable</td>
<td>Edit and edit custom agent states.</td>
</tr>
<tr>
<td>Agent status - View</td>
<td>AgentStates.View</td>
<td>View an agent’s status in the real-time metrics report (p. 1015) and historical metrics report. For example, if they are Available, Offline, or in a custom state. View their status in the Agent activity report (p. 1040).</td>
</tr>
</tbody>
</table>

**Contact Control Panel (CCP)**

<table>
<thead>
<tr>
<th>UI name</th>
<th>API name</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access Contact Control Panel</td>
<td>BasicAgentAccess</td>
<td>Manages access to the Contact Control Panel (CCP). Assign this permission to agents as well as managers who</td>
</tr>
<tr>
<td>UI name</td>
<td>API name</td>
<td>Use</td>
</tr>
<tr>
<td>---------------------</td>
<td>----------------------------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>Contact Lens data</td>
<td>RealtimeContactLens.View</td>
<td>Enables users to view real-time analytics provided by Contact Lens.</td>
</tr>
<tr>
<td>Make outbound calls</td>
<td>OutboundCallAccess</td>
<td>Grants users permissions to make outbound calls. For more information about setting up outbound calling, see Set up outbound communications (p. 207).</td>
</tr>
<tr>
<td>Voice ID</td>
<td>Voiceld.Access</td>
<td>Enables controls in the Contact Control Panel so agents can:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• View authentication outcomes.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Opt-out or re-authenticate a caller.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Update SpeakerID.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• View fraud detection results, rerun fraud analysis (fraud detection decision, fraud type and score).</td>
</tr>
<tr>
<td>Restrict task creation</td>
<td>RestrictTaskCreation.Access</td>
<td>Block agents from being able to create tasks.</td>
</tr>
<tr>
<td>Audio device settings</td>
<td>Audio.View</td>
<td>Choose your preferred device for speaker, microphone, and ringer in the Contact Control Panel (CCP) (p. 1252).</td>
</tr>
</tbody>
</table>

### Analytics

<table>
<thead>
<tr>
<th>UI name</th>
<th>API name</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access metrics</td>
<td>AccessMetrics</td>
<td>Manage access to real-time and historical metrics reports (p. 1004).</td>
</tr>
<tr>
<td>Contact Search</td>
<td>ContactSearch.View</td>
<td>Access the Contact search page, which is where users can search.</td>
</tr>
</tbody>
</table>
## List of security profile permissions

<table>
<thead>
<tr>
<th>UI name</th>
<th>API name</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search contacts by conversation characteristics</td>
<td>ContactSearchWithCharacteristics.Access</td>
<td>Contact Lens filters that enable users to search by sentiment scores, non-talk time, and category.</td>
</tr>
<tr>
<td>Search contacts by conversation characteristics - View</td>
<td>ContactSearchWithCharacteristics.View</td>
<td>View the Contact Lens filters that enable users to search by sentiment scores, non-talk time, and category.</td>
</tr>
<tr>
<td>Search contacts by keywords</td>
<td>ContactSearchWithKeywords.Access</td>
<td>Search for contacts by keyword. On the Contact Search page, users can access additional filters that allow them to search Contact Lens transcripts by keywords or phrases, such as “thank you for your business.”</td>
</tr>
<tr>
<td>Search contacts by keywords - View</td>
<td>ContactSearchWithKeywords.View</td>
<td>View for contacts by keyword. On the Contact Search page, users can access additional filters that allow them to search Contact Lens transcripts by keywords or phrases, such as “thank you for your business.”</td>
</tr>
<tr>
<td>Configure searchable contact attributes - View</td>
<td>ConfigureContactAttributes.View</td>
<td>Determine what custom attribute data will be searchable (by people who have the Contact attributes permission). It allows them to access the Searchable custom contact attributes page. For more information, see Search by custom contact attributes (p. 940).</td>
</tr>
<tr>
<td>UI name</td>
<td>API name</td>
<td>Use</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Restrict contact access</td>
<td>ContactRecording.Access</td>
<td>If your organization isn’t using Contact Lens for Amazon Connect, use this permission to manage who can listen to recordings, access the corresponding URLs that are generated in S3, and delete recordings. For more information, see [Assign permissions to review recordings of past conversations](p. 801). Checking this box limits a user’s access to contacts based on their agent hierarchy. The user will only have access to contacts handled by agent within their own hierarchy.</td>
</tr>
<tr>
<td>Restrict contact access</td>
<td>RestrictContactAccessByHierarchy.View</td>
<td>Manage a user’s access to results on the Contact search page based on their agent hierarchy group. For more information, see [Manage who can search for contacts and access detailed information](p. 938).</td>
</tr>
<tr>
<td>Contact attributes</td>
<td>ContactAttributes.View</td>
<td>View contact attributes. Also controls access to the search filters based on contact attributes. For more information, see [Search by custom contact attributes](p. 940).</td>
</tr>
<tr>
<td>Contact Lens speech analytics - View</td>
<td>GraphTrends.View</td>
<td>On the Contact Details page for a contact, users can view graphs that summarize speech analytics, such as customer sentiment trend, sentiment, and talk time.</td>
</tr>
</tbody>
</table>
## List of security profile permissions

<table>
<thead>
<tr>
<th>UI name</th>
<th>API name</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact Lens - custom vocabularies - Edit</td>
<td>ContactLensCustomVocabulary.Edit</td>
<td>Add custom vocabularies (p. 819).</td>
</tr>
<tr>
<td>Contact Lens - custom vocabularies - View</td>
<td>ContactLensCustomVocabulary.View</td>
<td>Download and view custom vocabularies (p. 821).</td>
</tr>
<tr>
<td>Recorded conversations (redacted)</td>
<td>RedactedData.View</td>
<td>On the Contact details page for a contact, listen to call recording files and view call transcripts in which the sensitive data has been removed.</td>
</tr>
</tbody>
</table>
| Recorded conversations (unredacted) - View  | ListenCallRecordings                  | View unredacted content that contains sensitive data such as name and credit card information. Users can view the following unredacted content:  
  - Original, unredacted chat transcripts  
  - Original, unredacted transcripts analyzed by Contact Lens  
  - Original, unredacted audio recordings  
  Users can access this content on the Contact Record page for a contact. |
<p>| Recorded conversations (unredacted) - Access| ListenCallRecordings                  | View the Play icon so they can listen to call recordings by using the Amazon Connect user interface. |</p>
<table>
<thead>
<tr>
<th>UI name</th>
<th>API name</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recorded conversations (unredacted) - Enable download button</td>
<td>DownloadCallRecordings</td>
<td>Download call recordings (p. 804). By default, the <strong>Enable download button</strong> permission is granted too so the user can download recordings through the user interface.</td>
</tr>
<tr>
<td>Recorded conversations (unredacted) - Delete</td>
<td>DeleteCallRecordings</td>
<td>Delete call recordings. By default, the <strong>Enable download button</strong> permission is granted too so the user can delete recordings through the user interface.</td>
</tr>
<tr>
<td>Login/Logout report - View</td>
<td>AgentTimeCard.View</td>
<td>View Login/Logout reports (p. 1041).</td>
</tr>
<tr>
<td>Manager monitor - Enable/Disable</td>
<td>ManagerListenIn</td>
<td>Monitor live conversations (p. 798) and listen to recordings of past conversations (p. 800). Be sure to assign managers to the Agent security profile so they can access the Contact Control Panel (CCP). This enables them to monitor the conversation through the CCP.</td>
</tr>
<tr>
<td>Saved reports - View</td>
<td>MetricsReports.View</td>
<td>View a shared report (p. 1092).</td>
</tr>
<tr>
<td>Saved reports - Create</td>
<td>MetricsReports.Create</td>
<td>Create and share reports (p. 1090).</td>
</tr>
<tr>
<td>Saved reports - Edit</td>
<td>MetricsReports.Edit</td>
<td>Edit save reports.</td>
</tr>
<tr>
<td>Saved reports - Delete</td>
<td>MetricsReports.Delete</td>
<td>Delete saved reports.</td>
</tr>
<tr>
<td>Saved reports - Publish</td>
<td>MetricsReports.Publish</td>
<td>Publish reports (p. 1093).</td>
</tr>
<tr>
<td>UI name</td>
<td>API name</td>
<td>Use</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>---------------------------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>Saved reports - Schedule</td>
<td>MetricsReports.Schedule</td>
<td>Schedule a saved report (p. 1035). By default, the user gets permission to create, delete, edit, and view a saved report.</td>
</tr>
<tr>
<td></td>
<td>MetricsReports.Publish</td>
<td></td>
</tr>
<tr>
<td></td>
<td>ReportSchedules.Create</td>
<td></td>
</tr>
<tr>
<td></td>
<td>ReportSchedules.Delete</td>
<td></td>
</tr>
<tr>
<td></td>
<td>ReportSchedules.Edit</td>
<td></td>
</tr>
<tr>
<td></td>
<td>ReportSchedules.View</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Evaluation.View</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Evaluation.Edit</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Evaluation.Delete</td>
<td></td>
</tr>
<tr>
<td>Evaluation forms - manage form definitions</td>
<td>EvaluationForms.Create</td>
<td>Create and manage evaluation forms (p. 920).</td>
</tr>
<tr>
<td></td>
<td>EvaluationForms.View</td>
<td></td>
</tr>
<tr>
<td></td>
<td>EvaluationForms.Edit</td>
<td></td>
</tr>
<tr>
<td></td>
<td>EvaluationForms.Delete</td>
<td></td>
</tr>
<tr>
<td>Voice ID - attributes and search</td>
<td>VoiceIdAttributesAndSearch.View</td>
<td>Search for and view Voice ID results on the Contact detail page.</td>
</tr>
</tbody>
</table>

### Historical changes

<table>
<thead>
<tr>
<th>UI name</th>
<th>API name</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>View historical changes</td>
<td>HistoricalChanges.View</td>
<td>On the User management page, view historical changes to user records.</td>
</tr>
</tbody>
</table>

### Customer Profiles

<table>
<thead>
<tr>
<th>UI name</th>
<th>API name</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer profiles - Create</td>
<td>CustomerProfiles.Create</td>
<td>Create customer profiles in the agent application (p. 1297).</td>
</tr>
</tbody>
</table>
### List of security profile permissions

<table>
<thead>
<tr>
<th>UI name</th>
<th>API name</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>View</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Agent Applications

<table>
<thead>
<tr>
<th>UI name</th>
<th>API name</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wisdom - View</td>
<td>Wisdom.View</td>
<td>View real-time recommendations in the agent application (p. 1308).</td>
</tr>
</tbody>
</table>

## Cases

<table>
<thead>
<tr>
<th>UI name</th>
<th>API name</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cases - Create</td>
<td>Cases.Create</td>
<td>Create cases in the agent application (p. 1303).</td>
</tr>
<tr>
<td>Cases - View</td>
<td>Cases.View</td>
<td>View cases in the agent application.</td>
</tr>
<tr>
<td>Cases - Edit</td>
<td>Cases.Edit</td>
<td>Edit cases in the agent application.</td>
</tr>
<tr>
<td>Case Fields - Create</td>
<td>CaseFields.Create</td>
<td>Create case fields (p. 734).</td>
</tr>
<tr>
<td>Case Fields - View</td>
<td>CaseFields.View</td>
<td>View case fields.</td>
</tr>
<tr>
<td>Case Fields - Edit</td>
<td>CaseFields.Edit</td>
<td>Edit case fields.</td>
</tr>
<tr>
<td>Case Templates - Create</td>
<td>CaseTemplates.Create</td>
<td>Create case templates (p. 738).</td>
</tr>
<tr>
<td>Case Templates - View</td>
<td>CaseTemplates.View</td>
<td>View case templates.</td>
</tr>
<tr>
<td>Case Templates - Edit</td>
<td>CaseTemplates.Edit</td>
<td>Edit case templates.</td>
</tr>
</tbody>
</table>

## Campaigns

<table>
<thead>
<tr>
<th>UI name</th>
<th>API name</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campaigns - Create</td>
<td>Campaigns.Create</td>
<td>Create outbound campaigns (p. 219).</td>
</tr>
<tr>
<td>Campaigns - Delete</td>
<td>Campaigns.Delete</td>
<td>Delete outbound campaigns.</td>
</tr>
</tbody>
</table>
Default security profiles

Amazon Connect includes default security profiles for general roles. You can review the permissions granted by these profiles and use them if they align with the permissions that your users need. Otherwise, create a security profile that grants your users only the permissions they need.

The following table lists the default security profiles:

<table>
<thead>
<tr>
<th>Security profile</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admin</td>
<td>Grants administrators permission to perform all actions.</td>
</tr>
<tr>
<td>Agent</td>
<td>Grants agents permission to access the CCP.</td>
</tr>
<tr>
<td>CallCenterManager</td>
<td>Grants managers permission to perform actions related to user management, metrics, and routing.</td>
</tr>
<tr>
<td>QualityAnalyst</td>
<td>Grants analysts permission to perform actions related to metrics.</td>
</tr>
</tbody>
</table>

Assign a security profile to a user

Required permissions to assign security profiles

Before you can assign a security profile to a user, you must be logged in with an Amazon Connect account that has the Users - Edit permission. Or, if you’re creating the user’s account for the first time, you need Users - Create permission.

By default, the Amazon Connect Admin security profile has these permissions.
How to assign security profiles

1. Review Best practices for security profiles (p. 780).
2. Log in to your contact center at https://instance name.my.connect.aws/.
3. Choose Users, User management.
4. Select one or more users and choose Edit.
5. For Security Profiles, add or remove security profiles as needed. To add a security profile, put your cursor in the field and select the security profile from the list. To remove a security profile, click the x next to its name.
6. Choose Save.

Create a security profile

Creating a security profile enables you to grant your users only the permissions that they need.

For each permission group, there is a set of resources and supported set of actions. For example, users are part of the Users and permissions group, which supports the following actions: view, edit, create, remove, enable/disable, and edit permission.

Some actions depend on other actions. When you choose an action that depends on another action, the dependent action is automatically chosen and must also be granted. For example, if you add permission to edit users, we also add permission to view users.

Required permissions to create security profiles

Before you can create a new security profile, you must be logged in with an Amazon Connect account that has the following permissions: Security profiles - Create.

![Users and permissions]

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

How to create security profiles

1. Log in to your contact center at https://instance name.my.connect.aws/.
3. Choose Add new security profile.
4. Type a name and description for the security profile.
5. Choose the appropriate permissions for the security profile from each permission group. For each permission type, choose one or more actions. Selecting some actions results in other actions being selected. For example, selecting Edit also selects View for the resource and any dependent resources.
6. Choose Save.
Update security profiles

You can update a security profile at any time to add or remove permissions.

Required permissions to update security profiles

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

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

How to update security profiles

1. Log in to your contact center at https://instance name.my.connect.aws/. You must be logged in with an Amazon Connect account that has permissions to update security profiles.
3. Select the name of the profile.
4. Update the name, description, and permissions as needed.
5. Choose Save.
Monitor live and recorded conversations

The articles in this section explain how to monitor (listen-in) on conversations between agents and contacts.

Contents
- Monitor live conversations (p. 798)
- Review recorded conversations (p. 800)

Monitor live conversations

Managers and agents in training can monitor live conversations between agents and customers. To set this up, you need to add the Set recording behavior block to your voice/chat flow, assign managers and trainees the appropriate permissions, and then show them how to monitor the conversations.

Looking for how many people can monitor the same conversation at one time? See Amazon Connect feature specifications (p. 1332).

There is no limit to the number of conversations being monitored in an instance.

Set up live monitoring for voice and/or chat

1. Add the Set recording and analytics behavior (p. 411) block to your flow. Do this to monitor calls, chats, or both.

To enable monitoring of voice and/or chat conversations, in the block's properties choose Agent and Customer.
Assign permissions

For more information, see Set up recording behavior (p. 483).

2. Choose whether to record the conversations you monitor.

Although you need to add the Set recording behavior block to your flow, you don't need to record voice and/or chat conversations for monitoring to work. By default when you set up your instance, Amazon S3 buckets are created (p. 129) to store call recordings and chat transcripts. The existence of these buckets enables call recording and chat transcripts at the instance level.

To not record the calls or chats you’re monitoring, disable the Amazon S3 buckets. For instructions, see Update instance settings (p. 132).

Assign permissions to monitor live conversations

For managers to monitor live conversations, you assign them the CallCenterManager and Agent security profiles. To allow agent trainees to monitor live conversations, you may want to create a security profile specific for this purpose.

To assign a manager permissions to monitor a live conversation

1. Go to Users, User management, choose the manager, and then choose Edit.
2. In the Security Profiles box, assign the manager to the CallCenterManager security profile. This security profile also includes a setting that makes the icon to download recordings appear in the results of the Contact search page.
3. Assign the manager to the Agent security profile so they can access the Contact Control Panel (CCP), and use it to monitor the conversation.
4. Choose Save.

To create a new security profile for monitoring live conversations

2. Choose Add new security profile.
3. Expand Analytics and optimization, then choose Access metrics and Manager monitor.

<table>
<thead>
<tr>
<th>Metrics and Quality</th>
<th>All</th>
<th>Access</th>
<th>View</th>
<th>Edit</th>
<th>Create</th>
<th>Enable/Disable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access metrics</td>
<td></td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contact search</td>
<td></td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contact attributes</td>
<td></td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Login/Logout report</td>
<td></td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manager monitor</td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✔</td>
</tr>
<tr>
<td>Recorded conversations</td>
<td></td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Saved reports</td>
<td></td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Access metrics is needed so they can access the real-time metrics report, which is where they choose which conversations to monitor.

4. Expand Contact Control Panel, then choose Access Contact Control Panel and Make outbound calls.
Monitor conversations

These permissions are needed so they can monitor the conversation through the Contact Control Panel.

5. Choose Save.

Monitor live conversations with contacts

Tip
Call barge-in is not currently supported. That is, if you're listening to a conversation, your microphone stays muted.

1. Check that the Set recording and analytics behavior (p. 411) block is in the flow you want to monitor. It has to be there whether you're monitoring calls or chats. In the block's Properties, choose Agent and Customer.

2. Log in to your Amazon Connect instance with a user account that is assigned the CallCenterManager security profile, or that is enabled for the Manager monitor permission.

3. Open the Contact Control Panel (CCP) by choosing the phone icon in the top-right corner of your screen. You'll need the CCP open to connect to the conversation.

4. To choose the agent conversation you want to monitor, in Amazon Connect choose Analytics and optimization, Real-time metrics, Agents.

5. To monitor voice conversations: Next to the names of agents in a live voice conversation, you'll see an eye icon. Choose the icon to start monitoring the conversation.

   When you're monitoring a conversation, the status in your CCP changes to Monitoring.

6. To monitor chat conversations: For each agent you'll see the number of live chat conversations they're in. Click on the number. Then choose the conversation you want to start monitoring.

   When you're monitoring a conversation, the status in your CCP changes to Monitoring.

7. To stop monitoring the conversation, in the CCP choose End call or End chat.

   When the agent ends the conversation, monitoring stops automatically.

Review recorded conversations

Managers can review past conversations between agents and customers. To set this up, you need to set up recording behavior (p. 483), assign managers the appropriate permissions, and then show them how to access the recorded conversations.

When is a conversation recorded? A conversation is recorded only when the contact is connected to an agent. The contact is not recorded before then, when they are connected to the IVR. If the call is transferred externally, the call recording stops when the agent drops from the call.
Tip
When call recording is enabled, the recording is placed in your S3 bucket shortly after the contact is disconnected. Then the recording is available for you to review it using the steps in this article.
You can also access the recording from the customer’s contact record (p. 1077). The recording is available in the contact record, however, only after the contact has left the After Contact Work (ACW) state (p. 1079).

How do I manage access to recordings? Use the Recorded conversations (unredacted) security profile permission to manage who can listen to recordings, and access the corresponding URLs that are generated in S3. For more information about this permission, see Assign permissions to review recordings of past conversations (p. 801).

Assign permissions to review recordings of past conversations

Assign the CallCenterManager security profile so a user can listen to call recordings or review chat transcripts. This security profile also includes a setting that makes the icon to download recordings appear in the results of the Contact search page.

Or, assign the following individual permissions.

1. Contact search: This permission is required so users can access the Contact search page, which is where they can search contacts so they can listen to recordings and review transcripts.

2. Restrict contact access: Manage access to results on the Contact search page based on their agent hierarchy group.

   For example, agents who are assigned to AgentGroup-1 can only view contact trace records (CTRs) for contacts handled by agents in that hierarchy group, and any groups below them. (If they have permissions for Recorded conversations, they can also listen to call recordings and view transcripts.) Agents assigned to AgentGroup-2 can only access CTRs for contacts handled by their group, and any groups below them.

   Managers and others who are in higher level groups can view CTRs for contacts handled by all the groups below them, such as AgentGroup-1 and 2.

   For this permission, All = View since View is the only action granted.

   For more information about hierarchy groups, see Set up agent hierarchies (p. 233).

   Note
   When you change a the hierarchy group of a user, it may take a couple of minutes for their contact search results to reflect their new permissions.

3. Recorded conversations (redacted): If your organization uses Contact Lens for Amazon Connect, you can assign this permission so agents access only those call recordings and transcripts in which sensitive data has been removed.

   The redaction feature is provided as part of Contact Lens for Amazon Connect. For more information, see Use sensitive data redaction (p. 868).

4. Manager monitor: This permission allows users to monitor live conversations and listen to recordings.

Note
When you change a the hierarchy group of a user, it may take a couple of minutes for their contact search results to reflect their new permissions.
Review recordings/transcripts of past conversations

These are the steps that a manager does to review past recordings/transcripts of conversations.

1. Log in to Amazon Connect with a user account that has permissions to access recordings (p. 801).
2. In Amazon Connect choose Analytics and optimization, Contact search.
3. Filter the list of contacts by date, agent login, phone number, or other criteria. Choose Search.

   Tip
   We recommend using the Contact ID filter to search for recordings (p. 805). This is the best way to ensure you get the right recording for the contact. Many recordings have the same name as the contact ID, but not all.

4. Conversations that were recorded have icons in the Recording/Transcript column. If you don't have the appropriate permissions, you won't see these icons.
5. To listen to a recording of a voice conversation, or read the transcript of a chat, choose the Play icon.

6. The following image shows a sample chat transcript.

---

### Pause, rewind, or fast-forward a recording

1. Instead of choosing the Play icon, choose the contact ID to open the contact record.

2. On the Contact record page, there are more controls to navigate the recording.
Troubleshoot problems

1. Click or tap to the time you want to investigate.
2. Adjust the playing speed.
3. Play, pause, skip backwards or forwards in 10 second increments.

**Troubleshoot problems pausing, rewinding, or fast-forwarding**

If you are unable to pause, rewind or fast-forward recordings on the Contact search page, one possible reason could be that your network is blocking HTTP range requests. See HTTP range requests on the MDN Web Docs site. Work with your network administrator to unblock HTTP range requests.

**Download recordings/transcripts of past conversations**

These are the steps that a manager does to download past recordings/transcripts of conversations.

1. Log in to Amazon Connect with a user account that has permissions to access recordings (p. 801).
2. In Amazon Connect choose Analytics and optimization, Contact search.
3. Filter the list of contacts by date, agent login, phone number, or other criteria. Choose Search.
4. Conversations that were recorded have icons in the **Recording/Transcript** column. If you don't have the appropriate permissions, you won't see these icons.

<table>
<thead>
<tr>
<th>Contact ID</th>
<th>Channel</th>
<th>Initiation Timestamp</th>
<th>Phone number</th>
<th>Queue</th>
<th>Agent</th>
<th>Recording/Transcript</th>
</tr>
</thead>
<tbody>
<tr>
<td>b3</td>
<td>Voice</td>
<td>2/3/20 7:02 PM</td>
<td>+1</td>
<td>BasicQueue</td>
<td></td>
<td>🎧 📋 📸</td>
</tr>
<tr>
<td>eb:</td>
<td>Voice</td>
<td>2/5/20 7:04 PM</td>
<td>+1</td>
<td>BasicQueue</td>
<td></td>
<td>🎧 📋 📸</td>
</tr>
</tbody>
</table>

5. Choose the **Download** icon.

<table>
<thead>
<tr>
<th>Contact ID</th>
<th>Channel</th>
<th>Initiation Timestamp</th>
<th>Phone number</th>
<th>Queue</th>
<th>Agent</th>
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</tr>
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<tr>
<td>b3</td>
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<td>eb:</td>
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<td>+1</td>
<td>BasicQueue</td>
<td></td>
<td>🎧 📋 📸</td>
</tr>
</tbody>
</table>

6. The recording is saved automatically to your **Downloads** folder as a .wav file.

The name of the file is the contact ID.

**Tip**
You may hear only the agent, only the customer, or both the agent and customer in the recording. This is determined by how the **Set recording and analytics behavior** (p. 411) block is configured (p. 484).

### Search for recordings by contact ID

To find a recording of a specific contact, you only need the contact ID. You don't need to know the date range, agent, or any other information about the contact.

**Tip**
We recommend using the contact ID to search for recordings.

Even though many call recordings for specific contact IDs may be named with the contact ID prefix itself (for example, 123456-aaaa-bbbb-3223-2323234.wav), there is no guarantee that the contact IDs and name of the contact recording file always match. By using **Contact ID** for your search on the **Contact search** page, you can find the correct recording by referring the audio file on the contact's record.

1. Log in to Amazon Connect with a user account that has permissions to access recordings (p. 801).
2. In Amazon Connect choose **Analytics and optimization, Contact search**.
3. In the **Contact ID**, enter the contact ID, and then choose **Search**.
4. Conversations that were recorded have icons in the **Recording/Transcript** column. If you don't have the appropriate permissions, you won't see these icons.
To learn more about searching, see Search for contacts (p. 935).
Contact Lens for Amazon Connect

Contact Lens for Amazon Connect provides a set of conversational analytics and quality management capabilities, powered by machine learning. For example, you can use these analytics to:

- Automatically categorize contacts based on uttered keywords and phrases (p. 826). This helps you understand the compliance of customer conversations.
- Investigate customer sentiment (p. 864).
- Search call and chat transcripts (p. 853).
- Monitor agent performance in real-time (p. 830).
- View contact summary (p. 863).

Contact Lens helps you protect your customer's privacy by enabling you to automatically redact sensitive data (p. 868) from conversation transcripts and audio files.

You can define and assess agent performance criteria (for example, adherence to required scripts) and automatically pre-populate evaluation forms. This reduces the need for managers to do manual reviews, while more easily identifying coaching needs for your agents.

Contents
- Analyze conversations using Contact Lens for Amazon Connect (p. 807)
- Evaluate performance (Preview) (p. 916)
- Search for contacts (p. 935)

Analyze conversations using Contact Lens for Amazon Connect

With Contact Lens for Amazon Connect, you can analyze conversations between customer and agents by using speech and chat transcriptions, natural language processing, and intelligent search capabilities. Contact Lens for Amazon Connect performs sentiment analysis, detects issues, and enables you to automatically categorize contacts.

Speech analytics support
- **Real-time call analytics**: Use to detect and resolve customer issues more proactively while the call is progress. For example, it can analyze and alert you when a customer is getting frustrated because the agent is unable to resolve a complicated problem. This allows you to provide more immediate assistance.
- **Post-call analytics**: Use to understand trends of customer conversations and agent compliance. This helps you identify opportunities to coach an agent after the call.

Chat analytics support
- **Post-chat analytics**: Use to understand trends of customer conversations with both bots and agents. It provides information specific to a chat interaction, such as the agent greeting time, and agent and customer response times. The response times and sentiments help you investigate the customer's experience with the bot versus the agent, and identify areas for improvement.
You can protect your customer's privacy by redacting sensitive data, such as name, address, and credit card information from transcripts and audio recordings.

**Sample Contact details page for a call**

The following image shows the summary and conversational analytics for a voice call. Notice that it includes **Talk time** metrics.

The following image shows the next section on the **Contact details** page for a voice call: the audio analysis and transcript. Notice that personally identifiable information (PII) has been **redacted from the transcript** (p. 868).
Sample Contact details page for a chat

The following image shows the summary and conversational analytics for a chat. Notice that it includes chat response metrics, such as **Agent greeting time** (the time from the agent joining the chat to when they send the first response), **Customer response time**, and **Agent response time**.
Enable Contact Lens for Amazon Connect

You can enable Contact Lens for Amazon Connect in a few steps. Just add a Set recording and analytics behavior (p. 411) block to a flow, and configure it to enable Contact Lens for voice, chat, or both.
The following image shows a block that's configured for call recording, and Contact Lens speech analytics and chat analytics.

**Set recording and analytics behavior**

Specify recording behavior and configure Contact Lens conversational analytics.

**Call recording**

Enables or disables call recording for the agent, customer, or both.

- **On**
  - Agent and customer
  - Agent only
  - Customer only
- **Off**

**Analytics**

- Enable Contact Lens conversational analytics.
  - Contact Lens conversational analytics provides ML-based speech and chat analytics such as transcripts, sentiment, contact categorization, sensitive data redaction, and contact summarization. These analytics help identify customer issues and improve agent performance. [Info]
  - Enable speech analytics
    - ML-based speech analytics for post-call and real-time. You need agent and customer call recordings to enable speech analytics
      - Post-call analytics
        - Recommended for best transcription accuracy.
      - Real-time and post-call analytics
        - Enables real-time alerts and speech analytics on live calls.
  - Enable chat analytics
    - ML-based chat analytics for post-chat. You need chat transcripts enabled on the Amazon Connect AWS management console to leverage chat analytics

**Collect data after transferring a contact:** If you want to continue using Contact Lens to collect data after transferring a contact to another agent or queue, you need to add another Set recording and analytics behavior (p. 411) block with Enable analytics enabled for the flow. This is because a transfer generates a second contact ID and contact record. Contact Lens needs to run on that contact record as well.

**Important**

When you select Enable Contact Lens conversational analytics, you must choose to enable speech or chat analytics. Otherwise, your flow will display an error when you publish it.

The following procedures describe the steps to enable Contact Lens for call or chat analytics.
Enable call recording and speech analytics

1. In the Set recording and analytics behavior (p. 411) block, under Call recording, choose On, Agent and Customer.

Both agent and customer call recordings are required to use Contact Lens for voice contacts.

2. Under Analytics, choose Enable Contact Lens conversational analytics, Enable speech analytics.

If you don't see this option, Contact Lens for Amazon Connect hasn't been enabled for your instance. To enable it, see Update instance settings (p. 132).

3. Choose one of the following:
   a. Post-call analytics: Contact Lens analyzes the call recording after the conversation and After Contact Work (ACW) is complete. This option provides the best transcription accuracy.
   b. Real-time analytics: Contact Lens provides both real-time insights during the call, and post-call analytics after the conversation has ended and After Contact Work (ACW) is complete.

   If you choose this option, we recommend setting up alerts based on keywords and phrases that the customer may utter during the call. Contact Lens analyzes the conversation real-time to detect the specified keywords or phrases, and alerts supervisors. From there, supervisors can listen in on the live call and provide guidance to the agent to help them resolve the issue faster.

   For information about setting up alerts, see Alert supervisors in real-time based on keywords and phrases (p. 830).

   If your instance was created before October 2018, additional configuration is needed to access real-time call analytics. For more information, see Service-linked role permissions for Amazon Connect (p. 1228).

4. Choose the language. For a list of available languages for various Contact Lens features, see Supported languages (p. 6).

   For instructions on using an attribute, see Use contact attributes (p. 813).

5. Optionally, enable redaction of sensitive data. For more information, see the next section, Enable redaction of sensitive data (p. 813).

6. Choose Save.

7. If the contact is going to be transferred to another agent or queue, repeat these steps to add another Set recording and analytics behavior (p. 411) block with Enable Contact Lens for conversational analytics enabled.

Enable chat analytics

1. In the Set recording and analytics behavior (p. 411) block, under Analytics, choose Enable Contact Lens conversational analytics, and Enable chat analytics.

If you don't see this option, Contact Lens for Amazon Connect hasn't been enabled for your instance. To enable it, see Update instance settings (p. 132).

2. Choose the language. For a list of available languages for various Contact Lens features, see Supported languages (p. 6).

   For instructions on using an attribute, see Use contact attributes (p. 813).

3. Optionally, enable redaction of sensitive data. For more information, see the next section, Enable redaction of sensitive data (p. 813).

4. Choose Save.
5. If the contact is going to be transferred to another agent or queue, repeat these steps to add another Set recording and analytics behavior (p. 411) block with Enable Contact Lens for conversational analytics enabled.

Enable redaction of sensitive data

To enable redaction of sensitive data in a flow, choose Redact sensitive data. No other configuration is needed. Contact Lens determines what data can be redacted.

For more information about using redaction, see Use sensitive data redaction (p. 868).

Review sensitive data redaction for accuracy

The redaction feature is designed to identify and remove sensitive data. However, due to the predictive nature of machine learning, it may not identify and remove all instances of sensitive data in a transcript generated by Contact Lens. We recommend you review any redacted output to ensure it meets your needs.

**Important**

The redaction feature does not meet the requirements for de-identification under medical privacy laws like the U.S. Health Insurance Portability and Accountability Act of 1996 (HIPAA), so we recommend you continue to treat it as protected health information after redaction.

For the location of redacted files and examples, see Output file locations (p. 877).

Dynamically enable Contact Lens using contact attributes

You can dynamically enable Contact Lens and the redaction of the output files based on the language of the customer. For example, for customers using en-US, you may want only a redacted file whereas for those using en-GB, you may want both the original and redacted output files.

- Redaction: choose one of the following (they are case sensitive)
Enable Contact Lens

- None
- RedactedOnly
- RedactedAndOriginal
- Language: Choose from the list of available languages (p. 7).

You can set these attributes in the following ways:

- User defined: use a Set contact attributes block. For general instructions about using this block, see How to reference contact attributes (p. 535). Define the Destination key and Value for redaction and language as needed.

The following image shows how to use contact attributes for redaction. Note that Value is case sensitive.

Set contact attributes

Define and store key-value pairs as contact attributes. Learn more

Contact attributes are accessible by other areas of Amazon Connect, such as the Contact Control Panel (CCP) and Contact Trace Records (CTRs).

Attribute to save

- Use text
- Use attribute

This is case sensitive!

The following image shows how to use contact attributes for language:
Use a Lambda function (p. 545). This is similar to how you set up user-defined contact attributes. An AWS Lambda function can return the result as a key-value pair, depending on the language of the Lambda response. The following example shows a Lambda response in JSON:

```json
{
    'redaction_option': 'RedactedOnly',
    'language': 'en-US'
}
```

What if the flow block fails to enable Contact Lens?

It's possible that the Set recording and analytics behavior (p. 411) block can fail to enable Contact Lens on a contact. If Contact Lens isn't enabled for a contact, check the flow logs (p. 515) for the error.

Availability of Contact Lens features by Region

<table>
<thead>
<tr>
<th>Region</th>
<th>Post-call/chat analytics</th>
<th>Real-time call analytics</th>
<th>Extended language support</th>
</tr>
</thead>
<tbody>
<tr>
<td>US East (N. Virginia)</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>US West (Oregon)</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Canada (Central)</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Europe (Frankfurt)</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Europe (London)</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Asia Pacific (Singapore)</td>
<td>Yes</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Asia Pacific (Sydney)</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Asia Pacific (Tokyo)</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>
Multi-party calls and Contact Lens

We do not support multi-party calls in Contact Lens. For example, if there are more than two parties (agent and customer) on a call, the quality of the transcription and analytics, such as sentiment and categories, is degraded.

Security profile permissions for Contact Lens

To keep customer data secure, you can set up permissions to have granular control on who can access information generated by Contact Lens.

The following image shows the security profile permissions that apply to Contact Lens:

Following is a description of the permissions.

Contact search

This permission isn’t specific to Contact Lens, but it is required so you can access the Contact search page, which is where you can search contacts so you can review the analyzed recording and transcript. In addition, you can do fast, full-text search on call transcripts, and search by sentiment score and non-talk time.
Search contacts by conversation characteristics

On the **Contact Search** page, for voice contacts, you can access additional filters that allow you to return results by sentiment score and non-talk time. For chat contacts, you can access an additional filter to search for contacts by response time. For both voice and chat, you can search conversations that fall into specific contact categories. For more information, see **Search for sentiment score/shift** (p. 856), **Search for non-talk time** (p. 857), and **Search a contact category** (p. 858).

Search contacts by keywords

On the **Contact Search** page, you can access additional filters that allow you to search contacts by **Words or phrases**, such as "thank you for your business." For more information, see **Search for words or phrases** (p. 854).

Contact Lens - conversational analytics

On the **Contact details** page for a contact, you can view graphs that summarize conversational analytics: customer sentiment trend, sentiment, and talk time for voice contacts. For example, the following image shows how this information is displayed on the **Contact details** page for a voice contact.
Rules

This permission allows you to view, edit, or create rules for categorizing contacts. For more information, see Automatically categorize contacts based on uttered keywords and phrases (p. 826).

Recorded conversations (redacted)

On the Contact details page for a contact, this permission allows you to listen to call recording files or view the chat transcript in which the sensitive data has been removed. For more information, see Example redacted file for a call (p. 883).

Recorded conversations (unredacted)

This permission manages access to unredacted content that contains sensitive data such as name and credit card information. It manages access to the following unredacted content:

- Original, unredacted chat and speech transcripts analyzed by Contact Lens
- Original, unredacted transcripts analyzed by Contact Lens
- Original, unredacted audio recordings

You can access this content on the Contact details page for a contact. For more information, see Example original, analyzed file for a call (p. 878).

Important

If you have permissions to both Recorded conversations (redacted) and Recorded conversations (unredacted), by default only redacted recordings are made available on the Contact details page.
You must remove permissions to Recorded conversations (redacted) to access unredacted conversations.
You can’t access redacted and unredacted content at the same time.

Contact Lens notification types

Contact Lens provides the following notification types:
• Contact Lens Post Call/Chat Rules Matched: An EventBridge event is delivered whenever a Contact Lens rule is matched and has triggered the EventBridge rule action.

This event contains useful information about the Contact Lens rule that is triggered including the category assigned, and details of the agent, contact and queue.

• Contact Lens Real Time Call Rules Matched: An EventBridge event is delivered whenever a Contact Lens rule is matched and has triggered in real time.

This event contains useful information about the Contact Lens rule that is triggered including the category assigned, and details of the agent, contact and queue.

• Contact Lens Analysis State Change: An EventBridge event is delivered when Contact Lens is unable to analyze a contact recording. The event contains the Event Reason Code which provides the details on why it was unable to process the recording.

You can use these notification types in a variety of scenarios. For example, use Contact Lens analysis State Change events to signal unexpected errors in the processing of a contact file where EventBridge event details can be subsequently stored in a CloudWatch log for additional review, trigger additional workflows, or alert relevant support teams for further investigation.

The Contact Lens events for speech and chat analytics enable numerous new use cases such as surfacing and visualization of additional insights, for example:

• Generate alerts on real-time customer sentiment drops across all calls
• Aggregating and reporting on reoccurring issues and topics
• Measuring the impact of the latest marketing campaign by detecting how many customers referenced it during a call
• Customizing agent compliance standards for each Region and lines of business, and enrolling agents into additional training where required.

Add custom vocabularies

You can improve the accuracy of speech recognition for product names, brand names, and domain-specific terminology, by expanding and tailoring the vocabulary of the speech-to-text engine in Contact Lens.

This topic explains how to add custom vocabularies using the Amazon Connect console. You can also add them using the CreateVocabulary and AssociateDefaultVocabulary APIs.

Things to know about custom vocabularies

• You must set a vocabulary as the default for it to be applied to the analyses to generate transcripts.
• You can have one vocabulary per language applied to the analyses. This means only one file per language can be in the **Ready (default)** state.

• You can upload more than 20 vocabulary files. However, you can activate only 20 custom vocabulary files at the same time.

• Transcription is a one-time event. A newly uploaded vocabulary isn’t applied retroactively to existing transcriptions.

• Your text file must be in LF format. If you use any other format, such CRLF format, your custom vocabulary is not accepted by Amazon Transcribe.

• For limits to the size of a vocabulary file and other requirements, see [Custom vocabularies](#) in the Amazon Transcribe Developer Guide.

• Custom vocabularies apply to speech analytics only. They do not apply to chat conversations because the transcripts already exist.

### Required permissions

Before you can add custom vocabularies to Amazon Connect, you need the **Analytics and Optimization, Contact Lens - custom vocabularies** permission assigned to your security profile.

By default, in new instances of Amazon Connect the **Admin** and **CallCenterManager** security profiles have this permission.

For information about how add more permissions to an existing security profile, see [Update security profiles](#) (p. 797).

### Add a custom vocabulary

1. Log in to Amazon Connect with a user account that has the required permissions to add custom vocabularies.

2. Navigate to **Analytics and optimization, Custom vocabularies**.

3. Choose **Add custom vocabulary**.

4. On the **Add custom vocabulary** page, enter a name for the vocabulary, choose a language, and then choose **Download a sample** file.

The following image shows what the sample file looks like:

![Sample file](image)

5. The information in the file is separated by one [TAB] per entry. For details about how to add words and acronyms to your vocabulary file, see [Creating a custom vocabulary using a table](#) in the Amazon Transcribe Developer Guide.
Add custom vocabularies

To enter multiple words in the Phrase column, separate each word with a hyphen (-); do not use spaces.

Vocabulary states

- **Ready (default)**: The vocabulary is being applied to the analyses to generate transcripts. It is applied to both real-time and post-call analyses.
- **Ready**: The vocabulary is not being applied to analyses, but it is a valid file and available. To apply it to analyses, set it to default.
- **Processing**: Amazon Connect is validating your uploaded vocabulary and trying to apply it to the analyses to generate transcripts.
- **Deleting**: You chose to Remove the vocabulary, and Amazon Connect is deleting it now.

It takes about 90 minutes for Amazon Connect to delete a vocabulary.

If you attempt to upload a vocabulary that does not validate, it results in a Failed state. For example, if you add multiple-word phrases to the Phrase column, and separate them with spaces instead of hyphens, it will fail.

Download and view a custom vocabulary

To view a custom vocabulary that has been uploaded, you download and open the file. Only files in the Ready state can be downloaded and viewed.

1. Navigate to Analytics and optimization, Custom vocabularies.
2. Choose More, Download.

3. Open the download to view the contents.
4. You can change the contents, and then choose Save and upload.
Create rules with Contact Lens

Contact Lens rules allow you to automatically categorize contacts, receive alerts, or generate tasks based on uttered keywords, sentiment scores, customer attributes, and other criteria.

This topic explains how to create rules using the Amazon Connect console. To create and manage rules programmatically, see Rules actions and the Amazon Connect Rules Function language in the Amazon Connect API Reference Guide.

Tip
For a list of rules feature specifications (for example, how many rules you can create), see Amazon Connect Rules feature specifications (p. 1335).

Step 1: Define rule conditions

1. On the navigation menu, choose Analytics and optimization, Rules.
2. Select Create a rule, Contact Lens.
3. Under When, use the dropdown list to choose post-call analysis, real-time analysis, or post-call analysis.

You can combine criteria from a large set of conditions to build very specific Contact Lens rules. Following are the available conditions:

- **Words or phrases**: Choose from Exact match, Pattern match, or Semantic match (p. 846) to trigger an alert or task when keywords are uttered.
- **Agent**: Build rules that run on a subset of agents. For example, create a rule to ensure newly hired agents comply with company standards.

  To see agent names so you can add them to rules, you need Users - View permissions in your security profile.
- **Queues**: Build rules that run on a subset of queues. Often organizations use queues to indicate a line of business, topic, or domain. For example, you could build rules specifically for your sales queues, tracking the impact of a recent marketing campaign or alternatively rules for your customer support queues, tracking overall sentiment.

  To see the queue names so you can add them to rules, you need Queues - View permissions in your security profile.
- **Contact attributes**: Build rules that run on the values of custom contact attributes (p. 519). For example, you can build rules specifically for a particular line of business or for specific customers,
such as based on their membership level, their current country of residence, or if they have an outstanding order.

You can add up to five contact attributes to a rule.

- **Sentiment - Time period**: Build rules that run on the sentiment analysis results (positive, negative, or neutral) over a trailing window of time.

  For example, you can build a rule for when customer sentiment has remained negative for a set period of time. If the participant joined the contact later, the time period set here applies to when participant was present.

- **Sentiment - Entire contact**: Build rules that run on the value of sentiment scores over an entire contact. For example, you can build a rule when customer sentiment has remained low for the entire contact, you can create a task for a customer experience analyst to review the call transcript and follow-up.

- **Interruptions**: Build rules that detect when the agent has interrupted the customer for more than X times. This feature applies to calls only.

- **Non-talk time**: Build rules that run when periods of no talk time are detected. For example, when a customer and agent have not spoken for over 30 seconds which may indicate unnecessary customer wait time or highlight a customer services process that would benefit from optimisation. This feature applies to calls only.

- **Response time**: Build rules to identify contacts where the participant had a response time longer or shorter than what was expected: Average or Maximum.

  For example, you can set a rule on the **Agent greeting time**, also known as **First response time**: after the agent joined the chat, how long until they sent the first greeting message. This will help you to identify when an agent took too long to engage with the customer.

The following image shows a sample rule with multiple conditions for a voice contact.
The following image shows a sample rule with multiple conditions for a chat contact. The rule is triggered when the First response time is greater than or equal to 1 minute, and the agent did not mention any of the listed greeting words or phrases in their first response.

**First response time** = after the agent has joined the chat, how long until they sent the first message to the customer.

5. Choose **Next**.
Step 2: Define rule actions

1. Under **Assign contact category**, enter a category name.

   **Note**
   In this step, you are naming a required rule action: **Assign Contact Category**. The action is to categorize all contacts based on the category name you create. The category name is reflected in the Contact Lens output. And, you can use it for contact search (p. 858).

2. Choose **Add action**. Since you already named **Assign Contact Category**, it's not available. You can choose the following:
   - Generate an EventBridge event (p. 838)
   - Create Task (p. 842)
   - Send email notifications (p. 835)

3. Choose **Next**.
4. Review and make any edits, then choose **Save**.
5. After you add rules, they are applied to new contacts that occur after the rule was added. Rules are applied when Contact Lens analyzes conversations.

   You cannot apply rules to past, stored conversations.
Automatically categorize contacts based on uttered keywords and phrases

You can set up Contact Lens to track issues that you know exist in your contact center ("known knowns"), and monitor any changes over time.

You can label your contacts based on predefined criteria you set up, that is, keywords and phrases you want to detect. Through categorization, each contact is analyzed for these criteria, and labeled.

This is useful to do when, for example, you want to ensure that agents are using certain words or phrases in calls or chats, for compliance reasons. Or, for example, you want to investigate when customers use certain words and have a negative sentiment.

To set up this feature, add rules that contain the words or phrases that you want to highlight.

In a **Contact details** page for a chat, categories appear above the transcript, as shown in the following image.

![Contact details page with categories](image1.png)

The following image shows what a **Contact details** page looks like with a category for a call.

![Contact details page with category for a call](image2.png)
Add rules to categorize contacts

Step 1: Define conditions

1. Log in to Amazon Connect with a user account that is assigned the CallCenterManager security profile, or that is enabled for Rules permissions.
2. On the navigation menu, choose Analytics and optimization, Rules.
3. Select Create a rule, Contact Lens.
4. Assign a name to the rule.
5. Under When, use the dropdown list to choose post-call analysis, real-time analysis, or post-call analysis.

6. Choose Add condition, and then choose the type of match:

   • Exact Match: Finds only the exact words or phrases. Enter the words or phrases, separated by a comma.
   • Semantic Match: Finds words that may be synonyms. For example, if you enter "upset" it can match "not happy," or "hardly acceptable" can match with "unacceptable," and "unsubscribe" can match with "cancel subscription."

   Similarly, it can semantically match phrases. For example, "thank you so much for helping me out," "thanks a lot and this is so helpful," and "I am so happy that you are able to help me."

   This removes the need to define an exhaustive list of keywords while creating categories, and provides you the ability to cast a wider net for searching similar phrases that are important to you.

   For best semantic matching results, provide keywords or phrases with similar meaning within a semantic matching card. Currently, you can provide a maximum of four keywords and phrases per semantic matching card.

   • Pattern Match: Finds matches that may be less than 100 percent exact. You can also specify the distance between words. For example, if you are looking for contacts where the word "credit" was mentioned but you do not want to see any mention of the words "credit card," you can define a pattern matching category to look for the word "credit" that is not within a one-word distance of "card."

7. Using Exact Match as an example, enter the words or phrases, separated by a comma, that you want to highlight.
Choose **Add**. Each word or phrase separated by a comma gets its own line in the card.

The logic that Contact Lens uses to read these phrases is: (Hello OR thank OR you OR for OR calling OR Example OR Corp) OR (we OR value OR your OR business) OR (how OR may OR I OR assist OR you).

9. To add more words or phrases, choose **Add group of words or phrases**. In the following image, the first group of words or phrases are what the agent might utter, and the second group is what the customer might utter.
1. In this first card, Content Lens reads each line as an OR. For example: (Hello OR thank OR you OR for OR calling OR Example OR Corp) OR (we OR value OR your OR business) OR (how OR may OR I OR assist OR you).

2. The two cards are connected with an AND. This means, one of the rows in the first card needs to be uttered AND then one of the phrases in the second card needs to be uttered.

The logic that Contact Lens uses to read the two cards of words or phrases is (card 1) AND (card 2).

10. Choose **Add condition** to apply the rules to:
   - Specific queues
   - When contact attributes have certain values
   - When sentiment scores have certain values

For example, the following image shows a rule that applies when an agent is working the BasicQueue or Billing and Payments queues, the customer is for auto insurance, and the agent is located in Seattle.
Create rules with Contact Lens

Step 2: Define actions

In addition to categorizing a contact, you can define what actions Amazon Connect should take:

1. Generate an EventBridge event (p. 838)
2. Create Task (p. 842)
3. Send email notifications (p. 835)

Step 3: Review and save

1. When done, choose Save.
2. After you add rules, they are applied to new contacts that occur after the rule was added. Rules are applied when Contact Lens analyzes conversations.

   You cannot apply rules to past, stored conversations.

Alert supervisors in real-time based on keywords and phrases

After you enable real-time analytics (p. 810) in your flow, you can add rules that automatically alert supervisors when a customer experience issue occurs. This feature is not available for chat contacts.

For example, Contact Lens can automatically send an alert when certain keywords or phrases are uttered during the conversation, or when it detects other criteria. The supervisor sees the alert on the real-time metrics dashboard. From there, supervisors can listen in to the live call, and provide guidance to the agent over chat to help them resolve the issue faster.

The following image shows an example of what a supervisor would see on the real-time metrics report when they get an alert. In this case, Contact Lens has detected an angry customer situation.
When the supervisor listens in to a live call, Contact Lens provides them with a real-time transcript and customer sentiment trend that helps them understand the situation and assess the appropriate action. The transcript also eliminates the need for customers to repeat themselves if the call is transferred to another agent. Following is a sample real-time transcript.
Add rules for real-time alerts

1. Log in to Amazon Connect with a user account that is assigned the CallCenterManager security profile, or that is enabled for Rules permissions.
2. On the navigation menu, choose Analytics and optimization, Rules.
3. Select Create a rule, Contact Lens.
4. Assign a name to the rule.
5. Under When, use the dropdown list to choose real-time analysis.
6. Choose Add condition, and then choose the type of match:
   - Exact Match: Finds only the exact words or phrases.
   - Pattern Match: Finds matches that may be less than 100 percent exact. You can also specify the distance between words. For example, you might look for contacts where the word “credit” was mentioned, but you do not want to see any mention of the words “credit card.” You can define a pattern matching category to look for the word “credit” that is not within a one-word distance of the word “card.”

   Tip
   Semantic Match isn’t available for real-time analysis.
7. Enter the words or phrases, separated by a comma, that you want to highlight. Real-time rules only support any keywords or phrases that were mentioned.
8. Choose Add. Each word or phrase separated by a comma gets its own line.

The logic that Contact Lens uses to read these words or phrases is: (Talk OR to OR your OR manager) OR (this OR is OR not OR helpful) OR (speak OR to OR your OR supervisor), etc.

9. To add more words or phrases, choose Add group of words or phrases. In the following image, the first group of words or phrases are what the agent might utter. The second group is what the customer might utter.
1. In this first card, Content Lens reads each line as an OR. For example: (Hello) OR (thank OR you OR for OR calling OR Example OR Corp) OR (we OR value OR your OR business).

2. The two cards are connected with an AND. This means, one of the rows in the first card needs to be uttered AND then one of the phrases in the second card needs to be uttered.

The logic that Contact Lens uses to read the two cards of words or phrases is (card 1) AND (card 2).

10. Choose **Add condition** to apply the rules to:

- Specific queues
- When contact attributes have certain values
- When sentiment scores have certain values

For example, the following image shows a rule that applies when an agent is working the BasicQueue or Billing and Payments queues, the customer is for auto insurance, and the agent is located in Seattle.
11. When done, choose Next.
12. In the Assign contact category box, add a name for the category. For example, Compliant or Not_Compliant.
13. Choose Next, then choose Save and publish.

Create Contact Lens rules that send email notifications

You can create Contact Lens rules that send email notifications to people in your organization. This helps you to respond more expediently to potential issues in your contact center. For example, you can create a rule to notify:

- A team supervisor when there is an account escalation or cancellation.
- A group of people in your contact center as a result of certain words being mentioned during a call.
- A designated person in your contact center when a disagreement occurs during the call.

All emails are sent from no-reply@amazonconnect.com.

To create a Contact Lens rule that sends an email notification

1. Log in to Amazon Connect with a user account that has the required permissions (p. 848) to create rules.
2. Navigate to Analytics and optimization, Rules.
3. On the Rules page, choose Create a rule, and then from the dropdown list, choose Contact lens.
4. On the **New rule** page, define the conditions for the rule. For more information, see *Step 1: Define conditions* (p. 822).

5. When you define actions for the rule, choose **Send email notification** for the action.

6. In the **Send email notification** section, choose who is going to receive the email by using one of these options:
   - **Select recipients by login**: Routes the email to the specified user.
   - **Select recipients by tags**: Routes the email dynamically based on the agent's tag values.

   In the following example, the rule sends a notification email to the agent's team supervisor.
7. **In Subject**, add the email subject. In **Body**, add the contents of the email notification.

To specify contact attributes in the body of the email, type `[` and a list of available attributes appears, as shown in the following image.

8. Choose **Next**. Review your selections, and then choose **Save**.

9. After you add rules, they are applied to new contacts that occur after the rule was added. Rules are applied when Contact Lens analyzes conversations.

You cannot apply rules to past, stored conversations.

**Email limits**

- Amazon Connect has a default limit of 500 emails a day. When that limit is exceeded, the Amazon Connect instance is blocked for 24 hours from sending more email. This is because the emails are subject to bounce and complaint limits. For more information, see the **Bounce** and **Complaint** sections in **Understanding email deliverability in Amazon SES**.

- All emails are sent from `no-reply@amazonconnect.com`, which you cannot customize.
Alternatively, you can use your own Amazon Simple Email Service (Amazon SES) instance to send emails, as discussed in the next section.

**Use Amazon SES to send email notifications**

Setting up Amazon Simple Email Service to send email notifications can be useful in the following situations to:

- Change `no-reply@amazonconnect.com` to a different email address that you own.
- Send more than 500 emails a day.
- Receive delivery, complaint, and bounce reports. Amazon SES enables you to monitor sending activity.

**To set up Amazon SES**

1. Create and verify an email address as your sending identity.
   
   **Note**
   Do not choose a domain as your sending identity. The following setup steps will fail.

2. Move your instance out of the Amazon SES sandbox. The sandbox has a limit of 200 emails per day. If your business needs meet this 200 email limit, we recommend using the Amazon Connect email notification solution instead, because there are fewer steps to setting it up.

3. Associate your Amazon SES instance to Amazon Connect, using the `CreateIntegrationAssociation` API.

   Following is a sample integration association command. Replace EMAIL with an email address that's type SES_IDENTITY.

   ```bash
   aws connect create-integration-association --instance-id $your_AmazonConnect_instanceId --integration-type SES_IDENTITY --integration-arn $EMAIL
   ```

4. You can associate only one Amazon SES instance with your Amazon Connect instance.

   **To change the association**, run `DeleteIntegrationAssociation` and then create the association again. The following example shows how to delete an integration association.

   ```bash
   aws connect delete-integration-association --instance-id $your_AmazonConnect_instanceId --integration-association-id dd2f871a-a312-4d54-EXAMPLE012
   ```

5. **To verify if the association exists**, run `ListIntegrationAssociations` as shown in the following example.

   ```bash
   aws connect list-integration-associations --instance-id $your_AmazonConnect_instanceId --integration-type SES_IDENTITY
   ```

After you complete these steps, emails will be sent from the associated Amazon SES identity.

If the associated Amazon SES identity is deleted, emails will be sent from the default ID, `no-reply@amazonconnect.com`.

**Create a Contact Lens rule that generates an EventBridge event**

In real-time or post-call/chat, you can get events and use them to trigger subsequent notifications or alerts, or aggregate reports outside of Amazon Connect. There's a lot you can do with this data. For example:

- Get real-time alerts in a QuickSight dashboard.
• Create aggregated reported outside of Amazon Connect.
• Join data with your CRM.
• Connect your notification solution to EventBridge and make sure that by end of day, all of a certain type of events go to a certain inbox. The payload tells you the contact, agent, and queue.

**To create a rule that generates an EventBridge event**

1. When you create your rule, choose **Generate EventBridge event** for the action.

2. For **Action name**, enter the name for the event payload.

   **Note**
   The value you assign for **Action name** is visible in the EventBridge payload. When you aggregate events, the action name provides an additional dimension that you can use to process them. For example, you have 200 category names, but only 50 have a specific action name, such as NOTIFY_CUSTOMER_RETENTION.
3. Choose Next. Review and then Save.

4. After you add rules, they are applied to new contacts that occur after the rule was added. Rules are applied when Contact Lens analyzes conversations.

You cannot apply rules to past, stored conversations.

5. To leverage the EventBridge data, subscribe to the EventBridge event type. See the next procedure.

**Subscribe to EventBridge event types**

To subscribe to EventBridge event types, create a custom EventBridge rule that matches the following:

- "source" = "aws.connect"
- "detail-type" = "Contact Lens Analysis State Change" (or Contact Lens Post Call Rules Matched, Contact Lens Realtime Rules Matched, or Contact Lens Post Chat Rules Matched)
Create rules with Contact Lens

Example EventBridge payloads

Following is an example of what the EventBridge payload looks like when **Contact Lens Post Call Rules Matched**.

```
{
  "version": "0", // set by EventBridge
  "id": "aaaaaaaa-bbbb-cccc-dddd-bf3703467718", // set by EventBridge
  "source": "aws.connect",
  "detail-type": "Contact Lens Post Call Rules Matched",
  "account": "your AWS account ID",
  "time": "2020-04-27T18:43:48Z",
  "region": "us-east-1", // set by EventBridge
  "resources": ["arn:aws:connect:us-east-1:your AWS account ID:instance/instance-ARN"],
  "detail": {
    "version": "1.0",
    "ruleName": "ACCOUNT_CANCELLATION", // Rule name
    "actionName": "NOTIFY_CUSTOMER_RETENTION",
    "instanceArn": "arn:aws:connect:us-east-1:your AWS account ID:instance/instance-ARN",
    "contactArn": "arn:aws:connect:us-east-1:your AWS account ID:instance/instance-ARN/contact/contact-ARN",
    "agentArn": "arn:aws:connect:us-east-1:your AWS account ID:instance/instance-ARN/agent/agent-ARN",
    "queueArn": "arn:aws:connect:us-east-1:your AWS account ID:instance/instance-ARN/queue/queue-ARN",
  }
}
```

Following is an example of what the payload looks like when **Contact Lens Realtime Rules Matched**.
Create a task when a contact is categorized in real-time or post-call/chat

An especially powerful use of Content Lens rules is to build rules that generate tasks. This helps you identify issues in your contact center for you to follow up, and creates traceable actions with owners. Following are some examples:

- Create a task to review a contact when the customer is fraudulent. For example, you can create a follow-up task when a customer utters words or phrases that makes them appear potentially fraudulent.
- Follow up when the customer mentions specific topics that you want to later on upsell or provide additional support by reaching out.
- Follow up when there is a serious quality issue. In addition to contacts being categorized and getting alerts, you can route a task so you have owners. You also have contact records for these tasks, so you can search for and trace them.

To create a rule that creates a task

1. When you create your rule, choose **Create Task** for the action.
2. Complete the task fields as follows:
a. **Category name**: The category name appears in the contact record. Max length: 200 characters.

b. **Name**: The name appears in the agent's Contact Control Panel (CCP). Max length: 512 characters.

c. **Description**: The description appears in the agent's Contact Control Panel (CCP). Max length: 4096 characters.

**Tip**

In **Name** and **Description**, use [ ] to choose from a menu of dynamic values. For more information, see *Create a task when a contact is categorized in real-time or post-call/chat* (p. 842).
d. **Task reference name**: This is a default reference that automatically appears in the agent's CCP.
   - For real-time rules, the task reference links to the Real-time details page.
   - For post-call/chat rules, the task reference links to the Contact details page.

e. **Additional Reference name**: Max length: 4096 characters. You can add up to 25 references.

f. **Select a flow**: Choose the contact flow that is designed to route the task to the appropriate owner of the task. The flow must be saved and published for it to appear in your list of options in the dropdown.

3. The following image shows an example of how this information appears in the agent's CCP:

![Image of CCP example](image.png)

In this example, the agent sees the following values for **Name**, **Description**, and **Task reference name**:

a. **Name** = Action-Required-Contact Lens - ba2cf8fe....
b. **Description** = Test
c. **Task reference name** = taskRef and the URL to the Real-time details page

4. Choose **Next**. Review and then choose **Save** the task.

5. After you add rules, they are applied to new contacts that occur after the rule was added. Rules are applied when Contact Lens analyzes conversations.

   You cannot apply rules to past, stored conversations.
Voice and task contact records are linked

When a rule creates a task, a contact record is automatically generated for the task. It's linked to the contact record of the voice call or chat that met the criteria for the rule to create the task.

For example, a call comes into your contact center and generates CTR1:

| Contact ID: | CTR1-1234abc |
| Channel:   | Voice        |
| Initiation method: | Inbound |

| Category: | Compliance |
| Custom Contact Attributes: |
| - CustomerType: | VIP |
| - AgentLocation: | NYC |

Next contact ID: CTR2-5678abc

The Rules engine generates a task. In the contact record for the task, the voice contact record appears as the Previous contact ID. In addition, the task contact record inherits contact attributes from the voice contact record, as illustrated in the following image:

| Contact ID: | CTR2-5678abc |
| Channel:   | Task         |
| Initiation method: | API |

| Category: | Compliance |
| Custom Contact Attributes: |
| - CustomerType: | VIP |
| - AgentLocation: | NYC |

Previous contact ID: CTR1-1234abc

About dynamic values for ContactId, AgentId, QueueId, RuleName

The dynamic values in brackets [ ] are called contact attributes (p. 519). Contact attributes enable you to store temporary information about the contact so you can use it in a flow.

When you add contact attributes in brackets [ ] — such as ContactId, AgentId, QueueId, or RuleName — the value is passed from one contact record to another. You can use contact attributes in your flow to branch and route the contact accordingly.

For more information, see Use Amazon Connect contact attributes (p. 519).

How to use exact match, pattern match, and semantic match in a rule

How to use exact match

Exact Match really is an exact word match, singular or plural.
How to use pattern match

If you want to match related words, append an asterisk (*) to the criteria. For example, if you want to match on all variations of "neighbor" (neighbors, neighborhood) you would type `neighbo*`.

With **Pattern Match** you can specify the following:

- **List of values**: This is useful when you want to build expressions with interchangeable values. For example, the expression might be:

  ```
  I'm calling about a power outage in ["Beijing" or "London" or "New York" or "Paris" or "Tokyo"]
  ```

  Then in your list of values you would add the cities: Beijing, London, New York, Paris, Tokyo.

  The advantage of using values is that you can create one expression, instead of multiple. This reduces the number of cards that you need to create.

- **Number**: This option is used most frequently in compliance scripts, or if you're looking for a context when you know somewhere in between there's a number. This way you can put all of your criteria into one expression instead of two. For example, an agent compliance script might say:

  ```
  I have been in this industry for [num] years and would like to discuss this topic with you.
  ```

  Or a customer might say:

  ```
  I have been a member for [num] years.
  ```

- **Proximity definition**: Finds matches that may be less than 100 percent exact. You can also specify the distance between words. For example, if you are looking for contacts where the word "credit" was mentioned but you do not want to see any mention of the words "credit card," you can define a pattern matching category to look for the word "credit" that is not within a one-word distance of "card."

  For example, a proximity definition might be:

  ```
  credit* [is not within 0 to 1 word apart] card*
  ```

  **Tip**
  For a list of languages supported by pattern match, see Pattern match languages (p. 7).

How to use semantic match

Semantic matching is supported only for post-call/chat analysis.

- An "intent" is an example of utterance. It can be a phrase or a sentence.
- You can enter up to four intents in one card (group).
- We recommend using semantically similar intents within one card to get the best results. For example, there's category for "politeness." It includes two intents: "greetings" and "goodbye". We recommend separating these intents into two cards:
  - Card 1: "How are you today" and "How's everything going". They are semantically similar greetings.
  - Card 2: "Thanks for contacting us" and "Thank you for being our customer." They are semantically similar goodbyes.

  Separating the intents into two cards provides more accuracy than putting them all into one card.
Enter a script in a rule

There are times when you may need you agents to follow an exact script. For example, a compliance script that all agents need to follow.

To enter a script in a rule, enter phrases. For example, if you want to highlight when agents say *Thank you for being a member. We appreciate your business*, enter two phrases:

- Thank you for being a member.
- We appreciate your business.

To apply the rule to certain lines of businesses, add a condition for which queues it applies to, or contact attributes. For example, the following image shows a rule that applies when an agent is working the BasicQueue or Billing and Payments queues, the customer is for auto insurance, and the agent is located in Seattle.

Security profile permissions for Contact Lens rules

To view, edit, or add rules for automatic categorization, you must be assigned to a security profile that has **Analytics and Optimization: Rules** permissions.

To see agent names so you can add them to rules, you need **Users and permissions: Users - View** permissions in your security profile.

To see the queue names so you can add them to rules, you need **Routing: Queues - View** permissions in your security profile.

For more information, see Security profile permissions for Contact Lens (p. 816).

About contact attributes in a rule

You can have up to 5 contact attributes in a rule.

You can design flows to use the contact attributes you specify in a rule, and then route the task accordingly. For example, a call or chat arrives in your contact center. When Contact Lens analyzes the call or chat, it gets a hit on the **Compliance** rule. The contact record that’s created for the call, for example, includes information similar to the following image:
The Rules engine generates a task. The contact record for the task inherits contact attributes from the voice contact record, as illustrated in the following image:

**Contact ID:** CTR1-1234abc  
**Channel:** Voice  
**Initiation method:** Inbound

**Category:** Compliance  
**Custom Contact Attributes:**  
- **CustomerType:** VIP  
- **AgentLocation:** NYC

**Next contact ID:** CTR2-5678abc

The flow that you specify in the rule should be designed to use the contact attributes and route the task to the appropriate owner. For example, you may want to route tasks where **CustomerType = VIP** to a specific agent.

For more information, see Use Amazon Connect contact attributes (p. 519).

**Rules are applied to new contacts**

After you add rules, they are applied to new contacts that occur after the rule was added. Rules are applied when Contact Lens analyzes conversations.

You cannot apply rules to past, stored conversations.

**Error notifications: When Contact Lens can't analyze a contact**

It's possible that Contact Lens can't analyze a contact file, even though analysis is enabled on the flow. When this happens, Contact Lens sends error notifications using Amazon EventBridge events.

Events are emitted on a best effort basis.

**Subscribe to EventBridge notifications**

To subscribe to these notifications, create a custom EventBridge rule that matches the following:

- "source" = "aws.connect"
- "detail-type" = "Contact Lens Analysis State Change"
You can also add to the pattern to be notified when a specific event code occurs. For more information, see Event Patterns in the Amazon EventBridge User Guide.

The format of a notification looks like the following sample:

```json
{
    "version": "0", // set by CloudWatch Events
    "id": "55555555-1111-1111-1111-111111111111", // set by CloudWatch Events
    "source": "aws.connect",
    "detail-type": "Contact Lens Analysis State Change",
    "account": "111122223333",
    "time": "2020-04-27T18:43:48Z",
    "region": "us-east-1", // set by CloudWatch Events
    "resources": [
        "arn:aws:connect:us-east-1:111122223333:instance/abcd1234-defg-5678-h9j0-7c822889931e",
        "arn:aws:connect:us-east-1:111122223333:instance/abcd1234-defg-5678-h9j0-7c822889931e/contact/efgh4567-pqrs-5678-t9c0-1111111111111"
    ],
    "detail": {
        "instance": "arn:aws:connect:us-east-1:111122223333:instance/abcd1234-defg-5678-h9j0-7c822889931e",
        "contact": "arn:aws:connect:us-east-1:111122223333:instance/abcd1234-defg-5678-h9j0-7c822889931e/contact/efgh4567-pqrs-5678-t9c0-1111111111111",
        "channel": "VOICE",
        "state": "FAILED",
        "reasonCode": "RECORDING_FILE_CANNOT_BE_READ"
    }
}
```

**Event codes**

The following table lists the event codes that may result when Contact Lens can't analyze a contact.

<table>
<thead>
<tr>
<th>Event reason code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>INVALID_ANALYSIS_CONFIGURATION</td>
<td>Contact Lens received invalid values when the flow was initiated, such as an unsupported or invalid language code, or an unsupported value for redaction behavior.</td>
</tr>
<tr>
<td>RECORDING_FILE_CANNOT_BE_READ</td>
<td>Contact Lens can't get the recording file. This might be because file isn't present in the S3 bucket, or there are problems with permissions.</td>
</tr>
<tr>
<td>RECORDING_FILE_TOO_SMALL</td>
<td>The recording file is too small for analysis (less than 105 ms). If file doesn't have expected format, an INVALID error occurs. Empty JSON is also an unexpected object.</td>
</tr>
<tr>
<td>RECORDING_FILE_TOO_LARGE</td>
<td>The recording file exceeds the duration limit for analysis.</td>
</tr>
<tr>
<td></td>
<td>• Voice: More than 14,400 seconds, or 4 hours</td>
</tr>
<tr>
<td></td>
<td>• Chat: More than 20K messages in a transcript</td>
</tr>
<tr>
<td>RECORDING_FILE_INVALID</td>
<td>The recording file is invalid.</td>
</tr>
</tbody>
</table>
Create rules with Contact Lens

<table>
<thead>
<tr>
<th>Event reason code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>RECORDING_FILE_CANNOT_BE_READ</td>
<td>An error occurred when Contact Lens tried to read the recording file.</td>
</tr>
<tr>
<td>RECORDING_FILE_EMPTY</td>
<td>The recording file is empty.</td>
</tr>
<tr>
<td>RECORDING_SAMPLE_RATE_NOT_SUPPORTED</td>
<td>The sample rate of the audio file is not supported. Contact Lens currently</td>
</tr>
<tr>
<td></td>
<td>supports audio files with an 8kHz sample rate. That is the sample rate for</td>
</tr>
<tr>
<td></td>
<td>Amazon Connect recordings.</td>
</tr>
</tbody>
</table>

**Error notifications: When Amazon Connect Rules action fails to run**

It's important to know when a specific rule action has failed in a production environment, and what caused the failure. Then you can proactively mitigate such failures in future.

To get real-time insights on the actions that failed to run, you integrate Amazon Connect Rules with Amazon EventBridge events. This enables you to be notified when, for example, the "Create task” action failed to run because the maximum number of **Concurrent active tasks per instance** reached the service quota. When this happens, Amazon Connect sends error notifications using Amazon EventBridge events.

Events are emitted on a best effort basis.

**Subscribe to EventBridge notifications**

To subscribe to these notifications, create a custom EventBridge rule that matches the following:

- "source" = "aws.connect"
- "detail-type" = "Contact Lens Rules Action Execution Failed"

You can also add to the pattern to be notified when a specific event code occurs. For more information, see [Event Patterns](#) in the **Amazon EventBridge User Guide**.

The format of a notification looks like the following sample:

```json
{
    "version": "0",
    "id": "8d122163-6c07-f0cb-06e7-373a1b0f8fc6",
    "source": "aws.connect",
    "detail-type": "Amazon Connect Rules Action Execution Failed",
    "account": "123456789012",
    "time": "2022-01-05T01:30:42Z",
    "region": "us-east-1",
    "resources": ["arn:aws:connect:us-east-1:123456789012:instance/cb54730f-5aac-4376-b2f4-7c822889931e"],
    "detail": {
        "ruleId": "7410c94b-21c2-4db0-a707-c6d751edbe8f",
        "actionType": "CREATE_TASK",
        "triggerEvent": "THIRD_PARTY",
        "instanceArn": "arn:aws:connect:us-east-1:123456789012:instance/cb54730f-5aac-4376-b2f4-7c822889931e",
        "reasonCode": "ResourceNotFoundException",
        "error": "ContactFlowId provided does not belong to connect instance",
        "additionalInfo": "\n        \
        \
        \
        "retryable": false,
        "retryDelay": 28.21753783450316"
    }
}
```
Supported action types

- CREATE_TASK
- GENERATE_EVENTBRIDGE_EVENT
- SEND_NOTIFICATION

For information about ASSIGN_CONTACTCATEGORY, see Error notifications: When Contact Lens can’t analyze a contact (p. 849).

Supported trigger events

- REAL_TIME_CALL
- POST_CALL
- POST_CHAT
- THIRD_PARTY

Reason codes for failed actions

When an action fails, the error notification service collects the reason codes from the supported actions. For more information about the reason codes for Task and EventBridge action failures, see the following topics:

- For reason codes for Task action failures, see Errors in the StartTaskContact API topic in the Amazon Connect API Reference Guide.
- For reason codes for EventBridge action failures, see Errors in the PutEvents API topic in the Amazon EventBridge API Reference Guide.

JSONPath Reference for Rules action public API fields that support variable injection

When you create or manage rules programmatically using Amazon Connect APIs (such as CreateRule or UpdateRule), you can specify variables for certain parameters. The variables are resolved at runtime when the action is triggered, based on the value of the EventSourceName parameter.

For example, let's say you're setting up a task action and you want to add more context. Following is an example of how you could use variable injections to include the ID of the contact and the ID of the agent in the Description field of the task:

- Customer is unhappy about the phone call. A swear word was detected during the conversation with agent $.ContactLens.PostCall.Agent.AgentId in the contact $.ContactLens.PostCall>ContactId

When the action is triggered, his string would resolve to “Customer is unhappy about the phone call. A swear word was detected during a conversation with agent 12345678-1234-1234-1234-EXAMPLEID012 in the contact 87654321-1234-1234-1234-EXAMPLEID345”

The following table lists each event source, and the JSONPath to use for fields that support variable injection.
<table>
<thead>
<tr>
<th>EventSourceName</th>
<th>JSONPath Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>OnPostCallAnalysisAvailable</td>
<td>$.ContactLens.PostCall.ContactId</td>
</tr>
<tr>
<td></td>
<td>$.ContactLens.PostCall.Agent.AgentId</td>
</tr>
<tr>
<td></td>
<td>$.ContactLens.PostCall.Queue.QueueId</td>
</tr>
<tr>
<td>OnRealTimeCallAnalysisAvailable</td>
<td>$.ContactLens.RealTimeCall.ContactId</td>
</tr>
<tr>
<td></td>
<td>$.ContactLens.RealTimeCall.Agent.AgentId</td>
</tr>
<tr>
<td></td>
<td>$.ContactLens.RealTimeCall.Queue.QueueId</td>
</tr>
<tr>
<td></td>
<td>$.ContactLens.PostChat.Agent.AgentId</td>
</tr>
<tr>
<td></td>
<td>$.ContactLens.PostChat.Queue.QueueId</td>
</tr>
<tr>
<td>OnSalesforceCaseCreate</td>
<td>$.ThirdParty.Salesforce.CaseCreate.CaseNumber</td>
</tr>
<tr>
<td></td>
<td>$.ThirdParty.Salesforce.CaseCreate.Name</td>
</tr>
<tr>
<td></td>
<td>$.ThirdParty.Salesforce.CaseCreate.Email</td>
</tr>
<tr>
<td></td>
<td>$.ThirdParty.Salesforce.CaseCreate.Phone</td>
</tr>
<tr>
<td></td>
<td>$.ThirdParty.Salesforce.CaseCreate.Type</td>
</tr>
<tr>
<td></td>
<td>$.ThirdParty.Salesforce.CaseCreate.Subject</td>
</tr>
<tr>
<td></td>
<td>$.ThirdParty.Salesforce.CaseCreate.CreatedDate</td>
</tr>
<tr>
<td></td>
<td>$.ThirdParty.Salesforce.CaseCreate.Description</td>
</tr>
<tr>
<td>OnZendeskTicketCreate</td>
<td>$.ThirdParty.Zendesk.TicketCreate.Id</td>
</tr>
<tr>
<td></td>
<td>$.ThirdParty.Zendesk.TicketCreate.CreatedAt</td>
</tr>
<tr>
<td>OnZendeskTicketStatusUpdate</td>
<td>$.ThirdParty.Zendesk.TicketStatusUpdate.Id</td>
</tr>
<tr>
<td></td>
<td>$.ThirdParty.Zendesk.TicketStatusUpdate.CreatedAt</td>
</tr>
</tbody>
</table>

**Search conversations analyzed by Contact Lens**

You can search the analyzed and transcribed recordings based on:
• Speaker (agent or customer)
• Keywords
• Sentiment score
• Non-talk time (for calls only)
• Response time (for chats only)

In addition, you can search conversations that are in specific contact categories (that is, the conversation has been categorized based on uttered keywords and phrases).

These criteria are described in the following sections.

**Important**
When a Contact Lens is enabled on a contact, after a call or chat ends and the agent completes After Contact Work (ACW), Contact Lens analyzes (and for calls, transcribes) the recording of the customer-agent conversation. The agent must choose **Close contact** first.
Chat transcripts are indexed for search when Contact Lens is enabled; they are not indexed for search if Contact Lens is not enabled.

**Required permissions for searching conversations**

Before you can search conversations, you need the following permissions in your security profile. They allow you to do the type of search you want.

• **Contact search.** This is required so you can get to the Contact Search page.
• **Search contacts by conversation characteristics.** This includes non-talk time, sentiment score, and contact category.
• **Search contacts by keywords**

For more information, see [Security profile permissions for Contact Lens (p. 816)](#).

**Search for words or phrases**

For keyword search, Contact Lens uses the standard analyzer in Amazon OpenSearch Service. This analyzer is not case sensitive. For example, if you enter *thank you for your business 2 CANCELLED Flights*, the search looks for:

[thank, you, for, your, business, 2, cancelled, flights]

If you enter "*thank you for your business", two, "CANCELLED Flights"*, the search looks for:

[thank you for your business, two, cancelled flights]

**To search conversations for words or phrases**

1. In Amazon Connect, log in with a user account that is assigned the **CallCenterManager** security profile, or that is enabled for the **Search contacts by keywords** permission.
2. Choose **Analytics and optimization**, **Contact search**.
3. In the **Filter** section, specify the time period that you want to search, and specify the channel.
   **Tip**
   When searching by date, you can search up to 8 weeks at a time.
4. Choose **Click here to add filter**, and in the dropdown menu, choose **Words or phrases**.
5. In the **Used by** section, choose whose part of the conversation you want to search. Note the following:

- **System** applies to chat, where the participant may be a Lex bot or prompt.
- To search for words or phrases that are used by all participants, select **Agent, Customer, System**.
- If no boxes are selected, it means search for words or phrases used by any of the participants.

6. In the **Logic** section, choose from the following options:

- Choose **Match any** to return contacts that have any of the words present in the transcripts.

  For example, the following query means match (hello OR cancellation OR "example airline"). And, because no **Used by** boxes are selected, it means "find contacts where any of these words were used by any of the participants."

  - Choose **Match all** to return contacts that have all of the words present in the transcripts.

    For example, the following query means match ("thank you for your business" AND cancellation AND "example airline"). And, because all the participant boxes are selected, it means "find contacts where all of these words and phrases were used by all of the participants."
7. In the **Words or phrases** section, enter the words to search, separated by commas. If you enter a phrase, surround it with quotation marks.

You can enter up to 128 characters.

**Search for sentiment score or evaluate sentiment shift**

With Contact Lens, you can search conversations for sentiment scores or sentiment shifts on a scale of -5 (most negative) to +5 (most positive). This enables you to identify patterns and factors for why calls go well or poorly.

For example, suppose you want to identify and investigate all the contacts where the customer sentiment ended negatively. You might search for all contacts where the sentiment score is \( \leq -1 \).

For more information, see [Investigate sentiment scores during contacts](p. 864).

**To search for sentiment scores or evaluate sentiment shift**

1. In Amazon Connect, log in with a user account that is assigned the **CallCenterManager** security profile, or that is enabled for the **Search contacts by conversation characteristics** permission.
2. On the **Contact search** page, specify whether you want the sentiment score for words or phrases spoken by the customer or agent.
3. In **Type of score analysis**, specify what type of scores to return:
• **Sentiment score**: This returns the average score for the customer or agent's portion of the conversation.

In addition to searching for sentiment scores when the agent or customer are on the contact, you can filter the search by when the customer is:

• **With agent on the chat**
• **Without agent on the chat**: This is the time the customer is chatting with a bot, prompts, and time in queue.

• **Sentiment shift**: Identify where the customer or agent's sentiment changed during the contact.

For example, the following images shows an example of searching for contacts where where the customer's sentiment score begins at less than or equal to -1 and ends at greater than or equal to +1. In addition, the customer is on a chat with the agent present.

**Search for non-talk time**

To help you identify which calls to investigate, you can search for non-talk time. For example, you might want to find all calls where the non-talk time is greater than 20%, and then investigate them.

Non-talk time includes hold time and any silence where both participants aren't talking for longer than three seconds. This duration can't be customized.
Use the drop-down arrow to specify whether to search conversations for the duration or percentage of non-talk time.

For information about how to use this metric, see Investigate non-talk time during calls (p. 865)

Search by response time for chat conversations

You can search by the:

- Average response time of the agent or customer during the chat
- Maximum response time of the agent or customer during the chat

You specify whether the duration is less or greater than or equal to a specific time. For information about how to use this metric, see Investigate response time during chats (p. 866).

For the supported minimum and maximum response times, see Amazon Connect Rules feature specifications (p. 1335).

The following image shows a search for contacts where the agent's average response time was greater than or equal to 1 minute.

Search a contact category

1. On the Contact search page, choose Add filter, Contact category.
2. In the Contact categories box, use the dropdown box to list all the current categories that are available for you to search. Or, if you start typing, the input is used to match existing categories and to filter those that don't match.

   - Match any: Searches for contacts that match any of the selected categories.
   - Match all: Searches for contacts that match all of the selected categories.
Review analyzed conversations using Contact Lens

By using Contact Lens for Amazon Connect, you can review the transcript and identify what part of the contact is of interest. You won't need to listen to an entire call or read an entire chat transcript to find out what's interesting about it. You can focus on specific parts of the audio or transcript. Both are highlighted for you wherever there are points of interest.

For example, you might scan the transcript of the contact and see a red sentiment emoji for a customer turn, which indicates the customer is expressing a negative sentiment. You can choose the timestamp and jump to that portion of audio recording or chat interaction.

The following image shows an example of a voice contact.
The following image shows an example of a chat contact. **System Message** applies to chat, where the participant may be a Lex bot or prompt.

**To review analyzed conversations**

1. Log in to Amazon Connect with a user account that has **Contact search** and **Contact Lens - speech analytics** permissions in the security profile.
2. In Amazon Connect, choose **Analytics and optimization, Contact search**.
3. Use the filters on the page to narrow your search for a contact. For date, you can search up to 14 days at a time. For more information about searching for contacts, see **Search for contacts** (p. 935).
4. Choose the contact ID to view the contact details for the contact.
5. In the **Recording** and **Transcript** sections of the **Contact details** page, review what was spoken or written, when, and their sentiment.
6. For calls, if desired, choose the play prompt to listen to the recording. Or, click on the relevant part of the recording to listen to the portion you're interested in.
7. For chats, if desired, use the graph to navigate to the portion of the transcript you're interested in.

**Quickly navigate transcripts and audio**

Supervisors are often required to review the contacts for many agents, for quality assurance purposes. The turn-by-turn transcript and sentiment data helps you quickly identify and navigate to the portion of the recording that is of interest to you.
The following image shows features that enable you to quickly navigate transcripts and audio to find areas that need your attention. While the image shows a voice contact, the same features apply to chat contacts.

1. Use **Show transcript summary** (p. 861) to review only the issue, outcome, and/or action item.
2. Use **Autoscroll** (p. 862) for voice contacts, to jump around the audio or transcript. The two always stay in sync.
3. Scan for **sentiment emojis** (p. 862) to quickly identify a part for the transcript you want to read or listen to.
4. Choose the timestamp to jump to that part of the audio recording or transcript.

**Show transcript summary**

It can be time-consuming to review contact transcripts that are hundreds of lines long. To make this process faster and more efficient, Contact Lens provides the option for you to view a transcript summary. The summary shows only those lines where Contact Lens has identified an issue, outcome, or action item in the transcript.

- **Issue** represents the call driver. For example, "I'm thinking of upgrading to your online subscription plan."
- **Outcome** represents the likely conclusion or outcome of the contact. For example, "Based on your current plan I would recommend the online essentials plans that we have."
- **Action item** represents the action item the agent takes. For example, "Please keep an eye out for an email with a price quote. I will send it to you shortly."

Each contact has no more than one issue, one outcome, and one action item. Not all contacts will have all three.
Note
If Contact Lens displays the message There is no summary information for this transcript, it means no issue, outcome, or action item was identified.

You don't need to configure contact summarization. It works out-of-the-box without any training of the machine learning model.

Turn on autoscroll to synchronize the transcript and audio

For voice contacts, use Autoscroll to jump around the audio or transcript, and the two always stay in sync. For example:

• When you listen to a conversation, the transcript moves along with it, showing you sentiment emojis and any detected issue.
• You can scroll through the transcript, and choose the timestamp for the turn to listen to that specific point in the recording.

Because the audio and transcript are aligned, the transcript can help you understand what the agent and customer are saying. This is especially useful when:

• The audio is bad, maybe due to a connection issue. The transcript can help you understand what's being said.
• There's a dialect or language variant. Our models are trained on different accents so the transcript can help you understand what's being said.

Scan for sentiment emojis

Sentiment emojis help you quickly scan a transcript so you can listen to that part of the conversation.

For example, where you see red emojis for customer turns and then a green emoji, you might choose the timestamp to jump to that specific point of the conversation to check how that agent helped the customer.

Tap or click category tags to navigate through transcript

When you tap or click on the category tags, Contact Lens auto-navigates to the corresponding point-of-interests in the transcript. There are also category markers in the visualization of the interaction to indicate which part of the recording file has utterances related to the category.

The following image shows part of a Contact details page for a chat.
It can be time-consuming to review contact transcripts that are hundreds of lines long. To make this process faster and more efficient, Contact Lens provides the option for you to view a transcript summary. The summary shows only those lines where Contact Lens has identified an issue, outcome, or action item in the transcript.

1. Toggle Show transcript summary on and off as needed.
2. **Issue** represents the contact driver. For example, "I’m thinking of upgrading to your online subscription plan."

3. **Outcome** represents the likely conclusion or outcome of the contact. For example, "Based on your current plan I would recommend the online essentials plans that we have."

4. **Action item** (not shown) represents the action item the agent takes. For example, "Please keep an eye out for an email with a price quote. I will send it to you shortly."

Each contact has no more than one issue, one outcome, and one action item. Not all contacts will have all three.

**Note**

If Contact Lens displays the message **There is no summary information for this transcript**, it means no issue, outcome, or action item was identified.

You don't need to configure contact summarization. It works out-of-the-box without any training of the machine learning model.

**Investigate sentiment scores during contacts**

**What are sentiment scores?**

A sentiment score is an analysis of text, and a rating of whether it includes mostly positive, negative, or neutral language. Supervisors can use sentiment scores to search conversations and identify contacts that are associated with varying degrees of customer experiences, positive or negative. It helps them identify which of their contacts to investigate.

You can view a sentiment score for the entire conversation, as well as sentiment trend across whole contact.

**How to investigate sentiment scores**

When working to improve your contact center, you may want to focus on the following:

- Contacts that start with a positive sentiment score but end with a negative score.

  If you want to focus on a limited set of contacts to sample for quality assurance, for example, you can look at contacts where you know the customer had a positive sentiment at the start but ended with a negative sentiment. That shows you they left the conversation unhappy about something.

- Contacts that start with a negative sentiment score but end positive.

  Analyzing these contacts will help you identify what experiences you can recreate in your contact center. You can share successful techniques with other agents.

An additional way of looking at sentiment progression is to check the sentiment trendline. You can see the variation in the customer's sentiment as the contact progresses. For example, the following images show a conversation with a very low sentiment score in the beginning of the conversation, and very positive one at the end.
For more information, see Search for sentiment score or evaluate sentiment shift (p. 856).

How sentiment scores are determined

To determine the sentiment score, Contact Lens for Amazon Connect analyzes the sentiment for every part of the conversation of each of the participants. It uses the frequency and proximity of the resulting sentiment for each participant turn to assign a score that ranges from -5 to +5 for each portion of the contact.

The final sentiment score for the entire conversation is an average of the scores assigned during the contact.

Investigate non-talk time during calls

What is non-talk time?

Contact Lens for Amazon Connect also identifies the amount of non-talk time in a call. Non-talk time equals hold time, plus any silence where both participants aren't talking for more than 3 seconds. This duration can't be customized.
How to investigate non-talk time

Non-talk time can help you identify calls that have gone poorly. This may be because:

- The customer was asking a question that's new for your contact center.
- It's taking the agent a long time to do something but they are well-trained. This indicates there may be an issue with the tools the agent is using. For example, the tools aren't responsive enough or aren't easy to use.
- The agent didn't have a ready answer, but they are fairly new. This indicates they need more training.

You can decide whether to focus on these contacts to improve your contact center. For example, you can go to that section of the audio, and then look at the transcript to see what was going on.

In the following example, the non-talk time occurred when the agent was looking up the caller's trip ID. This could indicate there's an issue with the agent's tools. Or if the agent is new, they need more training.

For more information, see Search for non-talk time (p. 857).

Investigate response time during chats

Use the response time metric to understand the responsiveness of the agent or customer during a chat contact.

Contact Lens calculates the following metrics:

- **Agent greeting time.** This is the first response time for the agent, which is how fast the agent engaged with the customer after the agent joined the chat. A long first response time may explain, for example, if a customer has a negative sentiment in the beginning of conversation.
- **Avg agent response time** and **Avg customer response time.** The agent response time helps you check an agent's performance against your organization's base line.
- **Max agent response time** and **Max customer response time.**

  The customer's max response time may explain an agent's response time. For example, if a customer didn't reply for five minutes and then sent a message, it's possible the agent took longer than usual to respond because they were handling other chats at the same time.
We recommend examining the response time metrics in conjunction with the interactions graph that shows gaps in conversation and participant sentiment.

You can choose (or click) or tap the longest response time value on the graph to be directed to the associated message in the transcript.

For more information, see *Search by response time for chat conversations* (p. 858).

### Investigate loudness scores during calls

A loudness score measures how loudly the customer or agent are speaking during a call. Contact Lens displays an analysis of the conversation that lets you identify where the customer or agent may be talking loudly and have a negative sentiment.

### How to use loudness scores

We recommend using loudness scores together with sentiments. Look for areas of the conversation where the loudness score is high and the sentiment is low. Then read that portion of the transcript or listen to that section of the call.

For example, the following image shows where the customer is talking loudly and their sentiment is negative.
Use sensitive data redaction

To help you protect your customer’s privacy, Contact Lens lets you automatically redact sensitive data from conversation transcripts and audio files. It redacts sensitive data, such as name, address, and credit card information using Natural Language Understanding.

No configuration is needed. Contact Lens determines what data can be redacted.

To enable redaction, choose the option on the Set recording and analytics behavior (p. 411) block. For more information, see Enable redaction of sensitive data (p. 813).

Sensitive data redaction is applied after a call disconnects.

**Important**
The redaction feature is designed to identify and remove sensitive data. However, due to the predictive nature of machine learning, it may not identify and remove all instances of sensitive data in a transcript generated by Contact Lens. We recommend you review any redacted output to ensure it meets your needs.

The redaction feature does not meet the requirements for de-identification under medical privacy laws like the U.S. Health Insurance Portability and Accountability Act of 1996 (HIPAA), so we recommend you continue to treat it as protected health information after redaction.

For a list of the languages supported by Contact Lens redaction, see Languages supported by Amazon Connect (p. 6).

**About redacted files**

Redacted voice files are stored in your Voice Amazon S3 bucket, for example: connect-`instanceARN`/Analysis.

Redacted chat files are stored in your chat Amazon S3 bucket, for example: connect-`instanceARN`/Chat
• You cannot access redacted files through the Amazon Connect console (the Amazon Connect user interface).
• You can access redacted files through the AWS console, using the Amazon S3 user interface.

When redaction is enabled, Contact Lens generates the following files:

• A redacted file. This file is generated by default when Redaction is enabled. It's the output schema, with sensitive data redacted. For an example file, see Example redacted file for a call (p. 883).
• An original (raw), analyzed file. This file is generated only when you choose Get redacted and original transcripts with redacted audio in the Set recording and analytics behavior (p. 411) block. For an example file, see Example original, analyzed file for a call (p. 878).

  **Important**
  For voice contacts, the original analyzed file is the only place where the complete conversation is stored. If you delete it, there will be no record of the sensitive data that was redacted.
• A redacted audio file (wav) for voice contacts. Sensitive data in audio files is redacted as silence. These silent times are not flagged in the Amazon Connect console or elsewhere as non-talk time.

Use your file retention policies to determine how long to keep these files.

**Use the API for real-time call analytics**

Use the real-time call analytics API—ListRealtimeContactAnalysisSegments—to build solutions that make your contact center more efficient for voice contacts. No real-time capabilities are currently available for chat.

This real-time call analytics API is a polling API, with a standard request/response architecture, where you don't need to integrate with any other service. However, there are rate limitations (p. 1339). If needed, you can eliminate these limitations by using the real-time streaming API (p. 869). It requires integration with Amazon Kinesis Data Streams.

Following are two use cases for the real-time call analytics API.

**Better call transfers**

When a contact is transferred from one agent to another agent, you can transfer a transcript of the conversation to the new agent. The new agent then has context for why the customer is calling, and the customer doesn't need to repeat everything they already said. Use the ListRealtimeContactAnalysisSegments API to get the entire transcript of the conversation up to a certain point, and share it with the new agent.

**Automatic call summaries**

While handling a call agents may need to make notes, such as listing action items. Since you have the entire transcript available, you can build machine learning models to identify the key notes and summarize them at the end of the conversation. These notes are then available for any other agent or supervisor to reference. This helps agents focus on the conversation and the customer rather than focus on taking notes for the call summary.

**Use streaming for real-time contact analysis**

Real-time contact analysis segment streams enable you to access Contact Lens analytics in near real-time. Real-time streaming overcomes the scaling limitations of existing real-time call analytics.
Use streaming for real-time contact analysis

API (p. 869). It also provides access to a data segment called Utterance that allows you to access partial transcripts. This enables you to meet ultra-low latency requirements to assist agents on live calls.

This section explains how to integrate with Amazon Kinesis Data Streams for real-time streaming.

Through real-time streaming, you can receive the following event types:

- **STARTED** events published at the beginning of a real-time contact analysis session.
- **SEGMENTS** events published during the real-time contact analysis sessions. These events contain a list of segments with analyzed information.
- **COMPLETED** or **FAILED** events published at the end of a real-time contact analysis session.

Contents

- Enable real-time contact analysis segment streams (p. 870)
- Real-time contact analysis segment streams data model (p. 872)
- Sample real-time contact analysis segment stream (p. 875)

Enable real-time contact analysis segment streams

Real-time contact analysis segment streams are not enabled by default. This topic explains how to enable them.

**Step 1: Create a Kinesis stream**

Create the data stream on the same account and Region where your Amazon Connect instance resides. For instructions, see Step 1: Create a Data Stream in the Amazon Kinesis Data Streams Developer Guide.

**Tip**

We recommend creating a separate stream for each type of data. While it's possible to use the same stream for real-time contact analysis segment streams, agent events, and contact records, it is much easier to manage and get data from the stream when you use a separate stream for each one. For more information, see the Amazon Kinesis Data Streams Developer Guide.

**Step 2: Set up server-side encryption for the Kinesis stream (optional but recommended)**

There are several ways you can do this.

- Option 1: Use the Kinesis AWS managed key (aws/kinesis). This works with no additional setup from you.
- Option 2: Use the same customer managed key for call recordings, chat transcripts, or exported reports in your Amazon Connect instance.

Enable encryption, and use a customer managed key for call recordings, chat transcripts, or exported reports in your Amazon Connect instance. Then choose the same KMS key for your Kinesis data stream. This key already has the permission (grant) required to be used.

- Option 3: Use a different customer managed key.

Use an existing customer managed key or create a new one and add required permissions for Amazon Connect role to use the key. To add permissions using AWS KMS grants, see the following example:

```bash
aws kms create-grant
   --key-id your key ID
```
Use streaming for real-time contact analysis

```
--grantee-principal arn:aws:iam::your AWS account ID:role/aws-service-role/connect.amazonaws.com/AWSServiceRoleForAmazonConnect_11111111111111111111 \
--operations GenerateDataKey \
--retiring-principal arn:aws:iam::your AWS account ID:role/adminRole
```

Where grantee-principal is the ARN of the service-linked role associated to your Amazon Connect instance. To find the ARN of the service-linked role, in the Amazon Connect console, go to Overview, Distribution settings, Service-linked role.

**Step 3: Associate the Kinesis stream**

Use Amazon Connect AssociateInstanceStorageConfig API to associate the resource type REAL_TIME_CONTACT_ANALYSIS_SEGMENTS along with the Kinesis stream where real-time contact analysis segments will be published. You'll need the instance ID and the Kinesis stream ARN.

**AWS CLI**

```
aws connect associate-instance-storage-config --instance-id your Amazon Connect instance ID --resource-type REAL_TIME_CONTACT_ANALYSIS_SEGMENTS --storage-config 'StorageType=KINESIS_STREAM,KinesisStreamConfig={StreamArn=the ARN of your Kinesis stream}'
```

**AWS SDK**

```javascript
import { Connect } from 'aws-sdk';

async function associate () { Promise <void> {
    const clientConfig: Connect.ClientConfiguration = {
        region: 'the Region of your Amazon Connect instance',
    };
    const connect = new Connect(clientConfig);

    // Build request
    const request: Connect.Types.AssociateInstanceStorageConfigRequest = {
        InstanceId: 'your Amazon Connect instance ID',
        ResourceType: 'REAL_TIME_CONTACT_ANALYSIS_SEGMENTS',
        StorageConfig: {
            StorageType: 'KINESIS_STREAM',
            KinesisStreamConfig: {
                StreamArn: 'the ARN of your Kinesis stream',
            },
        },
    };
    try {
        // Execute request
        const response: Connect.Types.AssociateInstanceStorageConfigResponse = await connect.associateInstanceStorageConfig(request).promise();

        // Process response
        console.log('raw response: ${JSON.stringify(response, null, 2)}');
    } catch (err) {
        console.error('Error calling associateInstanceStorageConfig. err.code: ${err.code}, ' +
            '${err.retryable}');
    }
}
associate().then(r => console.log('Done'));
```
Step 4: Enable Contact Lens for your Amazon Connect instance

For instructions, see Enable Contact Lens for Amazon Connect (p. 810).

Step 5 (Optional): Review a sample segment stream

We recommend you review a sample segment stream to familiarize yourself with what it looks like. See Sample real-time contact analysis segment stream (p. 875).

Real-time contact analysis segment streams data model

Real-time contact analysis segment streams are generated in JSON. Event JSON blobs are published to the associated stream for every contact that has real-time contact analysis enabled. The following types of events can be published for a real-time contact analysis session:

- **STARTED events**—Each real-time contact analysis session publishes one STARTED event at the beginning of the session.
- **SEGMENTS events**—Each real-time contact analysis session may publish zero or more SEGMENTS events during the session. These events contain a list of segments with analyzed information. The list of segments may include "Utterance," "Transcript," or "Categories" segments.
- **COMPLETED or FAILED events**—Each real-time contact analysis session publishes one COMPLETED or FAILED event at the end of the session.

Common properties included in all events

Every event includes the following properties:

**Version**

The version of the event schema.

Type: String

**Channel**

The type of channel for this contact.

Type: String

Valid values: VOICE, CHAT, TASK

For more information about channels, see Channels and concurrency (p. 26).

**AccountId**

The identifier of the account where this contact takes place.

Type: String

**ContactId**

The identifier of the contact being analyzed.

Type: String

**InstanceId**

The identifier of the instance where this contact takes place.

Type: String
LanguageCode

The language code associated to this contact.

Type: String

Valid values: the language code for one of the supported languages for Contact Lens real-time call analytics (p. 7).

EventType

The type of event published.

Type: String

Valid values: STARTED, SEGMENTS, COMPLETED, FAILED

STARTED event

STARTED events include only the common properties:

- Version
- Channel
- AccountId
- ContactId
- LanguageCode
- EventType: STARTED

SEGMENTS event

SEGMENTS events include the following properties:

- Version
- Channel
- AccountId
- ContactId
- LanguageCode
- EventType: SEGMENTS
- Segments: In addition to the common properties, SEGMENTS events include a list of segments with analyzed information.

  Type: Array of Segment (p. 873) objects

Segment

An analyzed segment for a real-time analysis session.

Each segment is an object with the following optional properties. Only one of these properties is present, depending on the segment type:

- Utterance
- Transcript
- Categories

Utterance

The analyzed utterance.
Required: No

- **Id**
  
  The identifier of the utterance.

  Type: String

- **TranscriptId**
  
  The identifier of the transcript associated to this utterance.

  Type: String

- **ParticipantId**
  
  The identifier of the participant.

  Type: String

- **ParticipantRole**
  
  The role of participant. For example, is it a customer, agent, or system.

  Type: String

- **PartialContent**
  
  The content of the utterance.

  Type: String

- **BeginOffsetMillis**
  
  The beginning offset in the contact for this transcript.

  Type: Integer

- **EndOffsetMillis**
  
  The end offset in the contact for this transcript.

  Type: Integer

**Transcript**

The analyzed transcript.

Type: Transcript object

Required: No

**Categories**

The matched category rules.

Type: Categories object

Required: No

**COMPLETED event**

COMPLETED events include only the following common properties:

- **Version**
- **Channel**
Use streaming for real-time contact analysis

- AccountId
- ContactId
- LanguageCode
- EventType: STARTED

**FAILED event**

FAILED events include only the following common properties:

- Version
- Channel
- AccountId
- ContactId
- LanguageCode
- EventType: FAILED

**Sample real-time contact analysis segment stream**

This topic provides sample segment streams for STARTED, SEGMENTS, COMPLETED, and FAILED events.

**Sample STARTED event**

- EventType: STARTED
- Published at the beginning of the real-time contact analysis session.

```json
{
  "Version": "1.0.0",
  "Channel": "VOICE",
  "AccountId": "your AWS account ID",
  "InstanceId": "your Amazon Connect instance ID",
  "ContactId": "the ID of the contact",
  "LanguageCode": "the language code of the contact",
  "EventType": "STARTED"
}
```

**Sample SEGMENTS event**

- EventType: SEGMENTS
- Published during a real-time contact analysis session. This event contains a list of segments with analyzed information. The list of segments may include "Utterance," "Transcript," or "Categories" segments.

```json
{
  "Version": "1.0.0",
  "Channel": "VOICE",
  "AccountId": "your AWS account ID",
  "InstanceId": "your Amazon Connect instance ID",
  "ContactId": "the ID of the contact",
  "LanguageCode": "the language code of the contact",
  "EventType": "SEGMENTS",
  "Segments": [
```
Use streaming for real-time contact analysis

```json
{
    "Utterance": {
        "Id": "the ID of the utterance",
        "TranscriptId": "the ID of the transcript",
        "ParticipantId": "AGENT",
        "ParticipantRole": "AGENT",
        "PartialContent": "Hello, thank you for calling Example Corp. My name is Adam.",
        "BeginOffsetMillis": 19010,
        "EndOffsetMillis": 22980
    },
    "Utterance": {
        "Id": "the ID of the utterance",
        "TranscriptId": "the ID of the transcript",
        "ParticipantId": "AGENT",
        "ParticipantRole": "AGENT",
        "PartialContent": "How can I help you?",
        "BeginOffsetMillis": 23000,
        "EndOffsetMillis": 24598
    },
    "Transcript": {
        "Id": "the ID of the transcript",
        "ParticipantId": "AGENT",
        "ParticipantRole": "AGENT",
        "Content": "Hello, thank you for calling Example Corp. My name is Adam. How can I help you?",
        "BeginOffsetMillis": 19010,
        "EndOffsetMillis": 24598,
        "Sentiment": "NEUTRAL"
    },
    "Transcript": {
        "Id": "the ID of the transcript",
        "ParticipantId": "CUSTOMER",
        "ParticipantRole": "CUSTOMER",
        "Content": "I'm having trouble submitting the application, number AX876293 on the portal. I tried but couldn't connect to my POC on the portal. So, I'm calling on this toll free number",
        "BeginOffsetMillis": 19010,
        "EndOffsetMillis": 22690,
        "Sentiment": "NEGATIVE",
        "IssuesDetected": [
            {
                "CharacterOffsets": {
                    "BeginOffsetChar": 0,
                    "EndOffsetChar": 81
                }
            }
        ]
    },
    "Categories": {
        "MatchedCategories": [
            "CreditCardRelated",
            "CardBrokenIssue"
        ],
        "MatchedDetails": {
            "CreditCardRelated": [
                "PointsOfInterest": [
                    {
                    }
                ]
            ]
        }
    }
}
```
Sample COMPLETED event

- **EventType**: COMPLETED
- **Published at the end of the real-time contact analysis session if the analysis completed successfully.**

```json
{
   "Version": "1.0.0",
   "Channel": "VOICE",
   "AccountId": "your AWS account ID",
   "InstanceId": "your Amazon Connect instance ID",
   "ContactId": "the ID of the contact",
   "LanguageCode": "the language code of the contact",
   "EventType": "COMPLETED"
}
```

Sample FAILED event

- **EventType**: FAILED
- **Published at the end of the real-time contact analysis session if the analysis failed.**

```json
{
   "Version": "1.0.0",
   "Channel": "VOICE",
   "AccountId": "your AWS account ID",
   "InstanceId": "your Amazon Connect instance ID",
   "ContactId": "the ID of the contact",
   "LanguageCode": "the language code of the contact",
   "EventType": "FAILED"
}
```

Output file locations for files analyzed by Contact Lens

Following are examples of what the path looks like for Contact Lens output files when they are stored in the Amazon S3 bucket for your instance.

- Original analyzed transcript file (JSON)
Call: Example Contact Lens output files

- /connect-instance- bucket/Analysis/Voice/2020/02/04/contact's_ID_analysis_2020-02-04T21:14:16Z.json
- /connect-instance- bucket/Analysis/Chat/2020/02/04/contact's_ID_analysis_2020-02-04T21:14:16Z.json
- Redacted analyzed transcript file in (JSON)
  - /connect-instance- bucket/Analysis/Voice/Redacted/2020/02/04/contact's_ID_analysis_redacted_2020-02-04T21:14:16Z.json
  - /connect-instance- bucket/Analysis/Chat/Redacted/2020/02/04/contact's_ID_analysis_redacted_2020-02-04T21:14:16Z.json
- Redacted audio file
  - /connect-instance- bucket/Analysis/Voice/Redacted/2020/02/04/contact's_ID_call_recording_redacted_2020-02-04T21:14:16Z.wav

Important
To delete a recording, you must delete the files for both the redacted and unredacted recordings.

Example Contact Lens output files for a call

Example original, analyzed file for a call

This section shows an example schema for a call that Contact Lens has analyzed. The example shows loudness, issue detection/call drivers, and what information is going to be redacted.

Note the following about the analyzed file:

- It doesn't indicate what sensitive data was redacted. All data are referred to as PII (personally identifiable information).
- Each turn includes a Redaction section only if it includes PII.
- If a Redaction section exists, it includes the offset in milliseconds. In a .wav file, the redacted portion will be silence. If desired, you can use the offset to replace the silence with something else, such as a beep.
- If two or more PII redactions exist in a turn, the first offset applies to the first PII, the second offset applies to the second PII, and so on.

```json
{
  "Version": "VOICE-2022-11-30",
  "AccountId": "your AWS account ID",
  "Channel": "VOICE",
  "ContentMetadata": {
    "Output": "Raw"
  },
  "JobStatus": "COMPLETED",
  "LanguageCode": "en-US",
  "Participants": [
    {
      "ParticipantId": "CUSTOMER",
      "ParticipantRole": "CUSTOMER"
    },
    {
      "ParticipantId": "AGENT",
      "ParticipantRole": "AGENT"
    }
  ]
}
```
"Categories": [
  "MatchedCategories": [],
  "MatchedDetails": {}
],
"ConversationCharacteristics": {
  "TotalConversationDurationMillis": 32110,
  "Sentiment": {
    "OverallSentiment": {
      "AGENT": 0,
      "CUSTOMER": 3.1
    },
    "SentimentByPeriod": {
      "QUARTER": {
        "AGENT": [
          {
            "BeginOffsetMillis": 0,
            "EndOffsetMillis": 7427,
            "Score": 0
          },
          {
            "BeginOffsetMillis": 7427,
            "EndOffsetMillis": 14855,
            "Score": -5
          },
          {
            "BeginOffsetMillis": 14855,
            "EndOffsetMillis": 22282,
            "Score": 0
          },
          {
            "BeginOffsetMillis": 22282,
            "EndOffsetMillis": 29710,
            "Score": 5
          }
        ],
        "CUSTOMER": [
          {
            "BeginOffsetMillis": 0,
            "EndOffsetMillis": 8027,
            "Score": -2.5
          },
          {
            "BeginOffsetMillis": 8027,
            "EndOffsetMillis": 16055,
            "Score": 5
          },
          {
            "BeginOffsetMillis": 16055,
            "EndOffsetMillis": 24082,
            "Score": 5
          },
          {
            "BeginOffsetMillis": 24082,
            "EndOffsetMillis": 32110,
            "Score": 5
          }
        ]
      }
    }
  },
  "Interruptions": {
    "InterruptionsByInterrupter": {},
    "TotalCount": 0,
    "TotalTimeMillis": 0
  },
  "NonTalkTime": {
    "879":
  }
}
"TotalTimeMillis": 0,
"Instances": []
},
"TalkSpeed": {
  "DetailsByParticipant": {
    "AGENT": {
      "AverageWordsPerMinute": 239
    },
    "CUSTOMER": {
      "AverageWordsPerMinute": 163
    }
  }
},
"TalkTime": {
  "TotalTimeMillis": 28698,
  "DetailsByParticipant": {
    "AGENT": {
      "TotalTimeMillis": 15079
    },
    "CUSTOMER": {
      "TotalTimeMillis": 13619
    }
  }
},
"CustomModels": [],
"Transcript": [
  {
    "BeginOffsetMillis": 0,
    "Content": "Okay.",
    "EndOffsetMillis": 90,
    "Id": "the ID of the turn",
    "ParticipantId": "AGENT",
    "Sentiment": "NEUTRAL",
    "LoudnessScore": [
    79.27
    ]
  },
  {
    "BeginOffsetMillis": 160,
    "Content": "Just hello. My name is Peter and help.",
    "EndOffsetMillis": 4640,
    "Id": "the ID of the turn",
    "ParticipantId": "CUSTOMER",
    "Sentiment": "NEUTRAL",
    "LoudnessScore": [
    66.56,
    40.06,
    85.27,
    82.22,
    77.66
    ],
    "Redaction": {
      "RedactedTimestamps": [
      {
        "BeginOffsetMillis": 3290,
        "EndOffsetMillis": 3620
      }
      ]
    }
  },
  {
    "BeginOffsetMillis": 4640,
    "Content": "Hello. Peter, how can I help you?",
    "EndOffsetMillis": 6610,
    "Id": "the ID of the turn",
    "ParticipantId": "AGENT",
    "Sentiment": "NEUTRAL",
    "LoudnessScore": [
    68.06
    ]
  }
]
"ParticipantId": "AGENT",
"Sentiment": "NEUTRAL",
"LoudnessScore": [
  70.23,
  73.05,
  71.8
],
"Redaction": {
  "RedactedTimestamps": [
  {
    "BeginOffsetMillis": 5100,
    "EndOffsetMillis": 5450
  }
  ,
  {
    "BeginOffsetMillis": 7370,
    "Content": "I need to cancel. I want to cancel my plan subscription."
  }
  ,
  {
    "BeginOffsetMillis": 11190,
    "Id": "the ID of the turn",
    "ParticipantId": "CUSTOMER",
    "Sentiment": "NEGATIVE",
    "LoudnessScore": [
      77.18,
      79.59,
      85.23,
      81.08,
      73.99
    ],
    "IssuesDetected": [
      {
        "CharacterOffsets": {
          "BeginOffsetChar": 0,
          "EndOffsetChar": 55
        },
        "Text": "I need to cancel. I want to cancel my plan subscription"
      }
    ]
  }
  ,
  {
    "BeginOffsetMillis": 11220,
    "Content": "That sounds very bad. I can offer a 20% discount to make you stay with us."
  }
  ,
  {
    "BeginOffsetMillis": 15210,
    "Id": "the ID of the turn",
    "ParticipantId": "AGENT",
    "Sentiment": "NEGATIVE",
    "LoudnessScore": [
      75.92,
      75.79,
      80.31,
      80.44,
      76.31
    ]
  }
  ,
  {
    "BeginOffsetMillis": 15840,
    "Content": "That sounds interesting. Thank you accept."
  }
  ,
  {
    "BeginOffsetMillis": 18120,
    "Id": "the ID of the turn",
    "ParticipantId": "CUSTOMER",
    "Sentiment": "POSITIVE",
    "LoudnessScore": [
      73.77,
      79.17,
Alright, I made all the changes to the account and now these discounts applied.

Awesome. Thank you so much.

No worries. I will send you all the details later today and call you back next week to check up on you.
Example redacted file for a call

This section shows an example redacted file for a call. It's a twin of the original analyzed file. The only difference is that sensitive data are redacted.

```json
{
  "Version": "VOICE-2022-11-30",
  "AccountId": "your AWS account ID",
  "ContentMetadata": {
    "RedactionTypes": ["PII"],
    "Output": "Redacted"
  },
  "Channel": "VOICE",
  "JobStatus": "COMPLETED",
  "LanguageCode": "en-US",
  "Participants": [
    {
      "ParticipantId": "CUSTOMER",
      "ParticipantRole": "CUSTOMER"
    },
    {
      "ParticipantId": "AGENT",
      "ParticipantRole": "AGENT"
    }
  ],
  "Categories": {
    "MatchedCategories": [],
    "MatchedDetails": {};
  },
  "ConversationCharacteristics": {
    "TotalConversationDurationMillis": 32110,
    "Sentiment": {
      "OverallSentiment": {
        "AGENT": 0,
        "CUSTOMER": 3.1
      },
      "SentimentByPeriod": {
        "QUARTER": {
          "AGENT": {
            "BeginOffsetMillis": 0,
            "EndOffsetMillis": 7427,
          }
        }
      }
    }
  }
}
```
"Score": 0
},
{"BeginOffsetMillis": 7427,
"EndOffsetMillis": 14855,
"Score": -5
},
{"BeginOffsetMillis": 14855,
"EndOffsetMillis": 22282,
"Score": 0
},
{"BeginOffsetMillis": 22282,
"EndOffsetMillis": 29710,
"Score": 5
}
],"CUSTOMER": [
{"BeginOffsetMillis": 0,
"EndOffsetMillis": 8027,
"Score": -2.5
},
{"BeginOffsetMillis": 8027,
"EndOffsetMillis": 16055,
"Score": 5
},
{"BeginOffsetMillis": 16055,
"EndOffsetMillis": 24082,
"Score": 5
},
{"BeginOffsetMillis": 24082,
"EndOffsetMillis": 32110,
"Score": 5
}
],
"Interruptions": {
"InterruptionsByInterrupter": {},
"TotalCount": 0,
"TotalTimeMillis": 0
},
"NonTalkTime": {
"TotalTimeMillis": 0,
"Instances": []
},
"TalkSpeed": {
"DetailsByParticipant": {
"AGENT": {
"AverageWordsPerMinute": 239
},
"CUSTOMER": {
"AverageWordsPerMinute": 163
}
},
"TalkTime": {
"TotalTimeMillis": 28698,
"DetailsByParticipant": {
"AGENT": {
"AverageWordsPerMinute": 239
},
"CUSTOMER": {
"AverageWordsPerMinute": 163
}
},
"TotalTimeMillis": 28698,
"DetailsByParticipant": {
"AGENT": {
"AverageWordsPerMinute": 239
},
"CUSTOMER": {
"AverageWordsPerMinute": 163
}
},
"TalkTime": {
"TotalTimeMillis": 28698,
"TotalTimeMillis": 15079,
],
"CUSTOMER": {
"TotalTimeMillis": 13619
}
},
"CustomModels": [],
"Transcript": [
{
"BeginOffsetMillis": 0,
"Content": "Okay."
"EndOffsetMillis": 90,
"Id": "the ID of the turn",
"ParticipantId": "AGENT",
"Sentiment": "NEUTRAL",
"LoudnessScore": [
79.27
]
},
{
"BeginOffsetMillis": 160,
"Content": "Just hello. My name is [PII] and help."
"EndOffsetMillis": 4640,
"Id": "the ID of the turn",
"ParticipantId": "CUSTOMER",
"Sentiment": "NEUTRAL",
"LoudnessScore": [
66.56, 40.06, 85.27, 82.22, 77.66
],
"Redaction": {
"RedactedTimestamps": [
{
"BeginOffsetMillis": 3290,
"EndOffsetMillis": 3620
}
]
},
{
"BeginOffsetMillis": 4640,
"Content": "Hello. [PII], how can I help you?"
"EndOffsetMillis": 6610,
"Id": "the ID of the turn",
"ParticipantId": "AGENT",
"Sentiment": "NEUTRAL",
"LoudnessScore": [
70.23, 73.05, 71.8
],
"Redaction": {
"RedactedTimestamps": [
{
"BeginOffsetMillis": 5100,
"EndOffsetMillis": 5450
}
]
},
]
"BeginOffsetMillis": 7370,
"Content": "I need to cancel. I want to cancel my plan subscription."
"EndOffsetMillis": 11190,
"Id": "the ID of the turn",
"ParticipantId": "CUSTOMER",
"Sentiment": "NEGATIVE",
"LoudnessScore": [
77.18,
79.59,
85.23,
81.08,
73.99
],
"IssuesDetected": [
{
"CharacterOffsets": {
"BeginOffsetChar": 0,
"EndOffsetChar": 55
},
"Text": "I need to cancel. I want to cancel my plan subscription"
}
],
"BeginOffsetMillis": 11220,
"Content": "That sounds very bad. I can offer a 20% discount to make you stay with us.",
"EndOffsetMillis": 15210,
"Id": "the ID of the turn",
"ParticipantId": "AGENT",
"Sentiment": "NEGATIVE",
"LoudnessScore": [
75.92,
75.79,
80.31,
80.44,
76.31
],
"BeginOffsetMillis": 15840,
"Content": "That sounds interesting. Thank you accept.",
"EndOffsetMillis": 18120,
"Id": "the ID of the turn",
"ParticipantId": "CUSTOMER",
"Sentiment": "POSITIVE",
"LoudnessScore": [
73.77,
79.17,
77.97,
79.29
],
"BeginOffsetMillis": 18310,
"Content": "Alright, I made all the changes to the account and now these discounts applied."
"EndOffsetMillis": 21820,
"Id": "the ID of the turn",
"ParticipantId": "AGENT",
"Sentiment": "NEUTRAL",
"LoudnessScore": [
83.88,
86.75,
86.97,
86.11
]
"OutcomesDetected": [
    {
        "CharacterOffsets": {
            "BeginOffsetChar": 9,
            "EndOffsetChar": 77
        },
        "Text": "I made all the changes to the account and now these discounts applied"
    },
    {
        "BeginOffsetMillis": 22610,
        "Content": "Awesome. Thank you so much.",
        "EndOffsetMillis": 24140,
        "Id": "the ID of the turn",
        "ParticipantId": "CUSTOMER",
        "Sentiment": "POSITIVE",
        "LoudnessScore": [
            79.11,
            81.7,
            78.15
        ]
    },
    {
        "BeginOffsetMillis": 24120,
        "Content": "No worries. I will send you all the details later today and call you back next week to check up on you.",
        "EndOffsetMillis": 29710,
        "Id": "the ID of the turn",
        "ParticipantId": "AGENT",
        "Sentiment": "POSITIVE",
        "LoudnessScore": [
            87.07,
            83.96,
            76.38,
            88.38,
            87.69,
            76.6
        ]
    },
    "ActionItemsDetected": [
        {
            "CharacterOffsets": {
                "BeginOffsetChar": 12,
                "EndOffsetChar": 102
            },
            "Text": "I will send you all the details later today and call you back next week to check up on you"
        }
    },
    {
        "BeginOffsetMillis": 30580,
        "Content": "Thank you. Sir. Have a nice evening.",
        "EndOffsetMillis": 32110,
        "Id": "the ID of the turn",
        "ParticipantId": "CUSTOMER",
        "Sentiment": "POSITIVE",
        "LoudnessScore": [
            81.42,
            82.29,
            73.29
        ]
    }
]
Example Contact Lens output files for a chat

This section shows an example schema for a chat conversation that Contact Lens has analyzed. The example shows inferred sentiment, matched categories, contact summary, and response time.

The original, analyzed file contains the full chat transcript. The same content that is present in the chat Transcript field on the Contact details page is present in Transcript field in the original Contact Lens analysis file. In addition, the analyzed file may contain more fields, such as a Redaction section to indicate that there is redacted data in the redacted analysis file.

Categories

PointsOfInterest differs between post-chat and post-call categories:

• Post-call PointsOfInterest has milliseconds offset.
• Post-chat PointsOfInterest has an array of TranscriptItems; each item has an id and CharacterOffset.

There is an array of PointsOfInterest. Each array has an array of TranscriptItems: each PointOfInterest is for a Category match, but each match can span across multiple transcript items.

For both calls and chats, the PointsOfInterest array can be empty. This means that the category is matched for the whole contact. For example, if you create a rule to match the category when Hello is not mentioned in the contact, there would be no portion of the transcript to pinpoint for this condition.

Note
Currently, category is inferred for text/plain, text/markdown chat messages only.

Contact summary

Contact summary is located in the ConversationCharacteristics.ContactSummary.SummaryItemsDetected array. No more than one item can be in that array, emphasizing that only one set of Issue, Outcome, and Action item can be found.

Each object in the array has following fields: IssuesDetected, OutcomesDetected, ActionItemsDetected.

Each of the fields has an array of TranscriptItems that has Id and CharacterOffsets. They describe TranscriptItems and specific parts that were identified to contain that contact summary: issue, outcome, or action item.

Note
Currently, contact summary is inferred for text/plain chat messages only.

Sentiment

Overall sentiment

The DetailsByParticipantRole field sentiment score for contact participants is similar to Contact Lens for speech analysis file.

DetailsByInteraction field has CUSTOMER sentiment score for parts of chat interaction WithAgent and WithoutAgent. If there were no customer messages in those parts of interaction, the respective field will be absent.
Note
Currently, sentiment is inferred is for text/plain, text/markdown chat messages only.

Sentiment shift

The DetailsByParticipantRole field contains an object that describes the sentiment shift for contact participants (that is, AGENT, CUSTOMER): BeginScore and EndScore.

The DetailsByInteraction field has CUSTOMER sentiment shift for parts of the chat interaction WithAgent and WithoutAgent. If there were no customer messages in those parts of the interaction, the respective field will be absent.

Sentiment shift provides information about how the participant's sentiment changed throughout the chat interaction.

Response time

AgentGreetingTimeMillis measures the time between when the AGENT joined the chat and the moment when they ended their first message to customer.

DetailsByParticipantRole has following characteristics for each of participant:

• Average: What is average response time for a participant.
• Maximum: What is the longest response time for a participant. If there are multiple transcript items with the same maximum response time, which ones are they.

To calculate the Average and Maximum response times for a given participant, they need to respond to a message from another participant (AGENT needs to responds to the CUSTOMER, or vice versa).

For example, if there was only one message from CUSTOMER and then only one message from AGENT before the chat ended, Contact Lens will calculate a response time for the AGENT, but not for the CUSTOMER.

Note
Currently, response time is inferred is for text/plain, text/markdown chat messages only.

Redaction

Note the following about the original analysis file for chats:

• Transcript item includes a Redaction section only if it there is data to be redacted. The section contains character offsets for the data that is redacted in the redacted analysis file.
• If two or more pieces of a message are redacted, the first offset applies to the first redacted piece, the second offset applies to the second redacted piece, and so on.

DisplayNames for AGENT and CUSTOMER are redacted because they contain PII. This applies to AttachmentName, too.

CharacterOffsets take into consideration redaction changes of the Content length in the redacted analysis file. CharacterOffsets describe redacted content, not original content.

Example original chat file

```json
{
```
"AccountId": "123456789012",
"Categories": {
  "MatchedCategories": [
    "agent-intro"
  ],
  "MatchedDetails": {
    "agent-intro": {
      "PointsOfInterest": [
        {
          "TranscriptItems": [
            {
              "CharacterOffsets": {
                "BeginOffsetChar": 0,
                "EndOffsetChar": 73
              },
              "Id": "e4949dd1-aaa1-4fbd-84e7-65c95b2d3d9a"
            }
          ]
        }
      ]
    }
  },
  "Channel": "CHAT",
  "ChatTranscriptVersion": "2019-08-26",
  "ContentMetadata": {
    "Output": "Raw"
  },
  "ConversationCharacteristics": {
    "ContactSummary": {
      "SummaryItemsDetected": [
        {
          "ActionItemsDetected": [],
          "IssuesDetected": {
            "TranscriptItems": [
              {
                "CharacterOffsets": {
                  "BeginOffsetChar": 72,
                  "EndOffsetChar": 244
                },
                "Id": "2b8ba020-53ee-4053-b5b7-35364ac1c7df"
              }
            ]
          },
          "OutcomesDetected": [
            {
              "TranscriptItems": [
                {
                  "CharacterOffsets": {"BeginOffsetChar": 0,
                    "EndOffsetChar": 150
                  },
                  "Id": "72cc8c8d-2199-422a-b363-01d63fcd851"
                }
              ]
            }
          ],
          "ResponseTime": {
            "AgentGreetingTimeMillis": 2511,
            "DetailsByParticipantRole": {
              "AGENT": {
                "CharacterOffsets": {
                  "BeginOffsetChar": 0,
                  "EndOffsetChar": 150
                },
                "Id": "72cc8c8d-2199-422a-b363-01d63fcd851"
              }
            }
          }
        }
      ]
    }
  }
}
"Average": {
  "ValueMillis": 5575
},
"Maximum": {
  "TranscriptItems": [
    {
      "Id": "21acf0fc-7259-4a08-b4cd-688eb56587d3"
    }
  ],
  "ValueMillis": 7309
},
"CUSTOMER": {
  "Average": {
    "ValueMillis": 5875
  },
  "Maximum": {
    "TranscriptItems": [
      {
        "Id": "c71ad383-f876-4bb3-b254-7837b6a3d395"
      }
    ],
    "ValueMillis": 11366
  }
},
"Sentiment": {
  "DetailsByTranscriptItemGroup": [
    {
      "ParticipantRole": "AGENT",
      "ProgressiveScore": 0,
      "Sentiment": "NEUTRAL",
      "TranscriptItems": [
        {
          "Id": "e4949dd1-aaa1-4fbd-84e7-65c95b2d3d9a"
        }
      ]
    },
    {
      "ParticipantRole": "AGENT",
      "ProgressiveScore": 0,
      "Sentiment": "NEUTRAL",
      "TranscriptItems": [
        {
          "Id": "3673d926-6e75-4620-a6f0-7ea571790a15"
        }
      ]
    },
    {
      "ParticipantRole": "AGENT",
      "ProgressiveScore": 0,
      "Sentiment": "NEUTRAL",
      "TranscriptItems": [
        {
          "Id": "46d37141-32d8-4f2e-a664-bcd3f34a68b3"
        }
      ]
    },
    {
      "ParticipantRole": "AGENT",
      "ProgressiveScore": 0,
      "Sentiment": "NEUTRAL",
      "TranscriptItems": [
        {
          "Id": "3c4a2a1e-6790-46a6-8ad4-4a0980b04795"
        }
      ]
    }
  ]
}
"ParticipantRole": "AGENT",
"ProgressiveScore": 0,
"Sentiment": "NEUTRAL",
"TranscriptItems": [
  {
    "Id": "f9cd41b6-3f68-4e83-a47d-664395f324c0"
  }
],

"ParticipantRole": "AGENT",
"ProgressiveScore": 1.6666666666666667,
"Sentiment": "POSITIVE",
"TranscriptItems": [
  {
    "Id": "21acf0fc-7259-4a08-b4cd-688eb56587d3"
  }
],

"ParticipantRole": "AGENT",
"ProgressiveScore": 1.6666666666666667,
"Sentiment": "NEUTRAL",
"TranscriptItems": [
  {
    "Id": "2b8ba020-53ee-4053-b5b7-35364ac1c7df"
  }
],

"ParticipantRole": "AGENT",
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Chat: Example Contact Lens output files

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  {
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    "ParticipantId": "2b2288b4-ff6e-4996-8d8e-260fd5a8ac02",
    "ParticipantRole": "SYSTEM"
  },
  {
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    "ParticipantId": "f36a545d-67b2-4fd4-89fb-896136b609a7",
    "ParticipantRole": "AGENT"
  }
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    "ParticipantId": "e9b36a6d-12aa-4c21-9745-1881648ecfc8",
    "ParticipantRole": "CUSTOMER",
    "Type": "EVENT"
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  {
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    "Content": "Hello, thanks for contacting us. This is an example of what the Amazon Connect virtual contact center can enable you to do.",
    "ContentType": "text/plain",
    "DisplayName": "SYSTEM_MESSAGE",
    "Id": "78aa8229-714a-4c87-916b-ce7d8d567ab2",
    "ParticipantId": "2b2288b4-ff6e-4996-8d8e-260fd5a8ac02",
    "ParticipantRole": "SYSTEM",
    "Type": "MESSAGE"
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    "ContentType": "text/plain",
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"ParticipantRole": "AGENT",
"Type": "EVENT"
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{"AbsoluteTime": "2022-10-27T03:32:03.462Z",
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"Type": "MESSAGE"
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{"AbsoluteTime": "2022-10-27T03:32:08.102Z",
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"ContentType": "text/markdown",
"DisplayName": "John",
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"ContentType": "text/markdown",
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"Type": "MESSAGE"
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"ParticipantRole": "CUSTOMER",
"Type": "MESSAGE"
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"DisplayName": "Jane",
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"ParticipantId": "f36a545d-67b2-4fd4-89fb-896136b609a7",
"ParticipantRole": "AGENT",
"Type": "MESSAGE"
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"Type": "MESSAGE"
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"Type": "MESSAGE"
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"ContentType": "text/markdown",
"DisplayName": "John",
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"ParticipantId": "e9b36a6d-12aa-4c21-9745-1881648ecfc8",
"ParticipantRole": "CUSTOMER",
"Type": "MESSAGE"
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{
"AbsoluteTime": "2022-10-27T03:52:59.441Z",
"Content": "Alright, perfect. And could you also just confirm the shipping address for me?",
"ContentType": "text/markdown",
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"ParticipantId": "f36a545d-67b2-4fd4-89fb-896136b609a7",
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    }
  ],
"Type": "MESSAGE"
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{
"AbsoluteTime": "2022-10-27T03:52:59.441Z",
"Content": "Thank you very much. Just waiting on my system here. ... I'll also need the last four digits of your debit card.",
"ContentType": "text/markdown",
"DisplayName": "Jane",
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"Type": "MESSAGE"
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{ "AbsoluteTime": "2022-10-27T03:33:17.412Z", "Content": "Ok. Last four for my debit care are 9008", "ContentType": "text/markdown", "DisplayName": "John", "Id": "3ec6adb5-3f11-409c-af39-40cf7ba6f078", "ParticipantId": "e9b56a6d-12aa-4c21-9745-1881648ecfc8", "ParticipantRole": "CUSTOMER", "Redaction": { "CharacterOffsets": [ { "BeginOffsetChar": 27, "EndOffsetChar": 31 } ] }, "Type": "MESSAGE" },
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{ "AbsoluteTime": "2022-10-27T03:33:38.961Z", "Content": "I apologize for the experience you had Mr. Doe, its very uncommon that our customer will have this issue. We will look into this and get this sorted out for you right away.", "ContentType": "text/markdown", "DisplayName": "Jane", "Id": "28d0a1ce-64d1-4625-bbef-4cfeb97b6742", "ParticipantId": "f36a545d-67b2-4fd4-89fb-896136b609a7", "ParticipantRole": "AGENT", "Redaction": { "CharacterOffsets": [ { "BeginOffsetChar": 41, "EndOffsetChar": 46 } ] }, "Type": "MESSAGE" },
{ "AbsoluteTime": "2022-10-27T03:33:44.192Z", "Content": "Well, my wife's birthday already passed, so. There's not too much you can do. But I would still like to grow the herbs for her, if possible.", "ContentType": "text/markdown", "DisplayName": "John", "Id": "4b292b64-4a33-45ff-89df-d5a175d16d70", "ParticipantId": "e9b56a6d-12aa-4c21-9745-1881648ecfc8", "ParticipantRole": "CUSTOMER", "Type": "MESSAGE" },
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"ParticipantId": "f36a545d-67b2-4fd4-89fb-896136b609a7",
"ParticipantRole": "AGENT",
"Type": "MESSAGE"
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"ContentType": "text/markdown",
"DisplayName": "Jane",
"Id": "72cc8c8d-2198-4e53-759a4e63198d",
"ParticipantId": "e9b36a6d-12aa-4c21-9745-1881648ecfc8",
"ParticipantRole": "CUSTOMER",
"Type": "MESSAGE"
],
{
"AbsoluteTime": "2022-10-27T03:34:17.029Z",
"Content": "Yeah! That would be great. I just want my wife to be able to have these herbs in her room. And I'm always happy to get my money back!",
"ContentType": "text/markdown",
"DisplayName": "John",
"Id": "72cc8c8d-2199-4e53-759a4e63198d",
"ParticipantId": "e9b36a6d-12aa-4c21-9745-1881648ecfc8",
"ParticipantRole": "CUSTOMER",
"Type": "MESSAGE"
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"Content": "Awesome! We really want to keep our customers happy and satisfied, and again I want to apologize for your less than satisfactory experience with the last product you ordered from us.",
"ContentType": "text/markdown",
"DisplayName": "Jane",
"Id": "61bb2591-fe87-44e4-bba0-a3619c4cef1f",
"ParticipantId": "f36a545d-67b2-4fd4-89fb-8696136b09a7",
"ParticipantRole": "AGENT",
"Type": "MESSAGE"
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"DisplayName": "John",
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"ParticipantId": "e9b36a6d-12aa-4c21-9745-1881648ecfc8",
"ParticipantRole": "CUSTOMER",
"Type": "MESSAGE"
},

{"AbsoluteTime": "2022-10-27T03:34:31.431Z",
"Content": "Is there anything else I can help you out with John?",
"ContentType": "text/markdown",
"DisplayName": "Jane",
"Id": "1761f27e-0989-4b6d-8046-fc03d2c6bc9c",
"ParticipantId": "f36a545d-67b2-4fd4-89fb-8696136b09a7",
"ParticipantRole": "AGENT",
"Redaction": { "CharacterOffsets": [ { "BeginOffsetChar": 48, "EndOffsetChar": 53 } ] },
"Type": "MESSAGE"
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"ContentType": "text/markdown",
"DisplayName": "John",
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"ParticipantId": "e9b36a6d-12aa-4c21-9745-1881648ecfc8",
"ParticipantRole": "CUSTOMER",
"Type": "MESSAGE"
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{"AbsoluteTime": "2022-10-27T03:34:41.448Z",
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"ContentType": "text/markdown",
"DisplayName": "Jane",
"Id": "8cddf161-dc5-44e6-986f-fc0e08ee0a7d",
"ParticipantId": "f36a545d-67b2-4fd4-89fb-8696136b09a7",
"ParticipantRole": "AGENT",
"Type": "MESSAGE"
},

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"Id": "d1ba54ba-61d4-4a4-0a99-6cd17d70b8fb",
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"ParticipantRole": "CUSTOMER"
"Type": "EVENT"
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"Id": "2d9a0e4f-faec-485f-97af-2767dde1f30a",
"Type": "EVENT"
}
],
"Version": "CHAT-2022-11-30"
}

Example redacted chat file

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                "EndOffsetChar": 71
              },
              "Id": "e4949dd1-aaa1-4fbd-84e7-65c95b2d3d9a"
            }
          ]
        }
      ]
    }
  }
},
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"ContentMetadata": {
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              }
            ]
          }
        ]
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"Sentiment": "NEGATIVE",
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}
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    },
    {
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    }
  ]
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  "ProgressiveScore": -3.75,
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    ]
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  "ProgressiveScore": 1.6666666666666667,
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  "ProgressiveScore": 3.75,
  "Sentiment": "POSITIVE",
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  "ProgressiveScore": 3.75,
  "Sentiment": "NEUTRAL",
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    ]
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        "WithAgent": 0
      }
    }
  }
}
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    "CUSTOMER": 0
},
"SentimentShift": {
    "DetailsByInteraction": {
        "DetailsByParticipantRole": {
            "CUSTOMER": {
                "BeginScore": -3,
                "EndScore": 3.75
            }
        }
    }
},
"DetailsByParticipantRole": {
    "AGENT": {
        "BeginScore": 0,
        "EndScore": 2.5
    },
    "CUSTOMER": {
        "BeginScore": -3.75,
        "EndScore": 3.75
    }
}
},
"CustomerMetadata": {
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    "InputS3Uri": "path to the json file in s3",
    "InstanceId": "f25f323-36d4-48aa-EXAMPLE012"
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"JobStatus": "COMPLETED",
"LanguageCode": "en-US",
"Participants": [
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        "ParticipantId": "e9b36a6d-12aa-4c21-9745-1881648ecfc8"
    },
    {
        "DisplayName": "SYSTEM_MESSAGE",
        "ParticipantId": "2b2288b4-ff6e-4996-8d8e-260fd5a8ac02"
    },
    {
        "DisplayName": "[PII]",
        "ParticipantId": "f36a545d-67b2-4fd4-89fb-896136b09a7"
    }
],
"Transcript": [
    {
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        "ContentType": "application/vnd.amazonaws.connect.event.participant.joined",
        "DisplayName": "[PII]",
        "Id": "740c494d-9df7-4400-91c0-3e4df33922c8",
        "ParticipantId": "e9b36a6d-12aa-4c21-9745-1881648ecfc8",
        "ParticipantRole": "CUSTOMER",
        "Type": "EVENT"
    },
    {
        "AbsoluteTime": "2022-10-27T03:31:53.390Z",
        "Content": "Hello, thanks for contacting us. This is an example of what the Amazon Connect virtual contact center can enable you to do."
    }
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"ContentType": "text/plain",
"DisplayName": "SYSTEM_MESSAGE",
"Id": "78aa8229-714a-4c87-916b-ce7d8d567ab2",
"ParticipantId": "2b2288b4-ff6e-4996-8d8e-260fd5a8ac02",
"ParticipantRole": "SYSTEM",
"Type": "MESSAGE"
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{ "AbsoluteTime": "2022-10-27T03:31:55.131Z",
"Content": "The time in queue is less than 5 minutes.",
"ContentType": "text/plain",
"DisplayName": "SYSTEM_MESSAGE",
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"ParticipantId": "2b2288b4-ff6e-4996-8d8e-260fd5a8ac02",
"ParticipantRole": "SYSTEM",
"Type": "MESSAGE"
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{ "AbsoluteTime": "2022-10-27T03:31:56.618Z",
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"ContentType": "text/plain",
"DisplayName": "SYSTEM_MESSAGE",
"Id": "88c2363e-8206-4781-a353-c15e1ccacc12",
"ParticipantId": "2b2288b4-ff6e-4996-8d8e-260fd5a8ac02",
"ParticipantRole": "SYSTEM",
"Type": "MESSAGE"
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{ "AbsoluteTime": "2022-10-27T03:32:00.951Z",
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"DisplayName": "[PII]",
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"ParticipantId": "f36a545d-67b2-4fd4-89fb-896136b609a7",
"ParticipantRole": "AGENT",
"Type": "EVENT"
},

{ "AbsoluteTime": "2022-10-27T03:32:03.462Z",
"Content": "Hello, thanks for reaching Example Corp. This is [PII]. How may I help you?",
"ContentType": "text/plain",
"DisplayName": "[PII]",
"Id": "e4949dd1-aaa1-4fbd-84e7-65c95b2d3d9a",
"ParticipantId": "f36a545d-67b2-4fd4-89fb-896136b609a7",
"ParticipantRole": "AGENT",
"Redaction": {
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{ "BeginOffsetChar": 46,
"EndOffsetChar": 51,
}
],
"Type": "MESSAGE"
},

{ "AbsoluteTime": "2022-10-27T03:32:08.102Z",
"Content": "I'd like to see if I can get a refund or an exchange, because I ordered one of your grow-it-yourself indoor herb garden kits and nothing sprouted after a couple weeks so I think something is wrong with the seeds and this product may be defective."
"ContentType": "text/plain",
"DisplayName": "[PII]",
"Id": "bcc51949-3a79-4398-be1b-a27345a8a8ad",
"ParticipantId": "e9b36a6d-12aa-4c21-9745-18d148eefc08",
"ParticipantRole": "CUSTOMER"
}
"Type": "MESSAGE"
},
{"AbsoluteTime": "2022-10-27T03:12:14.137Z",
"Content": "My wife is blind and sensitive to the sun so I was going to surprise her for her birthday with all the herbs that she loves so you guys actually really let me down.",
"ContentType": "text/plain",
"DisplayName": "[PII]",
"Id": "7d5c07d7-3d26-4b34-ae91-39aeaeef685c",
"ParticipantId": "e9b56a6d-12aa-4c21-9745-1881648ecfc8",
"ParticipantRole": "CUSTOMER",
"Type": "MESSAGE"
},
{"AbsoluteTime": "2022-10-27T03:12:18.781Z",
"Content": "I should be taking my business elsewhere. I don't see why I should be giving money to a company that isn't even going to sell a product that works.",
"ContentType": "text/plain",
"DisplayName": "[PII]",
"Id": "e0efbd17-9139-439b-8c80-eb2b70b3b9",
"ParticipantId": "e9b56a6d-12aa-4c21-9745-1881648ecfc8",
"ParticipantRole": "CUSTOMER",
"Type": "MESSAGE"
},
{"AbsoluteTime": "2022-10-27T03:12:24.123Z",
"Content": "Ok. Can I get your first and last name please?",
"ContentType": "text/plain",
"DisplayName": "[PII]",
"Id": "3673d926-6e75-4620-a6f0-7ea571790a15",
"ParticipantId": "f36a545d-67b2-4fd4-89fb-896136b609a7",
"ParticipantRole": "AGENT",
"Type": "MESSAGE"
},
{"AbsoluteTime": "2022-10-27T03:12:29.879Z",
"Content": "Yeah. My first name is [PII] and last name [PII].",
"ContentType": "text/plain",
"DisplayName": "[PII]",
"Id": "8fbb8dd4-9fd4-4991-83dc-5f06e8ed9aa",
"ParticipantId": "e9b56a6d-12aa-4c21-9745-1881648ecfc8",
"ParticipantRole": "CUSTOMER",
"Redaction": {
"CharacterOffsets": [
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"BeginOffsetChar": 21,
"EndOffsetChar": 26
},
{
"BeginOffsetChar": 44,
"EndOffsetChar": 49
}
],
"Type": "MESSAGE"
},
{"AbsoluteTime": "2022-10-27T03:12:34.670Z",
"Content": "Could you please provide me with the order ID number?",
"ContentType": "text/plain",
"DisplayName": "[PII]",
"Id": "46d37141-32d8-4f2e-a664-bcd3f34a60b3",
"ParticipantId": "f36a545d-67b2-4fd4-89fb-896136b609a7",
"ParticipantRole": "AGENT",
"Type": "MESSAGE"
"AbsoluteTime": "2022-10-27T03:32:39.726Z",
"Content": "Yes, just. Looking...",
"ContentType": "text/plain",
"DisplayName": "[PII]",
"Id": "3b856fd9-0eeb-4fb2-93ed-95ec4aeae3a6",
"ParticipantId": "e9b36a6d-12aa-4c21-9745-1881648ecfc8",
"ParticipantRole": "CUSTOMER",
"Type": "MESSAGE"

"AbsoluteTime": "2022-10-27T03:32:44.887Z",
"Content": "Not a problem, take your time.",
"ContentType": "text/plain",
"DisplayName": "[PII]",
"Id": "3c4a2a1e-6790-46a6-8ad4-4a0980b04795",
"ParticipantId": "f36a545d-67b2-4fd4-89fb-896136b609a7",
"ParticipantRole": "AGENT",
"Type": "MESSAGE"

"AbsoluteTime": "2022-10-27T03:32:52.978Z",
"Content": "Okay, that should be #5376897. You know, if the product was fine I wouldn't have to scrounge through emails.",
"ContentType": "text/plain",
"DisplayName": "[PII]",
"Id": "ecb8c498-96d7-448b-89bd-666eddbd4090",
"ParticipantId": "e9b36a6d-12aa-4c21-9745-1881648ecfc8",
"ParticipantRole": "CUSTOMER",
"Type": "MESSAGE"

"AbsoluteTime": "2022-10-27T03:32:59.441Z",
"Content": "Alright, perfect. And could you also just confirm the shipping address for me, [PII],
"ContentType": "text/plain",
"DisplayName": "[PII]",
"Id": "f9cd41b6-3f68-4e83-a47d-666eddbd4090",
"ParticipantId": "f36a545d-67b2-4fd4-89fb-896136b609a7",
"ParticipantRole": "AGENT",
"Redaction": {
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      "BeginOffsetChar": 77,
      "EndOffsetChar": 82
    }
  ]
},
"Type": "MESSAGE"

"AbsoluteTime": "2022-10-27T03:33:05.455Z",
"Content": "[PII], and the zip code [PII].",
"ContentType": "text/plain",
"DisplayName": "[PII]",
"Id": "d334058f-e3de-4cf1-a361-32e4e61f839",
"ParticipantId": "e9b36a6d-12aa-4c21-9745-1881648ecfc8",
"ParticipantRole": "CUSTOMER",
"Redaction": {
  "CharacterOffsets": [
    {
      "BeginOffsetChar": 0,
      "EndOffsetChar": 5
    }
  ]
},
"Type": "MESSAGE"
"BeginOffsetChar": 27,
"EndOffsetChar": 32
],
"Type": "MESSAGE"
},
{
"AbsoluteTime": "2022-10-27T03:33:17.412Z",
"Content": "Ok. Last four for my debit card [PII]",
"ContentType": "text/plain",
"DisplayName": "[PII]",
"Id": "3ec6adb5-3f11-409c-af39-40cf7ba6f078",
"ParticipantId": "e9b36a6d-12aa-4c21-9745-1881648ecfc8",
"ParticipantRole": "CUSTOMER",
"Redaction": {
"CharacterOffsets": [
{
"BeginOffsetChar": 27,
"EndOffsetChar": 32
}
],
"Type": "MESSAGE"
},
{
"AbsoluteTime": "2022-10-27T03:33:33.852Z",
"Content": "It's just too bad. I thought this was going to be the best gift idea. How can you guys be sending out defective seeds? Isn't that your whole business?",
"ContentType": "text/plain",
"DisplayName": "[PII]",
"Id": "c71ad383-f876-4bb3-b254-783176a3d395",
"ParticipantId": "e9b36a6d-12aa-4c21-9745-1881648ecfc8",
"ParticipantRole": "CUSTOMER",
"Type": "MESSAGE"
},
{
"AbsoluteTime": "2022-10-27T03:33:38.961Z",
"Content": "I apologize for the experience you had Mr [PII], its very uncommon that our customer will have this issue. We will look into this and get this sorted out for you right away."
,
"ContentType": "text/plain",
"DisplayName": "[PII]",
"Id": "28d0a1ce-64d1-4d25-bbef-4ce9b76742",
"ParticipantId": "f36a545d-67b2-4fd4-89fb-89613b609a7",
"ParticipantRole": "AGENT",
"Redaction": {
"CharacterOffsets": [
{
"BeginOffsetChar": 41,
"EndOffsetChar": 46
}
],
"Type": "MESSAGE"}
Well, my wife's birthday already passed, so. There's not too much you can do. But I would still like to grow the herbs for her, if possible.

Totally understandable. Let me see what we can do for you. Please give me a couple of minutes as I check the system.

Thank you sir, one moment please.

Alright are you still there Mr [PII]?

We are not only refunding the cost of the grow-it-yourself indoor herb kit but we will also be sending you a replacement. Would you be okay with this?

We are not only refunding the cost of the grow-it-yourself indoor herb kit but we will also be sending you a replacement. Would you be okay with this?
"DisplayName": "[PII]",
"Id": "72cc8c8d-2199-422a-b363-01d6d3fd051",
"ParticipantId": "f36a545d-67b2-4fd4-89fb-896136b609a7",
"ParticipantRole": "AGENT",
"Type": "MESSAGE"
},

{"AbsoluteTime": "2022-10-27T03:34:17.029Z",
"Content": "Yeah! That would be great. I just want my wife to be able to have these herbs in her room. And I'm always happy to get my money back!",
"ContentType": "text/plain",
"DisplayName": "[PII]",
"Id": "e23a2331-f3fc-4d3c-8a51-1541451186c9",
"ParticipantId": "e9b36a6d-12aa-4c21-9745-1881648ecfc8",
"ParticipantRole": "CUSTOMER",
"Type": "MESSAGE"
},

{"AbsoluteTime": "2022-10-27T03:34:22.269Z",
"Content": "Awesome! We really want to keep our customers happy and satisfied, and again I want to apologize for your less than satisfactory experience with the last product you ordered from us.",
"ContentType": "text/plain",
"DisplayName": "[PII]",
"Id": "61bb2591-fe87-4e4e-bba0-a3619c4cef1f",
"ParticipantId": "f36a545d-67b2-4fd4-89fb-896136b609a7",
"ParticipantRole": "AGENT",
"Type": "MESSAGE"
},

{"AbsoluteTime": "2022-10-27T03:34:26.353Z",
"Content": "Okay! No problem. Sounds great. Thank you for all your help!",
"ContentType": "text/plain",
"DisplayName": "[PII]",
"Id": "5a27cc39-9b73-4ebe-9275-5e6723788a1b",
"ParticipantId": "e9b36a6d-12aa-4c21-9745-1881648ecfc8",
"ParticipantRole": "CUSTOMER",
"Type": "MESSAGE"
},

{"AbsoluteTime": "2022-10-27T03:34:31.431Z",
"Content": "Is there anything else I can help you out with Mr [PII]?",
"ContentType": "text/plain",
"DisplayName": "[PII]",
"Id": "1761f27e-0989-4b6d-a046-fc05d2c6bc9c",
"ParticipantId": "f36a545d-67b2-4fd4-89fb-896136b609a7",
"ParticipantRole": "AGENT",
"Redaction": {
  "CharacterOffsets": [
    {
      "BeginOffsetChar": 48,
      "EndOffsetChar": 53
    }
  ]
},
"Type": "MESSAGE"
},

{"AbsoluteTime": "2022-10-27T03:34:36.704Z",
"Content": "Nope!",
"ContentType": "text/plain",
"DisplayName": "[PII]",
"Id": "540368c7-ec19-4fc0-8c86-0a5ee62d31a0",
"ParticipantId": "e9b36a6d-12aa-4c21-9745-1881648ecfc8",
"ParticipantRole": "CUSTOMER",
"Type": "MESSAGE"
}
Troubleshoot issues in Contact Lens

Why don't I see color-coded bars on my Amazon Connect console?

If your Amazon Connect console doesn't include color-coded bars similar to those shown in the preceding image, check whether the conversation that you're trying to analyzed occurred before June 30, 2020.

This view of conversations works only if the Contact Lens is enabled, and then the conversation occurred after June 30, 2020. This is because the feature that displays analyzed conversations in this format was released on June 30, 2020, and it can only be applied to conversations that happen after that time.

Why don't I see or hear unredacted content?

If your organization is using the Contact Lens redaction feature, by default only redacted content appears in the Amazon Connect console.

You must have permissions to view unredacted content. For more information, see Security profile permissions for Contact Lens (p. 816).

Evaluate performance (Preview)

This feature is in preview release and subject to change.
Amazon Connect helps you to assess, track, and improve how agents interact with customers and resolve issues. For example, you can search for a contact, choose the appropriate evaluation form, review the contact audio, transcript, or both, and then evaluate how the agent interacted with the customer. You can then use that feedback to help the agent deliver improved customer experiences.

To evaluate performance

1. Log in to Amazon Connect with a user account that has permissions to perform evaluations (p. 934).

2. Access the contact that you want to evaluate. There are a few ways you can do this. For example, someone may have shared the contact URL with you, or assigned you a task that has the URL. Or, you may have the contact ID, which lets you search for the contact record by doing the following: on the navigation pane, choose Analytics and optimization, Contact search, and then search for the contact that you want to evaluate.

3. On the Contact details page, choose Evaluations or the < icon.

4. The evaluations pane lists any evaluations that are in progress or completed for the contact.
5. To start an evaluation, choose an evaluation from the dropdown menu, and then choose **Start evaluation**.

6. To navigate an especially long evaluation form, use the arrows next to each section to collapse or expand it.
7. Choose **Save** to save a form in progress. The status of the form becomes **Draft**. You can return to it any time to continue, or you can delete it and start over.
Create an evaluation form (Preview)

This feature is in preview release and subject to change.

In Amazon Connect, you can create many different evaluation forms (p. 1335). For example, you may need a different evaluation form for each business unit and type of interaction. Each form can contain multiple sections and questions, and you can weigh how they factor into the agent's total score.

This topic explains how to add sections and questions, assign weights for scoring, and then activate the evaluation form so that it is available to managers, for example, when they want to evaluate contacts.

Step 1: Assign a title to the form

In this step, you assign a title to the form. Evaluators will see this title in a dropdown menu.

1. Log in to Amazon Connect with a user account that has permissions to create evaluation forms (p. 934).
2. In Amazon Connect, choose Analytics and optimization, Evaluation forms.
3. On the Evaluation forms page, choose Create new form.
4. Assign a title for the form, for example, **Sales evaluation.** Choose **Ok.**

![Set form title](image)

5. At the top of the evaluation form page, there are two tabs:
   - **Sections and questions.** Add sections, questions, and answers to the form.
   - **Scoring.** Enable scoring on the form. You can also apply scoring to sections or questions.

![Evaluation forms](image)

6. Choose **Save** at any time while creating your form. This enables you to navigate away from the page and return to the form later.

7. Continue to the next step to add sections and questions.

**Step 2: Add sections and questions**

1. While on the **Sections and questions** tab, add a title to the section 1, for example, **Greeting.**
2. Choose **Add question** to add a question.

3. In the **Question title** box, enter the question that will appear on the evaluation form. For example, **Did the agent state their name and say they are here to assist?**

4. In the **Instructions to evaluators** box, add information to help the evaluators answer the question, such as a link to an internal wiki or other resource.

5. In the **Question type** box, choose one of the following options to appear on the form:
   - **Single selection**: The evaluator can choose from a list of options, such as **Yes**, **No**, or **Good**, **Fair**, **Poor**.
   - **Text field**: The evaluator can enter free form text.
• **Number**: The evaluator can enter a number from a range that you specify, such as 1-10.

6. Continue to the next step to add answers.

### Step 3: Add answers

1. On the **Answers** tab, add answer options that you want to display to evaluators, such as **Yes**, **No**.
2. To add more answers, choose **Add option**.

The following image shows example answers for a **Single selection** question.

The following image shows an answer range for a **Number** question.
3. When you’re finished adding answers, continue to the next step to enable scoring, and add ranges for scoring Number answers.

### Step 4: Assign scores and ranges to answers

1. Go to the top of the form. Choose the Scoring tab, and then choose Enable scoring.

   ![Enable scoring](image)

   This enables scoring for the entire form. It also enables you to add ranges for answers to Number question types.

2. Return to the Sections and questions tab. Now you have the option to assign scores to Single selection, and add ranges for Number question types.
3. When you create a **Number** type question, on the **Scoring** tab, choose **Add range** to enter a range of values. Indicate the worst to best score for the answer.

The following image shows an example of ranges and scoring for a **Number** question type.
1. If the agent interrupted the customer 0 times, they get a score of 10 (best).
2. If the agent interrupted the customer 1-4 times, they get a score of 5.
3. If the agent interrupted the customer 5-10 times, they get a score of 1 (worst).

4. After you assign scores to all the answers, choose Save.
5. When you're finished assigning scores, continue to the next step to automate the question of certain questions, or continue to preview the evaluation form (p. 928).

**Step 5: Enable automated evaluations**

Contact Lens lets you define agent performance criteria (for example, adherence to required scripts), and then use that criteria to automatically complete evaluation forms. You set up the criteria and logic for each question where you want to allow automated evaluations.

Following are examples of setting up automated evaluations, one for a Single section question and another for a Numeric question.

**Example automation for a Single selection question**

- If the agent mentioned X or Y in the script, score this question as Yes.

The following image shows that when Contact Lens detects the words or phrases in the **ScriptCompliance** category, the question will automatically be answered Yes.
Example automation for a Numeric question

- If the agent interaction duration was less than 30 seconds, score the question as a 10.

For information about setting up the criteria, see Automatically categorize contacts based on uttered keywords and phrases (p. 826).

- On the Automation tab, choose the metric that is used to automatically evaluate the question.
• You can use any metadata that is a number. For example, first response time, sentiment score, and non-talk time.

**Step 6: Preview the evaluation form**

The **Preview** button is active only after you have assigned scores to answers for all of the questions.

The following image shows the form preview. Use the arrows to collapse sections and make the form easier to preview.
Step 7: Assign weights for final score

When scoring is enabled for the evaluation form, you can assign weights to sections or questions. The weight raises or lowers the impact of a section or question on the final score of the evaluation.
Weight distribution mode

With Weight distribution mode, you choose whether to assign weight by section or question:

- **Weight by section**: You can evenly distribute the weight of each question in the section.
- **Weight by question**: You can lower or raise the weight of specific questions.

When you change a weight of a section or question, the other weights are automatically adjusted so the total is always 100 percent.

For example, in the following image, three of the questions were manually set to 10 percent. The weights that display in italics were adjusted automatically.
Step 8: Activate an evaluation form

Choose **Activate** to make the form available to evaluators. Evaluators will no longer be able to choose the previous version of the form from the dropdown list.

Previous versions of the form are linked to the completed evaluations based on them. This allows you to view the version of the form that the evaluation is based on.

View an evaluation form audit trail (Preview)

1. Select the evaluation form that you want to research.
2. At the bottom of the page, under Example Evaluation, use the dropdown menu to view previous versions, who accessed them, and when. The following image shows an example audit trail.

3. Optionally, choose one of the forms to open it.

What do Active, Draft, and Locked mean?

An form is in one of the following states:

- **Active**. A published version of the form that is available to evaluators.
- **Draft**. An inactive, locked version of the form. A draft is unlocked only when you are working on it.
- **Locked**. An evaluation form is locked when you activate or publish it. Even after you deactivate the form, it stays locked, and becomes a historical version of the form. However, you can activate the historical version to save it as new version.

Use reference ID for questions (Preview)

This feature is in preview release and subject to change.

A reference ID is a token that appears in the JSON output file. It represents a specific question. When building reports, you can use it in place of the exact wording of a question.
For example, a question might be "Did agents stick to the script?" but the next day the question might be changed to "Was there good script adherence?" Regardless of how the question is worded, the reference ID always stays the same.

Example evaluation form output (Preview)

This feature is in preview release and subject to change.

This section shows the export output path for evaluations, and provides an example of evaluation form scores and metadata.

Example output locations

Following is the output file path for evaluation forms:

- contact_evaluations_S3_bucket/Evaluations/YYYY/MM/DD/hh:mm:ss.sTZD-evaluation_id.json

For example:

amazon-connect-s3/Evaluations/2022/04/14/05:04:20.869Z-11111111-2222-3333-4444-555555555555.json

Known issue: Two output files for the same evaluation

Contact Lens generates two output files for the same evaluation form.

- One file is written to the new default S3 path. You can configure the path in the AWS console.
- Another file, which will be deprecated, is written to a different, previous S3 path. You can disregard this file.

The previous S3 path looks like the following:

- s3_bucket/Evaluations/contact_contactId/evaluation_evaluationId/YYYY-MM-DDThh:mm:ss.sTZD.json

Example scores and metadata

```
{
  "schemaVersion": "3.1",
  "evaluationId": "fb90de35-4507-479a-8b57-970290fd5c2c",
  "metadata": {
    "contactId": "badd4896-75f7-43b3-bee6-c617ed3d04cb",
    "accountId": "874551140838",
    "instanceId": "8f7531140838",
    "agentId": "286becce-e722-4166-865f-84db0252218",
    "evaluationDefinitionTitle": "Compliance Evaluation Form",
    "evaluator": "jane",
    "evaluationDefinitionId": "01d89bf1-b4b2-4ace-869b-82714e2f6e3e",
    "evaluationDefinitionVersion": 2,
    "evaluationStartTimestamp": "2022-11-14T17:57:08.649Z",
    "evaluationSubmitTimestamp": "2022-11-14T17:59:29.052Z",
    "score": { "percentage": 100 }
  },
  "sections": [
```
Assign security profile permissions for evaluation forms (Preview)

This feature is in preview release and subject to change.
To allow users to create, define, and access evaluation forms, assign the following Analytics and optimization security profile permissions:

- **Evaluation forms - perform evaluations**: Allows a user, such as a Quality Assurance team member, to use an evaluation form to review a contact. For an example image, see Evaluate performance (Preview) (p. 916).
- **Evaluation forms - manage form definitions**: Allows admins and managers to create (p. 920) and manage (p. 931) evaluation forms.

The **Admin** security profile has these permissions by default.

For information about how add more permissions to an existing security profile, see Update security profiles (p. 797).

---

**Search for contacts**

### Important things to know

- You can search for contacts as far back as two years ago.
- Amazon Connect returns results for completed contacts. If an agent is still doing After Contact Work (ACW) on a contact, for example, that contact is not considered closed and won't be returned in the search results.
- The search results for a given query are limited to the first 10K results returned.
- When you filter by Contact ID, only results for that specific contact will be returned and other criteria are ignored. For example, say you search for Contact ID 12345 and agent login Jane Doe. Results for Contact ID 12345 will be returned regardless of whether Jane Doe was the agent.

### What's new in contact search

Thanks to your feedback, we've made the following changes to contact search.

**Search contacts by agent's first or last name**

The following image shows the Agent filter, and the option to choose agents by name.
Required permissions to "Agent" search filter

To use the Agent filter on the Contact search page, in your Amazon Connect security profile you must have Users - View permissions, as shown in the following image:

When you have Users - View permissions, on the Contact search page the Agent filter appears, as shown in the following image:

Without User - View permissions, the Agent filter is not visible, and searching contacts by Agent login is not supported, as shown in the following image:
Key search features

- Search by custom contact attributes (p. 940) (user-defined attributes).
- Search a time range up to 8 weeks.
- Multi-select for filters such as agent names, contact queues, contact flows, and more.

This feature is available only for searches with a date range that starts November 2, 2020, or later, when the feature was released. If you search for contacts that occurred before November 2, 2020, you will be prompted to ensure only one value is selected for each filter mentioned above.

- Filters for Contact Lens for Amazon Connect (p. 807). You can search for Contact categories (p. 858) by specifying the full category name. Choose to search using Match any or Match all. For example, you can search contacts with both "category A" and "category B," or with either one of the two categories.

In the Add filter drop-down box, the Contact Lens filters have CL next to them. You can apply these filters only if your organization has enabled Contact Lens.

If you want to remove the Contact Lens filters from a user's drop-down list, remove the following permissions from their security profile:

- **Search contacts by conversation**: This controls access to the sentiment scores, non-talk time, and category searches.
- **Search contacts by keywords**: This controls access to the keywords search.
- **Contact Lens - speech analytics**: On the Contact Trace Record page, this displays graphs that summarize speech analytics.
• Filters for Voice ID (p. 944). You can search for the Voice ID authentication and fraud detection status of contacts, if your organization has enabled Voice ID. To access this functionality, on your security profile, you need Analytics and Optimization, Voice ID - attributes and search - View permission.

Manage who can search for contacts and access detailed information

Before users can search for contacts in Amazon Connect, or access detailed contact information, they need to be assigned to the CallCenterManager security profile, or have the following Analytics and Optimization permissions:

• Access metrics - Access (Required): Grants access to metrics data.
• Contact search - View (Required): Grants access to the Contact search page, and the ability to search for contacts.
• Restrict contact access (Optional): Manage a user's access to results on the Contact search page based on their agent hierarchy group.

For example, agents who are assigned to AgentGroup-1 can only view contact records for contacts handled by agents in that hierarchy group, and any groups below them. (If they have permissions for Recorded conversations, they can also listen to call recordings and view transcripts.) Agents assigned
to AgentGroup-2 can only access contact records for contacts handled by their group, and any groups below them.

Managers and others who are in higher level groups can view contact records for contacts handled by all the groups below them, such as AgentGroup-1 and 2.

For this permission, All = View since View is the only action granted.

For more information about hierarchy groups, see Set up agent hierarchies (p. 233).

**Note**

When you change a user's hierarchy group, it may take a couple of minutes for their contact search results to reflect their new permissions.

- **Contact Lens - speech analytics**: On the Contact Record page for a contact, you can view graphs that summarize speech analytics: customer sentiment trend, sentiment, and non-talk time.

- **Recorded conversations (redacted)**: If your organization uses Contact Lens for Amazon Connect, you can assign this permission so agents access only those call recordings and transcripts in which sensitive data has been removed.

- **Recorded conversations (unredacted)**: If your organization isn't using Contact Lens, agents need recorded conversations (unredacted) to listen to call recordings or view transcripts. If desired, you can use Restrict contact access to ensure they only have access to detailed information for those contacts handled by their hierarchy group.

- **Voice ID - attributes and search**: If your organization uses Voice ID, users with this permission can search for and view Voice ID results in the Contact detail page.

- **Users - View permission**: You must have this permission to use the Agent filter on the Contact search page.

By default, the Amazon Connect Admin and CallCenterManager security profiles have these permissions.

For information about how add more permissions to an existing security profile, see Update security profiles (p. 797).

**How to search for a contact**

1. Log in to Amazon Connect with a user account that has permissions to access contact records (p. 938).
2. In Amazon Connect choose Analytics and optimization, Contact search.
3. Use the filters on the page to narrow your search. For date, you can search up to 8 weeks at a time.

**Tip**

To see if a conversation was recorded, you need to be assigned to a profile that has Manager monitor permissions. If a conversation was recorded, by default the search result will indicate so with an icon in the Recording column. You won't see this icon if you don't have permission to review the recordings.

**Additional fields: Add columns to your search results**

Use the options under Additional fields to add columns in your search results. These options are not used to filter your search.

For example, if you want to include columns for Agent Name and Routing profile in your search output, choose those columns here.
Tip
The **Is transferred out** option indicates whether the contact was transferred to an external number. For the date and time (in UTC time) when the transfer was connected, see `TransferCompletedTimestamp` in the `ContactTraceRecord` (p. 1068).

Download search results

You can download up to 3,000 search results at a time.

Search by custom contact attributes

You can create search filters based on custom contact attributes (also called **user-defined contact attributes** (p. 533)). For example, if you add `AgentLocation` and `InsurancePlanType` to your contact records as custom attributes, you can search for contacts with specific values in these attributes, such as calls handled by agents located in Seattle, or calls made by customers who purchased homeowners insurance.

Required permissions to configure searchable contact attributes

By default, a custom attribute isn't indexed until someone with appropriate permissions, such as an admin or manager, specifies it should be searchable. You grant permissions to select users so they can configure which custom contact attributes can be added as a search filter.

Assign the following permissions to their security profile:

- **Contact search**: Controls basic access to the Contact search page.
- **Contact attributes**: Allows users to view contact attributes. Also controls access to the search filters based on contact attributes.
- **Configure searchable contact attributes - All**: People who have this permission determine what custom data will be searchable (by people who have the **Contact attributes** permission). It allows them to access the following configuration page:

Configure searchable custom contact attributes

1. On the Contact search page, choose **Add filter, Custom contact attribute**. Only people with Configure searchable contact attributes permissions in their security profile see this option.
2. The first time you choose **Custom contact attribute**, the following box appears, indicating no attributes have been configured for this Amazon Connect instance. Choose **Specify searchable attribute keys**.

3. In the **Attribute key** box, type the name of your custom attribute, and then choose **Add key**.

   **Important**
   You must type the exact key name. It is case sensitive.

4. When finished, choose **Save**.

Your users will be able to search on these keys for any future contacts.

**Edit, add, or remove contact attributes**

To edit, add, or remove keys, choose **Attribute, Settings**. If you don't see the **Settings** option, you don't have the required permissions.
Search for custom contact attributes

Users who have the Contact attributes permission in their security profile can find contacts by using the contact attribute filters.

1. On the Contact search page, choose Add filter, Custom contact attribute.
2. In the Attribute key box, choose the dropdown to select the key to search.
3. In the Attribute values box, choose value you want to find. Note that the Settings icon doesn't appear in the following image because this user doesn't have Configure searchable contact attributes permissions in their security profile.

4. To create a query with multiple custom attributes, choose Add filter and Custom contact attribute again, and add a different attribute name and specify the value to search for.

The following image shows a query that includes two custom attributes: one for AgentLocation and another for InsurancePlanType.
Use real-time caller authentication with Voice ID

Amazon Connect Voice ID provides real-time caller authentication and fraud risk detection which make voice interactions in contact centers more secure and efficient. Voice ID uses machine learning to verify the identity of genuine customers by analyzing a caller's unique voice characteristics. This allows contact centers to use an additional security layer that doesn't rely on the caller answering multiple security questions, and makes it easy to enroll and verify customers without changing the natural flow of their conversation. Voice ID also offers real-time detection of fraudsters who frequently target your contact center, thereby reducing losses due to fraud.

With Amazon Connect Voice ID you can:

- Passively enroll customers for voice authentication without requiring them to repeat a particular word or phrase.
- Migrate customers into Voice ID by enrolling them in batch.
- Verify the enrolled customer's identity by analyzing their unique voice characteristics.
- Detect fraudsters from a watchlist that you have created.
- Detect voice spoofing.

How Voice ID works

Customer enrollment

1. When a customer calls for the first time, the agent confirms the identity of the caller by using existing security measures, such as asking for mother's maiden name or a one-time passcode (OTP) delivered by SMS. This ensures that only genuine customers are enrolled in Voice ID.

2. Voice ID starts listening to the customer's speech after the contact has encountered the Set Voice ID block, where Voice ID is enabled. Voice ID listens to the call until one of the following happens:
   - It gets enough audio to evaluate the speaker for authentication, fraud, and enroll the speaker (if requested). This is 30 seconds of customer speech, excluding silence.
   - The call ends.

3. Voice ID then creates the enrollment voiceprint. A voiceprint is a mathematical representation that implicitly captures unique aspects of an individual's voice such as speech rhythm, pitch, intonation, and loudness.

   The caller does not need to say or repeat any specific phrases to enroll in Voice ID.

Customer authentication

1. When the enrolled customer calls back in, they are verified through an interaction with an IVR, or during their interaction with an agent.

   By default Voice ID is configured to require 10 seconds of a caller's speech to authenticate, which can be done as part of a typical customer interaction in the IVR or with the agent (such as "what's your
How much speech is needed for enrollment and authentication

- Enrollment: 30 seconds of customer net speech (speech that excludes any silence) to create a voiceprint and enroll a customer.
- Verification: By default, 10 seconds of customer net speech to verify that the voice belongs to the claimed identity. The speech can be from interacting with an IVR or an agent. You can adjust the amount of required speech using the Authentication response time (p. 417) property in the Set Voice ID (p. 415) block.

For more information about the agent's experience, see Use Voice ID (p. 1309).

Batch enrollment

You can get a jump start on using biometrics by batch enrolling customers who have already consented for biometrics. Using stored audio recordings in your S3 bucket, and a JSON input file that provides the speaker identifier and a link to the audio recordings, you can invoke the Voice ID batch APIs.

For more information, see Batch enrollment using audio data from prior calls (p. 956).

Known fraudster detection

1. Create a watchlist of known fraudsters by using fraudster registration API on your stored audio recordings in your S3 bucket. For more information, see Create and edit a fraudster watchlist (p. 959).
2. When a fraudster from the watchlist calls in, Voice ID analyzes the call audio to return a risk score and outcome to indicate how closely the caller's voiceprint matches the fraudsters voiceprint that is created from audio recordings from your S3 bucket.

Voice spoofing detection

1. When a prospective fraudster tries to spoof caller audio using audio playback or synthesized speech, Voice ID returns a risk score and outcome to indicate the how likely it is that the voice is spoofed.
2. By enabling fraud detection in contact flows, you also enable checks for known fraudster risks and voice spoofing risks.

What data is stored?

Voice ID stores audio files of the speaker's voice, voiceprints, and speaker identifiers. This data is encrypted using a KMS key that you provide.
If you enable detection of fraudsters in a watchlist, Voice ID also stores the fraudster audio and voiceprints. For more information, see Data handled by Amazon Connect (p. 1172).

Expired speakers

For BIPA compliance, Voice ID automatically expires speakers that have not been accessed for enrollment, re-enrollment, or successful authentication for three years.

To view a speaker's last access, look at the lastAccessedAt attribute that is returned by the DescribeSpeaker and ListSpeakers APIs.

If you try to use the EvaluateSession API to authenticate an expired speaker, a SPEAKER_EXPIRED authentication decision is returned.

To use the expired speaker again, they must be re-enrolled.

Voice ID domains

When you enable Amazon Connect Voice ID, you create a Voice ID domain: a container for all Voice ID data, such as speaker identifiers (which serves as the customer identifier), the voiceprints, the customer audio that was used for creating the enrollment voiceprints, and the enrollment statuses (enrolled, opted out, etc.) associated with the speaker identifiers. For detection of fraudsters in a watchlist, the Voice ID domain stores the fraudster identifiers, voiceprints, and audio used for creating the voiceprints.

Following are guidelines for creating Voice ID domains:

- Each Amazon Connect instance can be associated with only one Voice ID domain.
- Each Voice ID domain can be associated with multiple Amazon Connect instances. This enables you to use the same stored customer data across multiple Amazon Connect instances.
- You can create multiple domains, but they don't share customer data between each other.
- We recommend creating a new Voice ID domain to associate with a Amazon Connect instance when:
  - You are enabling Voice ID for the first time on your account in an AWS Region.
  - You want to ensure that you isolate the Voice ID domains used for your test and production environments.
- We recommend using an existing Voice ID domain when:
  - You want to use the same set of enrolled callers and fraudsters across different Amazon Connect instances (that may belong to different customer service teams)
  - You want to use the same test environment across different test Amazon Connect instances.

  Note
  Only existing Voice ID domains in the same Region in your Amazon Connect account can be shared across Amazon Connect instances in that Region.

- You can change the association of your Amazon Connect instance from your current domain to a new domain at any time, by choosing a different domain.
- To delete a Voice ID domain, use the DeleteDomain Voice ID API. DeleteDomain soft deletes the domain. Amazon Connect waits 30 days before completely erasing the domain data. During this period, Voice ID is disabled for all the Amazon Connect instances it is associated with. To restore a domain during this window, submit an AWS Support ticket and provide the domain ID. You can find the domain ID on the Voice ID section of the Amazon Connect console, as shown in the following example:
Deleting a Voice ID domain deletes all stored customer data, such as audio recordings, voiceprints, and speaker identifiers, as well as any fraudster watchlists that you managed.

Enrollment status

Voice ID stores three different enrollment status for a speaker: ENROLLED, OPTED_OUT and EXPIRED. You can recall these speaker status using Amazon Connect Voice ID APIs and using contact flow blocks to take appropriate action.

- **ENROLLED**: When you enroll a new caller is enrolled into Voice ID, Voice ID creates a new voiceprint and set the speaker status as ENROLLED. Even if you re-enroll the same caller into Voice ID, the status stays as ENROLLED.

- **OPTED_OUT**: If a caller does not provide consent to enroll into biometrics, you can opt out the caller (in the Contact Control Panel) or using APIs. Voice ID creates a new entry for this caller and set the speaker's status OPTED_OUT. Voice ID does not generate any voiceprint or store any audio recording for the speaker. Future enrollment requests for this speaker is rejected unless their entry is deleted.

- **EXPIRED**: If a caller's voiceprint has not been accessed or refreshed for 3 years, Voice ID changes the status to EXPIRED, and you are no longer able to perform authentications for this caller. You can re-enroll the caller again or delete the caller from Voice ID.

Speaker and fraudster identifiers

Voice ID uses speaker identifiers to refer to and retrieve the voiceprints in a Voice ID domain. We recommend that you use identifiers that do not contain an Personally Identifiable Information (PII) in the identifiers.

Voice ID creates two fields to refer to a caller:

- **CustomerSpeakerId**: A identifier provided by the customer. It can be between 1-256 characters and can only contain: a-z, A-Z, 0-9, - and _
- **GeneratedSpeakerId**: A unique 22-character alphanumeric string that Voice ID creates and returns at the time of enrollment of the caller.
Amazon Connect Voice ID speaker APIs accept either form of speaker identifiers, but only emit GeneratedSpeakerId in the Voice ID event streams and contact records. If you want to re-record the caller to redo the voiceprint, you can enroll the caller with the same CustomerSpeakerId.

Similarly, Voice ID creates unique fraudster identifiers called GeneratedFraudsterId for every fraudster that you add to a watchlist in the domain. Voice ID returns the fraudster identifier if a fraudster is detected in a call when performing fraud risk detection.

Enable Voice ID

Before you begin

Before you get started, complete the following tasks.

Tasks
- Grant the required permissions (p. 948)
- Decide how to name your Voice ID domain (p. 948)
- Create an AWS KMS key to encrypt data stored in the domain (p. 948)

Grant the required permissions

You must grant the required permissions to IAM users, groups, or roles. For more information, see AmazonConnectVoiceIDFullAccess (p. 1221).

Access to Voice ID APIs using the Contact Control Panel (CCP) is disabled by default.

Decide how to name your Voice ID domain

When you enable Voice ID, you are prompted to provide a friendly domain name that's meaningful to you such as your organization name, for example, Voice ID-ExampleCorp.

Create an AWS KMS key to encrypt data stored in the domain

When you enable Voice ID, you are prompted to create or provide an AWS KMS key. It encrypts the customer data stored by Voice ID such as audio files, voiceprints, and the speaker identifiers.

Step-by-step instructions for creating these KMS keys are provided in Step 2: Create a new Voice ID domain and encryption key (p. 949).

Data at rest—specifically, freeform fields that you provide plus audio files/voiceprints—are encrypted under the KMS key you choose. Your customer managed key is created, owned, and managed by you. You have full control over the KMS key (AWS KMS charges apply).

When making calls to Voice ID for anything other than CreateDomain or UpdateDomain, the user making the call requires kms:Decrypt permissions for the key associated with the domain. When making calls to CreateDomain or UpdateDomain, the user also requires kms:DescribeKey and kms:CreateGrant permissions for the key. When you create (or update) a Voice ID domain, it creates a grant on the KMS key so that it can be used by Voice ID asynchronous processes (such as speaker enrollment) and by the Amazon Connect service-linked role during your flows. This grant includes an encryption context specifying the domain with which the key is associated. For more on grants, see Using grants in the AWS Key Management Service Developer Guide.
If you create a domain and associate it with one key, store some data, and then change the KMS key to a different key, an asynchronous process will be triggered to re-encrypt the old data with the new KMS key. After this process completes, all of your domain's data will be encrypted under the new KMS key, and you may safely retire the old key. For more information, see UpdateDomain.

**Tip**
You can create KMS keys or provide an existing KMS key programmatically. For more information, see Amazon Connect Voice ID APIs.

### Step 1: Read the BIPA Consent Acknowledgement

Reading the Biometric Privacy Act (BIPA) Consent Acknowledgement is a requirement to enable Voice ID. You need to do this once per account, across all Regions. You cannot do this step by using APIs. For more information about BIPA, see this Wikipedia article: Biometric Information Privacy Act.

1. Open the Amazon Connect console at https://console.aws.amazon.com/connect/.
2. On the instances page, choose the instance alias. The instance alias is also your **instance name**, which appears in your Amazon Connect URL.

   ![Instance Table](image)

   - **Instance alias**: mytest67
   - **Access URL**: https://mytest67.my.connect.aws
   - **Channels**: Inbound, outbound telephony
   - **Create date**: 1/12/2022
   - **Status**: Active

3. In the navigation pane, choose **Voice ID**. Read the BIPA Consent Acknowledgement, and accept if you agree.

   ![Voice ID Console](image)

### Step 2: Create a new Voice ID domain and encryption key

You can perform this step using the Amazon Connect console or by using Amazon Connect and Voice ID APIs.
Amazon Connect console instructions

1. In the **Domain setup** section, choose **Create a new domain**.

   ![Create a new domain](#)

   **Enable Voice ID**

   Use Voice ID to provide real-time caller authentication, make voice interactions faster and more secure, and spot fraudulent calls in real time.

   **BIPA Consent Acknowledgement for Amazon Connect Voice ID**

   **Domain setup**

   **Choose domain method**

   - **Create a new domain**
     Use a new domain to enable Voice ID for your instance.
   - **Choose an existing domain**
     Use an existing domain to enable Voice ID for your instance.

   **Voice ID domain name**

   This is where your voice prints will be stored.

   MyVoiceDomainName

   Must be between 1 and 1024 characters. Valid characters are a-z, A-Z, 0-9, - (hyphen), _ (underscore), and . (period). No spaces.

   ![Enable Voice ID](#)

   By enabling Voice ID, you are granting us permission to store voice prints in your Voice ID domain. Learn more

2. In the **Domain name** box, enter a friendly name that's meaningful to you, such as your organization name, for example, **VoiceID-ExampleCorp**.

3. Under **Encryption**, create or enter your own AWS KMS key for encrypting your Voice ID domain. Following are the steps to create your KMS key:

   1. Choose **Create KMS key**.

   ![Create KMS key](#)

   **Encryption**

   **KMS key for Voice ID**

   Create a KMS key to encrypt customer audio and voice. This key is specific to Voice ID and is paired with the domain.

   ![Create a new KMS key](#)

   **Choose an AWS KMS key**

   Format: s3://bucket/prefix. Source files are bundled with colon. Valid extensions are .tar and .gz.

   ![Create KMS key](#)

   ![Create KMS key](#)

   2. A new tab in your browser opens for the Key Management Service (KMS) console. On the **Configure key** page, choose **Symmetric**, and then choose **Next**.
3. On the **Add labels** page, add a name and description for the KMS key, and then choose **Next**.
4. On the **Define key administrative permissions** page, choose **Next**.
5. On the **Define key usage permissions** page, choose **Next**.
6. On the **Review and edit key policy** page, choose **Finish**.
7. Return to the tab in your browser for the Amazon Connect console, **Voice ID** page. Click or tap in the **AWS KMS key** for the key you created to appear in a dropdown list. Choose the key you created.
4. Choose **Enable Voice ID**.

API instructions

1. Call the **CreateDomain** API to create a new Voice ID domain.
2. Call the **CreateIntegrationAssociation** API to associate the Voice ID domain with the Amazon Connect instance.
   - Pass the ARN of the Voice ID domain just created into the **IntegrationArn** parameter. For **IntegrationType** use **VOICE_ID**.

You've enabled Voice ID for your instance. Next, in Step 3 you configure how you want Voice ID to work in your flow.

**Note**
When you enable Voice ID for an Amazon Connect instance (by using either the Amazon Connect console or the **CreateIntegrationAssociation** API), Amazon Connect creates a managed Amazon EventBridge rule in your account. This rule is used to ingest Voice ID events for creating contact records related to Voice ID. Additionally, Amazon Connect adds **Voice ID permissions** (p. 1228) to the service-linked role for Amazon Connect.

**Step 3: Configure Voice ID in your contact flow**

In this step you add the required blocks to your flow and configure how you want Voice ID to work.

- **Play prompt (p. 396)**: Add this block before the **Set Voice ID (p. 415)** block to stream audio properly. You can edit it to include a simple message such as "Welcome."
- **Set Voice ID (p. 415)**: After the **Play prompt (p. 396)** block, add the **Set Voice ID (p. 415)** block. It should be at the start of a call. You use this block to start streaming audio to Amazon Connect Voice ID to verify the caller's identity, as soon as the call is connected to a flow. In this block you configure the authentication threshold, response time, and fraud threshold.
- **Set contact attributes (p. 403)**: Use to pass the **CustomerId** attribute to Voice ID. The **CustomerId** may be a customer number from your CRM, for example. You can create a Lambda function to
pull the unique customer ID of the caller from your CRM system. Voice ID uses this attribute as the `CustomerSpeakerId` for the caller.

**Note**

CustomerId can be an alphanumeric value. It supports only _ and - (underscore and hyphen) special characters. It does not need to be UUID. For more information, see `CustomerSpeakerId` in the `Speaker` data type.

- **Check Voice ID (p. 357)**: Use to check the response from Voice ID for enrollment status, voice authentication, and fraud detection, and then branch based on one of the returned statuses.

**Example Voice ID flow**

**Caller not enrolled**

1. When a customer calls for the first time, their `CustomerId` is passed to Voice ID using the `Set contact attributes` (p. 403) block.
2. Voice ID looks for `CustomerId` in its database. Since it's not there, it sends a **Not enrolled** result message. The `Check Voice ID` (p. 357) block branches based on this result, and you can decide what the next step should be. For example, you might want agents to enroll the customer in voice authentication.
3. Voice ID starts listening to the customer's speech after the contact has encountered the `Set Voice ID` (p. 415) block, where Voice ID is enabled. It listens until it accumulates 30 seconds of net speech or the call ends, whichever happens first.

**Caller enrolled**

1. The next time the customer calls, Voice ID finds their `CustomerId` in the database.
2. Voice ID starts listening to the audio to create a voiceprint. The voiceprint that is created this time is used for authentication purposes so Voice ID can compare if the caller had been enrolled previously.
3. It compares the caller's current voiceprint with the stored voiceprint associated with the claimed identity. It returns a result based on the **Authentication threshold** property you configured in the `Set Voice ID` (p. 415) block.
4. After it evaluates the speech, it returns the message **Authenticated** if the voiceprints are similar. Or it returns one of the other statuses.
5. The contact is then routed down the appropriate branch by the `Check Voice ID` (p. 357) block.

**Security profile permissions for Voice ID**

- To enable users to search for contacts by their Voice ID status, assign the following **Analytics and Optimization** permission to their security profile:
  - **Voice ID - attributes and search**: Enables users to search for and view Voice ID results on the **Contact detail** page.
- To grant agents access to Voice ID in the Contact Control Panel, assign the following permission in the **Contact Control Panel** group:
  - **Voice ID - Access**: Enables controls in the Contact Control Panel so agents can:
    - View authentication outcomes.
    - Opt-out or re-authenticate a caller.
    - Update `SpeakerID`.
    - View fraud detection results, rerun fraud analysis (fraud detection decision, fraud type and score).
The following image shows an example of these controls on the CCP:

![Image of Amazon Connect interface with Voice ID and Fraud Risk controls]

For information about how add more permissions to an existing security profile, see Update security profiles (p. 797).

By default, the Admin security profile already has permissions to perform all Voice ID activities.

## Search and review Voice ID results

Use the Contact search (p. 935) page to search for and review the results of enrollment status, voice authentication, and detection of fraudsters in a watchlist. With the required security profile permissions (p. 938) (Analytics and Optimization - Voice ID - attributes and search - View), you can search for Voice ID results using the following filters:

- **Speaker actions**: Use this filter to search for contacts where the caller was enrolled into Voice ID or chose to opt-out of Voice ID altogether.
- **Authentication result**: Use this filter to search for contacts where Voice ID authentication returned the following results:
  - Authenticated
  - Not authenticated
  - Opted out
  - Inconclusive
  - Not enrolled

For example, if you want to search for all contacts where the authentication status was returned as Not authenticated or Opted out, select both these options and choose Apply.

- **Fraud detection result**: Use this filter to search for contacts where Voice ID fraud analysis returned the following results:
  - High risk for fraud
  - Low risk for fraud
  - Inconclusive
- **Fraud detection reason**: Use this filter to search for contacts where specific fraud risk mechanisms were detected:
  - Known fraudster: the caller's voice matches a fraudster from the fraudster watchlist you have created.
  - Voice spoofing: the caller is modifying their voice or is using speech synthesis to spoof the agent.
Voice ID results in a Contact Record

After you search for a contact, you can choose an ID to view their contact record. The following image shows an example of the fields in the Voice ID section of the contact record:

<table>
<thead>
<tr>
<th>Voice ID</th>
<th>Enrollment</th>
<th>Opt-out</th>
<th>Authentication</th>
<th>Speaker ID</th>
<th>Threshold</th>
<th>Minimum speech (secs)</th>
<th>Score</th>
<th>Result</th>
<th>Fraud detection</th>
<th>Threshold</th>
<th>Result</th>
<th>Reason(s)</th>
<th>Known fraudster risk score</th>
<th>Fraudster ID</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>No</td>
<td>No</td>
<td>Enabled</td>
<td></td>
<td>90</td>
<td>10 secs</td>
<td>95</td>
<td>Authenticated</td>
<td>Enabled</td>
<td>20</td>
<td>Low risk</td>
<td>-</td>
<td>5</td>
<td>-</td>
</tr>
</tbody>
</table>

Use the Voice ID APIs

To manage Voice ID programmatically, see Amazon Connect Voice ID APIs.

This section explains how to perform common scenarios using the Voice ID APIs.

Contents

- Voice ID domain operations (p. 955)
- Voice ID and Amazon Connect Integration Association APIs (p. 955)
- Voice ID speaker and fraudster management APIs (p. 956)
- Batch enrollment using audio data from prior calls (p. 956)
- Input and output file schema for Speaker Enrollment Job (p. 957)
- Create and edit a fraudster watchlist (p. 959)
- Input and output file schema for Fraudster Registration Job (p. 960)
- Amazon Connect Streams Voice ID APIs (p. 961)
Voice ID domain operations

Amazon Connect Voice ID provides APIs for you manage Voice ID domains. You can find equivalents for Create, Update, Describe and List in the AWS Console.

1. **CreateDomain**: To create a new Voice ID domain, you can use the `CreateDomain` Voice ID API. You can only invoke this for your account after you have acknowledged the BIPA Consent in the AWS console. You must also specify the KMS key for the Voice ID domain at the time of creation.

   Creating a domain doesn't associate it with an Amazon Connect instance. You must call the Amazon Connect association APIs to do so.

2. **UpdateDomain**: To update the name and encryption configuration for a domain, you can use the `UpdateDomain` Voice ID API. This API clobbers existing attributes, and you must provide both these fields.

   When you change the KMS key associated with the Voice ID domain, following the `UpdateDomain` call your domain's existing data will be asynchronously re-encrypted under the new KMS key. You can check status of this process from your domain's `ServerSideEncryptionUpdateDetails` attribute via `DescribeDomain` API. While this update process is in progress, you must retain your old KMS key in an accessible state, otherwise this process may fail. After this process completes, the old KMS key may be safely retired.

3. **DescribeDomain**: Use this API to return the name, description and encryption configuration of an existing domain identified by its `DomainID`.

4. **ListDomains**: Use this API to list all your Voice ID domains owned by your account in the Region.

5. **DeleteDomain**: To delete a Voice ID domain, you must invoke the `DeleteDomain` Voice ID API and provide the domain ID. If this domain was associated with an Amazon Connect instance, Voice ID API calls and Voice ID flow blocks will return runtime error. Deleting a Voice ID domain deletes all stored customer data such as audio recordings, voiceprints and speaker identifiers, as well as fraudster lists that you managed.

Voice ID and Amazon Connect Integration Association APIs

You can use the following APIs to manage associations with Amazon Connect instances. You can perform these operations on the AWS Console as well.

1. **CreateIntegrationAssociation**: To enable Voice ID on an Amazon Connect instance, you will need to associate a Voice ID domain with a Amazon Connect instance using a `CreateIntegrationAssociation` request. You can only associate one Voice ID domain to an Amazon Connect instance. If the instance is already associated with a domain, the API returns the following error:

   DuplicateResourceException (409) - Request is trying to created a duplicate resource.

   **Note**

   When you enable Voice ID for an Amazon Connect instance (by using either the Amazon Connect console or the `CreateIntegrationAssociation` API), Amazon Connect creates a managed Amazon EventBridge rule in your account. This rule is used to ingest Voice ID events for creating contact records related to Voice ID. Additionally, Amazon Connect adds Voice ID permissions (p. 1228) to the service-linked role for Amazon Connect.

2. **DeleteIntegrationAssociation**: To delete an existing association between an Amazon Connect instance and a Voice ID domain, you will need to call the `DeleteIntegrationAssociation` APIs along with the Amazon Connect InstanceID and the `IntegrationAssociationID` returned by `CreateIntegrationAssociation`. This is a required step if you want to associate a different
Voice ID domain to this Amazon Connect instance. We do not recommend deleting associations in a production setup as it can cause unpredictable behavior for Voice ID in your Amazon Connect instance.

3. **ListIntegrationAssociations**: To list all the associations between Amazon Connect instance and Voice ID domains for your account in this Region, you can invoke ListIntegrationAssociations API.

### Voice ID speaker and fraudster management APIs

Amazon Connect Voice ID includes APIs to manage speakers enrolled into a Voice ID domain and fraudsters registered in the domain. All speaker APIs except ListSpeakers accept either the CustomerSpeakerId or GeneratedSpeakerId.

1. **DescribeSpeaker**: Use this API to describe a speaker’s status in a domain (ENROLLED, OPTED_OUT, EXPIRED) (p. 947), and to map a GeneratedSpeakerId to a CustomerSpeakerId, and vice versa.

2. **OptOutSpeaker**: To opt out a caller from a Voice ID domain, you can use this API. This API doesn't require the speaker to be present in Voice ID. A non-existing speaker can be opted-out using this API and Voice ID persists the opted out status and rejects future enrollment requests for this speaker. Opting out also removes voiceprints and any stored audio recordings for this caller.

3. **DeleteSpeaker**: To completely remove all records for a caller/speaker from a Voice ID domain, you can use this API. All voiceprints and enrollment status is deleted immediately, and associated audio recordings are removed within 24 hours.

4. **ListSpeakers**: To list all the speakers whose entries are present in a Voice ID domain, you can use this API, which returns both the CustomerSpeakerId and GeneratedSpeakerId for a speaker. It returns a paginated output with the page size dictated in the API request.

5. **DescribeFraudster**: You can use this API to describe a fraudster's status in the Voice ID domain.

6. **DeleteFraudster**: To delete a fraudster from a Voice ID domain, you can use this API. It deletes all voiceprints and any stored audio recordings.

### Batch enrollment using audio data from prior calls

You can get a jump start on using biometrics by batch enrolling customers who have already consented for biometrics. Using stored audio recordings in your S3 bucket, and a JSON input file that provides the speaker identifier and a link to the audio recordings, you can invoke the Voice ID batch APIs.

To enroll customers programmatically, pass the following data to the API:

1. The domain ID to specify the domain to associate recordings to.
2. The location for the output file.
3. An input file containing a list of speakers. See [Input and output file schema for Speaker Enrollment Job](p. 957).

   For each speaker the file must include:
   - A link to a call audio recording in a .wav file with 8KHz sample rate and PCM-16 encoding.
   - The corresponding CustomerSpeakerId for the customer.
   - A channel for the caller in the audio recording. If the audio has multiple channels, you can select only one.

4. A KMS key to use when writing the output.
5. A role that Voice ID can assume. It must have access to the S3 bucket where the audio files are stored. This role must have access to any KMS key used to encrypt the files. It must also be able to write to the specified output location and use the KMS key requested for writing the output. Specifically, it must have the following permissions:
• `s3:GetObject` on the input bucket.
• `s3:PutObject` on the output bucket.
• `kms:Decrypt` on the KMS key used for input bucket's default encryption.
• `kms:Decrypt` and `kms:GenerateDataKey` on the KMS key provided in the input which will be used for writing output file to the output bucket.

You must have `iam:PassRole` permissions when making the call and providing the `dataAccessRole`. To enable confused deputy protection for the `dataAccessRole`, see Amazon Connect Voice ID cross-service confused deputy prevention (p. 1244).

6. Optionally, a fraud check skip flag in case you want to skip checks for fraud and voice spoofing on the enrollment audio.
7. Optionally, the fraud threshold in case you want to raise or lower the risk.
8. Optionally, a flag to re-enroll enrolled customers. This is useful if you want to refresh the audio recording, since the default is to ignore previously enrolled customers.

The batch enrollment returns the `CustomerSpeakerId`, `GeneratedSpeakerId`, and associated status for each entry. It stores this data in a JSON file at the output path you specify in the API.

Note
You are charged for enrolling speakers. For more information, see Amazon Connect Voice ID Pricing.

**Input and output file schema for Speaker Enrollment Job**

**Input file schema**

Following is the schema of the input manifest file for the Speaker Enrollment Job:

```json
{
    "Version": "string",
    "SpeakerEnrollmentRequests": [
        {
            "RequestId": "string",
            "SpeakerId": "string",
            "AudioSpecifications": [
                {
                    "S3Uri": "string",
                    "ChannelId": number
                }
            ]
        }
    ]
}
```

**Note**
All the fields in the schema are **required**.

Following is a description of each attribute of the input schema.

- **Version**: The version of the input schema document. Currently, this should be 1.0.
- **SpeakerEnrollmentRequests**: List of speaker enrollment requests to be fulfilled as part of the job.
- **RequestId**: An identifier for this speaker enrollment request. It must be unique within the input file. It is used for mapping and identifying entries in the output file.
• **SpeakerId**: The client-provided identifier of the speaker who needs to be enrolled. You must pass the **CustomerSpeakerId** in this field. The **GeneratedSpeakerId** is not currently supported.

• **AudioSpecifications**: The list of audio files that Voice ID can use for enrolling this speaker. Voice ID uses these audio files together to gather required amount of speech for enrollment. Currently, the maximum number of audio files allowed for an enrollment request is **10**. Each file can be a .wav file up to 20MB, containing audio with 8KHz sample rate and PCM-16 encoding.

• **S3URI**: The Amazon S3 location of the audio file in .wav format that needs to be used for enrolling the speaker.

• **ChannelId**: The audio channel to be used for enrolling the speaker in a multi-channel audio file. Voice ID supports audio files with up to two channels, so this value is restricted to either **0** or **1**.

### Output file schema

Following is the schema of the output file generated for the Speaker Enrollment Job:

```json
{
  "Version": "string",
  "Errors": [
    {
      "RequestId": "string",
      "ErrorCode": number,
      "ErrorMessage": "string"
    }
  ],
  "SuccessfulEnrollments": [
    {
      "RequestId": "string",
      "GeneratedSpeakerId": "string",
      "CustomerSpeakerId": "string",
      "EnrollmentStatus": "DUPLICATE_SKIPPED" | "NEW_ENROLLMENT" | "ENROLLMENT_OVERWRITE"
    }
  ]
}
```

Following is a description of each attribute of the output schema.

• **Version**: The version of the output schema document. Currently, this should be **1.0**.

• **Errors**: The list of errors for the speaker enrollment requests that failed at some point during enrollment.

• **RequestId**: The request identifier associated with this request. This is the same as the **RequestId** specified in the input file for this request.

• **ErrorCode**: The HTTP error code representing the type of error. Some example error scenarios are described below.

  **Note**
  This is not an exhaustive list.

• **400** (Bad Request Exception):
  • The input JSON file is malformed and cannot be parsed.
  • The provided audio files do not have enough speech for enrollment.
  • Fraud verification checks failed for the given speaker.

• **402** (ServiceQuotaLimitExceeded Exception):
  • Speaker limit exceeded.

• **409** (Conflict Exception):
  • Conflicting action: You cannot request an enrollment for an opted out speaker.
• 500 (Internal Failure):
  • Internal Server Error (Unexpected error on the Service-side).
• ErrorMessage: A message describing the cause of the enrollment failure.
• SuccessfulEnrollments: The list of enrollment requests that succeeded.
  • RequestId: The request identifier associated with this request. This is the same as the RequestId specified in the input file for this request.
  • CustomerSpeakerId: The client-provided identifier for the speaker who was enrolled.
  • GeneratedSpeakerId: The service-generated identifier for the speaker who was enrolled.
• EnrollmentStatus: The status of successful speaker enrollment
  • DUPLICATE_SKIPPED: The speaker is already enrolled, and the enrollment was skipped.
  • NEW_ENROLLMENT: The speaker was newly enrolled into the system.
  • ENROLLMENT_OVERWRITE: The speaker is already enrolled, but was re-enrolled/overwritten using the new audio.

Create and edit a fraudster watchlist

To create and edit a fraudster watchlist, invoke the StartFraudsterRegistrationJob API for batch registration of fraudsters.

To add speakers the fraudster watchlist programmatically, pass the following data to the API:

1. The domain ID to specify the domain to associate recordings to.
2. An input file containing a list of fraudsters. See Input and output file schema for Fraudster Registration Job (p. 960).
3. The location for output file.
4. A KMS key to use when writing the output.
5. A role that Voice ID can assume. It must have access to the S3 bucket where the audio files are stored. This role must have access to any KMS key used to encrypt the files. It must also be able to write to the specified output location and use the KMS key requested for writing the output. Specifically, it must have the following permissions:
   • s3:GetObject on the input bucket.
   • s3:PutObject on the output bucket.
   • kms:Decrypt on the KMS key used for input bucket's default encryption.
   • kms:Decrypt and kms:GenerateDataKey on the KMS key provided in the input which will be used for writing output file to the output bucket.

You must have iam:PassRole permissions when making the call and providing the dataAccessRole. To enable confused deputy protection for the dataAccessRole, see Amazon Connect Voice ID cross-service confused deputy prevention (p. 1244).

6. The threshold for establishing the duplicate status of fraudsters.
7. A flag to ignore fraudster duplicates.

Voice ID updates the fraudster list with successful additions, and return a GeneratedFraudsterId associated with entry back to the same S3 location. If duplicates are identified, Voice ID returns a "duplicate" status for the entry and provides the closest matching GeneratedFraudsterId.

Voice ID is not able to perform detection of fraudsters in a watchlist before the fraudster list is created.

For quotas for the fraudster list, see Amazon Connect service quotas (p. 1325).
Note
You are charged for adding to the fraudster list. For more information, see Amazon Connect Voice ID Pricing.

Input and output file schema for Fraudster Registration Job

Input file schema

Following is the schema of the input manifest file for Fraudster Registration Jobs:

```json
{
  "Version": "string",
  "FraudsterRegistrationRequests": [
    {
      "RequestId": "string",
      "AudioSpecifications": [
        {
          "S3Uri": "string",
          "ChannelId": number
        }
      ]
    }
  ]
}
```

Note
All the fields in the schema are required.

Following is a description of each attribute of the input schema.

- **Version**: The version of the schema document. Currently, this should be 1.0.
- **FraudsterRegistrationRequests**: List of fraudster registration requests to be fulfilled as part of the job.
- **RequestId**: An identifier for this fraudster registration request. It must be unique within the input file. It is used for mapping and identifying entries in the output file.
- **AudioSpecifications**: The list of audio files that Voice ID can use for registering this fraudster. Voice ID uses these audio files together to gather required amount of speech for registration. Currently, the maximum number of audio files allowed for a registration request is 10. Each file can be a .wav file up to 20MB, containing audio with 8KHz sample rate and PCM-16 encoding.
- **S3URI**: The Amazon S3 location of the audio file in .wav format that needs to be used for registering the fraudster.
- **ChannelId**: The audio channel to be used for registering the fraudster in a multi-channel audio file. Voice ID supports audio files with up to two channels, so this value is restricted to either 0 or 1.

Output file schema

Following is the schema of the output manifest file for Fraudster Registration Jobs:

```json
{
  "Version": "string",
  "Errors": [
    {
    }
  ]
}
```
Following is a description of each attribute of the output schema.

- **Version**: The version of the output schema document. Currently, this should be 1.0.
- **Errors**: The list of errors for the fraudster registration requests that failed at some point during registration.
- **RequestId**: The request identifier associated with this request. This is the same as the RequestId specified in the input file for this request.
- **ErrorCode**: The HTTP error code representing the type of error. Some example error scenarios are described below.
  
  **Note**
  This is not an exhaustive list.
  - 400 (Bad Request Exception):
    - The input JSON file is malformed and cannot be parsed.
    - The provided audio files do not have enough speech for registration.
  - 402 (ServiceQuotaLimitExceeded Exception):
    - Fraudster limit exceeded.
  - 500 (Internal Failure):
    - Internal Server Error (Unexpected error on the Service-side).

- **ErrorMessage**: A message describing the cause of the fraudster registration failure.
- **SuccessfulRegistrations**: The list of registration requests that succeeded.
- **RequestId**: The request identifier associated with this request. This is the same as the RequestId specified in the input file for this request.
- **RegistrationStatus**: The status of successful fraudster registration.
  - **DUPLICATE_SKIPPED**: The fraudster was identified as a duplicate, and the registration was skipped.
  - **NEW_FRAUDSTER**: The Fraudster was newly enrolled into the system.
- **GeneratedFraudsterId**: The service-generated identifier for the fraudster who was registered.
In case the RegistrationStatus is DUPLICATE_SKIPPED, this is the identifier of the fraudster already in the domain that is the closest match to the given fraudster.
- **FraudsterSimilarityScore**: An optional field that is populated when the fraudster registration is skipped due to it being a duplicate. This represents the similarity of the given fraudster with the closest matching fraudster already existing in the domain.

### Amazon Connect Streams Voice ID APIs

Use the following Amazon Connect Streams APIs to integrate Voice ID into your existing agent web applications.
• enrollSpeakerInVoiceId: Enroll a customer to Voice ID after obtaining their consent to enroll.
• evaluateSpeakerWithVoiceId: Check the customer's Voice ID authentication status, and to detect fraudsters.
• optOutVoiceIdSpeaker: Opt out a customer from Voice ID.
• getVoiceIdSpeakerStatus: Describe the enrollment status of a customer.
• getVoiceIdSpeakerId: Get the SpeakerID for a customer.
• updateVoiceIdSpeakerId: Update the SpeakerID for a customer.

You can also use the Voice ID widget in the Contact Control Panel (CCP) if you don't want to build a custom agent interface. For more information about Voice ID in the CCP, see Use Voice ID (p. 1309).

Voice ID event schema

Voice ID generates events for every transaction: enrollment, authentication, or detection of fraudsters in a watchlist. Events are sent to the EventBridge default event bus.

You can create an analytics pipeline for Voice ID authentication outcomes and detection of fraudsters in a watchlist by using EventBridge to monitor Voice ID events. Using the schema available in this topic, you can configure EventBridge rules to listen and filter for Voice ID events that are relevant, and then process them through Amazon Kinesis Data Firehose to store in a data warehouse of your choice.

For example, you may want near real-time tracking of Voice ID analysis. To do that, you can pull all the Evaluate-Session events, and get the authenticationResult and fraudDetectionResult.

Events are emitted on a best effort basis.

Common fields in the event

• version - The version of the event data.
• id - A unique identifier of the event generated by EventBridge.
• detail-type - An identifier for the details of the event.
• source - The source of the event. This is always aws.voiceid.
• account - AWS account ID.
• timestamp - The date and time that the event was published in UTC.
• region - The AWS Region where the API call was made.
• resources - Resources used by the API call.
• detail - Details about the event:
  • detail.sourceId - A unique ID generated by Voice ID that you can use for de-duplication.
  • detail.action - Analogous to the API being invoked.
  • detail.status - Specifies the status of the action: success or failure.
  • detail.errorInfo - Is populated when the specified action errors out at Voice ID.

Following are the schemas for the events that are emitted.

Start Session Action

Emits events on stream start (after setup), stream end, and on failures.
Update Session Action

Emits events when the internal session update succeeds or fails.

{...commonfields
"detail-type": "VoiceId Update Session Action",
"detail": {
  "sourceId": String,
  "action": "UPDATE_SESSION",
  "status": String,
  "domainId": String,
  "session": {
    "sessionId": String,
    "sessionName": String,
    "authenticationConfiguration": {
      "acceptanceThreshold": Integer
    },
    "fraudDetectionConfiguration": {
      "riskThreshold": Integer
    },
    "streamingConfiguration": {
      "authenticationMinimumSpeechInSeconds": Integer
    },
    "enrollmentAudioProgress": {
      "audioAggregationStatus": String,
      "audioAggregationStartedAt": "Timestamp",
      "audioAggregationEndedAt": "Timestamp"
    },
    "authenticationAudioProgress": {
      "audioAggregationStartedAt": "Timestamp",
      "audioAggregationEndedAt": "Timestamp"
    },
    "fraudDetectionAudioProgress": {
      "audioAggregationStartedAt": "Timestamp",
      "audioAggregationEndedAt": "Timestamp"
    },
    "generatedSpeakerId": String
  },
  "errorInfo": {
    "errorMessage": String,
    "errorType": String,
    "errorCode": Integer
  }
}
Evaluate Session Action

Emits events when the session evaluation succeeds or fails. Reasons can be KNOWN_FRAUDSTER or VOICE_SPOOFING.

```json
{...
  "detail-type": "VoiceId Evaluate Session Action",
  "detail": {
    "sourceId": String,
    "action": "EVALUATE_SESSION",
    "status": String,
    "domainId": String,
    "session": {
      "sessionId": String,
      "sessionName": String,
      "generatedSpeakerId": String,
      "streamingStatus": String,
      "authenticationResult": {
        "authenticationResultId": String,
        "decision": String,
        "score": Integer,
        "audioAggregationStartedAt": "Timestamp",
        "audioAggregationEndedAt": "Timestamp",
        "configuration": {
          "acceptanceThreshold": Integer
        }
      },
      "fraudDetectionResult": {
        "fraudDetectionResultId": String,
        "decision": String,
        "reasons": [String],
        "audioAggregationStartedAt": "Timestamp",
        "audioAggregationEndedAt": "Timestamp",
        "configuration": {
          "riskThreshold": Integer,
          "riskDetails": {"knownFraudsterRisk": {
            "generatedFraudsterId": String,
            "riskScore": Integer},
            "voiceSpoofingRisk": {
              "riskScore": Integer
            }
          }
        }
      }
    },
    "errorInfo": {
      "errorMessage": String,
      "errorType": String,
      "errorCode": Integer
    }
  }
}
```
Speaker Action

Emits events on the success or failure to opt out a speaker, delete a speaker, or enroll a speaker.

```
{...commonfields
  "detail-type": "VoiceId Speaker Action",
  "detail": {
    "sourceId": String,
    "domainID": String,
    "action": String,
    "status": String,
    "generatedSpeakerId": String,
    "data": {
      "enrollmentSource": String,
      "enrollmentSourceId": String,
      "enrollmentStatus": String,
      "errorInfo": {
        "errorMessage": String,
        "errorType": String,
        "errorCode": Integer
      }
    }
  }
}
```

Fraudster Action

Emits events on the success or failure to delete a fraudster or registering a fraudster.

```
{...commonfields
  "detail-type": "VoiceId Fraudster Action",
  "detail": {
    "sourceId": String,
    "domainID": String,
    "action": String,
    "status": String,
    "generatedFraudsterId": String,
    "data": {
      "registrationSource": String,
      "registrationSourceId": String,
      "registrationStatus": String
    },
    "errorInfo": {
      "errorMessage": String,
      "errorType": String,
      "errorCode": Integer
    }
  }
}
```

EnrollBySession

Emits this event when an enrollment request is submitted. A Speaker event is emitted when the actual enrollment succeeds or fails.

```
{...commonfields
  "detail-type": "VoiceId Session Speaker Enrollment Action",
  "detail": {
    "sourceId": String,
    "domainId": String,
    "enrollmentSource": String,
    "enrollmentSourceId": String,
    "enrollmentStatus": String,
    "errorInfo": {
      "errorMessage": String,
      "errorType": String,
      "errorCode": Integer
    }
  }
}
```
StartSpeakerEnrollmentJob

Emits this event when a batch enrollment request is submitted, succeeds, or fails. A Speaker event is emitted for each of the individual speakers to indicate if corresponding enrollment succeeds or fails.

```json
{...commonfields
 "detail-type": "VoiceID Batch Speaker Enrollment Action",
 "detail": {
   "sourceId": String,
   "domainId": String,
   "action": "BATCH_ENROLLMENT_REQUEST",
   "status": String,
   "batchJobId": String,
   "data": {
     "dataAccessRoleArn": String,
     "enrollmentConfig": {
       "existingEnrollmentAction": String,
       "fraudDetectionConfig": {
         "fraudDetectionAction": String,
         "riskThreshold": Integer
       }
     },
     "inputDataConfig": {
       "s3Uri": String
     },
     "outputDataConfig": {
       "s3Uri": String,
       "kmsKeyId": String
     }
   },
   "errorInfo": {
     "errorMessage": String,
     "errorType": String,
     "errorCode": Integer
   }
 }
}
```

StartFraudsterRegistrationJob

Emits this event when a batch registration request is submitted, succeeds, or fails. A Fraudster event is emitted for each of the individual fraudsters to indicate if corresponding registration succeeds or fails.

```json
{...commonfields
 "detail-type": "VoiceId Batch Fraudster Registration Action",
 "detail": {
   "sourceId": String,
   "domainId": String,
   "action": "BATCH_REGISTRATION_REQUEST",
```
"status": String,
"batchJobId": String,
"data": {
    "dataAccessRoleArn": String,
    "registrationConfig": {
        "duplicateRegistrationAction": String,
        "fraudsterSimilarityThreshold": Integer
    }
},
"inputDataConfig": {
    "s3Uri": String
},
"outputDataConfig": {
    "s3Uri": String,
    "kmsKeyId": String
},
"errorInfo": {
    "errorMessage": String,
    "errorType": String,
    "errorCode": Integer
}
Deliver information to agents using Amazon Connect Wisdom

With Amazon Connect Wisdom, agents can search and find content across multiple repositories, such as frequently asked questions (FAQs), wikis, articles, and step-by-step instructions for handling different customer issues. They can type questions or phrases in a search box (such as, "how long after purchase can handbags be exchanged?") without having to guess which keywords will work.

If your organization uses real-time analytics from Contact Lens for Amazon Connect to automatically detect customer issues during calls, then Wisdom can proactively recommend information to help resolve the issue. For example, Contact Lens can detect phrases such as "product broke during shipping" and then display text snippets, FAQs, and instructions for exchanging damaged products.

Currently, Amazon Connect Wisdom can be used in compliance with GDPR and is pending additional certifications held by Amazon Connect.

The following image shows how an article may appear in the agent application when the agent is on a call.

Enable Amazon Connect Wisdom for your instance

There are two ways you can enable Wisdom for your instance:

1. The agent is on a call.
2. The Customer profile tab is available.
3. The agent can have multiple articles open at the same time.
4. The agent can search for articles.
• Use the new (p. 1361) Amazon Connect console. There are instructions on this page.

• Use the Amazon Connect Wisdom API. You can ingest content using the Amazon Connect Wisdom APIs. To learn more, see this blog post: Ingesting content to power real-time recommendations and search with Amazon Connect Wisdom.

The APIs support the ingestion of HTML and text; plain text files must be in UTF-8. For more information, see the Amazon Connect Wisdom API Reference.

Following is an overview of the steps to enable Wisdom:

1. Create a Wisdom Assistant (domain). An Assistant is made up of one knowledge base.
2. Create an encryption key to encrypt the excerpt that is provided in the recommendations to the agent.
3. Create a knowledge base using external data:
   • Add data integrations from Salesforce, ServiceNow, and ZenDesk using prebuilt connectors in the Amazon Connect console.
   • Encrypt the content importing from these applications using a KMS key.
   • Specify the sync frequency.

Before you begin

Following is an overview of key concepts and the information that you'll be prompted for during the setup process.

About the Wisdom domain

When you enable Amazon Connect Wisdom, you create a Wisdom domain: an Assistant that is made up of one knowledge base. Following are guidelines for creating Wisdom domains:

• You can create multiple domains, but they don't share external application integrations or customer data between each other.
• Each domain can be associated with one or more Amazon Connect instances, but each Amazon Connect instance can be associated with only one domain.
• All the external application integrations you create are at a domain level. All of the Amazon Connect instances associated with a domain inherit the domain’s integrations.
• You can change the association of your Amazon Connect instance from your current domain to a new domain at any time, by choosing a different domain.

How do you want to name your Wisdom domain?

When you enable Wisdom, you are prompted to provide a friendly domain name that's meaningful to you such as your organization name, for example, Wisdom-ExampleCorp.

Create AWS KMS keys to encrypt the domain and the connection

When you enable Wisdom, by default the domain and connection are encrypted with an AWS owned key. However, you have the option to create or provide two AWS KMS keys:

1. One for the Wisdom domain, used to encrypt the excerpt provided in the recommendations.
2. Another to encrypt the content imported from Salesforce, ServiceNow, and ZenDesk. Note that Wisdom search indices are always encrypted at rest using an AWS owned key.
Step-by-step instructions for creating these KMS keys are provided in Step 1: Add integration (p. 970).

Your customer managed key is created, owned, and managed by you. You have full control over the KMS key (AWS KMS charges apply).

If you choose to set up a KMS key where someone else is the administrator, the key must have a policy that allows `kms:CreateGrant` and `kms:DescribeKey` permissions to the IAM identity using the key to invoke Wisdom. For information about how to change a key policy, see Changing a key policy in the AWS Key Management Service Developer Guide.

**Step 1: Add integration**

Following are instructions for how to create a new domain and add an integration.

1. Open the Amazon Connect console at https://console.aws.amazon.com/connect/.
2. On the instances page, choose the instance alias. The instance alias is also your **instance name**, which appears in your Amazon Connect URL.
3. In the navigation pane, choose **Wisdom**, and then choose **Add domain**.
4. On the **Add domain** page, choose **Create a domain**.
5. In the **Domain name** box, enter a friendly name that's meaningful to you, such as your organization name, for example, **Wisdom-ExampleCorp**.
6. Under **Encryption**, create or enter your own AWS KMS key for encrypting your Wisdom domain. Following are the steps to create your KMS key:

1. On the **Add domain** page, choose **Create an AWS KMS key**.

2. A new tab in your browser opens for the Key Management Service (KMS) console. On the **Configure key** page, choose **Symmetric**, and then choose **Next**.

3. On the **Add labels** page, add a name and description for the KMS key, and then choose **Next**.
4. On the Define key administrative permissions page, choose Next.
5. On the Define key usage permissions page, choose Next.

In the following example, the name of the KMS key starts with **bcb6fdd**:

7. Return to the tab in your browser for the Amazon Connect console, Wisdom page. Click or tap in the AWS KMS key for the key you created to appear in a dropdown list. Choose the key you created.

7. Choose Add domain.


9. On the Add integration page, choose Create a new integration, and then select the source.
10. In the Integration name box, assign a friendly name to the integration, one that is meaningful to you.

   **Tip**
   If you are going to have multiple integrations from the same source, we recommend you develop a naming convention to make them easy to distinguish.

11. Under Connection with [Source], choose Create a new connection, and then enter a friendly name for the connection that is meaningful to you.

12. Enter the instance URL of the source you want to connect to, and then choose Log in to [Source].

13. Under Encryption, choose Create an AWS KMS key. This key encrypts the connection to the external application that stores content. Following are the steps to create your KMS key:

   1. On the Add domain page, choose Create an AWS KMS key.
2. A new tab in your browser opens for the Key Management Service (KMS) console. On the Configure key page, choose Symmetric, and then choose Next.

3. On the Add labels page, add a name and description for the KMS key, and then choose Next.

4. On the Define key administrative permissions page, choose Next.

5. On the Define key usage permissions page, choose Next.


In the following example, the name of the KMS key starts with bcb6fdd:

7. Return to the tab in your browser for the Amazon Connect console, Wisdom page. Click or tap in the AWS KMS key for the key you created to appear in a dropdown list. Choose the key you created.
14. Under **Ingestion start date**, choose when you want Wisdom to import records from your application, and how often.

1. Defaults to the earliest date possible.

15. Under **Sync frequency**, the default is hourly. You can use the dropdown to choose **Every 3 hours** or **Daily**. On-demand syncing is not available.

16. Choose **Next**.

**Note**
Currently Wisdom does not process hard deletes of objects that are completed in SaaS applications. To remove content from your knowledge base that’s also been removed from your SaaS application, you must archive objects in Salesforce and retire articles in ServiceNow. For Zendesk, Wisdom does not process hard deletes or archives of articles. You need to unpublish articles in Zendesk to remove them from your knowledge base.

**Step 2: Select object and fields**

In this step you choose the object and fields from the source that you want to make available to your agents in Wisdom.

1. In the **Available objects** dropdown menu, choose the object you want. Only knowledge objects appear in the menu.
2. Under **Select Fields for [object name]**, choose the fields you want to include. You'll notice that some fields, such as **AccountID** and **ID**, are already selected by default. These fields are required.

3. Choose **Next**.

**Step 3: Review and integrate**

1. Review all the integration details.
Step 4: Add a Wisdom block to your contact flow

By adding a Wisdom (p. 446) block to your flow, you associate a Wisdom domain to the current contact. This enables you to display information from a specific domain, based on criteria about the contact.

**Note**
Amazon Connect Wisdom, along with Contact Lens Real-Time analytics, is used to recommend content that is related to customer issues detected during the current contact. The Set recording and analytics behavior (p. 411) block with Contact Lens real-time enabled must also be set in this flow for Wisdom recommendations to work. It doesn’t matter where in the flow you add Set recording and analytics behavior (p. 411).

When was your knowledge base last updated?
To confirm the last date and time that your knowledge base was updated (meaning a change in the content available), use the GetKnowledgeBase API to reference lastContentModificationTime.

Security profile permissions for Wisdom

Assign the following **Agent Applications** permission to the agent's security profile:
### Access Wisdom in the agent application

If you're using the CCP that is provided with Amazon Connect, after you enable Wisdom, share the following URL with your agents so they can access it:

- **https://instance name.my.connect.aws/agent-app-v2/**

If you access your instance using the **awsapps.com** domain, use the following URL:

- **https://instance name.awsapps.com/connect/agent-app-v2/**

For help finding your instance name, see *Find your Amazon Connect instance name* (p. 131).

By using the new URL, your agents can view the CCP and Wisdom in the same browser window.

If CCP is embedded in your agent's application, see *Initialization for CCP, Customer Profiles, and Wisdom* in the *Amazon Connect Streams Documentation* for information about how to include Wisdom.

For more information about the agent's experience using Wisdom, see *Search for content using Amazon Connect Wisdom* (p. 1308).
Monitor metrics and run reports

In Amazon Connect, data about contacts are captured in contact records. This data can include the amount of time a contact spends in each state: customer on hold, customer in queue, agent interaction time.

The basis for most historical and real-time metrics in Amazon Connect is the data in the contact record. When you create metrics reports, the values displayed for most (not all) metrics in the report are calculated using the data in the contact records.

Contact records are available within your instance for 24 months from the time when the associated contact was initiated. You can also stream contact records to Amazon Kinesis to retain the data longer, and perform advanced analysis on it.

**Tip**
For detailed information about the activity of agents in your contact center, use Amazon Connect agent event streams (p. 1045).

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- Real-time metrics reports (p. 995)
- Historical metrics reports (p. 1018)
- Login/Logout reports (p. 1041)
- Amazon Connect agent event streams (p. 1045)
- Amazon Connect contact events (p. 1059)
- Contact records data model (p. 1065)
- View a contact record in the UI (p. 1077)
- About agent status (p. 1078)
- About contact states (p. 1080)
- About queued callbacks in metrics (p. 1082)
- Save custom reports (p. 1088)
- Share custom reports (p. 1090)
- View a shared report (p. 1092)
- Publish reports (p. 1093)
- Manage saved reports (admin) (p. 1094)
- Monitoring your instance using CloudWatch (p. 1095)
- Logging Amazon Connect API calls with AWS CloudTrail (p. 1109)

What's new in metrics

Thanks to your feedback, we've made changes to Amazon Connect metrics. This topic gives you an overview of the improvements.

**November 2022**

The following updates were released in November 2022.

**Manage saved reports (admin)**

You can view and delete all saved reports in your instance, including reports that were not created by you or that are not currently published.
The following updates were released in September 2022.

**Queue Dashboard**

You can now visualize historical queue data via time series graphs to help identify patterns, trends and outliers specifically for Service Level, Contacts Queued, and Average Handle Time. To visualize your queue data, select View queue graphs from the queue dropdown. Once selected, you will be directed to the queue visualization dashboard where you can configure *Time range* (up to 24 hours) and *Channel*. You also have the ability to customize the service level thresholds.

**Navigate to Queue dashboard**

![Queue dashboard](image)

**Queue dashboard experience**

![Queue dashboard experience](image)
June 2022

The following updates were released in June 2022.

**15 minute scheduled reports**

You can now schedule historical metrics to refresh every 15 minutes. To select 15-minute schedules, select generate this report **Hourly** every .25 hours (this is the top most option in the second dropdown), for the previous .25 hours. The following image shows the values that you need to select.

![Image of recurrence options](image)

**Filter Real-Time Metrics Agent Table by Agent**

You can now filter the agent table on the Real-Time Metrics page by agent. This filter functions the same as the existing queues, routing profiles, and agent hierarchy filters.
New contact transferred related metrics

We are upgrading the existing Contacts transferred in (p. 1027) and Contacts transferred out (p. 1028) historical metrics to have consistent definitions. We are adding Contacts transferred in by agent (p. 1028) and Contacts transferred out by agent (p. 1028) for more granular contact transferred related metrics.

Changes to real-time metrics agent tables

We are rolling out a new service to maintain the high availability from metrics that you expect from Amazon Connect. Due to this change, the agent tables are sorted by agent status (p. 1078) instead of by agent login.

Additionally, the queues and routing profiles table are sorted by agents online instead of by queue or routing profile name.

Faster reload times for the Real-time metrics page

We are upgrading the performance of the Real-time metrics page so reload times are faster. The page will have the same functionality and user experience as the existing Real-time metrics page.
April 2021

The following updates were released in April 2021.

- Amazon Connect incorrectly reported that chat contacts that were created from disconnect flows were created from transfer flows.
- With these fixes, Amazon Connect correctly reflects in the contact records and agent event stream that these chat contacts were created from disconnect flows.

There is no impact to voice or task contacts.

Chat contacts created through disconnect flows no longer increment the following metrics:

- Contact flow time (p. 1024)
- Contacts incoming (p. 1027)
- Contacts handled incoming (p. 1026)
- Contacts transferred in (p. 1027)

In addition, note the following fixes for contact records and the agent event stream for chat contacts:

- Contact records: There was an issue in the Attributes section of a chat contact record where the initiation method is API for both disconnect and transfer contacts. With this fix, the initiation method correctly reflect Disconnect and Transfer, respectively.
- Agent event stream: Chat contacts created from disconnect flows now have Disconnect as the initiation method.

March 2021

The following updates were released in March 2021.

When customizing a historical metrics report, you have the option to select a 15 minutes interval, in addition to the current option of a 30 minutes interval.

The 15 minutes interval works the same as the 30 minutes interval. For example, you can query up to three days of data at a time, for the past 35 days.
The following updates were released in February 2021.

**New metric groupings and categories**

With the release of custom service level metrics (p. 987), we also made the following changes:

- On the Table settings pages, pre-set and custom service level metrics (p. 987) are in a new group called **Contact Service Levels**.
- Historical metrics on the Table settings page are grouped into categories.
- The order of metric columns on historical metrics reports changed to match the order of the metrics on the Table settings page.

Following is more information about these changes.

**Real-time metrics: New Contact Service Level category**

A new category of metrics appears on the Table settings page: **Contact Service Level**.

The following image shows this new category on the Table settings page, in an expandable group. Choose the arrow next to the group to view and select the metrics you want to add to your report.
Use the Contact Service Level category to choose pre-set service level metrics, and to create custom service level metrics.

The following image shows the user interface for creating custom service level metrics.
Historical metrics: New categories for metrics

To make it easier to find the historical metrics you want to add to a report, metrics on the Table settings page are grouped into the following categories:

- Agents
- Contacts Abandoned
- Contact Service Level: This group contains preset and custom service levels.
- Contacts Answered
- Performance

Choose Add Custom SL to add custom service levels to your historical metrics report.

The order of the metric columns on the historical metrics reports has changed

The order of the metric columns on the historical metrics reports matches the updated grouping scheme and order of the metrics on the Table settings page.

This change supports the addition of custom service level metrics (p. 987). It also allows us to make future improvements for where, for example, control of how a report looks resides on the Real-time metrics page and the Historical metrics page, not the Table settings page.

Note how metric columns now appear on reports:

- When you open the Real-time metrics page, custom service levels appear at the end of the Performance group.
- Metrics on existing Scheduled reports (the processed documents that arrive in your Amazon S3 buckets) are not re-ordered automatically. However, if you update an existing report, the metrics are re-ordered to match the order on the Table settings page.
- Service level metrics:
  - Real-time metrics reports: Service level metrics are always added to the end of the Performance group, in ascending order.
• Historical metrics reports: When you add custom service level metrics, they are added to the end of the report in the order they were created.

**Custom service level metrics**

You have the ability to add custom service level metrics. You can also choose from additional durations, such as minutes, hours, or days.

The maximum duration for a custom service level is 7 days. That's because in Amazon Connect you can't have a contact that goes longer than 7 days.

![Table Settings](image)

**Group by channel in a historical metrics report**

**To group by channel on historical metrics reports**

1. On the navigation menu, choose *Analytics and optimization*, *Historical metrics*, and then choose a report.
2. Choose *Settings*.
3. On the *Table Settings* page, choose the *Groupings* tab. Add *Channel*, and choose *Apply*.
4. The table shows a column for **Channel**, as shown in the following image.

---

**October 2020**

**New historical metrics for inbound and outbound contact time**

Released the following real-time metrics:

- Avg callback connecting time (p. 998)
- Avg incoming connecting time (p. 999)
- Avg outbound connecting time (p. 1000)

Released the following historical metrics:

- Agent API connecting time (p. 1019)
- Agent callback connecting time (p. 1019)
- Agent incoming connecting time (p. 1020)
• Agent outbound connecting time (p. 1021)
• Average agent API connecting time (p. 1022)
• Average agent callback connecting time (p. 1022)
• Average agent incoming connecting time (p. 1022)
• Average agent outbound connecting time (p. 1022)

One-click drill-downs for Routing profiles and Queues tables

In real-time metrics reports, for Routing profiles and Queues tables, you can open pre-filtered tables that display the associated queues, routing profiles, or agents. These one-click filters provide a way for you to drill into the performance data.

For more information, see Use one-click drill-downs for Routing profiles and Queues tables (p. 1005)

June 2020: Changes for omnichannel support

Group by channel

To group queues or routing profiles by channel on real-time metrics reports

1. On the navigation menu, choose Analytics and optimization, Real-time metrics, and then select either Queues or Routing profiles.

2. Choose Settings.

3. On the Table Settings page, choose the Groupings tab and then select Queues grouped by channels. Or, if you're setting up a Routing profiles report, choose Routing profiles grouped by channels.
4. Choose **Apply**.
5. The table shows a column for **Channel**.

**Group by queue in historical metrics reports**

In the historical metrics report, when you group or filter metrics by **Queue**, the results for the following metrics aren't accurate:

- Agent idle time (not supported in queue grouping as of June, 2020)
- Agent on contact time (not supported in queue grouping as of June, 2020)
- Occupancy (not supported in queue grouping as of June, 2020)

Because of this, on the **Table Settings** page, **Metrics** tab, these metrics are inactive, as shown in the following image:
In addition, in the historical metrics report, Amazon Connect displays a hyphen (-) in place of results for these metrics, and the cells are inactive (gray).

Effect of queue grouping on saved and scheduled reports

If the Queue grouping or filter is used on the following reports, note these effects:

- **Saved reports.** The columns for these metrics don’t appear in the saved reports when grouped by Queue. When the saved report is filtered by Queue, however, it shows “-”.
- **Scheduled reports.** These reports continue to run successfully, but no results are returned for these metrics.

Agent on contact time (not supported in queue grouping as of June, 2020)

On historical metrics reports when an agent handles multiple chats concurrently, Agent on contact time shows wall clock time: the amount of time spent chatting. However, there isn’t a metric that shows the time an agent spends chatting with each contact.

In addition, no results are returned when you use the Queue grouping or filter with Agent on contact time.

Agent idle time (not supported in queue grouping as of June, 2020)

The Agent idle time metric divides the idle time into each queue associated with the agent. When contacts are grouped or filtered by Queue, however, Amazon Connect doesn’t provide an accurate view into the how the agent is working. Because of this, Amazon Connect doesn’t show Agent idle time when you apply the Queue grouping or filter to your report.

Occupancy (not supported in queue grouping as of June, 2020)

With the addition of chat, the Occupancy metric is now defined as the percentage of time that an agent was active on contacts. This percentage is calculated as follows:

- \[
  \text{Occupancy} = \frac{\text{Agent on contact (wall clock time)}}{\text{Agent on contact (wall clock time)} + \text{Agent idle time}}
\]
Because **Agent idle time** is now inaccurate when contacts are grouped or filtered by **Queues**, the **Occupancy** metric is also inaccurate. As a result, when contacts are grouped or filtered by Queues, **Occupancy** doesn't appear on the report.

Occupancy no longer appears on the **Dashboard** page.

### November 2019

#### Name changes for "Missed" and "Agent status" and "On call"

The following real-time metrics were renamed:

<table>
<thead>
<tr>
<th>Old name</th>
<th>New name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Missed</td>
<td>Agent non-response</td>
</tr>
<tr>
<td>Agent status</td>
<td>Agent activity</td>
</tr>
<tr>
<td>On call</td>
<td>On contact</td>
</tr>
</tbody>
</table>

For each metric, existing saved reports automatically start displaying the new name; you don't need to do anything for the new name to appear in your reports.

The column order for a saved report containing one of these metrics stays the same. For example, if you previously saved a report where **Agent status** was the third metric, now when you open that saved report, **Agent activity** is the name for the third metric.

For **Missed**, only the name of the metric changed; the underlying calculation stayed the same. We've changing the name of this metric to **Agent non-response** so it better reflects its definition:

- **Agent non-response** increments whenever a contact is offered to an agent, and the agent doesn't respond to the contact for whatever reason.

  For example, the agent could have intentionally let the timer run out, or the agent could have forgotten to grant microphone access in the Contact Control Panel and never heard the ring. In these situations, Amazon Connect doesn't drop the contact. Instead, the routing engine will offer it to another available agent, while the customer continues to wait in queue. This means a single contact could result in multiple **Agent non-responses** before an agent responds and handles the contact.

For **On call**, the name change to **On Contact** applies to the Real-time metrics UI only. You can continue using **AGENTS_ON_CALL** with the **GetCurrentMetricData** API to retrieve data for this metric.

#### Label updates for "Agent activity" and "Contact state"

Labels are the values returned in a report. For example, in the following image **Available** and **Basic Routing Profile** are labels.
For **Agent Activity** and **Contact State**, we renamed some of the labels that describe what the agent's current activity is and what's happening with the contact they are currently working on. This way, the labels in the Real-Time Metrics report are more consistent with the labels the agent sees in the Contact Control Panel. They also align with the data returned about these different states in other parts of Amazon Connect.

When the name of **Agent Status** changed to **Agent Activity**, the following labels changed, too:

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Before: Agent Status Labels</th>
<th>After: Agent Activity Labels</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agent is logged in but offline</td>
<td>Not shown</td>
<td>Not shown</td>
<td></td>
</tr>
<tr>
<td>Agent switches to <strong>Available</strong> in the CCP</td>
<td>Available</td>
<td>Available</td>
<td></td>
</tr>
<tr>
<td>Agent has an incoming call</td>
<td>CallIncoming</td>
<td>Incoming</td>
<td>ContactState = Incoming contact</td>
</tr>
<tr>
<td>Agent has an incoming callback</td>
<td>CallbackIncoming</td>
<td>Incoming</td>
<td>ContactState = Inbound callback</td>
</tr>
<tr>
<td>Agent accepted a callback, which is now making an outbound call to the customer</td>
<td>Calling</td>
<td>On Contact</td>
<td>ContactState = Outbound callback</td>
</tr>
<tr>
<td>Agent makes outbound call (regardless of what status the agent chose in their CCP)</td>
<td>Calling</td>
<td>On Contact</td>
<td>ContactState = Outbound contact</td>
</tr>
<tr>
<td>Agent missed a phone call due to timer expired</td>
<td>MissedCallAgent</td>
<td>Missed</td>
<td></td>
</tr>
<tr>
<td>Agent is interacting with customer on phone call (regardless of what status the agent chose in their CCP)</td>
<td>On call</td>
<td>On Contact</td>
<td></td>
</tr>
<tr>
<td>Scenario</td>
<td>Before: Agent Status Labels</td>
<td>After: Agent Activity Labels</td>
<td>Notes</td>
</tr>
<tr>
<td>-------------------------------------------------------------------------</td>
<td>-----------------------------</td>
<td>-----------------------------</td>
<td>-------</td>
</tr>
<tr>
<td>Agent puts customer on hold while on phone call (regardless of what status the agent chose in their CCP)</td>
<td>On call</td>
<td>On Contact</td>
<td></td>
</tr>
<tr>
<td>After agent hangs up call</td>
<td>After call work</td>
<td>After contact work</td>
<td></td>
</tr>
<tr>
<td>Agent is on Lunch (a custom status)</td>
<td>Lunch</td>
<td>Lunch</td>
<td></td>
</tr>
<tr>
<td>Supervisor's activity state if they are monitoring some agent</td>
<td>Monitoring</td>
<td>Monitoring</td>
<td></td>
</tr>
<tr>
<td>Agent's activity state if they are connected to customer while being monitored by a supervisor</td>
<td>On call</td>
<td>On Contact</td>
<td></td>
</tr>
</tbody>
</table>

The following table shows the how the labels changed for **Contact State**.

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Label Name Before</th>
<th>Label Name After</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agent is logged in but offline</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Agent switches to <strong>Available</strong> in the CCP</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Agent has an incoming call</td>
<td>-</td>
<td>Incoming contact</td>
</tr>
<tr>
<td>Agent has an incoming callback</td>
<td>-</td>
<td>Inbound callback</td>
</tr>
<tr>
<td>Agent accepted a callback, which is now making an outbound call to the customer</td>
<td>Initial</td>
<td>Outbound callback</td>
</tr>
<tr>
<td>Agent makes outbound call (regardless of what status the agent chose in their CCP)</td>
<td>Initial</td>
<td>Outbound contact</td>
</tr>
<tr>
<td>Agent missed a phone call due to timer expired</td>
<td>Missed call</td>
<td>Missed contact</td>
</tr>
<tr>
<td>Agent is interacting with customer on phone call (regardless of what status the agent chose in their CCP)</td>
<td>Busy</td>
<td>Connected</td>
</tr>
<tr>
<td>Agent puts customer on hold while on phone call (regardless of what status the agent chose in their CCP)</td>
<td>OnHold</td>
<td>On hold</td>
</tr>
</tbody>
</table>
Real-time metrics reports

Real-time metrics reports show real-time or near-real time metrics information about activity in your contact center. Metrics such as Online show the number of agents currently online in real-time, updating every 15 seconds. Metrics such as Handled and Abandoned reflect near real-time values for your contact center.

You can customize the reports, specify a time range for each report, select metrics for each report, and select filters for data to include or exclude from each report.

You can also use the Amazon Connect Service APIs to create custom reports, such as real-time reports that are filtered by teams of agents.

Contents
- Real-time metrics definitions (p. 995)
- Permissions required to view real-time metrics reports (p. 1004)
- How often real-time metrics refresh (p. 1005)
- Use one-click drill-downs for Routing profiles and Queues tables (p. 1005)
- Visualize: Queue dashboard (p. 1008)
- View how many contacts are waiting in queue (p. 1009)
- Create a real-time metrics report (p. 1011)
- No metrics or too few rows in a queues report? (p. 1012)
- List queues grouped by routing profile (p. 1013)
- List agents grouped by routing profile (p. 1013)
- Sort agents by activity in a real-time metrics report (p. 1014)
- Change the "Agent activity" status in a real-time metrics report (p. 1015)
- Download a real-time metrics report (p. 1017)

Real-time metrics definitions

The following metrics are available to include in real-time metrics reports in Amazon Connect. The metrics available to include in a report depend on the report type.

Tip
Developers can use the GetCurrentMetricData API to get a subset of the following real-time metrics from the specified Amazon Connect instance.

Abandoned
Count of contacts disconnected by the customer while in the queue during the specified time range. Contacts queued for callback are not counted as abandoned. When you create a customized real-time
metrics report, to include this metric, choose a Queues report for the type. On the Filters tab, choose Queues, then on the Metrics tab you'll have the option to include Abandoned.

**Active**

Count of active slots. This number is incremented for each contact where the contact state is either Connected, On Hold, After contact work, or Outbound ring.

In the GetCurrentMetricData API, this metric is SLOTS_ACTIVE.

**ACW**

Count of contacts who are in an AfterContactWork state. (After contact work is also known as After call work.) After a conversation between an agent and customer ends, the contact is moved into the ACW state.

In the GetCurrentMetricData API, this metric is AGENTS_AFTER_CONTACT_WORK. The name of this metric is confusing because in the Amazon Connect console, ACW counts the number of contacts who are in an ACW state, not the number of agents.

To learn more about agent status and contact states, see About agent status (p. 1078) and About contact states (p. 1080).

**Agent Activity**

If an agent is handling a single contact, this metric may have the following values: Available, Incoming, On contact, Rejected, Missed, Error, After contact work, or a custom status.

If an agent is handling concurrent contacts, Amazon Connect uses the following logic to determine the state:

- If at least one contact is in Error, Agent Activity = Error.
- Else if at least one contact is Missed contact, Agent Activity = Missed.
- Else if at least one contact is Rejected contact, Agent Activity = Rejected.
- Else if at least one contact is Connected, On Hold, or Outbound contact/Outbound callback, Agent Activity = On contact.
- Else if at least one contact is After contact work, Agent Activity = After Contact Work.
- Else if at least one contact is Incoming/Inbound Callback, Agent Activity = Incoming.
- Else if agent status is a custom status, Agent Activity is the custom status.
- Else if agent status is Available, Agent Activity = Available.

If a supervisor is using the Manager Monitor feature to monitor a particular agent as they interact with a customer, then the supervisor’s Agent Activity will display as Monitoring. The Agent Activity of the agent who is being monitored is still On Contact.

**Agent First Name**

The first name of the agent, as entered in their Amazon Connect user account.

**Agent Hierarchy**

The hierarchy the agent is assigned to, if any.
Agent hung up
Count of contacts disconnected where the agent disconnected before the customer.

Agent Last Name
The last name of the agent, as entered in their Amazon Connect user account.

Agent Name
The name of the agent, displayed as follows: Agent Last Name, Agent First Name.

Agent non-response
Count of contacts routed to an agent but not answered by that agent, including contacts abandoned by the customer.

If a contact is not answered by a given agent, we attempt to route it to another agent to handle; the contact is not dropped. Because a single contact can be missed multiple times (including by the same agent), it can be counted multiple times: once for each time it is routed to an agent but not answered.

This metric was previously named Missed.

AHT (Average Handled Time)
The average time, from start to finish, that a contact was connected with an agent (average handled time). It includes talk time, hold time, and After Contact Work (ACW) time.

AHT is calculated by averaging the amount of time between the contact being answered by an agent and the completion of work on that contact by an agent.

API contacts handled
Count of contacts that were initiated by an API operation, such as StartOutboundVoiceContact, and handled by an agent.

Availability
For each agent, the number of available slots they have that can be routed contacts.

The number of available slots for an agent are based on their routing profile (p. 230). For example, let's say an agent's routing profile specifies they can handle either one voice contact or up to three chat contacts simultaneously. If they are currently handling one chat, they have two available slots left, not three.

What causes this number to go down? A slot is considered unavailable when:

• A contact in the slot is: connected to the agent, in After Contact Work, inbound ringing, outbound ringing, missed, or in an error state.
• A contact in the slot is connected to the agent and on hold.

Amazon Connect doesn't count an agent's slots when:

• The agent has set their status in the CCP to a custom status, such as Break or Training. Amazon Connect doesn't count these slots because agents can't take inbound contacts when they've set their status to a custom status.
• The agent can't take contacts from that channel per their routing profile.

In the `GetCurrentMetricData` API, this metric is `SLOTS_AVAILABLE`.

**Available**

The number of agents who can take an inbound contact. An agent can only take inbound contacts when they manually set their status to Available in the CCP (or in some cases when their supervisor changes it).

This is different from how many more inbound contacts an agent could take. If you want to know how many more contacts an agent can have routed to them, look at the Availability metric. It indicates how many slots the agent has free.

What causes this number to go down? An agent is considered **unavailable** when:

• The agent has set their status in the CCP to a custom status, such as Break or Training. Amazon Connect doesn't count these slots because agents can't take inbound contacts when they've set their status to a custom status.

• The agent has at least one contact ongoing.

• The agent has a contact in a missed or error state, which prevents the agent from taking any more contacts until they are flipped back to routable.

In the `GetCurrentMetricData` API, this metric is `AGENTS_AVAILABLE`.

**Average API Connecting Time**

The average time between when a contact is initiated using an Amazon Connect API, and the agent is connected.

**Avg abandon time**

Average time, in seconds, that abandoned contacts were in the queue before being abandoned.

**Avg ACW**

Average time, in seconds, that contacts spent in the **After contact work** state, during the specified time range.

This is not the average amount of time agents spent on contacts.

To learn more about agent status and contact states, see About agent status (p. 1078) and About contact states (p. 1080).

**Avg callback connecting time**

Then average time between when callback contacts are initiated by Amazon Connect reserving the agent for the contact, and the agent is connected.

No equivalent to this metric is available in the `GetCurrentMetricData` API.

The following image shows the five parts that go into calculating **Avg callback connecting time**. It also shows what is in the agent event stream.
Real-time metrics definitions

**Avg hold time**

Average time, in seconds, that a contact in the queue was on hold.

This metric doesn't apply to tasks so you'll notice a value of 0 on the report for them.

**Avg incoming connecting time**

The average time between when contacts are initiated Amazon Connect reserving the agent for the contact, and the agent is connected.

In the agent event stream, this time is calculated by averaging the duration between the contact state of STATE_CHANGE event changes from CONNECTING to CONNECTED/MISSED/ERROR.

No equivalent to this metric is available in the GetCurrentMetricData API.

The following image shows the three parts that go into calculating **Avg incoming connecting time**. It also shows what is in the agent event stream.

**Avg interaction time**

Average time, in seconds, that contacts were connected to and interacting with agents. This does not include hold time or time spent waiting in the queue.

**Avg interaction and hold time**

Average time, in seconds, that contacts in the queue spent interacting with agents and on hold. This is calculated as follows:

Avg hold time + Avg interaction time
**Avg queue answer time**

Average time, in seconds, that a contact was in the queue before being answered by an agent. This is calculated using the amount of time that the contact was in the queue, not any time that the contact spent in prior steps of the flow, such as listening or responding to prompts.

**Avg outbound connecting time**

The average time between when outbound contacts are initiated by Amazon Connect reserving the agent for the contact, and the agent is connected.

No equivalent to this metric is available in the GetCurrentMetricData API.

The following image shows the four parts that go into calculating *Avg outbound connecting time*. It also shows what is in the agent event stream.

![Diagram of agent outbound connection time](image)

**Callback contacts handled**

Count of contacts handled by an agent that were queued callbacks.

**Capacity**

Displays the maximum capacity that's set in the routing profile currently assigned to the agent. This column can be filtered by channel.

If an agent's routing profile is configured to handle either one voice or up to three chats, then their maximum capacity equals three, when not filtered by channel.

**Consult**

Deprecated May 2019. When used in a report, it returns a dash (-).

Count of contacts in the queue that were handled by an agent, and the agent consulted with another agent or a call center manager during the contact.

**Contact State**

The state of the contacts the agent is currently handling. The state can be: **Connected**, **On Hold**, **After contact work**, **Incoming**, **Calling**, or **Missed contact**.

For queued callbacks, the contact state can also **Callback incoming** or **Callback dialing**.

If a supervisor is using the Manager Monitor feature to monitor a particular agent as they interact with a customer, the supervisor's contact state is Monitoring; the agent's contact state is Connected.
Duration

Amount of time that the agent has been in the current Agent Activity State.

Error

A count of agents in Error state. An agent is included in this metric if they miss a call or reject a chat/task (most common). They could also be counted if there is a connection failure.

In the GetCurrentMetricData API, this metric is AGENTS_ERROR.

Handled

Count of contacts in the queue that were answered by an agent.

Handled in

Count of incoming contacts handled by an agent during the specified time range that were initiated using one of the following methods: inbound call, transfer to agent, transfer to queue, or queue-to-queue transfer.

Handled out

Count of contacts handled by an agent during the specified time range that were initiated by an agent placing an outbound call using the CCP.

Hold abandons

Count of contacts that disconnected while the customer was on hold. A disconnect could be because the customer hung up while on hold, or that there was a technical issue with the contact while on hold.

In queue

Count of contacts currently in the queue.

To learn how this is different from Scheduled contacts in a callback scenario, see How Initial delay affects Scheduled and In queue metrics (p. 1084).

In the GetCurrentMetricData API, this metric is CONTACTS_IN_QUEUE.

Max queued

The longest time that a contact spent waiting in the queue. This includes all contacts added to the queue, even if they were not connected with an agent, such as abandoned contacts.

NPT (Non-Productive Time)

Count of agents who have set their status in the CCP to a custom status. That is, their CCP status is other than Available or Offline.

Tip

Although agents aren’t routed any new inbound contacts while their CCP status is set to a custom status, it’s possible for them to change their CCP status to a custom status while still handling a contact. For example, let’s say an agent is being routed contacts very quickly. To go on break, they set their status to Break proactively, while still finishing up the last contact. This allows them to go on break and avoid accidentally missing a contact that’s routed to them in the sliver of time between the last contact ending and setting their status to Break.
Because agents can be **On call** or doing **ACW**, for example, while their CCP is set to a custom status, this means it's possible for agents to be counted as **On call** and **NPT** at the same time.

In the **GetCurrentMetricData** API, this metric is **AGENTS_NON_PRODUCTIVE**.

**Occupancy**

Percentage of time that an agent was active on contacts. This percentage is calculated as follows:

\[
\frac{\text{Agent on contact (wall clock time)}}{\text{Agent on contact (wall clock time)} + \text{Agent idle time}}
\]

Where:

- (Agent on contact + Agent idle time) = total amount of agent time
- So \(\frac{\text{Agent on contact}}{\text{total amount of agent time}}\) = percentage of time agents were active on contacts.

**Important**

**Occupancy** doesn't account for concurrency. That is, an agent is considered 100% occupied for a given interval if they are handling at least one contact for that entire duration.

**Oldest**

Length of time in the queue for the contact that has been in the queue the longest.

In the **GetCurrentMetricData** API, this metric is **OLDEST_CONTACT_AGE**.

**On contact**

Count of agents currently on a contact. An agent is "on a contact" when they are handling at least one contact who is either connected, on hold, in After contact work, or outbound ring.

In the **GetCurrentMetricData** API, this metric is **AGENTS_ON_CONTACT**. This metric used to be named **On call**. You can still use **AGENTS_ON_CALL** to retrieve data for this metric.

**Online**

Count of agents who have set their status in the CCP to something other than **Offline**. For example, they may have set their status to **Available**, or to a custom value such as **Break** or **Training**.

The **Online** metric doesn't tell you how many agents can be routed contacts. For that metric, see **Available** (p. 998).

This metric can be confusing so let's look at an example. Say you see this in a Queues report:

- Online = 30
- On Call = 1
- NPT = 30
- ACW = 0
- Error = 0
- Available = 0

This means 30 agents have set their status in the CCP to a custom status. 1 of those 30 agents is currently on a contact.

In the **GetCurrentMetricData** API, this metric is **AGENTS_ONLINE**.
Queue
The name of the queue associated with the contact the agent is currently handling.

Queued
Count of contacts added to the queue during the specified time range.

Routing Profile
The routing profile for the agent.

Scheduled
Count of customers in the queue for which there is a callback scheduled.

To learn how this is different from In queue contacts in a callback scenario, see How Initial delay affects Scheduled and In queue metrics (p. 1084).

In the GetCurrentMetricData API, this metric is CONTACTS_SCHEDULED.

SL X
Percentage of contacts removed from the queue between 0 and X after being added to it (Service Level). A contact is removed from the queue when one of the following occurs: an agent answers the call, the customer abandons the call, or the customer requests a call back.

For X, you can choose from pre-set times in seconds: 15, 20, 25, 30, 45, 60, 90, 120, 180, 240, 300, and 600.

Custom service levels
You can also create custom service level metrics. You can also choose from additional durations, such as minutes, hours, or days.

You can add up to 10 custom service levels per report.

The maximum duration for a custom service level is 7 days. That's because in Amazon Connect you can't have a contact that goes longer than 7 days.

Staffed
Count of agents who are online in the CCP, and not in NPT (a custom status).

Another way of thinking about this is, there are two scenarios in which Staffed is not incremented:

- The agent's status in the CCP is set to Offline.
- The agent's status in the CCP is set to a custom status.

For example, let's say an agent sets their status in the CCP to a custom status such as Break and they make an outbound call. Now the agent is On call, but Staffed is 0.

If the agent sets their status in the CCP to Available and makes an outbound call, the agent is On call and Staffed is 1.

This metric is available on the Queues report.
In the `GetCurrentMetricData` API, this metric is `AGENTS_STAFFED`.

**Transferred in**
Count of contacts transferred into the queue during the specified time range.

**Transferred in from queue**
Count of contacts transferred into the queue from another queue during a **Customer queue flow**.

**Transferred in by agent**
Count of contacts transferred in by an agent using the CCP.

**Transferred in from queue**
Count of contacts transferred into the queue from another queue during a **Customer queue flow**.

**Transferred out**
Count of contacts transferred out of the queue during the specified time range.

**Transferred out by agent**
Count of contacts transferred out by an agent using the CCP.

**Transferred out from queue**
Count of contacts transferred out of the queue to another queue during a **Customer queue flow**.

**Permissions required to view real-time metrics reports**
To view real-time metrics reports, you need to be assigned to a security profile that has **Access metrics** permission.

To create, share, and publish saved reports, you need the **Saved reports, Create** permission.
To view the agent's hierarchy information in a real-time metrics report, which can include their location and skill set data, you need the View - Agent hierarchy permission:

<table>
<thead>
<tr>
<th>Type</th>
<th>All</th>
<th>View</th>
<th>Edit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Users</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Agent hierarchy</td>
<td>☐</td>
<td>☑</td>
<td>☐</td>
</tr>
<tr>
<td>Security profiles</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Agent status</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>

How often real-time metrics refresh

Data in real-time metrics reports is refreshed as follows:

- The Real-time metrics page refreshes every 15 seconds, as long as the page is active. For example, if you have multiple tabs open in your browser and navigate to a different tab, the real-time metric page won't be updated until you return to it.
- Metrics such as Active and Availability refresh as activity occurs, with a small system delay for processing the activity.
- Agent near real-time metrics, such as Missed and Occupancy, refresh as activity occurs, with a small delay for processing.
- Contact near real-time metrics refresh about a minute after a contact ends.

Use one-click drill-downs for Routing profiles and Queues tables

In real-time metrics reports, for Routing profiles and Queues tables, you can open pre-filtered tables that display the associated queues, routing profiles, or agents. These one-click filters provide a way for you to drill into the performance data.

Example 1: Queues table -> Routing profiles table -> Agents table

For example, at a Queues table, choose the dropdown and then choose View routing profiles.
Below the **Queues** table, a **Routing profiles** table appears. It is filtered to display only the routing profiles associated with the queue. On the **Routing profiles** table, you can choose quick filters to display queues or agents *only associated with that routing profile*. 
Example 2: Queues table -> Agents table

At the Queues table, choose View agents. Below the Queues table, an Agents table appears. It is filtered to display all the agents working that queue. The agents may be associated with different routing profiles.
You can now visualize historical queue data using time series graphs to help identify patterns, trends, and outliers such as Service Level, Contacts Queued, and Average Handle Time.

To view your queue data, select View queue graphs from the queue dropdown.

Once selected, you will be directed to the queue visualization dashboard where you can configure a time range of up to 24 hours and select the channel of your choice. You also have the ability to customize the service level thresholds. The Queue dashboard will automatically refresh every 15 minutes.
View how many contacts are waiting in queue

To see the number of customers waiting in queue

1. Go to Analytics and optimization, Real-time metrics, Queues.
2. This column counts all customers who are in waiting a queue for an agent, including the callback customers.

View how many contacts are in an agent's queue

To see how many contacts are in an agent's personal queue, add an Agent queues table to your Real-time metrics, Queues report. Then view these two metrics:

- **In Queue**—how many contacts are in an agent's personal queue.
- **Queued**—the number of contacts added to their personal queue during the specified time range.

Use the following procedure.

1. Go to Analytics and optimization, Real-time metrics, Queues.
2. Choose New table, Agent queues.
The **In queue** column displays how many contacts are in the agent’s queue.

3. Review the metrics in then **In queue** and **Queue** columns.

   **Tip**
   An agent is included in the **Agent queues** table only if they are online or there is at least one contact in their queue.

### Add In Queue and Queue to the Agent queue table

If **In queue** or **Queue** don’t appear in your **Agent queue** table, use the following steps to add them.

1. On the **Agent queues** table, choose **Settings**.

   ![Settings](image)

2. Choose the **Metrics** tab.

   ![Metrics](image)
3. Scroll to the **Performance** section and choose **In queue** and **Queue**, and then **Apply**.

![Table Settings](image)

The changes appear in your table immediately.

4. Choose **Save** to add this report to your list of Saved reports.

**View how many contacts are waiting for a callback**

To see only the number of customers who are waiting for a call back, you need to create a queue that only takes callback contacts. To learn how to do this, see [Set up routing](p. 222).

Currently there isn't a way to see the phone numbers of the contacts waiting for callbacks.

**Create a real-time metrics report**

You can create a real-time metrics report to view real-time or near-real time metrics data for activity in your contact center. You must have permission to access metric data. The **CallCenterManager** and **QualityAnalyst** security profiles include this permission. For more information, see [Security profiles](p. 780).

**To create a real-time metrics report**

1. Log in to your contact center at `https://instance name.my.connect.aws/`.
2. Choose **Analytics and optimization**, **Real-time metrics**.
3. Choose one of the following report types. They group and order the data in different ways and include different metrics by default.
   - **Queues**
   - **Agents**
No metrics or too few rows in a queues report?

It's possible to run a manually configured queues report and have no metrics returned, or fewer rows than expected.

This is because a queues report only includes data for a maximum of 100 queues, using one row per queue. If a queue doesn't have any activity* during the time range for the report, it's excluded from the report rather than included with null values. This means that if you create a report, and there is no activity for any of the queues included in the report, your report will not include any data.

This applies to the GetCurrentMetricsData API as well. This means that if a queue is not considered active, if you query for its metrics using the API you won't get any data.

**Tip**

*Here's how we define whether a queue is active: there's at least one contact in queue or there's at least one online agent for that queue. Otherwise, it's considered inactive.*

In the following situations, you could end up with no metrics or fewer rows than expected:

1. You're attempting to run a report with no filters or groupings, and have more than 100 queues in your instance. The report pulls metrics for the first 100 queues, and then displays only those that are active.
2. You’re attempting to run a report with filters and groupings, but it still has more than 100 queues matching that criteria. To process this request, Amazon Connect applies all the specified filters and groupings. This pulls the first 100 queues matching that criteria. Then out of those queues, it displays only the active ones.

For example, let’s say you have 300 queues in your instance. Of these, 200 match your criteria; 100 are active and by coincidence all happen to be Queues #100-#200. When you run the report, you’d get just 1 row (Queue #100) since the other 99 queues that were returned (Queues #1-#99) were considered inactive and were not displayed.

3. You’re running a report with fewer than 100 queues. While you may expect to see metrics for all filtered queues, only active queues are shown on the real-time metrics report page. Try changing the settings for the report, such as changing the time range.

**List queues grouped by routing profile**

1. Go to Analytics and optimization, Real-time metrics, Queues.
2. Click Settings.

![Real-time metrics](image)

3. On the Groupings tab, choose Queues grouped by routing profiles.
4. Choose Apply.

**List agents grouped by routing profile**

1. Go to Analytics and optimization, Real-time metrics, Queues.
2. Choose New table, Agents.
3. Click Settings.

![Real-time metrics](image)

4. On the Filters tab, choose Routing profiles. In Include, select the routing profiles you want included in the table.
5. Choose **Apply**.

**Sort agents by activity in a real-time metrics report**

On the real-time metrics **Agents** report, you can sort agents by **Activity** when agents are enabled to use the same channel.

For example, the following image shows that you can sort agents by the **Activity** column because all the agents are enabled to use the same channel: voice.

However, if one or more agents are enabled to handle voice, chat, and tasks—or any two of the channels—you can’t sort them by the **Activity** column because of the multiple channels. In this case, there’s no option to sort by the **Activity** column, as shown in the following image:
Note
The real-time metrics Agents report doesn’t support secondary sorting. For example, you can’t sort by Activity, and then sort by Duration.

Change the "Agent activity" status in a real-time metrics report

Agents manually set their status in the Contact Control Panel (CCP). However, on the real-time metrics report, supervisors can manually change the Agent Activity status of an agent. This overrides what the agent has set in the CCP.

The value that’s displayed in the Agent Activity column can be either:

• The agent’s availability status, such as Offline, Available, or Break.
• The contact state, such as Incoming or On contact.

When you choose the Agent Activity column, you can select and change an agent’s availability status, such as Offline, Available, or Break.
This change appears in the agent event stream.

However, when a contact state is displayed in the Agent Activity column, such as Incoming or On contact, you cannot change it to Available or Offline, for example, even though those options are displayed in the dropdown menu. This means you can’t set the agent’s next status while they are on a contact.

You'll get an error message, as shown in the following image.

Required permissions to change an agent's activity status

For someone such as a supervisor to be able to change an agent's activity status, they need to be assigned a security profile that has the following permissions:

- View - Agent Status
- Access metrics
Download a real-time metrics report

You can download the data included in your report as a comma-separated value (CSV) file so that you can use it with other applications. If there is no data for one of the selected metrics, the field in the downloaded CSV file contains a dash.

All exported times are in seconds.

**To download a real-time metrics report as a CSV file**

1. Create the report.
2. Choose the down arrow next to **Save** in the top-right corner of the page and choose **Download CSV**.
3. When prompted, confirm whether to open or save the file.

You can convert the seconds to minutes using an Excel formula. Alternatively, if you have a short report, you can copy and paste the data from Amazon Connect to Excel and it will preserve the format.
Historical metrics reports

Historical metrics reports include data about past, completed activity and performance in your contact center. Amazon Connect includes built-in historical reports that you can start using right away. You can also build your own custom reports.

When creating and analyzing your historical metrics reports, keep in mind that there are two categories of metrics:

**Contact record-driven metrics**

These metrics are based on formed contact record records. For a given interval, contact records whose disconnect date falls in the interval are selected to calculate metrics. For example, if a contact starts at 05:23 and ends at 06:15, this contact contributes 52 minutes of metrics for the 06:00-06:30 interval.

Example contact record-driven metrics are **Service level**, **Agent interaction time**, and **After contact work time**.

**Agent activity-driven metrics**

These metrics are based on agent activities, like agent status changes, agent conversation changes. The metrics reflect on the actual time the activity happens. For example, if agent handles a contact from 05:23 to 06:15, the **Agent on contact time** has 7 minutes for the 05:00-05:30 interval, 30 minutes for the 05:30-06:00 interval, and 15 minutes for the 06:00-06:30 interval.

For example, an agent activity-driven metric is **Non-Productive Time**.

You can customize the report settings to get the view of the data that is most meaningful for your organization. You can change the time frame for the report, which metrics are included in the report, and how data is grouped in the report. After you have customized a report, you can save it for future reference. You can generate a report using a recurring schedule that you define.

Contents

- Historical metrics definitions (p. 1018)
- Permissions required to view historical metrics reports (p. 1031)
- Create a historical metrics report (p. 1032)
- Historical report limits (p. 1034)
- Schedule a historical metrics report (p. 1035)
- Update a historical metrics report (p. 1037)
- Download a historical metrics report (p. 1037)
- Show agent queues in a Queues table (p. 1039)
- How many contacts in queue on a specific date (p. 1040)
- Agent activity audit report (p. 1040)

**Historical metrics definitions**

The following metrics are available to include in historical metrics reports in Amazon Connect.

**Tip**

Developers can use the `GetMetricData` API to get a subset of the following historical metrics from the specified Amazon Connect instance.
After contact work time

The total time that an agent spent doing ACW for a contact. In some businesses, also known as Call Wrap Up time.

You specify the amount of time an agent has to do ACW in their agent configuration settings (p. 235). When a conversation with a contact ends, the agent is automatically allocated to do ACW for the contact. They stop doing ACW for a contact when they indicate they are ready for another contact in the CCP.

In the GetMetricData API, this metric is AFTER_CONTACT_WORK_TIME.

• Type: String (hh:mm:ss)
• Category: contact record-driven metric

Agent answer rate

Percentage of contacts routed to an agent that were answered.

• Type: String
• Min value: 0.00%
• Max value: 100.00%
• Category: Agent activity-driven metric

Agent API connecting time

The total time between when a contact is initiated using an Amazon Connect API, and the agent is connected.

Type: String (hh:mm:ss)

Category: Agent activity-driven metric

Agent callback connecting time

The total time between when a callback contact is initiated by Amazon Connect reserving the agent for the contact, and the agent is connected.

Type: String (hh:mm:ss)

Category: Agent activity-driven metric

Agent first name

The first name of the agent, as entered in their Amazon Connect user account. This metric is available only when grouping by agent.

• Type: String
• Length: 1-255

Agent idle time

After the agent sets their status in the CCP to Available, this is the amount of time they weren't handling contacts + any time their contacts were in an Error state.
Agent idle time doesn’t include the amount of time from when Amazon Connect starts routing the contact to the agent, to when agent picks up or declines the contact.

- Type: String (hh:mm:ss)
- Category: Agent activity-driven metric

**Agent incoming connecting time**

The total time between when a contact is initiated by Amazon Connect reserving the agent for the contact, and the agent is connected.

In the agent event stream, this is the duration between the contact state of STATE_CHANGE event changes from CONNECTING to CONNECTED/MISSED/ERROR.

- Type: String (hh:mm:ss)
- Category: Agent activity-driven metric

**Agent interaction and hold time**

Sum of Agent interaction time (p. 1020) and Customer hold time (p. 1029).

- Type: String (hh:mm:ss)
- Category: contact record-driven metric

**Agent interaction time**

Total time that agents spent interacting with customers on inbound and outbound contacts. This does not include Customer Hold Time (p. 1029) or After Contact Work Time (p. 1019).

- Type: String (hh:mm:ss)
- Category: contact record-driven metric

**Agent last name**

The last name of the agent, as entered in their Amazon Connect user account. This metric is available only when grouping by agent.

- Type: String
- Length: 1-255

**Agent name**

The name of the agent, displayed as follows: Agent last name, Agent first name. This metric is available only when grouping by agent.

**Agent non-response**

Count of contacts routed to an agent but not answered by that agent, including contacts abandoned by the customer.

If a contact is not answered by a given agent, we attempt to route it to another agent to handle; the contact is not dropped. Because a single contact can be missed multiple times (including by the same agent), it can be counted multiple times: once for each time it is routed to an agent but not answered.
This metric appears as **Contacts missed** in scheduled reports and exported CSV files.

- **Type:** Integer
- **Category:** Agent activity-driven metric

### Agent on contact time

Total time that an agent spent on a contact, including Customer Hold Time (p. 1029) and After Contact Work Time (p. 1019). This does not include time spent on a contact while in a custom status or **Offline** status. (Custom status = the agent's CCP status is other than **Available** or **Offline**. For example, Training would be a custom status.)

**Tip**
If you want to include the time spent in a custom status and **Offline** status, see Contact handle time (p. 1024).

- **Type:** String (hh:mm:ss)
- **Category:** Agent activity-driven metric

### Agent outbound connecting time

The total time between when an outbound contact is initiated by Amazon Connect reserving the agent for the contact, and the agent is connected.

**Type:** String (hh:mm:ss)

**Category:** Agent activity-driven metric

### API contacts

Count of contacts that were initiated using an Amazon Connect API operation, such as `StartOutboundVoiceContact`. This includes contacts that were not handled by an agent.

- **Type:** Integer
- **Category:** contact record-driven metric

### API contacts handled

Count of contacts that were initiated using an Amazon Connect API operation, such as `StartOutboundVoiceContact`, and handled by an agent.

In the **GetMetricData** API, this metric is `API_CONTACTS_HANDLED`.

- **Type:** Integer
- **Category:** contact record-driven metric

### Average after contact work time

Average amount of time that an agent spent doing After Contact Work (ACW) for contacts. This is calculated by averaging `AfterContactWorkDuration` (p. 1066) (from the contact record) for all contacts included in the report, based on the selected filters.

- **Type:** String (hh:mm:ss)
- **Category:** contact record-driven metric
Average agent API connecting time

The average time between when a contact is initiated using an Amazon Connect API, and the agent is connected.

Type: String (hh:mm:ss)
Category: Agent activity-driven metric

Average agent callback connecting time

The average time between when a callback contact is initiated by Amazon Connect reserving the agent for the contact, and the agent is connected.

Type: String (hh:mm:ss)
Category: Agent activity-driven metric

Average agent incoming connecting time

The average time between when contact is initiated by Amazon Connect reserving the agent for the contact, and the agent is connected. This is the ring time for configurations where the agent is not set to auto-answer.

No equivalent to this metric is available in the GetMetricData API.

Type: String (hh:mm:ss)
Category: Agent activity-driven metric

Average agent interaction and customer hold time

Average of the sum of the agent interaction and customer hold time. This is calculated by averaging the sum of the following values from the contact record: AgentInteractionDuration (p. 1066) and CustomerHoldDuration (p. 1066).

In the GetMetricData API, this metric is INTERACTION_AND_HOLD_TIME.

- Type: String (hh:mm:ss)
- Category: contact record-driven metric

Average agent interaction time

Average time that agents interacted with customers during inbound and outbound contacts. This does not include Customer Hold Time (p. 1029) or After Contact Work Time (p. 1019).

In the GetMetricData API, this metric is INTERACTION_TIME.

- Type: String (hh:mm:ss)
- Category: contact record-driven metric

Average agent outbound connecting time

The average time between when an outbound contact is initiated by Amazon Connect reserving the agent for the contact, and the agent is connected.

Type: String (hh:mm:ss)
Category: Agent activity-driven metric

**Average customer hold time**

Average time that customers spent on hold while connected to an agent. This is calculated by averaging `CustomerHoldDuration` (p. 1066) (from the contact record).

In the GetMetricData API, this metric is HOLD_TIME.

This average only includes contacts that went on hold.

- Type: String (hh:mm:ss)
- Category: contact record-driven metric

This metric doesn't apply to tasks so you'll notice a value of 0 on the report for them.

**Average handle time**

The average time, from start to finish, that a contact was connected with an agent (average handled time). It includes talk time, hold time, and After Contact Work (ACW) time.

AHT is calculated by averaging the amount of time between the contact being answered by an agent and the conversation ending. It applies to both inbound and outbound calls.

AHT is different from Contact handle time (p. 1024). AHT does not include any time spent in a custom status; Contact handle time (CHT) does include it.

In the GetMetricData API, this metric is HANDLE_TIME.

- Type: String (hh:mm:ss)
- Category: contact record-driven metric

**Average outbound after contact work time**

Average time that agents spent doing After Contact Work (ACW) for an outbound contact.

- Type: String (hh:mm:ss)
- Category: contact record-driven metric

**Average outbound agent interaction time**

Average time that agents spent interacting with a customer during an outbound contact.

- Type: String (hh:mm:ss)
- Category: contact record-driven metric

**Average queue abandon time**

Average time that contacts waited in the queue before being abandoned. This is calculated by averaging the difference between `EnqueueTimestamp` (p. 1073) and `DequeueTimestamp` (p. 1073) (from the contact record) for abandoned contacts.

A contact is considered abandoned if it was removed from a queue but not answered by an agent or queued for callback.
• Type: String (hh:mm:ss)
• Category: contact record-driven metric

In the GetMetricData API, this metric is ABANDON_TIME.

**Average queue answer time**

Average time that contacts waited in the queue before being answered by an agent. In some businesses, this is also known as average speed of answer (ASA).

This is the average of Duration (p. 1073) (from the contact record).

In the GetMetricData API, this metric is QUEUE_ANSWER_TIME.

• Type: String (hh:mm:ss)
• Category: contact record-driven metric

**Callback contacts**

Count of contacts that were initiated from a queued callback.

• Type: Integer
• Category: contact record-driven metric

**Callback contacts handled**

Count of contacts that were initiated from a queued callback and handled by an agent.

In the GetMetricData API, this metric is CALLBACK_CONTACTS_HANDLED.

• Type: Integer
• Category: contact record-driven metric

**Contact flow time**

Total time a contact spent in a flow.

Outbound contacts don't start in a flow, so outbound contacts aren't included.

• Type: String (hh:mm:ss)
• Category: contact record-driven metric

**Contact handle time**

Total time that an agent spent on contacts, including Customer Hold Time (p. 1029) and After contact work time (p. 1019). This includes any time spent on contacts while in a custom status. (Custom status = the agent's CCP status is other than Available or Offline. For example, Training would be a custom status.)

Contact handle time is different from Average handle time (p. 1023). Contact handle time includes time spent in a custom status; Average handle time does not include it.
Tip
If you want to exclude the amount of time spent in a custom status, see Agent on contact time (p. 1021).

- Type: String (hh:mm:ss)
- Category: contact record-driven metric

Contact abandoned
Count of contacts disconnected by the customer while in the queue. Contacts queued for callback are not counted as abandoned. When you create customized historical reports, to include this metric, on the Groupings tab choose either Queue or Phone Number.
In the GetMetricData API, this metric is CONTACTS_ABANDONED.

- Type: Integer
- Category: contact record-driven metric

Contacts abandoned in X seconds
Count of contacts disconnected by the customer while in the queue for 0 to X seconds. The possible values for X are: 15, 20, 25, 30, 45, 60, 90, 120, 180, 240, 300, and 600.

- Type: Integer
- Category: contact record-driven metric

Contacts agent hung up first
Count of contacts disconnected where the agent disconnected before the customer.
In the GetMetricData API, this metric is CONTACTS_AGENT_HUNG_UP_FIRST.

- Type: Integer
- Category: contact record-driven metric

Contacts answered in X seconds
Count of contacts that were answered by an agent between 0 and X seconds of being placed in the queue, based on the value of EnqueueTimestamp (p. 1073). The possible values for X are: 15, 20, 25, 30, 45, 60, 90, 120, 180, 240, 300, and 600.

- Type: Integer
- Category: contact record-driven metric

Contacts consulted
Deprecated May 2019. When used in a report, it returns a dash (-).
Count of contacts handled by an agent who consulted with another agent in Amazon Connect. The agent interacts with the other agent, but the customer is not transferred to the other agent.
In the GetMetricData API, this metric is CONTACTS_CONSULTED.
Contacts handled

Count of contacts that were connected to an agent.

It doesn't matter how the contact got to the agent. It could be a customer calling your contact center, or an agent calling the customer. It could be a contact transferred from one agent to another. It could be a contact where the agent answered it, but then they weren't sure what to do and they transferred the contact away again. As long as the agent was connected to the contact, it increments Contacts handled.

In the GetMetricData API, this metric is CONTACTS_HANDLED.

Contacts handled incoming

Count of incoming contacts that were handled by an agent, including inbound contacts and transferred contacts.

In the GetMetricData API, this metric is CONTACTS_HANDLED_INCOMING.

Contacts handled outbound

Count of outbound contacts that were handled by an agent. This includes contacts that were initiated by an agent using the CCP.

In the GetMetricData API, this metric is CONTACTS_HANDLED_OUTBOUND.

Contacts hold agent disconnect

Count of contacts that were disconnected by the agent while the customer was on hold.

Contacts hold customer disconnect

Count of contacts that were disconnected by the customer while the customer was on hold.

In the GetMetricData API, this metric is CONTACTS_HOLD_ABANDONS.
Contacts hold disconnect
Count of contacts disconnected while the customer was on hold. This includes both contacts disconnected by the agent and contacts disconnected by the customer.

- Type: Integer
- Category: contact record-driven metric

Contacts incoming
Count of incoming contacts, including inbound contacts and transferred contacts.

- Type: Integer
- Category: contact record-driven metric

Contacts missed
Count of contacts routed to an agent but not answered by the agent, including contacts abandoned by the customer. A contact can be counted as missed multiple times, once for each time it is routed to an agent but not answered.

When you add this to a historical metrics report, it appears under the column named **Agent non-response**.

In the GetMetricData API, this metric is CONTACTS_MISSED

- Type: Integer
- Category: Agent activity-driven metric

Contacts put on hold
Count of contacts put on hold by an agent one or more times.

- Type: Integer
- Category: contact record-driven metric

Contacts queued
Count of contacts placed in the queue.

In the GetMetricData API, this metric is CONTACTS_QUEUED.

- Type: Integer
- Category: contact record-driven metric

Contacts transferred in
Count of contacts transferred in from queue to queue, and transferred in by an agent using the CCP.

In the GetMetricData API, this metric is CONTACTS_TRANSFERRED_IN.

- Type: Integer
Contacts transferred in by agent

Count of contacts transferred in by an agent using the CCP.

In the GetMetricData API, this metric is CONTACTS TRANSFERRED IN BY AGENT.

- Type: Integer
- Category: contact record-driven metric

Contacts transferred in from queue

Count of contacts transferred to the queue from another in a Transfer to queue flow.

In the GetMetricData API, this metric is CONTACTS TRANSFERRED IN FROM Q.

- Type: Integer
- Category: contact record-driven metric

Contacts transferred out

Count of contacts transferred out from queue to queue, and transferred out by an agent using the CCP.

In the GetMetricData API, this metric is CONTACTS TRANSFERRED OUT.

- Type: Integer
- Category: contact record-driven metric

Contacts transferred out by agent

Count of contacts transferred out by an agent using the CCP.

In the GetMetricData API, this metric is CONTACTS TRANSFERRED OUT BY AGENT.

- Type: Integer
- Category: contact record-driven metric

Contacts transferred out external

Count of contacts that an agent transferred from the queue to an external source, such as a phone number other than the phone number for your contact center.

- Type: Integer
- Category: contact record-driven metric

Contacts transferred out queue

Count of contacts transferred from the queue to another queue in a Transfer to queue flow.

In the GetMetricData API, this metric is CONTACTS TRANSFERRED OUT FROM QUEUE.
• Type: Integer
• Category: contact record-driven metric

Contacts transferred out internal
Count of contacts for the queue that an agent transferred to an internal source, such as a queue or another agent. An internal source is any source that can be added as a Quick Connect.

• Type: Integer
• Category: contact record-driven metric

Customer hold time
Total time that customers spent on hold after being connected to an agent. This includes time spent on a hold when being transferred, but does not include time spent in a queue.

• Type: String (hh:mm:ss)
• Category: contact record-driven metric

Error status time
For a specific agent, the total time contacts were in an error status. This metric can't be grouped or filtered by queue.

• Type: String (hh:mm:ss)
• Category: Agent activity-driven metric

Maximum queued time
The longest time that a contact spent waiting in the queue. This includes all contacts added to the queue, even if they were not connected with an agent, such as abandoned contacts.

In the GetMetricData API, this metric is QUEUED_TIME.

• Type: String (hh:mm:ss)
• Category: contact record-driven metric

Non-Productive Time
Total time that agents spent in a custom status (p. 234). That is, their CCP status is other than Available or Offline.

This metric doesn't mean that the agent was spending their time unproductively.

Tip
Agents can handle contacts while their CCP status is set to a custom status. For example, agents can be On contact or doing ACW while their CCP is set to a custom status. This means it's possible for agents to be counted as On contact and NPT at the same time.

This metric can't be grouped or filtered by queue.

• Type: String (hh:mm:ss)
• Category: Agent activity-driven metric
Occupancy

Percentage of time that agents were active on contacts. This percentage is calculated as follows:

\[(\text{Agent on contact (wall clock time)} \div (\text{Agent on contact (wall clock time)} + \text{Agent idle time}))\]

Where:

- \((\text{Agent on contact} + \text{Agent idle time}) = \text{total amount of agent time}\)
- So \((\text{Agent on contact})/(\text{total amount of agent time}) = \text{percentage of time agents were active on contacts.}\)

**Important**

**Occupancy** doesn't account for concurrency. That is, an agent is considered 100% occupied for a given interval if they are handling at least one contact for that entire duration.

In the **GetMetricData** API, this metric is **OCCUPANCY**.

- Type: String
- Min value: 0.00%
- Max value: 100.00%
- Category: Agent activity-driven metric

Online time

Total time that an agent spent with their CCP set to a status other than **Offline**. This includes any time spent in a custom status. This metric can't be grouped or filtered by queue, phone number, or channels.

- Type: String
- Category: Agent activity-driven metric

Service level X

Percentage of contacts removed from the queue between 0 and \(X\) after being added to it. A contact is removed from a queue when the following occurs: an agent answers the contact, the customer abandons the contact, or the customer requests a call back.

For \(X\) you can choose from pre-set times in seconds: 15, 20, 25, 30, 45, 60, 90, 120, 180, 240, 300, and 600. This percentage is calculated as follows:

\[(\text{Contacts removed from queue in } X \text{ seconds} \div \text{Contacts queued}) \times 100\]

In the **GetMetricData** API, this metric is **SERVICE_LEVEL**.

- Type: String
- Min value: 0.00%
- Max value: 100.00%
- Category: contact record-driven metric

Custom service levels

You can also create custom service level metrics. Choose from additional durations, such as minutes, hours, or days.
Custom service levels are localized to the report where they are created. For example, you create a report that has a custom service level of 75. You leave the page and then create another report. The custom service level 75 won't exist in the second report. You'll need to create it again.

The maximum duration for a custom service level is 7 days. That's because in Amazon Connect you can't have a contact that goes longer than 7 days.

You can add up to 10 custom service levels per report.

### Permissions required to view historical metrics reports

To view historical metrics reports, you need to be assigned to a security profile that has **Access metrics** permission.

To create, share, and publish saved reports, you need the **Saved reports, Create** permission.

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To view the Agent activity audit report, you need **Users, View** permissions:
Create a historical metrics report

Although Amazon Connect includes built-in historical reports, you can create your own custom reports so you look at only the data that's of interest to your organization.

**Requirement**

- You must have permission to access metric data. The following security profiles include this permission: CallCenterManager and QualityAnalyst. For more information, see Security profiles (p. 780).

**Grouping options**

You can group the metrics included in your reports in different ways to provide greater insight into how your contact center is performing.

You can group reports by queue, agent, agent hierarchy, routing profile, or phone number. The metric calculations, and therefore metrics values displayed in the report, are different when reports are grouped differently. For example, if you group a report by queue, the value of a metric includes all contacts associated with the queue. If you group a report by agent, the values for the metrics associated with queues might not provide much insight.

When you create a report, the values for calculated metrics are displayed as rows in the report. The rows in the report are grouped by the grouping options you select. Grouping the data enables you to generate global data for your contact center, or more specific data for queues, agents, routing profiles, or agent hierarchy defined in your contact center.

For example, consider the Contacts handled metric. This metric is a count of the contacts handled during the time range defined for the report. Here are the results based on the grouping:
• **Queue** - The metric is the total number of contacts handled during the time range from that queue by all agents in your contact center.

• **Agent** - The metric is the total number of contacts handled by that agent during the time range across all queues and routing profiles.

• **Routing Profile** - The metric is the total number of contacts handled during the time range by agents assigned that routing profile.

• **Queue, then Agent, then Routing Profile** - The metric is the total number of contacts that agent assigned that routing profile handled from that queue.

Agent activity can be included in one routing profile at a time, but agents can switch between routing profiles over the reporting time interval. If agents are assigned multiple routing profiles and handle contacts from multiple queues, there are multiple rows in the report for each routing profile assigned to the agent and the queue that the agent handled contacts from.

**Filters**

When you customize a report, you can add filters to control which data is included in the report. You can filter on the following:

• **Queue**—Includes data only for the specified queues. If you don't specify any queues, all queues are included.

• **Routing profile**—Includes data only for the agents assigned to the specified routing profiles. If you don't specify any routing profiles, data for all agents for all routing profiles is included.

• **Agent hierarchy**—Includes data only for the contacts handled by agents in the specified hierarchies. If you don't specify a hierarchy, data for all contacts handled by agents in all hierarchies is included. When only one hierarchy is specified, you can specify a more granular filter within the hierarchy.

• **Phone number**—Includes data only for the contacts associated with the specified phone numbers. If you don't specify a phone number, data for all contacts associated with all phone numbers is included.

**How to create a historical metrics report**

1. Log in to your contact center at https://instance name.my.connect.aws/.
2. Choose **Analytics and optimization, Historical metrics**.
3. Choose one of the following report types, which group and order the data in different ways, and include different metrics:
   • **Queues**
     • Contact metrics
     • Agent metrics
   • **Agents**
     • Agent performance
     • Agent activity audit report (p. 1040)
   • **Phone numbers**
     • Contact metrics
4. To customize your report, choose the gear icon.
5. On the **Interval & Time range** tab, do the following:
   a. For **Interval**, choose **30 minutes** to get a row for each 30-minute period in the time range, **Daily** to get a row for each day in the time range, or **Total** to get all data for the time range in a single row.
b. For Time Zone, select a time zone, which determines the hour at which a day starts. For example, to align the report with your calendar days, select the time zone for your location.

You should use the same time zone for reports over time to get accurate and consistent metrics data for your contact center. Using different time zones for different reports may result in different data for the same time range selection.

c. The possible values for Time range depend on the value that you select for Interval. Alternatively, you can specify a custom time range.

For Last x days and Month to date, the current day is not included in the report. Yesterday specifies the previous calendar day while Last 24 hours specifies the 24 hours prior to the current time.

6. (Optional) On the Groupings tab, choose up to five groupings. If you choose one grouping option, the data is grouped by that option. If you choose multiple grouping options, the data is group by the first grouping option and then by the subsequent grouping options. For more information, see Grouping options (p. 1032).

7. (Optional) On the Filters tab, specify filters to scope the data to be included in the report. The available filters depend on the groupings that you select. For more information, see Filters (p. 1033).

8. On the Metrics tab, choose the metrics and fields to include in the report. An exclamation point (!) is displayed next to any metrics that are not available based on the groupings that you selected. For more information, see Historical metrics definitions (p. 1018).

9. When you are finished customizing your report, choose Apply.

10. (Optional) To save your report for future use, choose Save, provide a name for the report, and then choose Save.

Historical report limits

Historical metrics reports have the following limits:

Data only for active queues

- You can get data only for active queues. A queue is inactive if there are no contacts in the queue and no agents available.

Query data for three days at a time, for the past 35 days

- When you create a report that uses 15 minute intervals, you can return data for three days at a time, for the past 35 days. For 30 minute intervals you can return data for only three days at a time, but the data is available based on the retention period of contact records.

The availability of historical metric data is based on the retention period of contact records

- Historical metrics are based contact records. For the current retention period for contact records, see Amazon Connect feature specifications (p. 1332).

For daily and total intervals

- You can select up to 31 days in a single request.
80k cell limit

There is currently an 80k cell limitation on historical metrics reports and scheduled reports. This applies to the total number of cells (columns * rows), accounting for grouping and filtering.

For example, let's say you create a historical metrics report with this criteria:

- Grouped by agents
- With an interval of 30 minutes
- For the last 24 hours
- Configured to include only 5 metrics
- Filtered to show only contacts handled in BasicQueue

If only 10 agents handled contacts in BasicQueue during this time, then you would expect to see 
\[(24*2)*5*10 = 2400\] cells that count towards the 80k limit.

A message informs you if you reach the limit.

Schedule a historical metrics report

Before you schedule a historical metrics report, here are a few things you need to know:

Others can access the report

- Scheduling a report makes the report accessible by any other users in your contact center who have permissions to view saved reports.

Anyone with Schedule permissions can create, edit, or delete the schedule of your report

- After you publish a report, any user with Saved reports - Schedule permissions in their security profile can create, edit, or delete the schedule of your report. They cannot delete the actual report.

Scheduled reports are located in an Amazon S3 bucket

- Scheduled reports are saved as CSV files in the Amazon S3 bucket specified for reports for your contact center. When you set up the scheduled report, you can add a prefix to the location in Amazon S3 for the report files.

- When the report is exported to your Amazon S3 bucket, the file name includes the date and UTC time when the report was created. The Last modified date for the file is displayed using the time zone for the Amazon S3 bucket, and may not match the creation time for the report, which is in UTC.

There's a 15 minute delay

- For scheduled reports, there is a delay of 15 minutes after the scheduled report time before the report is generated. This is to ensure that the report includes the data for all of the activity that occurred during the time range specified for the report. Data from your contact center is not immediately processed and available to include in reports, so some data from the time range might not be captured in a report if the report is generated at the second the time range ends.

- For example, if you create a scheduled report for time frame of 8:00 AM to 5:00 PM, and there is activity in your contact center between 4:46:00 PM and 4:59:59 PM, the data about that activity may not be aggregated prior 5:00 PM when the report is scheduled to generate. Instead, the report is generated after 5:15 PM, by which time the data for the last 15 minutes of the time range is included in the report.
A scheduled Yesterday report works like a Last 24 hours report

- Usually Yesterday specifies the previous calendar day while Last 24 hours specifies the 24 hours prior to the current time. However, if you schedule to run a Yesterday report, it will work like a Last 24 hours report.

All scheduled reports use the UTC day, regardless of the timezone of the report

- For example, let's say you are in PST (Pacific Standard Time) and you schedule a Last 24 hours report to run at 16:00 every day. Here's the logic we use to run the report on May 15, 2020, for example:

<table>
<thead>
<tr>
<th>Item</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current time</td>
<td>2020-05-15T16:00:00.000Z</td>
</tr>
<tr>
<td>Minus 24 hours</td>
<td>2020-05-14T16:00:00.000Z</td>
</tr>
<tr>
<td>Get the date</td>
<td>2020-05-14</td>
</tr>
<tr>
<td>Get the time range</td>
<td>2020-05-14T00:00:00.000Z - 2020-05-15T00:00:00.000Z (this is the UTC day)</td>
</tr>
</tbody>
</table>

No message if a scheduled report doesn't run

- If a scheduled report fails to run, you won’t get any message in the Amazon Connect UI. You just won’t see the report in the Amazon S3 location.

Use your messaging system to email scheduled reports

- To email a scheduled report to a list of co-workers, you need to generate the email manually using your messaging system. Amazon Connect doesn’t provide an option to email the scheduled report automatically.

How to schedule a historical metrics report

1. Log in to your contact center at https://instance name.my.connect.aws/.
2. Create a new report and save it, or open a saved report.
3. Choose the down arrow next to Save in the top-right corner of the page and choose Schedule.
4. On the Recurrence tab, specify how often this report should be run (for example, weekly on Saturdays) and the range (for example, from midnight for the previous 5 days).
5. (Optional) On the Delivery Options tab, specify a prefix for the location in Amazon S3 for the report files.
6. Choose Create.

How to delete a scheduled report

To get to the page where you can delete a scheduled report, you need to create another temporary scheduled report.

1. Log in to your contact center at https://instance name.my.connect.aws/.
2. On the navigation menu, choose Analytics and optimization, Saved reports.
3. On the View reports page, choose the Historical metrics tab.
4. Click or tap on the saved report that has been scheduled.
5. Choose the down arrow next to Save in the top-right corner of the page and choose Schedule.
6. Choose Create.
7. On the Schedule Report page, choose Delete next to the scheduled reports you want to delete.

For instructions on deleting saved reports, see How to delete saved reports (p. 1089).

Update a historical metrics report

After you save a report, you can update it at any time.

To update a historical metrics report

1. Log in to your contact center at https://instance name.my.connect.aws/.
2. Choose Analytics and optimization, Saved reports.
3. From the Historical metrics tab, choose the name of the report. Choose the gear icon, update the report settings as needed, and choose Apply.
4. To update the current report, choose Save. To save your changes to a new report, choose Save as.

Download a historical metrics report

You can download the data included in a report as a comma-separated value (CSV) file so you can use it with other applications. If there's no data for one of the selected metrics, the field in the downloaded CSV file contains a dash.

To download a historical metrics report as a CSV file

1. Log in to your contact center at https://instance name.my.connect.aws/.
2. Create a new report or open a saved report.
3. Choose the down arrow next to Save in the top-right corner of the page and choose Download CSV.
4. When prompted, confirm whether to open or save the file.

Although the times in the online report are in hh:mm:ss, all times in the downloaded report are in seconds.
You can convert the seconds to minutes using an Excel formula. Alternatively, if you have a short report, you can copy and paste the data from Amazon Connect to Excel and it will preserve the format.

### Interval downloaded in ISO date format

The interval is downloaded in ISO date format, as shown in the following image.

Tip: when you download a historical metrics report, the interval will be in ISO date format, and won’t match the UI. If needed, use Excel to convert it to the desired format.

### Download all historical metric results

If you need to download more than a page or two of historical metrics, we recommend using the following steps:

1. Schedule the report to run as often as needed.
   
   For example, you might schedule the Login/Logout report to run daily at midnight.

2. The full report is saved to your Amazon S3 bucket.
3. Go to your Amazon S3 bucket and download the report.

To learn how scheduled reports work, see Schedule a historical metrics report (p. 1035).

Show agent queues in a Queues table

By default agent queues don't appear in a Queues table in a historical metrics report. You can choose to show them.

To show agent queues in a Queues table

1. In a historical metrics report, choose the Settings icon.

```
Historical metrics: Queues

| Queue | Average queue abandon time | Average after contact work time | Average queue \n\nQueue | \n\nTotal | Sep 10, 2020, 12:00 AM - Sep 17, 2020, 12:00 AM | \n\nTime Zone | UTC |
```

2. Choose Filters, Show agent queues, Agent queues, and then use the drop-down to choose the agent's queues you want to include in the table.

3. Choose Apply. The agent queues you selected appear in the Queues table in the historical metrics report.
How many contacts in queue on a specific date

The historical metrics reports don’t provide a way for you to determine how many contacts were in queue on a specific date, at a specific time.

To get this information in a historical report, you need the help of a developer. The developer uses the GetCurrentMetricData API to store the data so you can look it up later.

Agent activity audit report

The agent activity audit is like a report version of the agent event stream (p. 1045). All of the data in this report is also in the agent event stream.

For example, if there’s something in the audit report you want to recreate, or if you want to recreate a different time period, you can do so using the agent event stream.

Run the agent activity audit report

For a list of required permissions to perform this procedure, see Permissions required to view historical metrics reports (p. 1031).

1. Log in to your contact center at https://instance name.my.connect.aws/.
2. Choose Analytics and optimization, Historical metrics, Agents, Agent activity audit.
3. Choose the agent login, date, and timezone, and then choose Generate Report.
4. To download the results, choose Download CSV.

Status definitions

The following values may appear in the Status column on agent activity audit report.

• Available: The agent has set their status in the Contact Control Panel (CCP) to Available. Contacts can be routed to them.
• Offline: The agent has set their status in the Contact Control Panel (CCP) to Offline. Contacts cannot be routed to them.
• Custom status: The agent has set their status in the Contact Control Panel (CCP) to a custom status. Contacts cannot be routed to them.
• Joining Customer: The state between an inbound contact arriving in the flow and routing to the agent.
• Connecting Agent: The state between an inbound contact being routed to an agent and the agent receiving the contact.
• Connected: When an inbound contact has been established by the agent choosing Accept in their CCP.
• Busy: The agent is interacting with a customer.
• Agent Disconnected: When the agent doesn’t choose Accept on the inbound contact in 20 seconds, or they choose Reject.
• Calling Customer: The state before an outbound call is established.
• Contact Missed: When the agent misses a contact.
• Telecom issue: When an outbound call is ended before the call is established. For example, there was an error with the agent’s soft phone connection.

Note

If a status appears in your report but is not listed on this page, it is a custom status created by your organization. Contact your Amazon Connect admin to learn the definition.
Login/Logout reports

The Login/Logout report displays the login and logout information for the users in your contact center (for example, agents, managers, and administrators). For each user session, the login and logout times are displayed as a row in the report. You can use the report to determine the time users were logged in to Amazon Connect. The report also displays the amount of time for each session that user was logged in to Amazon Connect.

**Important**
By default, when an agent closes their CCP window, they are not logged out. Unless you have customized your CCP for automatic logout (p. 237), agents must choose the Logout button. Until they choose the Logout button, the Login/Logout report shows them as logged in.

Login/Logout report limit: 10,000 rows

- If you try to generate a Login/Logout report that has more than 10,000 rows, it won't complete.
- The Login/Logout report page displays only 10,000.
- If you schedule a Login/Logout report that contains more than 10,000 rows, the report will fail. In addition, no report output will be saved to your S3 bucket, and you cannot view the report.
- If you have a contact center with a lot of users, and your reports fail to complete, you can specify a shorter time range to reduce the size of the report generated, or apply filters to the report, such as routing profile and agent hierarchy. You can then use other filters to capture all of the login/logout data for your instance.

Required permissions to access the Login/Logout report

Before you can generate a Login/Logout report, you need the following permissions assigned to your security profile: Login/Logout report - View.

By default, the Amazon Connect Admin security profile has these permissions.
For information about how add more permissions to an existing security profile, see Update security profiles (p. 797).

### Generate a Login/Logout report

A Login/Logout report includes only login or logout actions by your users that occurred during the specified time range.

- If user logged in during the time range and did not log out, the report shows a login time but not a logout time.
- If the user logged in before the start of the time range, and then logged out during the time range, the report shows both the login and logout times even though the login occurred before the start of the time range. This is so you can view the duration of the user session associated with the most recent logout.

**To generate a Login/Logout report**

1. Log in to your contact center at https://instance name.my.connect.aws/.
2. Choose Analytics and optimization, Login/Logout report.
3. On the Login/Logout report page, choose the Time range for the records to include in the report. Choose Custom time range to specify a range up to 7 days.
4. Choose the Time zone to use for your report.
5. To filter data included in the report, for Filter by, choose a value.
6. Choose Generate report, Save.
7. Provide a name for the report, and choose Save.
Edit a Saved Login/Logout Report

After you save your report, you can edit it at any time. When you open a saved report, the time frame and date range displayed show the date and time defined when you saved the report.

To edit a saved Login/Logout report

1. Log in to your contact center at https://instance name.my.connect.aws/.
2. Choose Analytics and optimization, Saved reports.
3. Choose Login/Logout report and select the report to edit.
4. Update the Time range, Time zone, and Filter by settings.
5. To overwrite your existing report, choose Save.
6. To save the changes as a new report, choose Save, Save as. Provide a name for the report and choose Save as.

Download a Login/Logout report as a CSV File

When you have generated a report, you can download it as a comma-separated value (CSV) file so that you can use it other applications to work with the data, such as a spreadsheet or database.

To download a report as a CSV file

1. Open the report to download.
2. On the Login/Logout report page, at the top right corner, choose the Share report menu (arrow) next to Save.
3. Choose Download CSV. The file Login_logout_report.csv is downloaded to your computer.

Share a Login/Logout report

To make the report available to other people in your organization, you can share a report. People can access the report only if they have appropriate permissions in Amazon Connect.

To share a Login/Logout report

1. On the Login/Logout report page, at the top right corner, choose the Share report menu (arrow) next to Save.
2. Choose Share report.
3. To copy the URL to the report, choose Copy link address. You can send the URL to others in your organization by pasting the link into an email or other document.
4. To publish the report to your organization, for Publish report to organization, move the toggle to On.
5. Choose Save.

Schedule a Login/Logout report

To generate a report with the same settings on a regular basis, you can schedule the report to run daily or on specific days of the week. Note that scheduled Login/Logout reports work differently than Login/Logout reports you generate (p. 1042) from the user interface for a specified time range.
Important things to know

- When you schedule a report, it is automatically published to your organization. Anyone with appropriate permissions can view the report. Users with all permissions for Login/Logout reports can also edit, schedule, or delete the report.
- For scheduled Login/Logout reports, the trailing window value is always the last 24 hours.
- A scheduled report always runs at 12AM on the day you select, in the time zone that you choose.

  For example, if you select Wednesday, the report runs at midnight Wednesday and does not include any data for Wednesday.
- Scheduled reports are saved as CSV files in your Amazon S3 bucket. The default time zone is UTC. To have your report run at 12AM in your local time, choose your time zone instead.
- To email a scheduled report to a list of co-workers, you need to generate the email manually using your messaging system. Amazon Connect doesn't provide an option to email the scheduled report automatically.

How to schedule a Login/Logout report

1. If you already have a saved report to schedule open, skip to step 4. Otherwise, in the dashboard, choose Analytics and optimization, Saved reports.
2. Choose Login/Logout report.
3. Hover the mouse pointer over the row containing the name of the report to schedule, and choose the Schedule report icon.
4. On the Schedule report page, under Recurrence, for Generate this report, choose whether to generate the report Daily or Weekly.
5. If you choose Weekly, select the day or days of the week on which to run the report.
6. Choose the Time zone.
7. To add a prefix to the S3 path to the saved report, choose Delivery Options and enter a value in the Prefix field.

  The prefix is added to the path between /Reports and the report name. For example: .../Reports/my-prefix/report-name-YYYY-MM-DD...
8. Choose Create.

After you schedule a report, you can change or delete the schedule for it at any time.

To edit or delete the schedule for a report

1. Follow the steps in the preceding section to open the Schedule report page.
2. To edit the schedule, choose Edit, update the Recurrence and Delivery Options as desired, and then choose Save.
3. To delete the schedule for the report, choose Delete, and then choose Delete again on the confirmation dialog.

Delete a Saved Login/Logout report

Too many reports in your report library? If you no longer want to use a saved report, you can delete it. When you delete a report, you are only deleting the settings for the report, not any reports that have already been generated using those settings. No CSV files created from a scheduled report are removed from your S3 bucket.
To delete a saved Login/Logout report

1. Open your Amazon Connect dashboard.
2. Choose Analytics and optimization, Saved reports.
3. Hover over the row for the report to delete, and choose the Delete icon.
4. Choose Delete again.

Amazon Connect agent event streams

Amazon Connect agent event streams are Amazon Kinesis data streams that provide you with near real-time reporting of agent activity within your Amazon Connect instance. The events published to the stream include these CCP events:

- Agent login
- Agent logout
- Agent connects with a contact
- Agent status change, such as to Available to handle contacts, or on Break or at Training.

You can use the agent event streams to create dashboards that display agent information and events, integrate streams into workforce management (WFM) solutions, and configure alerting tools to trigger custom notifications of specific agent activity. Agent event streams help you manage agent staffing and efficiency.

Contents
- Enable agent event streams (p. 1045)
- Sample agent event stream (p. 1046)
- Determine how long an agent spends doing ACW (p. 1048)
- Agent event streams data model (p. 1053)

Enable agent event streams

Agent event streams are not enabled by default. Before you can enable agent event streams in Amazon Connect, create a data stream in Amazon Kinesis Data Streams. Then, choose the Kinesis stream as the stream to use for agent event streams. Though you can use the same stream for both agent event streams and contact records, managing and getting data from the stream is much easier when you use a separate stream for each. For more information, see the Amazon Kinesis Data Streams Developer Guide.

When data is sent to Kinesis, the partition key used is the agent ARN. All events for a single agent are sent to the same shard, and any resharding events in the stream are ignored.

Note
If you enable server-side encryption for the Kinesis stream you select for agent event streams, Amazon Connect cannot publish to the stream. This is because it does not have permission to Kinesis kms : GenerateDataKey. To work around this, first enable encryption for scheduled reports or recordings of conversations. Next, create a AWS KMS key using KMS for encryption. Finally, choose the same KMS key for your Kinesis data stream that you use for encryption of scheduled reports or recordings of conversations so that Amazon Connect has appropriate permissions to encrypt data sent to Kinesis. For more information about creating a KMS key, see Creating Keys.

To enable agent event streams

1. Open the Amazon Connect console at https://console.aws.amazon.com/connect/.
2. On the console, choose the name in the **Instance Alias** column of the instance for which to enable agent event streams.
3. Choose **Data streaming**, then select **Enable data streaming**.
4. Under **Agent Events**, select the Kinesis stream to use, and then choose **Save**.

**Sample agent event stream**

In the following sample agent event stream, the agent is assigned to a routing profile that requires them to take both chats and calls. They can take one call, and up to three chats at a time.

**Note**
For how many chats and tasks an agent can take concurrently, see **Amazon Connect service quotas** (p. 1325).

```json
{
  "AWSAccountId": "012345678901",
  "CurrentAgentSnapshot": {
    "AgentStatus": {
      "ARN": "example-ARN", // The ARN for the agent's current agent status (not for the agent).
      "Name": "Available", // This shows the agent status in the CCP is set to Available.
      "StartTimestamp": "2019-08-13T20:52:30.704Z"
    },
    "NextAgentStatus": {
      "Name": "Lunch", // They set their next status, which pauses new contacts being routed to them while they finish their current contacts.
      "ARN": "example-ARN2", // The ARN of the agent status that the agent has set as their next status.
      "EnqueueTimestamp": "2019-08-13T20:58:00.004Z", // When the agent set their next status and paused routing of incoming contacts.
    }
  },
  "Configuration": {
    "AgentHierarchyGroups": null,
    "FirstName": "AgentEventStreamTest",
    "LastName": "Agent",
    "RoutingProfile": {
      "Concurrency": {
        "AvailableSlots": 3, // This shows the agent has 3 slots available. They aren't on any chats right now.
        "Channel": "CHAT",
        "MaximumSlots": 3 // The agent's routing profile allows them to take up to 3 chats.
      },
      "AvailableSlots": 1, // The agent has 1 slot available to take a call.
      "Channel": "VOICE",
      "MaximumSlots": 1 // The agent's routing profile allows them to take 1 call at a time.
    }
  }
}
```

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"Channels": [  
  "VOICE"  //This outbound queue only works for calls.
],  
"Name": "OutboundQueue"
},  
"InboundQueues": [  
  {  
    "Channels": [  
      "VOICE",  
      "CHAT"
    ],  
    "Name": null  //This queue has a name of "null" because it's an agent queue,    
    //and agent queues don't have names.
  },  
  {  
    "Channels": [  
      "CHAT",  
      "VOICE"
    ],  
    "Name": "Omni-channel-queue"  //This inbound queue takes both chats and calls.
  }
],  
"Name": "AgentEventStreamProfile"},  
"Username": "aestest"},  
"Contacts": [ ]},  
"EventId": "EventId-1",  
"EventTimestamp": "2019-08-13T20:58:44.031Z",  
"EventType": "HEART_BEAT",  
"PreviousAgentSnapshot": {  
  "AgentStatus": {  
    "Name": "Offline",  
    "StartTimestamp": "2019-08-13T20:52:30.704Z"
  },  
  "Configuration": {  
    "AgentHierarchyGroups": null,  
    "FirstName": "AgentEventStreamTest",  
    "LastName": "Agent",  
    "RoutingProfile": {  
      "Concurrency": [  
        {  
          "AvailableSlots": 3,  
          "Channel": "CHAT",  
          "MaximumSlots": 3
        },  
        {  
          "AvailableSlots": 1,  
          "Channel": "VOICE",  
          "MaximumSlots": 1
        }
      ],  
      "DefaultOutboundQueue": {  
      

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Determine how long an agent spends doing ACW

There's no event in the agent event stream that tells you how long a contact is in the ACW state, and by extension how long an agent spends doing ACW. However, there's other data in the agent event stream that you can use to figure this out.

First, identify when the contact entered ACW. Here's how to do that:

1. Identify when the conversation between the contact and agent ENDED.
2. View the StateStartTimestamp for the event.

For example, in the following agent event stream output, the contact enters ACW state at StateStartTimestamp: "2019-05-25T18:55:27.017Z".

**Tip**

In the agent event stream, events are listed in reverse chronological order. We recommend reading through following examples by starting at the bottom of each example.
Determine how long an agent spends doing ACW

"Name": "Available", //This just refers to the status that the agent sets manually in the CCP.

It means they are ready to handle contacts, not say, on Break.
},

"Configuration": {
  "AgentHierarchyGroups": null,
  "FirstName": "(Removed)",
  "LastName": "(Removed)",
  "RoutingProfile": {
    "DefaultOutboundQueue": {
      "Name": "BasicQueue"
    },
    "InboundQueues": [
        "Name": "BasicQueue",
      },
      {"ARN": "arn:aws:connect:us-east-1:012345678901:instance/aaaaaaaa-bbbbc-dadd-111111111111/queue/queue-ARN-for-PrimaryQueue",
        "Name": "PrimaryQueue"
      }
    ],
    "Name": "Basic Routing Profile",
  },
  "Username": "(Removed)"
},

"Contacts": [
  {
    "Channel": "VOICE",
    "ContactId": "ContactId-1",
    //This is the same contact the agent was working on when their state was CONNECTED (below).
    Since it's still the same contact but they aren't connected, we know the contact is now in ACW state.
    "InitialContactId": null,
    "InitiationMethod": "OUTBOUND", //This indicates how the contact was initiated. OUTBOUND means the agent initiated contact with the customer.
    INBOUND means the customer initiated contact with your center.
    "Queue": {
      "Name": "BasicQueue"
    },
    "QueueTimestamp": null,
    "State": "ENDED", //This shows the conversation has ended.
    "StateStartTimestamp": "2019-05-25T18:55:27.017Z" //This is the timestamp for the ENDED event (above),
    which is when the contact entered ACW state.
  }
],

"EventId": "EventId-1",
"EventType": "STATE_CHANGE", //This shows that the state of the contact has changed;
above we can see the conversation ENDED.
"PreviousAgentSnapshot": {
  "AgentStatus": {

Determine how long an agent spends doing ACW

It means they were ready to handle contacts, not say, on Break.

Next, determine when a contact left ACW. Here’s how to do that:

1. Find where the CurrentAgentSnapshot has no contacts, and the state for the contact listed in the PreviousAgentSnapshot equals ENDED.
Because a STATE_CHANGE event also occurs when the agent’s configuration is changed, such as when they are assigned a different routing profile, this step confirms you have the right event.

2. Find where the EventType = "STATE_CHANGE".
3. View the EventTimeStam for it.

For example, in the following agent event stream file, the contact left ACW at "EventTimestamp": "2019-05-25T18:55:32.022Z".

```json
{
    "AWSAccountId": "012345678901",
    "CurrentAgentSnapshot": {
        "AgentStatus": {
            "Name": "Available",  //This just refers to the status that the agent sets manually in the CCP. It means they are ready to handle contacts, not say, on Break.
        },
        "Configuration": {
            "AgentHierarchyGroups": null,
            "FirstName": "(Removed)",
            "LastName": "(Removed)",
            "RoutingProfile": {
                "DefaultOutboundQueue": {
                    "Name": "BasicQueue"
                },
                "InboundQueues": [
                    {
                        "Name": "BasicQueue"
                    },
                    {
                        "ARN": "arn:aws:connect:us-east-1:012345678901:instance/aaaaaaaa-bbbb-cccc-dddd-111111111111/queue/queue-ARN-for-PrimaryQueue",
                        "Name": "PrimaryQueue"
                    }
                ],
                "Name": "Basic Routing Profile"
            },
            "Username": "(Removed)"
        },
        "Contacts": []  //Since a contact isn't listed here, it means ACW for ContactId-1 (below) is finished, and the agent is ready for a new contact to be routed to them.
    },
    "EventId": "477f2c4f-cd1a-4785-b1a8-97023dc1229d",
    "EventTimestamp": "2019-05-25T18:55:32.022Z",  //Here's the EventTimestamp for the STATE_CHANGE event. This is when the contact left ACW.
    "EventType": "STATE_CHANGE",  //Here's the STATE_CHANGE
    "PreviousAgentSnapshot": {
        "AgentStatus": {
        ...}
```

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Determine how long an agent spends doing ACW

It means they were at work, not say, on Break.

Finally, to calculate the amount of time the contact was in the ACW state, and thus how long the agent spent working on it:

In this example, the agent spent 5.005 seconds doing ACW for ContactId-1.

Agent event streams data model

Agent event streams are created in JavaScript Object Notation (JSON) format. For each event type, a JSON blob is sent to the Kinesis data stream. The following event types are included in agent event streams:

- LOGIN—An agent login to the contact center.
- LOGOUT—An agent logout from the contact center.
- STATE_CHANGE—One of the following changed:
  - The agent changed their status in the Contact Control Panel (CCP). For example, they changed it from Available to on Break.
  - The state of the conversation between the agent and contact changed. For example, they were connected and then on hold.
  - One of the following settings changed in the agent's configuration:
    - Their routing profile
    - The queues in their routing profile
    - Auto-accept call
    - Sip address
    - Agent hierarchy group
    - Language preference setting in the CCP
- HEART_BEAT—This event is published every 120 seconds if there are no other events published during that interval.

**Note**
These events continue to be published up to an hour after an agent has logged off.

**Event Objects**
- AgentEvent (p. 1053)
- AgentSnapshot (p. 1054)
- Configuration (p. 1055)
- Contact object (p. 1056)
- HierarchyGroup object (p. 1057)
- AgentHierarchyGroups object (p. 1058)
- Queue object (p. 1058)
- RoutingProfile object (p. 1058)

**AgentEvent**

The AgentEvent object includes the following properties:

**AgentARN**

The Amazon Resource Name (ARN) for the agent account.

Type: ARN

**AWSAccountid**

The 12-digit AWS account ID for the AWS account associated with the Amazon Connect instance.
**Agent event streams data model**

**CurrentAgentSnapshot**

Contains agent configuration, such as username, first name, last name, routing profile, hierarchy groups, contacts, and agent status.

Type: AgentSnapshot object

**EventId**

Universally unique identifier (UUID) for the event.

Type: String

**EventTimestamp**

A time stamp for the event, in ISO 8601 standard format.

Type: String (yyyy-mm-ddThh:mm:ss.sssZ)

**EventType**

The type of event.

Valid values: STATE_CHANGE | HEART_BEAT | LOGIN | LOGOUT

**InstanceARN**

Amazon Resource Name for the Amazon Connect instance in which the agent's user account is created.

Type: ARN

**PreviousAgentSnapshot**

Contains agent configuration, such as username, first name, last name, routing profile, hierarchy groups, contacts, and agent status.

Type: AgentSnapshot object

**Version**

The version of the agent event stream in date format, such as 2019-05-25.

Type: String

**AgentSnapshot**

The AgentSnapshot object includes the following properties:

**AgentStatus**

Agent status data, including:

- **ARN**—The ARN for the agent's current agent status (not for the agent).
- **Name**—This is the status of the agent that they manually set in the CCP (p. 1078), or that the supervisor manually changes in the real-time metrics report (p. 1015).

For example, their status might be **Available**, which means that they are ready for inbound contacts to be routed to them. Or it might be a custom status, such as Break or Training, which means that inbound contacts can't be routed to them but they can still make outbound calls.

- **StartTimestamp**—The timestamp in ISO 8601 standard format for the time at which the agent entered the status.
Agent event streams data model

Type: String (yyyy-mm-ddThh:mm:ssZ)
- Type—ROUTABLE, CUSTOM, or OFFLINE

Type: AgentStatus object.

NextAgentStatus

If the agent set a next agent status, the data appears here.
- ARN—The ARN of the agent status that the agent has set as their next status.
- Name—This is the name of the agent status that the agent has set as their next status.
- EnqueueTimestamp—The timestamp in ISO 8601 standard format for the time at which the agent set their next status and paused routing of incoming contacts.

Type: String (yyyy-mm-ddThh:mm:ssZ)

Type: NextAgentStatus object.

Configuration

Information about the agent, including:
- FirstName—The agent's first name.
- HierarchyGroups—The hierarchy group the agent is assigned to, if any.
- LastName—The agent's last name.
- RoutingProfile—The routing profile the agent is assigned to.
- Username—the agent's Amazon Connect user name.

Type: Configuration object

Contacts

The contacts

Type: List of Contact Objects object

Configuration

The Configuration object includes the following properties:

FirstName

The first name entered in the agent's Amazon Connect account.

Type: String

Length: 1-100

AgentHierarchyGroups

The hierarchy group, up to five levels of grouping, for the agent associated with the event.

Type: AgentHierarchyGroups object

LastName

The last name entered in the agent's Amazon Connect account.

Type: String
**RoutingProfile**

The routing profile assigned to the agent associated with the event.

Type: RoutingProfile object.

**Username**

The user name for the agent's Amazon Connect user account.

Type: String

Length: 1-100

**Contact object**

The Contact object includes the following properties:

**ContactId**

The identifier for the contact.

Type: String

Length: 1-256

**InitialContactId**

The original identifier of the contact that was transferred.

Type: String

Length: 1-256

**Channel**

The method of communication.

Valid values: VOICE, CHAT, TASKS

**InitiationMethod**

Indicates how the contact was initiated.

Valid values:

- **INBOUND**: The customer initiated voice (phone) contact with your contact center.
- **OUTBOUND**: An agent initiated voice (phone) contact with the customer, by using the CCP to call their number. This initiation method calls the `StartOutboundVoiceContact` API.
- **TRANSFER**: The customer was transferred by an agent to another agent or to a queue, using quick connects in the CCP. This results in a new contact record being created.
- **CALLBACK**: The customer was contacted as part of a callback flow.

For more information about the InitiationMethod in this scenario, see About queued callbacks in metrics (p. 1082).

- **API**: The contact was initiated with Amazon Connect by API. This could be an outbound contact you created and queued to an agent, using the `StartOutboundVoiceContact` API, or it could be a live chat that was initiated by the customer with your contact center, where you called the `StartChatConnect` API.
• QUEUE_TRANSFER: While the customer was in one queue (listening to Customer queue flow), they were transferred into another queue using a flow block.

• DISCONNECT: When a Set disconnect flow (p. 406) block is triggered, it specifies which flow to run after a disconnect event during a contact.

A disconnect event is when:
• A call, chat, or task is disconnected by an agent.
• A task is disconnected as a result of a flow action.
• A task expires. The task is automatically disconnected if it is not completed in 7 days.

If a new contact is created while running a disconnect flow, then the initiation method for that new contact is DISCONNECT.

State

The state of the contact.

Valid values: INCOMING | PENDING | CONNECTING | CONNECTED | CONNECTED_ONHOLD | MISSED | REJECTED | ERROR | ENDED

Note

The REJECTED state does not apply to voice contacts. Rejected voice contacts appear as MISSED.

StateStartTimestamp

The time at which the contact entered the current state.

Type: String (yyyy-mm-ddThh:mm:ss.sssZ)

ConnectedToAgentTimestamp

The time at which the contact was connected to an agent.

Type: String (yyyy-mm-ddThh:mm:ss.sssZ)

QueueTimestamp

The time at which the contact was put into a queue.

Type: String (yyyy-mm-ddThh:mm:ss.sssZ)

Queue

The queue the contact was placed in.

Type: Queue object

HierarchyGroup object

The HierarchyGroup object includes the following properties:

ARN

The Amazon Resource Name (ARN) for the agent hierarchy.

Type: String

Name

The name of the hierarchy group.
Type: String

**AgentHierarchyGroups object**

The AgentHierarchyGroups object includes the following properties:

**Level1**

Includes details for Level1 of the hierarchy assigned to the agent.

Type: HierarchyGroup object

**Level2**

Includes details for Level2 of the hierarchy assigned to the agent.

Type: HierarchyGroup object

**Level3**

Includes details for Level3 of the hierarchy assigned to the agent.

Type: HierarchyGroup object

**Level4**

Includes details for Level4 of the hierarchy assigned to the agent.

Type: HierarchyGroup object

**Level5**

Includes details for Level5 of the hierarchy assigned to the agent.

Type: HierarchyGroup object

**Queue object**

The Queue object includes the following properties:

**ARN**

The Amazon Resource Name (ARN) for the queue.

Type: String

**Name**

The name of the queue.

Type: String

**Channels**

The type of communication channel.

Type: List of Channel objects

**RoutingProfile object**

The RoutingProfile object includes the following properties:
Amazon Connect Administrator Guide

Contact events

ARN

The Amazon Resource Name (ARN) for the agent's routing profile.

Type: String

Name

The name of the routing profile.

Type: String

InboundQueues

The Queue objects associated with the agent's routing profile.

Type: List of Queue object

DefaultOutboundQueue

The default outbound queue for the agent's routing profile.

Type: Queue object

Concurrency

A list of concurrency information. Concurrency information objects have AvailableSlots (number), Channel (a channel object), and MaximumSlots (number) values.

Amazon Connect contact events

Amazon Connect allows you to subscribe to a near real-time stream of contact (voice calls, chat, and task) events (for example, call is queued) in your Amazon Connect contact center.

You can use contact events to create analytics dashboards to monitor and track contact activity, integrate into workforce management (WFM) solutions to better understand contact center performance, or to integrate applications that react to events (for example, call disconnected) in real-time.

Contents

- Subscribe to Amazon Connect contact events (p. 1059)
- Contact events data model (p. 1060)
- Contact timestamps (p. 1063)
- Sample contact event for when a voice call is connected to an agent (p. 1064)
- Sample contact event for when a voice call is disconnected (p. 1064)

Subscribe to Amazon Connect contact events

Amazon Connect contact events are published using Amazon EventBridge, and can be enabled in a couple of steps for your Amazon Connect instance in the Amazon EventBridge console by creating a new rule. Although events are not ordered, they have a timestamp which enables you to consume the data.

Events are emitted on a best effort basis.

To subscribe to Amazon Connect contact events, go to Amazon EventBridge and create a new rule by selecting Amazon Connect as the service name, and Amazon Connect contact event as the event type.
For more information about configuring rules, see Amazon EventBridge rules in the Amazon EventBridge User Guide.

The following image shows what this looks like in EventBridge:

You can then select a target of your choice which includes a Lambda function, SQS queue, or SNS topic. For information about configuring targets, Amazon EventBridge targets.

### Contact events data model

Contact events are generated in JSON. For each event type, a JSON blob is sent to the target of your choice, as configured in the rule. The following contact events are available:

- **INITIATED** - A voice call, chat, or task is initiated or transferred.
- **CONNECTED_TO_SYSTEM** - The contact has established media (for example, was answered by a human or a machine). This event uses the following status codes to identify the actual disposition.
if the contact was connected to Amazon Connect: HUMAN_ANSWERED, SIT_TONE-DETECTED, FAX_MACHINE_DETECTED, VOICEMAIL_BEEP, VOICEMAIL_NO_BEEP, AMD_UNRESOLVED, AMD_ERROR.

**Note**
This event is generated for outbound calls (Amazon Connect Campaign with answering machine detection enabled), Tasks, and Chats.

- QUEUED - A voice call, chat, or task is queued to be assigned to an agent.
- CONNECTED_TO_AGENT - A voice call, chat, or task is connected to an agent.
- DISCONNECTED - A voice call, chat, or task is disconnected. For outbound calls, the dial attempt is not successful, the attempt is connected but the call is not picked up, or the attempt results in a SIT tone.

A disconnect event is when:
- A call, chat, or task is disconnected by an agent.
- A task is disconnected as a result of a flow action.
- A task expires. The task is automatically disconnected if it is not completed in 7 days.

**Event Objects**
- Contact event (p. 1061)
- QueueInfo (p. 1062)
- AgentInfo (p. 1063)
- CustomerVoiceActivity (p. 1063)

**Contact event**

The Contact object includes the following properties:

**EventType**
The type of event published.
Type: String
Valid values: INITIATED, CONNECTED_TO_SYSTEM, QUEUED, CONNECTED_TO_AGENT, DISCONNECTED

**ContactId**
The identifier for the contact.
Type: String
Length: 1-256

**InitialContactId**
The original identifier of the contact that was transferred.
Type: String
Length: 1-256

**PreviousContactId**
The original identifier of the contact that was transferred.
Type: String
Length: 1-256
InstanceArn

Amazon Resource Name (ARN) for the Amazon Connect instance in which the agent's user account is created.

Type: ARN

Channel

The type of channel.

Type: VOICE, CHAT, or TASK

QueueInfo

The queue the contact was placed in.

Type: QueueInfo object

AgentInfo

The agent the contact was assigned to.

Type: AgentInfo object

InitiationMethod

Indicates how the contact was initiated.

Valid values:

• INBOUND: The customer initiated voice (phone) contact with your contact center.
• OUTBOUND: Represents an agent-initiated outbound voice call from the Contact Control Panel (CCP). This initiation method calls the StartOutboundVoiceContact API.
• TRANSFER: The contact was transferred by an agent to another agent or to a queue, using quick connects in the CCP. This results in a new contact record being created.
• CALLBACK: The customer was contacted as part of a callback flow. For more information about the InitiationMethod in this scenario, see About queued callbacks in metrics (p. 1082).
• API: The contact was initiated with Amazon Connect by API. This could be an outbound contact you created and queued to an agent, using the StartOutboundVoiceContact API, or it could be a live chat that was initiated by the customer with your contact center, where you called the StartChatContact API, or it could be a tasks initiated by the customer by calling the StartTaskContact API.
• QUEUE_TRANSFER: While the contact is one queue, and was then transferred into another queue using a flow block.
• DISCONNECT: When a Set disconnect flow (p. 406) block is triggered, it specifies which flow to run after a disconnect event.

A disconnect event is when:

• A call, chat, or task is disconnected by an agent.
• A task is disconnected as a result of a flow action.
• A task expires. The task is automatically disconnected if it is not completed in 7 days.

When the disconnect event occurs, the corresponding content flow runs. If a new contact is created while running a disconnect flow, then the initiation method for that new contact is DISCONNECT.

QueueInfo

The QueueInfo object includes the following properties:
QueueArn
The Amazon Resource Name (ARN) for the queue.
Type: String

QueueType
The type of queue.
Type: String

AgentInfo
The AgentInfo object includes the following properties:

AgentArn
The Amazon Resource Name (ARN) for the agent account.
Type: ARN

CustomerVoiceActivity
The CustomerVoiceActivity object includes the following properties:

GreetingStartTimestamp
The date and time that measures the beginning of the customer greeting from an outbound voice call, in UTC time.
Type: String (yyyy-MM-dd'T'HH:mm:ss.SSS'Z')

GreetingEndTimestamp
The date and time that measures the end of the customer greeting from an outbound voice call, in UTC time.
Type: String (yyyy-MM-dd'T'HH:mm:ss.SSS'Z')

Contact timestamps

InitiationTimestamp
The date and time this contact was initiated, in UTC time.
Type: String (yyyy-MM-dd'T'HH:mm:ss.SSS'Z')

ConnectedToSystemTimestamp
The date and time the customer endpoint connected to Amazon Connect, in UTC time.

EnqueueTimestamp
The date and time the contact was added to the queue, in UTC time.
Type: String (yyyy-MM-dd'T'HH:mm:ss.SSS'Z')

ConnectedToAgentTimestamp
The date and time the contact was connected to the agent, in UTC time.
Sample contact event

Sample contact event for when a voice call is connected to an agent

```json
{
    "initiationTimestamp":"2021-08-04T17:53:00.000Z",
    "contactId":"11111111-1111-1111-1111-111111111111",
    "channel":"VOICE",
    "instanceArn":"arn:aws::connect:us-west-2:123456789012:instance/12345678-1234-1234-1234-123456789012",
    "initiationMethod":"INBOUND",
    "eventType":"CONNECTED_TO_AGENT",
    "agentInfo":{
        "connectedToAgentTimestamp":"2021-08-04T17:29:09.000Z"
    },
    "queueInfo":{
        "queueType":"type",
        "enqueueTimestamp":"2021-08-04T17:29:09.000Z"
    }
}
```

Sample contact event for when a voice call is disconnected

```json
{
}
```
Contact records data model

This article describes the data model for Amazon Connect contact records. Contact records capture the events associated with a contact in your contact center. Real-time and historical metrics are based on the data captured in the contact records.

Important things to know

- We continually release new features that result in the addition of new fields to the contact records data model. Any changes we make to the data model are backward compatible. When you develop applications, we recommend that you build them to ignore the addition of new fields in the contact records data model. This will help ensure your applications are resilient.

- Amazon Connect delivers contact records at least once. Contact records may be delivered again for multiple reasons, such as new information arriving after initial delivery. For example, when you use update-contact-attributes to update a contact record, Amazon Connect delivers a new contact record. This contact record is available for 24 months from the time the associated contact was initiated.

If you're building a system that consumes contact record export streams, be sure to include logic that checks for duplicate contact records for a contact. Use the LastUpdateTimestamp property to
determine if a copy contains new data than previous copies. Then use the **ContactId** property for
deduplication.

- For the contact record retention period and maximum size of the attributes section of a contact record,
  see [Amazon Connect feature specifications](p. 1332).
- For information about when a contact record is created (and thus can be exported or used for data
  reporting), see [Events in the contact record](p. 1081).
- For a list of all contact attributes, including telephony call and case attributes, see [List of available
  contact attributes and their JSONPath reference](p. 521).

## Agent

Information about the agent who accepted the incoming contact.

### AgentInteractionDuration

The time, in whole seconds, that an agent interacted with a customer.

- **Type:** Integer
- **Min value:** 0

### AfterContactWorkDuration

The difference in time, in whole seconds, between `AfterContactWorkStartTimestamp` and
`AfterContactWorkEndTimestamp`.

- **Type:** Integer
- **Min value:** 0

### AfterContactWorkEndTimestamp

The date and time when the agent stopped doing After Contact Work for the contact, in UTC time.

- **Type:** String (`yyyy-mm-ddThh:mm:ssZ`)

### AfterContactWorkStartTimestamp

The date and time when the agent started doing After Contact Work for the contact, in UTC time.

- **Type:** String (`yyyy-mm-ddThh:mm:ssZ`)

### ARN

The Amazon Resource Name of the agent.

- **Type:** ARN

### ConnectedToAgentTimestamp

The date and time the contact was connected to the agent, in UTC time.

- **Type:** String (`yyyy-mm-ddThh:mm:ssZ`)

### CustomerHoldDuration

The time, in whole seconds, that the customer spent on hold while connected to the agent.

- **Type:** Integer
- **Min value:** 0

### HierarchyGroups

The agent hierarchy groups for the agent.
AgentHierarchyGroup

Information about an agent hierarchy group.

**ARN**

The Amazon Resource Name (ARN) of the group.

Type: ARN

**GroupName**

The name of the hierarchy group.

Type: String

Length: 1-256

AgentHierarchyGroups

Information about the agent hierarchy. Hierarchies can be configured with up to five levels.

**Level1**

The group at level one of the agent hierarchy.

Type: AgentHierarchyGroup (p. 1067)

**Level2**

The group at level two of the agent hierarchy.

Type: AgentHierarchyGroup (p. 1067)
Level3

The group at level three of the agent hierarchy.
Type: AgentHierarchyGroup (p. 1067)

Level4

The group at level four of the agent hierarchy.
Type: AgentHierarchyGroup (p. 1067)

Level5

The group at level five of the agent hierarchy.
Type: AgentHierarchyGroup (p. 1067)

ContactDetails

Contains user-defined attributes which are lightly typed within the contact.
This object is used only for task contacts. For voice or chat contacts, or for tasks that have contact attributes set with the flow block, check the ContactTraceRecord (p. 1068) Attributes object.

ContactDetailsName
Type: String
Length: 1-128

ContactDetailsValue
Type: String
Length: 0-1024

ReferenceAttributeName
Type: String
Length: 1-128

ReferenceAttributesValue
Type: String
Length: 0-1024

ContactTraceRecord

Information about a contact.

Agent
If this contact successfully connected to an agent, this is information about the agent.
Type: Agent (p. 1066)

AgentConnectionAttempts
The number of times Amazon Connect attempted to connect this contact with an agent.
Type: Integer
Min value: 0

**Attributes**

The contact attributes, formatted as a map of keys and values.

Type: Attributes

Members: AttributeName, AttributeValue

**AWSAccountId**

The ID of the AWS account that owns the contact.

Type: String

**AWSContactTraceRecordFormatVersion**

The record format version.

Type: String

**Channel**

How the contact reached your contact center.

Valid values: VOICE, CHAT, TASK

**ConnectedToSystemTimestamp**

The date and time the customer endpoint connected to Amazon Connect, in UTC time. For INBOUND, this matches InitiationTimestamp. For OUTBOUND, CALLBACK, and API, this is when the customer endpoint answers.

Type: String (yyyy-mm-ddThh:mm:ssZ)

**ContactId**

The ID of the contact.

Type: String

Length: 1-256

**CustomerEndpoint**

The customer endpoint.

Type: Endpoint (p. 1072)

**DisconnectTimestamp**

The date and time that the customer endpoint disconnected from Amazon Connect, in UTC time.

Type: String (yyyy-mm-ddThh:mm:ssZ)

**DisconnectReason**

Indicates how the contact was terminated. This data is currently available in the Amazon Connect contact record stream only.

The disconnect reason may not be accurate when there are agent or customer connectivity issues. For example, if the agent is having connectivity issues, the customer might not be able to hear them ("Are you there?") and hang up. This would be recorded as CUSTOMER_DISCONNECT and not reflect the connectivity issue.

Type: String

Voice contacts can have the following disconnect reasons:
- **CUSTOMER_DISCONNECT**: Customer disconnected first.
- **AGENT_DISCONNECT**: Agent disconnected when the contact was still on the call.
- **THIRD_PARTY_DISCONNECT**: In a third-party call, after the agent has left, the third-party disconnected the call while the contact was still on the call.
- **TELECOM_PROBLEM**: Disconnected due to an issue with connecting the call from the carrier, network congestion, network error, etc.
- **CONTACT_FLOW_DISCONNECT**: Call was disconnected in a flow.
- **OTHER**: This includes any reason not explicitly covered by the previous codes. For example, the contact was disconnected by an API.

Tasks can have the following disconnect reasons:
- **AGENT_DISCONNECT**: Agent marked the task as complete.
- **EXPIRED**: Task expired automatically because it was not assigned or completed within 7 days.
- **CONTACT_FLOW_DISCONNECT**: Task was disconnected or completed by a flow.
- **API**: The StopContact API was called to end the task.
- **OTHER**: This includes any reason not explicitly covered by the previous codes.

**InitialContactId**

If this contact is related to other contacts, this is the ID of the initial contact.

Type: String

Length: 1-256

**InitiationMethod**

Indicates how the contact was initiated.

Valid values:
- **INBOUND**: The customer initiated voice (phone) contact with your contact center.
- **OUTBOUND**: An agent initiated voice (phone) contact with the customer, by using the CCP to call their number. This initiation method calls the StartOutboundVoiceContact API.
- **TRANSFER**: The customer was transferred by an agent to another agent or to a queue, using quick connects in the CCP. This results in a new CTR being created.
- **CALLBACK**: The customer was contacted as part of a callback flow.

For more information about the InitiationMethod in this scenario, see About queued callbacks in metrics (p. 1082).

- **API**: The contact was initiated with Amazon Connect by API. This could be an outbound contact you created and queued to an agent, using the StartOutboundVoiceContact API, or it could be a live chat that was initiated by the customer with your contact center, where you called the StartChatConnect API.
- **QUEUE_TRANSFER**: While the customer was in one queue (listening to Customer queue flow), they were transferred into another queue using a flow block.
- **DISCONNECT**: When a Set disconnect flow (p. 406) block is triggered, it specifies which flow to run after a disconnect event during a contact.

A disconnect event is when:
- A call, chat, or task is disconnected by an agent.
- A task is disconnected as a result of a flow action.
- A task expires. The task is automatically disconnected if it is not completed in 7 days.

If a new contact is created while running a disconnect flow, then the initiation method for that new contact is DISCONNECT.
InitiationTimestamp

The date and time this contact was initiated, in UTC time. For INBOUND, this is when the contact arrived. For OUTBOUND, this is when the agent began dialing. For CALLBACK, this is when the callback contact was created. For TRANSFER and QUEUE_TRANSFER, this is when the transfer was initiated. For API, this is when the request arrived.

Type: String (yyyy-mm-ddThh:mm:ssZ)

InstanceARN

The Amazon Resource Name of the Amazon Connect instance.

Type: ARN

LastUpdateTimestamp

The date and time this contact was last updated, in UTC time.

Type: String (yyyy-mm-ddThh:mm:ssZ)

MediaStreams

The media streams.

Type: Array of MediaStream (p. 1072)

NextContactId

If this contact is not the last contact, this is the ID of the next contact.

Type: String

Length: 1-256

PreviousContactId

If this contact is not the first contact, this is the ID of the previous contact.

Type: String

Length: 1-256

Queue

If this contact was queued, this is information about the queue.

Type: QueueInfo (p. 1072)

Recording

If recording was enabled, this is information about the recording.

Type: RecordingInfo (p. 1073)

Recordings

If recording was enabled, this is information about the recording.

Type: Array of RecordingsInfo (p. 1073)

Note

The first recording for a contact will appear in both the Recording and Recordings sections of the contact record.

ScheduledTimestamp

The date and time when this contact was scheduled to trigger the flow to run, in UTC time. This is supported only for the task channel.
**Endpoint**

Information about an endpoint. In Amazon Connect, an endpoint is the destination for a contact, such as a customer phone number, or a phone number for your contact center.

**Address**

The value for the type of endpoint. For TELEPHONE_NUMBER, the value is a phone number in E.164 format.

Type: String  
Length: 1-256

**Type**

The endpoint type. Currently, an endpoint can only be a telephone number.

Valid values: TELEPHONE_NUMBER

**MediaStream**

Information about the media stream used during the contact.

**Type**

Type: MediaStreamType

Valid values: AUDIO, VIDEO, CHAT

**QueueInfo**

Information about a queue.

**ARN**

The Amazon Resource Name of the queue.
RecordingInfo

Type: ARN

DequeueTimestamp

The date and time the contact was removed from the queue, in UTC time. Either the customer disconnected or the contact was connected to an agent.

Type: String (yyyy-mm-ddThh:mm:ssZ)

Duration

The difference in time, in whole seconds, between EnqueueTimestamp and DequeueTimestamp.

Type: Integer

Min value: 0

EnqueueTimestamp

The date and time the contact was added to the queue, in UTC time.

Type: String (yyyy-mm-ddThh:mm:ssZ)

Name

The name of the queue.

Type: String

Length: 1-256

RecordingInfo

Information about a voice recording.

DeletionReason

If the recording was deleted, this is the reason entered for the deletion.

Type: String

Location

The location, in Amazon S3, for the recording.

Type: String

Length: 0-256

Status

The recording status.

Valid values: AVAILABLE | DELETED | NULL

Type

The recording type.

Valid values: AUDIO

RecordingsInfo

Information about a voice recording or chat transcript.
**DeletionReason**

If the recording/transcript was deleted, this is the reason entered for the deletion.

Type: String

**FragmentStartNumber**

The number that identifies the Kinesis Video Streams fragment where the customer audio stream started.

Type: String

**FragmentStopNumber**

The number that identifies the Kinesis Video Streams fragment where the customer audio stream stopped.

Type: String

**Location**

The location, in Amazon S3, for the recording/transcript.

Type: String

Length: 0-256

**MediaStreamType**

Information about the media stream used during the conversation.

Type: String

Valid values: AUDIO, VIDEO, CHAT

**ParticipantType**

Information about the conversation participant: whether they are an agent or contact.

Type: String

**StartTimestamp**

When the conversation started.

Type: String (yyyy-mm-ddThh:mm:ssZ)

**Status**

The status of the recording/transcript.

Valid values: AVAILABLE | DELETED | NULL

**StopTimestamp**

When the conversation stopped.

Type: String (yyyy-mm-ddThh:mm:ssZ)

**StorageType**

Where the recording/transcript is stored.

Type: String

Valid values: Amazon S3 | KINESIS_VIDEO_STREAM
References

Contains links to other documents that are related to a contact.

Reference Info

ReferenceType
ContentType
Location

RoutingProfile

Information about a routing profile.

ARN

The Amazon Resource Name of the routing profile.
Type: ARN
Name

The name of the routing profile.
Type: String
Length: 1-100

VoiceIdResult

The latest Voice ID status.

Authentication

The voice authentication information for the call.
Type: Authentication
FraudDetection

The fraud detection information for the call.
Type: FraudDetection
GeneratedSpeakerId

The speaker identifier generated by Voice ID.
Type: String
Length: 25 characters
SpeakerEnrolled

Was the customer enrolled during this contact?
Type: Boolean
SpeakerOptedOut

Did the customer opt out during this contact?
Authentication

Information about Voice ID authentication for a call.

ScoreThreshold
The minimum authentication score required for a user to be authenticated.
Type: Integer
Min value: 0
Max value: 100

MinimumSpeechInSeconds
The number of seconds of speech used to authenticate the user.
Type: Integer
Min value: 5
Max value: 10

Score
The output of Voice ID authentication evaluation.
Type: Integer
Min value: 0
Max value: 100

Result
The string output of Voice ID authentication evaluation.
Type: String
Length: 1-32
Valid values: Authenticated | Not Authenticated | Not Enrolled | Opted Out | Inconclusive | Error

FraudDetection

Information about Voice ID fraud detection for a call.

ScoreThreshold
The threshold for detection of fraudsters in a watchlist that was set in the flow for the contact.
Type: Integer
Min value: 0
Max value: 100
How to identify abandoned contacts

An abandoned contact refers to a contact that was disconnected by the customer while in queue. This means that they weren’t connected to an agent.

The contact record for an abandoned contact has a Queue, and an Enqueue Timestamp because it was enqueued. It won’t have a ConnectedToAgentTimestamp, or any of the other fields that populate only after the contact has been connected to an agent.

View a contact record in the UI

1. Do a contact search (p. 935). A list of contact IDs will be returned.
2. Choose an ID to view the contact record for the contact.

The following image shows part of a contact record in the UI, for a chat conversation. Note the following:

- For chats, the initiation method is always **API**.
- The chat transcript is visible in the UI.

---

**About agent status**

Agents have a status. It's manually set in the Contact Control Panel (CCP).

- When they're ready to handle contacts, they set their status in the CCP to **Available**. This means inbound contacts can be routed to them.
- When agents want to stop taking inbound contacts, they set their status to a custom status that you create, such as **Break** or **Training**. They can also change their status to **Offline**.
Tip
Supervisors can manually change the agent's status in the real-time metrics report (p. 1015).

The following diagram illustrates how the agent's status in the CCP stays constant while they are handling contacts, but in the real-time metrics report, the **Agent activity state** and the **Contact state** change. For example, when the **Agent activity state** = **Incoming**, the **Contact state** = **Incoming contact**.

**About custom agent statuses**

It's possible for agents to make outbound calls when their status in the CCP is set to a custom status. Technically, agents can make an outbound call when their CCP is set to **Offline**.

For example, an agent wants to make an outbound call to a contact. Because they don't want contacts to be routed to them during this time, they set their status to a custom status. So when you look at your real-time metrics report, you'll see the agent is simultaneously on **NPT** (the metric that indicates a custom status) and **On contact**, for example.

**About ACW (After contact work)**

After a conversation between an agent and customer ends, the contact is moved into the ACW state. When the agent finishes doing ACW for the contact, they click **Clear** to clear that slot so another contact can be routed to them.

To identify how long an agent spent on ACW for a contact:

- In the historical metrics report, **After contact work time** captures the amount of time each contact spent in ACW.
- In the agent event stream, you have to do some calculations. For more information, see Determine how long an agent spends doing ACW (p. 1048).

**How do you know when an agent can handle another contact?**

The **Availability** metric tells you when agents are finished with a contact and ready to have another one routed to them.

**What appears in the real-time metrics report?**

To find out what the agent status is in the real-time metrics report, look at the **Agent Activity** metric.

**What appears in the agent event stream?**

In the agent event stream you'll see the **AgentStatus**, for example:
"We couldn't find this agent. Use the agent's user name to identify them."

On occasion, in the Contact summary the Agent field may say "We couldn't find this agent. Use the agent's user name to identify them."

This is a generic message for contacts that did not get connected to an agent at the time. It usually means that the inbound call was not answered by the agent and the customer disconnected the call.

To confirm that the caller was never connected to an agent:

- Disconnect reason = Customer disconnect.
- No recording of the call is found for that contact ID.

To verify this behavior, call your contact center and disconnect after a period of time without an agent accepting the call.

About contact states

Contact states appear in two places: the real-time metrics reports and the agent event stream.
Contact states in the agent event stream

There are different events that can appear in the lifecycle of a contact. Each of these events appear in the agent event stream as a **State**. A contact can have the following states that appear in the agent event stream:

- **INCOMING** - This is specific to queued callbacks. The agent is presented with a callback.
- **PENDING** - This is specific to queued callbacks.
- **CONNECTING** - An inbound contact is being offered to the agent (it's ringing). The agent has not yet taken any action to accept or reject the contact, and they haven't missed it.
- **CONNECTED** - The agent has accepted the contact. Now the customer is in a conversation with the agent.
- **CONNECTED_ONHOLD** - They are in a conversation with the agent, and the agent has put the customer on hold.
- **MISSED** - The contact was missed by the agent.
- **ERROR** - This appears when, for example, the customer abandons the call during outbound whisper.
- **ENDED** - The conversation has ended, and the agent has started doing ACW for that contact.
- **REJECTED** - The contact was rejected by the agent or the customer abandoned the contact when it is connecting to the agent. This applies to chat and tasks.

Here's what the contact state looks like in the agent event stream:

```json
"Contacts": [
  {
    "Channel": "VOICE",  //This shows the agent and contact were talking on the phone.
    "ContactId": "ContactId-1",  //This shows the agent was working with a contact identified as "ContactId-1".
    "InitialContactId": null,
    "InitiationMethod": "OUTBOUND",  //This shows the agent reached the customer by making an outbound call.
    "Queue": {
      "QueueTimestamp": null,
      "State": "CONNECTED",  //Here's the contact state. In this case, it shows the contact was CONNECTED to the agent, instead of say, MISSED.
      "StateStartTimestamp": "2019-05-25T18:55:21.011Z"  //This shows when the contact was connected to the agent.
    }
  }
]
```

Events in the contact record

A contact record captures events associated with the contact in your contact center. For example, how long the contact lasted, when it started and stopped. For a list of all data that's captured in the contact record, see [Contact records data model](p. 1065).

A contact record is opened for a customer when they are connected to your contact center. The contact record is completed when the interaction with the flow or agent ends (that is, the agent has completed
the ACW and cleared the contact). This means it's possible for a customer to have multiple contact records.

The following diagram shows when a contact record is created for a contact.

Each time a contact is connected to an agent, a new contact record is created. The contact records for a contact are linked together through the contactId fields: original, next, and previous.

**Tip**
A contact is considered connected when a contact record is created. It's possible a contact record can be created before a call is finished ringing for the caller, due to network conditions and PSTN event propagation.

### About queued callbacks in metrics

This topic explains how queued callbacks appear in your real-time metrics reports and the contact record.

**Tip**
To see only the number of customers who are waiting for a call back, you need to create a queue that only takes callback contacts. To learn how to do this, see [Set up routing](p. 222). Currently there isn't a way to see the phone numbers of the contacts waiting for callbacks.

1. Callbacks are initiated when the Transfer to queue (p. 441) block is triggered to create the callback in a callback queue.

2. After any initial delay is applied, the callback is put into the queue. It remains there until an agent is available and can be offered the contact.
3. When the callback is connected to the agent, a new contact record is created for the contact.

4. The *Initiation Timestamp* in the callback contact record corresponds to when the callback is initiated in the flow, shown in step 1.
How properties in the Transfer to Queue block affect this flow

The Transfer to queue (p. 441) block has the following properties, which affect how Amazon Connect handles the callback:

- **Initial delay**: This property affects when a callback is put in queue. Specify how much time has to pass between a callback contact being initiated in the flow, and the customer being put in queue for the next available agent. For more information, see How Initial delay affects Scheduled and In queue metrics (p. 1084).

- **Maximum number of retries**: If this is set to 2, then Amazon Connect tries to call the customer at most three times: the initial callback, and two retries.

- **Minimum time between attempts**: If the customer doesn't answer the phone, this is how long to wait before trying again.

How Initial delay affects Scheduled and In queue metrics

In the Transfer to queue (p. 441) block, the **Initial delay** property affects when a callback is put in queue. For example, assume **Initial delay** is set to 30 seconds. Here's what appears in your real-time metrics report:

1. After 20 seconds, the callback has already been created, but it is not yet in queue because of the **Initial delay** setting.
2. After 35 seconds, the callback contact has been placed in queue.

3. Assume that after 40 seconds, an agent accepts the callback.

What counts as a "Failed Callback Attempt"

If an agent doesn't accept an offered callback, it doesn't count as an failed callback attempt. Rather, the routing engine offers the callback to the next available agent, until an agent accepts.

A failed callback attempt would be along the lines of: an agent accepts a callback but then something goes wrong between then and the agent being joined to the customer.

The contact is considered to be in the callback queue until an agent accepts the offered callback contact.
Amazon Connect removes the callback from the queue when it’s connected to the agent. At that time, Amazon Connect starts dialing the customer. The following image shows what this looks like in a contact record:

![Image of Amazon Connect](image)

The enqueued time on the contact record for a particular callback leg corresponds to the amount of time that the contact was in queue before that particular callback attempt was made. This is not the total enqueued time across all contact records.

For example, an inbound call could be in queue for 5 minutes before a callback is scheduled. Then, after an initial delay of 10 seconds, the callback contact could be in a callback queue for 10 seconds before an agent accepts it. In this case, you would see two contact records:

1. The first contact record, with InitiationMethod=INBOUND, would have an enqueued time of 5 minutes.
2. The second contact record, with InitiationMethod=CALLBACK, would have an enqueued time of 10 seconds.

### Example: Metrics for a queued callback

This topic shows an example queued callback flow and reviews how the contact records and times are set for it.

Assume we have set up the following flows:

- **Inbound flow** -- Runs when the customer calls the customer service number.
- **Customer queue flow** – Runs when the customer is waiting in queue. In this example, we build a flow that offers a callback to the customer. If the customer selects yes, this flow executes the **Transfer to queue** block to transfer the contact to the callback queue named CallbackQueue, with an initial delay of 99 seconds, and then hangs up.
- **Outbound whisper flow** -- When a queued callback is placed, the customer hears this after they pick up and before they connect to the agent. For example, "Hello, this is your scheduled callback..."
- **Agent whisper flow** -- The agent hears this right after they accept the contact, before they are joined to the customer. For example, "You are about to be connected to Customer John, who requested a refund for..."

In this example, John calls customer service. Here’s what happens:

1. **Inbound flow creates contact record-1:**
   a. John calls customer service at 11:35. The Inbound flow runs and puts him in queue at 11:35.
   b. The Customer queue flow runs. At 11:37, John chooses to schedule a callback, so Amazon Connect initiates a callback contact at 11:37, before the inbound contact is disconnected.
2. **Callback flow creates contact record-2:**
   a. The callback contact was initiated at 11:37.
b. Because the initial delay is 99 seconds, the callback contact is placed into CallbackQueue at 11:38:39, after the 99 seconds pass. Now the callback contact is offered to an available agent.

c. After 21 seconds, an agent available at 11:39:00 and accepts the contact. The 10-second agent whisper flow is played to the agent.

d. After the agent whisper flow is complete, Amazon Connect calls John at 11:39:10. John picks up, and listens to the 15-second outbound whisper flow.

e. When the outbound whisper flow is complete, John is connected to the agent at 11:39:25. They talk until 11:45, and then John hangs up.

This scenario results in two contact records, which include the following metadata.

<table>
<thead>
<tr>
<th>Contact record-1</th>
<th>Data</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initiation Method</td>
<td>Inbound</td>
<td></td>
</tr>
<tr>
<td>Initiation Timestamp</td>
<td>11:35</td>
<td>The inbound contact is initiated in Amazon Connect.</td>
</tr>
<tr>
<td>ConnectedToSystem Timestamp</td>
<td>11:35</td>
<td>Because this is an inbound contact, InitiationTimestamp = ConnectedToSystemTimestamp.</td>
</tr>
<tr>
<td>Next Contact Id</td>
<td>points to contact record-2</td>
<td></td>
</tr>
<tr>
<td>Queue</td>
<td>InboundQueue</td>
<td></td>
</tr>
<tr>
<td>Enqueued Timestamp</td>
<td>11:35</td>
<td>The inbound contact is put in queue.</td>
</tr>
<tr>
<td>Dequeued Timestamp</td>
<td>11:37</td>
<td>Because no agent picked up, this is the same as DisconnectedTimestamp.</td>
</tr>
<tr>
<td>ConnectedToAgent Timestamp</td>
<td>N/A</td>
<td>John scheduled a callback before any agent could pick up.</td>
</tr>
<tr>
<td>Disconnected Timestamp</td>
<td>11:37:00</td>
<td>John was disconnected by flow.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>contact record-2</th>
<th>Data</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>PreviousContactId</td>
<td>points to contact record-1</td>
<td></td>
</tr>
<tr>
<td>Initiation Timestamp</td>
<td>11:37</td>
<td>The callback contact is created in Amazon Connect.</td>
</tr>
<tr>
<td>Queue</td>
<td>CallbackQueue</td>
<td></td>
</tr>
<tr>
<td>Enqueued Timestamp</td>
<td>11:38:39</td>
<td>The contact was put into the CallbackQueue, after the 99-second initial delay completes.</td>
</tr>
<tr>
<td>Dequeued Timestamp</td>
<td>11:39:00</td>
<td>After 21 seconds, an agent accepts the contact.</td>
</tr>
<tr>
<td>Queue Duration</td>
<td>120 seconds</td>
<td>This is the initial delay (99 seconds), plus any additional</td>
</tr>
</tbody>
</table>
Save custom reports

You can create custom real-time, historical, and login/logout reports that include only the metrics you're interested in. For instructions, see Create a real-time metrics report (p. 1011) and Create a historical metrics report (p. 1032).

After you create a report, you can:

- **Save** (p. 1088) the custom report and return to it later.
- **Share** (p. 1090) a link to the custom report so only people in your organization who have the link AND who have the appropriate permissions (p. 1092) in their security profile can access the report.
- **Publish** (p. 1093) the report so everyone in your organization who has the appropriate permissions (p. 1093) in their security profile can view the report.

Personal saved reports count towards quota

Personal saved reports count towards your service quota of reports per instance. For example, if you save a report every day, it will count towards your organization's number of saved reports for the instance.

For more information about quotas, see Amazon Connect service quotas (p. 1325).

Create a naming convention

All saved reports in your Amazon Connect instance must have a unique name. We recommend creating a naming convention that indicates who the owner of the report is. For example, use the team name or owner alias as the report suffix: Agent Performance - team name. That way, if the report is published, others will know who owns it.

If your organization needs to delete reports because you've reached the service quota for reports for your instance, a naming convention that includes the team or owner alias will help you track down the report owners to find out if the report is still needed.

How to save reports

1. Customize a real-time, historical, or login/logout report to include the metrics you want.
2. Choose Save. If you don’t have permissions in your security profile to create reports, this button will be inactive.

3. Assign a unique name to the report.

   Tip
   We recommend establishing a naming convention for reports in your organization, especially published reports. This will help everyone identify who the owner is. For example, use the team name or owner alias as the report suffix: Agent Performance - team name.

4. To view the report at a later time, go to Analytics and optimization, Saved reports.

How to delete saved reports

1. On the navigation menu, choose Analytics and optimization, Saved reports.
2. Choose the Historical metrics tab.
3. Go to the row that has the report you want to delete, and choose the Delete icon. If you don’t have permissions in your security profile to delete reports, this option won’t be available.
Share custom reports

You can only share reports that you create and save. This means you need the following permissions in your security profile to share reports: **Access metrics** and **Create saved reports**.

<table>
<thead>
<tr>
<th>Metrics and Quality</th>
<th>All</th>
<th>Access</th>
<th>View</th>
<th>Edit</th>
<th>Create</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access metrics</td>
<td></td>
<td>✔️</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contact search</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contact attributes</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Login/Logout report</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manager monitor</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recorded conversations</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Saved reports</td>
<td></td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
</tbody>
</table>

**To share reports**

1. On the report page, choose **Share report**.
Or, from your list of saved reports, choose the **Share report** icon.

2. Choose **Copy link address** and choose **Save**. This saves the link to your clipboard. Paste this link into an email or other location to share the report.
You don't need to publish the report to your organization in order to share the link with specific people.

**Important**
Anyone who has the link and the appropriate permissions can access the report.

## View a shared report

To view a report that someone has shared with you, you need the following:

- A link to the report.
- Permissions in your security profile:
  - **Access metrics**, if the report is a real-time or historical metrics report
  - **View Login/Logout report**, if the report is a login/logout report
  - **View Saved reports**

### Tips for viewing a shared report

- Every time you want to view the shared report, you need to access it through the link that was shared with you.
- If you get a 505 error when you choose the link that was shared with you, it means you don't have permissions to view the report.
- There's no way to save the exact same report to your list of Saved reports. You can give the report a new name and save it to your list, but then it's a different report from the one that was shared with you. If the owner of original report makes changes, you won't see them in your renamed report.
Publish reports

After you create and save a custom report with the metrics you're interested in, you can publish it so everyone in your organization with the appropriate permissions (p. 1093) can access the report.

After a report is published, people will be able to see the report in their list of Saved reports.

**Tip**

We recommend establishing a naming convention for reports in your organization. When reports are published, this will help everyone identify who the owner is. For example, use the team name or owner alias as the report suffix: Agent Performance - team name.

Only people who have permissions in their security profile to Create saved reports will be able to change the published report and save their changes to the published version.

**To publish a report**

1. On the real-time metrics, historical metrics, login/logout report, or Saved reports page, choose **Share report**.
2. Toggle **Publish report** to **On**, and then choose **Save**.

   ![Publish report](image)

   The report appears in the list of Saved reports for everyone who has appropriate permissions in their security profile.

3. To unpublish the report, move the toggle to **Off**.

   The report is removed from everyone's list of Saved reports.

**View published reports**

To view published reports, at minimum you need the following permissions in your security profile:
• **Access metrics**, if the report is a real-time or historical metrics report
• **View** Login/Logout report, if the report is a login/logout report
• **View** Saved reports

### Metrics and Quality

<table>
<thead>
<tr>
<th>Type</th>
<th>All</th>
<th>Access</th>
<th>View</th>
</tr>
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<tbody>
<tr>
<td>Access metrics</td>
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</tr>
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<td></td>
<td></td>
</tr>
<tr>
<td>Recorded conversations</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Saved reports</td>
<td></td>
<td>✅</td>
<td></td>
</tr>
</tbody>
</table>

**To view published reports**

- Go to Analytics and optimization, Saved reports.

Published reports appear in your list automatically.

---

### Manage saved reports (admin)

You can view and delete all saved reports in your instance, including reports that were not created by you or that are not currently published. To do this you need the **Saved reports (admin)** permission in your security profile. This permission can be found under the Analytics tab.
Permissions

View and delete reports

Once you have the appropriate permissions, go to the Analytics and Optimization tab, then Saved reports, and the All Reports tab. To view reports, search and filter by report name, report type, published status, and user. To delete reports, select the reports by using the boxes on the left and choose Remove.

Monitoring your instance using CloudWatch

Amazon Connect sends data about your instance to CloudWatch metrics so that you can collect, view, and analyze CloudWatch metrics for your Amazon Connect virtual contact center. You can use this data to monitor key operational metrics and set up alarms. Data about your contact center is sent to CloudWatch every 1 minute.

When you view the CloudWatch metrics dashboard, you can specify the refresh interval for the data displayed. The values displayed in the dashboard reflect the values for the refresh interval you define. For example, if you set the refresh interval to 1 minute, the values displayed are for a minute period. You
can select a refresh interval of 10 seconds, but Amazon Connect does not send data more often than every 1 minute. Metrics that are sent to CloudWatch are available for two weeks, and then discarded. To learn more about metrics in CloudWatch, see the Amazon CloudWatch User Guide.

**Note**
If your Amazon Connect instance was created on or before October 2018, you need to provide Amazon Connect with permission to begin publishing chat metrics to your CloudWatch account. To do so, create an IAM policy with the following permission and attach it to the Amazon Connect service role. You can find the Amazon Connect service role on the Account overview page for your Amazon Connect instance.

```json
{
"Effect": "Allow",
"Action": "cloudwatch:PutMetricData",
"Resource": "*",
"Condition": {
"StringEquals": {
  "cloudwatch:namespace": "AWS/Connect"
}
}
}
```

### Amazon Connect metrics sent to CloudWatch

The AWS/Connect namespace includes the following metrics.

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CallsBreachingConcurrencyQuota</td>
<td>The total number of voice calls that exceeded the concurrent calls quota for the instance. For the total number of calls that breach the quota, take a look at the Sum statistic.</td>
</tr>
<tr>
<td></td>
<td>For example, assume your contact center experiences the following volumes, and your service quota is 100 concurrent calls:</td>
</tr>
<tr>
<td></td>
<td>• 0:00 : 125 concurrent calls. This is 25 over the quota.</td>
</tr>
<tr>
<td></td>
<td>• 0:04 : 135 concurrent calls. This is 35 over the quota.</td>
</tr>
<tr>
<td></td>
<td>• 0:10 : 150 concurrent calls. This is 50 over the quota.</td>
</tr>
<tr>
<td></td>
<td>CallsBreachingConcurrencyQuota = 110: the total number of voice calls that exceeded the quota between 0:00 and 0:10.</td>
</tr>
<tr>
<td></td>
<td>Unit: Count</td>
</tr>
<tr>
<td></td>
<td>Dimension:</td>
</tr>
<tr>
<td></td>
<td>• <strong>InstanceId</strong>: The ID of your instance</td>
</tr>
<tr>
<td></td>
<td>• <strong>MetricGroup</strong>: <strong>VoiceCalls</strong></td>
</tr>
<tr>
<td>CallBackNotDialableNumber</td>
<td>The number of times a queued callback to a customer could not be dialed because the customer's number is in a country for which outbound calls are not allowed for the instance. The countries allowed for an instance are defined by the service quotas.</td>
</tr>
<tr>
<td></td>
<td>Unit: Count</td>
</tr>
<tr>
<td></td>
<td>Dimensions:</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
</tr>
<tr>
<td>--------</td>
<td>-------------</td>
</tr>
<tr>
<td>InstanceId</td>
<td>The ID of your instance</td>
</tr>
<tr>
<td>MetricGroup: ContactFlow</td>
<td></td>
</tr>
<tr>
<td>ContactFlowName: The name of your flow</td>
<td></td>
</tr>
<tr>
<td>CallRecordingUploadError</td>
<td>The number of call recordings that failed to upload to the Amazon S3 bucket configured for your instance. This is the bucket specified in Data Storage &gt; Call Recordings settings for the instance. Unit: Count Dimensions:</td>
</tr>
<tr>
<td></td>
<td>• InstanceId: The ID of your instance</td>
</tr>
<tr>
<td></td>
<td>• MetricGroup: CallRecordings</td>
</tr>
<tr>
<td>CallsPerInterval</td>
<td>The number of voice calls, both inbound and outbound, received or placed per second in the instance. Unit: Count Dimensions:</td>
</tr>
<tr>
<td></td>
<td>• InstanceId: The ID of your instance</td>
</tr>
<tr>
<td></td>
<td>• MetricGroup: VoiceCalls</td>
</tr>
<tr>
<td>ChatsBreachingActiveChatQuota</td>
<td>The total number of valid requests made to start a chat that exceeded the concurrent active chats quota for the instance. For the total number of chats requests that breach the quota, take a look at the Sum statistic. For example, assume your contact center experiences the following volumes, and your service quota is 2500 concurrent active chats:</td>
</tr>
<tr>
<td></td>
<td>• 0:00 : 2525 concurrent active chats. This is 25 over the quota.</td>
</tr>
<tr>
<td></td>
<td>• 0:04 : 2535 concurrent active chats. This is 35 over the quota.</td>
</tr>
<tr>
<td></td>
<td>• 0:10 : 2550 concurrent active chats. This is 50 over the quota.</td>
</tr>
<tr>
<td></td>
<td>ChatsBreachingActiveChatsQuota = 110: the total number of chats that exceeded the quota between 0:00 and 0:10. Unit: Count Dimensions:</td>
</tr>
<tr>
<td></td>
<td>• InstanceId: The ID of your instance</td>
</tr>
<tr>
<td></td>
<td>• MetricGroup: Chats</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>ConcurrentActiveChats</td>
<td>The number of concurrent active chats (p. 1325) in the instance at the time the data is displayed in the dashboard. The value displayed for this metric is the number of concurrent active chats at the time the dashboard is displayed, and not a sum for the entire interval of the refresh interval set. All active chats are included, not only active tasks that are connected to agents. While all statistics are available in CloudWatch for concurrent active chats, you might be most interested in looking at the Maximum/Average statistic. The Sum statistic isn't as useful here.</td>
</tr>
<tr>
<td>ConcurrentActiveChatsPercentage</td>
<td>The percentage of the concurrent active chats service quota used in the instance. This is calculated by: &lt;br&gt;• ConcurrentActiveChats / ConfiguredConcurrentActiveChatsLimit Where ConfiguredConcurrentActiveChatsLimit is the Concurrent active chats per instance configured for your instance. Unit: Percent (Output displays as an integer. For example, 1% of chats is shown as 1, not as 0.01.)</td>
</tr>
<tr>
<td>ConcurrentCalls</td>
<td>The number of concurrent active voice calls in the instance at the time the data is displayed in the dashboard. The value displayed for this metric is the number of concurrent active calls at the time the dashboard is displayed, and not a sum for the entire interval of the refresh interval set. All active voice calls are included, not only active calls that are connected to agents. While all statistics are available in CloudWatch for concurrent voice calls you might be most interested in looking at the Maximum/Average statistic. The Sum statistic isn't as useful here.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| ConcurrentCallsPercentage | The percentage of the concurrent active voice calls service quota used in the instance. This is calculated by:  
• ConcurrentCalls / ConfiguredConcurrentCallsLimit  
Unit: Percent (output displays as a decimal)  
Dimensions:  
• InstanceId: The ID of your instance  
• MetricGroup: VoiceCalls |
| ConcurrentTasks        | The number of concurrent active tasks in the instance at the time the data is displayed in the dashboard. The value displayed for this metric is the number of concurrent active tasks at the time the dashboard is displayed, and not a sum for the entire interval of the refresh interval set. All active tasks are included, not only active tasks that are connected to agents.  
While all statistics are available in CloudWatch for concurrent tasks you might be most interested in looking at the Maximum/Average statistic. The Sum statistic isn't as useful here.  
Unit: Count  
Dimensions:  
• InstanceId: The ID of your instance  
• MetricGroup: Tasks |
| ConcurrentTasksPercentage | The percentage of the concurrent active tasks service quota used in the instance. This is calculated by:  
• ConcurrentTasks / ConfiguredConcurrentTasksLimit  
Where ConfiguredConcurrentTasksLimit is the Concurrent tasks per instance (p. 1325) configured for your instance.  
Unit: Percent (output displays as a decimal)  
Dimensions:  
• InstanceId: The ID of your instance  
• MetricGroup: Tasks |
| ContactFlowErrors      | The number of times the error branch for a flow was run.  
Unit: Count  
Dimensions:  
• InstanceId: The ID of your instance  
• MetricGroup: ContactFlow  
• ContactFlowName: The name of your flow |
<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ContactFlowFatalErrors</td>
<td>The number of times a flow failed to execute due to a system error.</td>
</tr>
<tr>
<td></td>
<td>Unit: Count</td>
</tr>
<tr>
<td></td>
<td>Dimensions:</td>
</tr>
</tbody>
</table>
|                              |   - **InstanceId**: The ID of your instance  
|                              |   - **MetricGroup**: **ContactFlow**  
|                              |   - **ContactFlowName**: The name of your flow                                                                                                                                                                                                                                  |
| LongestQueueWaitTime         | The longest amount of time, in seconds, that a contact waited in a queue. This is the length of time a contact waited in a queue during the refresh interval selected in the CloudWatch dashboard, such as 1 minute or 5 minutes.                                                                 |
|                              | Unit: Seconds                                                                                                                                                                                                                                                                 |
|                              | Dimensions:                                                                                                                                                                                                                                                                                                                               |
|                              |   - **InstanceId**: The ID of your instance  
|                              |   - **MetricGroup**: **Queue**  
|                              |   - **QueueName**: The name of your queue                                                                                                                                                                                                                                     |
| MissedCalls                  | The number of voice calls that were missed by agents during the refresh interval selected, such as 1 minute or 5 minutes. A missed call is one that is not answered by an agent within 20 seconds.                                                                                      |
|                              | To monitor the total missed calls in a given time period, take a look at the Sum statistic in CloudWatch.                                                                                                                                                                       |
|                              | Unit: Count                                                                                                                                                                                                                                                                 |
|                              | Dimensions:                                                                                                                                                                                                                                                                                                                               |
|                              |   - **InstanceId**: The ID of your instance  
|                              |   - **MetricGroup**: **VoiceCalls**                                                                                                                                                                                                                                           |
| MisconfiguredPhoneNumbers    | The number of calls that failed because the phone number is not associated with a flow.                                                                                                                                                                                         |
|                              | Unit: Count                                                                                                                                                                                                                                                                 |
|                              | Dimensions:                                                                                                                                                                                                                                                                                                                               |
|                              |   - **InstanceId**: The ID of your instance  
<p>|                              |   - <strong>MetricGroup</strong>: <strong>VoiceCalls</strong>                                                                                                                                                                                                                                           |</p>
<table>
<thead>
<tr>
<th><strong>Metric</strong></th>
<th><strong>Description</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>PublicSigningKeyUsage</td>
<td>The number of times a flow security key (public signing key) was used to encrypt customer input in a flow.</td>
</tr>
<tr>
<td></td>
<td>Unit: Count</td>
</tr>
<tr>
<td></td>
<td>Dimensions:</td>
</tr>
<tr>
<td></td>
<td>• <strong>InstanceId</strong>: The ID of your instance</td>
</tr>
<tr>
<td></td>
<td>• <strong>SigningKeyId</strong>: The ID of your signing key</td>
</tr>
<tr>
<td>QueueCapacityExceededError</td>
<td>The number of calls that were rejected because the queue was full.</td>
</tr>
<tr>
<td></td>
<td>Unit: Count</td>
</tr>
<tr>
<td></td>
<td>Dimensions:</td>
</tr>
<tr>
<td></td>
<td>• <strong>InstanceId</strong>: The ID of your instance</td>
</tr>
<tr>
<td></td>
<td>• <strong>MetricGroup</strong>: Queue</td>
</tr>
<tr>
<td></td>
<td>• <strong>QueueName</strong>: The name of your queue</td>
</tr>
<tr>
<td>QueueSize</td>
<td>The number of contacts in the queue. The value reflects the number of contacts in the queue at the time the dashboard is accessed, not for the duration of the reporting interval.</td>
</tr>
<tr>
<td></td>
<td>Unit: Count</td>
</tr>
<tr>
<td></td>
<td>Dimensions:</td>
</tr>
<tr>
<td></td>
<td>• <strong>InstanceId</strong>: The ID of your instance</td>
</tr>
<tr>
<td></td>
<td>• <strong>MetricGroup</strong>: Queue</td>
</tr>
<tr>
<td></td>
<td>• <strong>QueueName</strong>: The name of your queue</td>
</tr>
<tr>
<td>SuccessfulChatsPerInterval</td>
<td>The number of chats successfully started in the instance for the defined interval.</td>
</tr>
<tr>
<td></td>
<td>Unit: Count</td>
</tr>
<tr>
<td></td>
<td>Dimensions:</td>
</tr>
<tr>
<td></td>
<td>• <strong>InstanceId</strong>: The ID of your instance</td>
</tr>
<tr>
<td></td>
<td>• <strong>MetricGroup</strong>: Chats</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>TasksBreachingConcurrencyQuota</td>
<td>The total number of tasks that exceeded the concurrent tasks quota for the instance. For the total number of tasks that breach the quota, take a look at the Sum statistic.</td>
</tr>
<tr>
<td></td>
<td>For example, assume your contact center experiences the following volumes, and your service quota is 2500 concurrent tasks:</td>
</tr>
<tr>
<td></td>
<td>• 0:00 : 2525 concurrent tasks. This is 25 over the quota.</td>
</tr>
<tr>
<td></td>
<td>• 0:04 : 2535 concurrent tasks. This is 35 over the quota.</td>
</tr>
<tr>
<td></td>
<td>• 0:10 : 2550 concurrent tasks. This is 50 over the quota.</td>
</tr>
<tr>
<td></td>
<td>TasksBreachingConcurrencyQuota = 110: the total number of tasks that exceeded the quota between 0:00 and 0:10.</td>
</tr>
<tr>
<td></td>
<td>Unit: Count</td>
</tr>
<tr>
<td></td>
<td>Dimensions:</td>
</tr>
<tr>
<td></td>
<td>• <strong>InstanceId</strong>: The ID of your instance</td>
</tr>
<tr>
<td></td>
<td>• <strong>MetricGroup</strong>: Tasks</td>
</tr>
<tr>
<td>TasksExpired</td>
<td>Tasks which have expired after being active for 7 days.</td>
</tr>
<tr>
<td></td>
<td>To monitor the total number of tasks that have expired in a given time period, take a look at the Sum statistic in CloudWatch.</td>
</tr>
<tr>
<td></td>
<td>Unit: Count</td>
</tr>
<tr>
<td></td>
<td>Dimensions:</td>
</tr>
<tr>
<td></td>
<td>• <strong>InstanceId</strong>: The ID of your instance</td>
</tr>
<tr>
<td></td>
<td>• <strong>MetricGroup</strong>: Tasks</td>
</tr>
<tr>
<td></td>
<td>• <strong>ContactId</strong>: The ID of the task contact</td>
</tr>
<tr>
<td>TasksExpiryWarningReached</td>
<td>Tasks that have been active for 6 days 22 hours and reached expiry warning limit.</td>
</tr>
<tr>
<td></td>
<td>To monitor the total number of tasks that have reached expiry warning limit in a given time period, take a look at the Sum statistic in CloudWatch.</td>
</tr>
<tr>
<td></td>
<td>Unit: Count</td>
</tr>
<tr>
<td></td>
<td>Dimensions:</td>
</tr>
<tr>
<td></td>
<td>• <strong>InstanceId</strong>: The ID of your instance</td>
</tr>
<tr>
<td></td>
<td>• <strong>MetricGroup</strong>: Tasks</td>
</tr>
<tr>
<td></td>
<td>• <strong>ContactId</strong>: The ID of the task contact</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| ThrottledCalls                | The number of voice calls that were rejected because the rate of calls per second exceeded the maximum supported quota. To increase the supported rate of calls, request an increase in the service quota for concurrent active calls per instance. To monitor the total throttled calls in a given time period, take a look at the Sum statistic in CloudWatch. Unit: Seconds Unit: Count Dimensions:  
  • **InstanceId**: The ID of your instance  
  • **MetricGroup**: VoiceCalls |
| ToInstancePacketLossRate     | The ratio of packet loss for calls in the instance, reported every 10 seconds. Each data point is between 0 and 1, which represents the ratio of packets lost for the instance. Unit: Percent Dimensions:  
  • **Participant**: Agent  
  • **Type of Connection**: WebRTC  
  • **Instance ID**: The ID of your instance  
  • **Stream Type**: Voice |

**Amazon Connect CloudWatch metrics dimensions**

In CloudWatch, a dimension is a name/value pair that uniquely identifies a metric. In the dashboard, metrics are grouped by dimension. When you view metrics in the dashboard, only metrics with data are displayed. If there is no activity during the refresh interval for which there is a metric, then no data from your instance is displayed in the dashboard.

The following dimensions are used in the CloudWatch dashboard for Amazon Connect metrics.

**Flow metrics dimension**

**Note**
If a flow has a dimension name in non-ASCII characters, you won't be able to see it in CloudWatch.

Filters metric data by flow. Includes the following metrics:

- ContactFlowErrors
- ContactFlowFatalErrors
- PublicSigningKeyUsage
Contact metrics dimension

Filters metric data by contacts. Includes the following metrics:

- TasksExpiryWarningReached
- TasksExpired

Instance metrics dimension

Filters meta data by instance. Includes the following metrics:

- CallsBreachingConcurrencyQuota
- CallsPerInterval
- CallRecordingUploadError
- ChatsBreachingActiveChatQuota
- ConcurrentActiveChats
- ConcurrentActiveChatsPercentage
- ConcurrentCalls
- ConcurrentCallsPercentage
- ConcurrentTasks
- ConcurrentTasksPercentage
- MisconfiguredPhoneNumbers
- MissedCalls
- SuccessfulChatsPerInterval
- TasksBreachingConcurrencyQuota
- ThrottledCalls

Instance ID, Participant, Stream Type, Type of Connection

Filters metric data by connection. Includes the following metrics:

- ToInstancePacketLossRate

Queue metrics dimension

Note
If a queue has a dimension name in non-ASCII characters, you won't be able to see it in CloudWatch.

Filters metric data by queue. Includes the following metrics:

- CallBackNotDialableNumber
- LongestQueueWaitTime
- QueueCapacityExceededError
- QueueSize
Amazon Connect Voice ID metrics sent to CloudWatch

The VoiceID namespace includes the following metrics.

**RequestLatency**
- The elapsed time for the request.
- Frequency: 1 minute
- Unit: Milliseconds
- Dimension: API

**UserErrors**
- The number of Error counts due to bad requests from user.
- Frequency: 1 minute
- Unit: Count
- Dimension: API

**SystemErrors**
- The number of Error counts due to internal service error.
- Frequency: 1 minute
- Unit: Count
- Dimension: API

**Throttles**
- The number of requests that are rejected due to exceeding the max rate allowed for sending requests.
- Frequency: 1 minute
- Unit: Count
- Dimension: API

**ActiveSessions**
- The number of active sessions in the domain. Active sessions are sessions that are in pending or ongoing status.
- Frequency: 1 minute
- Unit: Count
- Dimension: Domain

**ActiveSpeakerEnrollmentJobs**
- The number of active Batch Enrollment Jobs in the domain. Active Jobs are those which are in Pending or InProgress status.
- Frequency: 15 minutes
- Unit: Count
Dimension: Domain

**ActiveFraudsterRegistrationJobs**

The number of active Batch Registration Jobs in the domain. Active Jobs are those which are in Pending or InProgress status.

- Frequency: 15 minutes
- Unit: Count

Dimension: Domain

**Speakers**

The number of Speakers in the domain.

- Frequency: 15 minutes
- Unit: Count

Dimension: Domain

**Fraudsters**

The number of Fraudsters in the domain.

- Frequency: 15 minutes
- Unit: Count

Dimension: Domain

---

**Amazon Connect Voice ID metrics dimensions**

The following dimensions are used in the CloudWatch dashboard for Amazon Connect Voice ID metrics. When you view metrics in the dashboard, only metrics with data are displayed. If there is no activity during the refresh interval for which there is a metric, then no data from your instance is displayed in the dashboard.

**API metrics dimension**

This dimension limits the data to one of the following Voice ID operations:

- DeleteFraudster
- EvaluateSession
- ListSpeakers
- DeleteSpeaker
- OptOutSpeaker

**Domain metrics dimension**

The Voice ID domain where the enrollment, authentication or registration is conducted.

---

**Amazon AppIntegrations metrics sent to CloudWatch**

The AWS/AppIntegrations namespace includes the following metrics.
**RecordsDownloaded**

The number of records that were successfully downloaded as part of an AppFlow flow execution for a data integration.

Frequency: 1 minute

Unit: Count

Valid Statistics: Maximum, Sum, Minimum, Average

**RecordsFailed**

The number of records that failed to download as part of an AppFlow flow execution for a data integration.

Frequency: 1 minute

Unit: Count

Valid Statistics: Maximum, Sum, Minimum, Average

**DataDownloaded**

The number of bytes that were successfully downloaded as part of an AppFlow flow execution for a data integration.

Frequency: 1 minute

Unit: Bytes

Valid Statistics: Maximum, Sum, Minimum, Average

**DataProcessingDuration**

The time it took to process and download data as part of a single AppFlow flow execution for a data integration.

Frequency: 1 minute

Unit: Milliseconds

Valid Statistics: Maximum, Sum, Minimum, Average

**EventsReceived**

The number of events that were successfully emitted from your third-party source application (Salesforce, Zendesk) and received on your event bus.

Frequency: 1 minute

Unit: Count

Valid Statistics: Maximum, Sum, Minimum, Average

**EventsProcessed**

The number of events that were successfully processed and forwarded to be evaluated against the rules you configured on an event integration.

Frequency: 1 minute

Unit: Count

Valid Statistics: Maximum, Sum, Minimum, Average
EventsThrottled

The number of events that were throttled because the rate of emitting events exceeded the maximum supported quota.

Frequency: 1 minute
Unit: Bytes
Valid Statistics: Maximum, Sum, Minimum, Average

EventsFailed

The number of events that failed to process due to malformed or unsupported third-party events, and other processing errors.

Frequency: 1 minute
Unit: Bytes
Valid Statistics: Maximum, Sum, Minimum, Average

EventProcessingDuration

The time it took to successfully process and forward an event to be evaluated against the rules you configured on an event integration.

Frequency: 1 minute
Unit: Milliseconds
Valid Statistics: Maximum, Sum, Minimum, Average

Amazon AppIntegrations metric dimensions

You can use the following dimensions to refine AppIntegrations metrics listed above.

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AccountId</td>
<td>AWS account ID</td>
</tr>
<tr>
<td>ClientId</td>
<td>Service principal of the client</td>
</tr>
<tr>
<td>IntegrationARN</td>
<td>ARN of the event or data integration</td>
</tr>
<tr>
<td>IntegrationType</td>
<td>DataIntegration or EventIntegration</td>
</tr>
<tr>
<td>Region</td>
<td>Region of the data or event integration</td>
</tr>
</tbody>
</table>

Use CloudWatch metrics to calculate concurrent call quota

Here's how to calculate your quota for concurrent calls.

With calls active in the system, look at ConcurrentCalls and ConcurrentCallsPercentage. Calculate the quota:

- \((\text{ConcurrentCalls} / \text{ConcurrentCallsPercentage})\)
Use CloudWatch metrics to calculate concurrent active chats quota

Here's how to calculate your quota for concurrent active chats.

With chats active in the system, look at \texttt{ConcurrentActiveChats} and \texttt{ConcurrentChatsPercentage}. Calculate the quota:

\[
\text{(ConcurrentActiveChats / ConcurrentActiveChatsPercentage) * 100}
\]

For example, if \texttt{ConcurrentActiveChats} is 1000 and \texttt{ConcurrentActiveChatsPercentage} is 50, your quota is calculated as \((1000/50)*100 = 2000\).

Use CloudWatch metrics to calculate concurrent task quota

Here's how to calculate your quota for concurrent tasks.

With tasks active in the system, look at \texttt{ConcurrentTasks} and \texttt{ConcurrentTasksPercentage}. Calculate the quota:

\[
\text{(ConcurrentTasks / ConcurrentTasksPercentage) * 100}
\]

For example, if \texttt{ConcurrentTasks} is 20 and \texttt{ConcurrentTasksPercentage} is 50, your quota is calculated as \((20/50)*100 = 40\).

Logging Amazon Connect API calls with AWS CloudTrail

Amazon Connect is integrated with AWS CloudTrail, a service that provides a record of the Amazon Connect API calls that a user, role, or AWS service makes. CloudTrail captures Amazon Connect API calls as events. All public Amazon Connect APIs support CloudTrail.

Using the information that CloudTrail collects, you can identify a specific request to an Amazon Connect API, the IP address of the requester, the requester's identity, the date and time of the request, and so on. If you configure a trail, you can enable continuous delivery of CloudTrail events to an Amazon S3 bucket. If you don't configure a trail, you can view the most recent events in \texttt{Event History} in the CloudTrail console.

For more information about CloudTrail, including how to configure and enable it, see Creating a Trail For Your AWS Account and AWS CloudTrail User Guide.

Amazon Connect information in CloudTrail

CloudTrail is enabled on your AWS account when you create the account. When supported event activity occurs in Amazon Connect, that activity is recorded in a CloudTrail event along with other AWS service
events in Event history. You can view, search, and download recent events in your AWS account. For more information, see Viewing Events with CloudTrail Event History.

For an ongoing record of events in your AWS account, including events for Amazon Connect, create a trail. A trail enables CloudTrail to deliver log files to an Amazon S3 bucket. By default, when you create a trail in the console, the trail applies to all AWS Regions. The trail logs events from all AWS Regions and delivers the log files to the Amazon S3 bucket that you specify. Additionally, you can configure other AWS services to further analyze and act upon the event data collected in CloudTrail logs. For more information, see the following:

- Creating a trail for your AWS account
- CloudTrail supported services and integrations
- Configuring Amazon SNS notifications for CloudTrail
- Receiving CloudTrail log files from multiple Regions
- Receiving CloudTrail log files from multiple accounts

Every event or log entry contains information about who generated the request. The identity information helps you determine the following:

- Whether the request was made with root or AWS Identity and Access Management (IAM) user credentials.
- Whether the request was made with temporary security credentials for a role or federated user.
- Whether the request was made by another AWS service.

For more information, see the CloudTrail userIdentity Element.

Example: Amazon Connect log file entries

A trail is a configuration that enables delivery of events as log files to an Amazon S3 bucket that you specify. CloudTrail log files contain one or more log entries. An event represents a single request from any source and includes information about the requested action, the date and time of the action, request parameters, and so on. CloudTrail log files aren't an ordered stack trace of the public API calls, so they don't appear in any specific order.

The following example shows a CloudTrail log entry that demonstrates the GetContactAttributes action.

```json
{
    "eventVersion": "1.05",
    "userIdentity": {
        "type": "AssumedRole",
        "principalId": "AAAAAAA11111111EXAMPLE",
        "arn": "arn:aws:sts::123456789012:assumed-role/John",
        "accountId": "123456789012",
        "accessKeyId": "AAAAAAA11111111EXAMPLE",
        "sessionContext": {
            "attributes": {
                "mfaAuthenticated": "false",
                "creationDate": "2019-08-15T06:40:14Z"
            },
            "sessionIssuer": {
                "type": "Role",
                "principalId": "AAAAAAA11111111EXAMPLE",
                "arn": "arn:aws:iam::123456789012:role/John",
                "accountId": "123456789012",
                "userName": "John"
            }
        }
    }
}
```
Example: Amazon Connect Voice ID log file entries

Just like Amazon Connect, Voice ID is integrated with CloudTrail. When enabled, the service emits events for the Voice ID API calls made by a user, role, or an AWS service. You can reuse the same CloudTrail resources created for Amazon Connect, including the trail and the S3 bucket, to receive CloudTrail logs for Voice ID as well.

For security reasons, the sensitive fields which might contain PII information in the API requests and responses are redacted in the events.

The following example shows a CloudTrail log entry that demonstrates the CreateDomain action.

```json
{
  "eventVersion": "1.08",
  "userIdentity": {
    "type": "AssumedRole",
    "principalId": "AROA5STZEFPSWCM4YHJB2:SampleUser",
    "arn": "arn:aws:sts::111122223333:assumed-role/SampleRole/SampleUser",
    "accountId": "111122223333",
    "accessKeyId": "AAAAAAA1111111EXAMPLE",
    "sessionContext": {
      "sessionIssuer": {
        "type": "Role",
        "principalId": "EXAMPLEZEFPSWCM4YHJB2",
        "arn": "arn:aws:iam::111122223333:role/SampleRole",
        "accountId": "111122223333",
        "userName": "SampleRole"
      },
      "webIdFederationData": {},
      "attributes": {
        "mfaAuthenticated": "false",
        "creationDate": "2021-08-17T01:55:39Z"
      }
    },
    "webIdFederationData": {},
    "attributes": {
      "mfaAuthenticated": "false",
      "creationDate": "2021-08-17T01:55:39Z"
    }
  },
  "eventTime": "2021-08-17T01:55:41Z",
  "eventSource": "voiceid.amazonaws.com",
  "eventName": "CreateDomain",
  "awsRegion": "us-west-2",
  "sourceIPAddress": "205.251.233.179",
  "requestParameters": {
    "InitialContactId": "00fbeee1-123e-111e-93e3-11111bfbfccc1",
    "InstanceId": "00fbeee1-123e-111e-93e3-11111bfbfccc1"
  },
  "responseElements": null,
  "requestID": "be1bee1d-1111-11e1-1eD1-0dc1111flac1c",
  "eventId": "00fbeee1-123e-111e-93e3-11111bfbfccc1",
  "readOnly": true,
  "eventType": "AwsApiCall",
  "recipientAccountId": "123456789012"
}
```
Example: Amazon Connect Voice ID log file entries

```
"userAgent": "aws-sdk-java/1.11.590 Mac_OS_X/10.14.6 Java_HotSpot(TM)_64-Bit_Server_VM/25.202-b08 java/1.8.0_202 vendor/Oracle_Corporation",
"requestParameters": {
  "description": "HIDDEN_DUE_TO_SECURITY_REASONS",
  "name": "HIDDEN_DUE_TO_SECURITY_REASONS",
  "serverSideEncryptionConfiguration": {
    "kmsKeyId": "alias/sample-customer-managed-key"
  }
},
"responseElements": {
  "domain": {
    "arn": "arn:aws:voiceid:us-west-2:111122223333:domain/ExampleOsAjzg9xoByUatN",
    "createdAt": "Aug 17, 2021, 1:55:40 AM",
    "description": "HIDDEN_DUE_TO_SECURITY_REASONS",
    "domainId": "UcUuCPF0sAjzg9xoByUatN",
    "domainStatus": "ACTIVE",
    "name": "HIDDEN_DUE_TO_SECURITY_REASONS",
    "serverSideEncryptionConfiguration": {
      "kmsKeyId": "arn:aws:kms:us-west-2:111122223333:key/1111111-7741-44b1-a5fe-7c620589bf3"
    },
    "updatedAt": "Aug 17, 2021, 1:55:40 AM"
  }
},
"requestID": "11111111-b358-4637-906e-67437274fe4e",
"eventID": "1111111-a4d1-445e-ab62-8626af3c458d",
"readOnly": false,
"eventType": "AwsApiCall",
"managementEvent": true,
"eventCategory": "Management",
"recipientAccountId": "111122223333"
}```
Forecasting, capacity planning, and scheduling

To run a contact center, you need the right number of agents working at the right times to achieve your operational goals. It’s critical to not overspend or overrun your workforce.

Amazon Connect provides a set of services powered by machine learning that help you optimize your contact center by offering the following:

- **Forecasting** (p. 1123). Analyze and predict contact volume based on historical data. What will future demand—the contact volume and handle time—look like? Amazon Connect forecasting provides accurate and auto-generated forecasts that are automatically updated daily.
- **Scheduling** (p. 1146). Generate agent schedules for day-to-day workloads that are flexible, and meet business and compliance requirements. Offer agents flexible schedules and work-life balance. How many agents are needed in each shift? Which agent works in which slot?
- **Schedule Adherence** (p. 1166). Enable contact center supervisors to monitor schedule adherence and improve agent productivity. Schedule adherence metrics are available after the agent schedules are published.
- **Capacity planning** (p. 1136). Predict how many agents your contact center will require. Optimize plans by scenarios, service level goals, and metrics, such as shrinkage.

The following diagram shows a typical end-to-end optimization workflow by persona: Amazon Connect administrator, forecaster, scheduler, capacity planner, and agent.

---

Get Started

You get started by first enabling Forecasting, capacity planning, and scheduling in the Amazon Connect Management Console and then by configuring **Security profile permissions** for the Amazon Connect users that wish to use this feature.

**Note**

After selecting the check-box to enable Forecasting, capacity planning, and scheduling, it may take up to 24 hours before the feature is available for use. See **Enable forecasting, capacity planning, and scheduling** (p. 1114) for more information.

**Prerequisites**

- Enable forecasting, capacity planning, and scheduling (p. 1114)
Set up Amazon Connect Forecasting, capacity planning, and scheduling

Once you have completed the prerequisites, you will be able to use Forecasting, capacity planning, and scheduling. To get started, you can set a forecast interval, create a forecast group, create a forecast, create a capacity plan, and create a schedule.

- Set the forecast and scheduling interval (p. 1124)
- Create forecast groups (p. 1125)
- Create forecasts (p. 1131)
- Create capacity planning scenarios (p. 1137)
- Create staff scheduling rules (p. 1148)

Enable forecasting, capacity planning, and scheduling

You must enable Forecasting, capacity planning, and scheduling at the Amazon Connect instance level. Once the check-box has been selected to enable this feature, it may take up to 24 hours for the feature to be available for use in your AWS account.

1. Log in to the AWS Management Console using your AWS account.
2. In the AWS Management Console, at the top of the page in the search bar, type Amazon Connect and then choose Amazon Connect.

3. Choose the Instance alias that you would like to enable Forecasting, capacity planning, and scheduling on.

4. Choose Forecasting, capacity planning, and scheduling on the left-hand navigation bar. For information on the security profile permissions needed to enable Forecasting, capacity planning, and scheduling, see Security profile permissions for Forecasting, capacity planning, and scheduling (p. 1116).
Enable forecasting, capacity planning, and scheduling
5. Select the check box to enable Forecasting, capacity planning, and scheduling.

6. The status will change to **In progress**.

7. Within 24 hours the status will change to **Enabled** and Forecasting, capacity planning, and scheduling will be ready to use.

Security profile permissions for Forecasting, capacity planning, and scheduling

The following images show you the security profile permissions that apply to forecasting, capacity planning, and scheduling.
Assign the following permissions as needed to use Amazon Connect forecasting, capacity planning, and scheduling features:

- **Forecasting**: This permission allows you to view and edit in forecasting pages. For example, you can create, view, publish, and delete forecast groups and forecasts, import historical data from external applications, and more.

- **Capacity planning**: This permission allows you to view and edit in capacity planning pages, including scenario and capacity plans. It also allows users to import future estimated shrinkage and available FTEs.

- **Schedule manager**: This permission allows you to view and edit generated schedules from the schedule manager. The view permission also enables you to view historical schedule adherence metrics. (Note: You still need the View Metrics Permission in addition to this permission)

- **Team schedule calendar**: After a schedule is published, this permission enables you to view or edit the published schedule. You can see the schedule calendar, but agents cannot. The view permission also enables you to view historical schedule adherence metrics. (Note: You still need the View Metrics Permission in addition to this permission)

- **Individual schedule calendar**: This permission allows agents to view their schedule in their agent application.

For information about how add more permissions to an existing security profile, see [Update security profiles](#).

By default, the **Admin** security profile already has permissions to perform all forecasting, capacity planning, and scheduling activities.

**Troubleshooting Forecasting, capacity planning, and scheduling**

These sections outline various troubleshooting scenarios and address frequently asked questions for Forecasting, capacity planning, and scheduling.

- **Forecasting** (p. 1118)
- **Capacity planning** (p. 1121)
- **Scheduling** (p. 1121)
Forecasting

• How can I create an ad hoc forecast?

Forecasts are processed automatically, delivering short-term forecasts daily, and long-term forecasts weekly, so users don’t need to worry about running forecasts manually. However, you may want to see how a forecast is updated when you add or modify historical data. For example, if you had an anomaly in your historical contact volume, and you don’t want the machine-learning model to use that anomaly in building a forecast, you can modify the historical data and then when the new forecasts are run, the new forecasts will not incorporate that data.

To see the most recent forecasts, check the Last computed column.

New forecasts will be generated when a user uploads or deletes historical data using the Import data tab or adds/removes queues from a forecast group.

<table>
<thead>
<tr>
<th>Forecasts</th>
<th>Forecast Groups</th>
<th>Import Data</th>
<th>Forecast and schedule interval</th>
</tr>
</thead>
</table>
| Sales FG  | Short Term      | Contact Volume | Scheduled  
| Sales FG  | Short Term      | Average Handling Time | Scheduled  
| Sales FG  | Long Term       | Average Handling Time | Complete  
| Sales FG  | Long Term       | Contact Volume | Complete |

• When I import historical data it returns errors.

Select download details to ensure that the imported data is in the correct format: If there are any errors, check the error details. It will provide additional details for the specific error. You must ensure that your file is in .csv format, contains no decimals, no extra rows, or column fields. For more information on the required format, see Import historical data for forecasting.

• Forecast failed due to error: Insufficient data in Amazon Connect.

When you receive this error, it could be due to three different reasons:

1. **You have less than 6 month of historical data.** To address this problem, upload more historical data. While Amazon Connect can generate forecasts with six months of data, we recommend at least 12 months of recent contact data to ensure that contact patterns (for example, seasonality) are properly captured. If you don’t have 6 months of data, you can give Connect synthetic (artificial) data that will be used to generate the forecast. Alternately, you can upload your own forecast using the Override function.

2. **You need at least 2,000 contacts per month across all of your forecast groups.** Amazon Connect generates forecasts using historical data for all queues that are included across all forecast groups. At least 2,000 monthly contacts in the past 6 months for the Connect instance are required to successfully generate a forecast. Amazon Connect does not require 2,000 monthly contacts for every queue. All queues in all forecast groups must total more than 2,000 monthly contacts.
3. **You need recent data.** Amazon Connect performs a data recency check (is the data recent enough) based on the aggregation of all queues included across all forecast groups. At least one data point in the past four weeks is required to successfully generate a forecast.

- **Cannot import data, cannot download forecast, cannot create forecast group, or cannot create forecast.**

  Most likely, you do not have the correct permissions. Check with your admin to ensure you have permissions for **Analytics, Forecasting - Edit**.

- **Forecasting override upload failed.**

  Check the error message to make sure the `.csv` file format matches our data schema. For more information on the required format, see [Import historical data for forecasting](#).

  **Tip**
  
  download the computed or published forecast `.csv` file. Take the time period for override, and copy the queue ID and queue name, time stamps to the override template. Note, only the latest uploaded `.csv` file will be used, and the previous uploaded files will be overridden.

- **Long-term Forecast failed even after I have uploaded more than 6 months of data.**

  The data uploads for long-term and short-term forecasts are independent, so you will need to upload these separately: one for long-term and one for short-term. First, check if you also uploaded the daily historical data for long-term forecast. The 15 to 30 minute interval data is for short-term forecasts only. Second, check if the long-term daily level `.csv` file has more than 6 consecutive months historical data counted from now.

- **Short-term forecast failed even after I uploaded more than 6 month of data.**

  The data uploads for long-term and short-term forecasts are independent. The daily interval data is for long-term forecast only. First, check if you uploaded the 15 or 30 minute interval historical data for short-term forecast and the file has more than 6 consecutive month data. Second, check what is the forecast interval setting in `.csv` file to ensure it matches the historical intervals on the UI.

- **Why am I unable to publish a forecast?**

  It's possible that you do not have permissions to publish a forecast. It's also possible that the forecasts (both contact volume and handle time for each of short-term and long-term) have not been successfully generated. Check if you have the permission for **Analytics, Forecasting - Publish** and check if the forecasts have been successfully generated (the status column should show **complete** when the forecasts are generated).

- **How can I see data from a previous period?**

  You are able to view forecasts in a specified period that occurred in the past.
Can I see past forecast data?

You can see the last published and the last computed forecast. The last computed forecast will be overwritten once the next forecast is computed. If you wish to retain this data, you can download the .csv file that contains the last computed and published forecasts.

Why are the forecasts used in capacity planning different than the ones I see in forecasting or scheduling?

The forecast that is used in capacity planning is the most recent published long-term forecast. You may see a different forecast in forecasting if you are looking at the most recent computed forecast in comparison to a published forecast. You will see a different forecast in scheduling, as that is the most recently published short-term forecast.

Why do I see the call volume peak in short-term forecast at mid-night when no traffic is expected?

Forecasting uses Coordinated Universal Time (UTC) as its time zone. For North American users on the Pacific or Atlantic Coasts, this is 8 hours ahead of PST, or 7 hours ahead of PDT; and 5 hours ahead of EST, or 4 hours ahead of EDT. So for example, midnight in UTC is 4pm PST / 5pm PDT or 7pm EST / 8pm EDT.

Note

It’s important to remember to use UTC time when uploading historical data or overrides.

Why am I unable to delete a forecast?

Forecasts can only be deleted if they are not being used for a capacity plan (long-term forecast) or schedule (short-term forecast). Check if the forecast has been published and that it is used for scheduling or capacity planning. You must delete the schedule or capacity plans in order to delete the forecast.

Why do the long-term and short-term forecasts show different values for the same time period?

These two forecasts have different training frequencies and different models, as they are optimized for different purposes. Short-term is designed for interval level granularity over a period of weeks and long-term is designed for daily granularity over a period of months.
• Why is long-term average handle time flat but short-term average handle time isn't?

A flat average handle time performs better when forecasting short-term forecast workloads as it displays interval granularity over a period of weeks. Allowing the average handle time to vary in a long-term forecast results in better performance as it displays daily granularity over a period of months.

Handle time is important when calculating a workload. It generally doesn't vary much in the short term but can vary over longer time periods, which is reflected in our models.

• Is call volume counted at the time when the call comes in, or when the call ends?

Call volume starts counting at the time when the call comes in. For example, a call started at 4:50 PM, and ends at 5:05 PM. It will be counted as the call volume for the 4:45 PM - 5:00 PM interval.

**Capacity planning**

• How do I handle shrinkage in capacity planning?

Users can increase capacity planning accuracy by providing estimated future data, which includes available full-time employees (FTE) and shrinkage, for the existing forecast groups. Providing Available FTE and shrinkage data is optional. Amazon Connect can generate a capacity plan without it, but it provides improvements in the accuracy of the capacity plan. In order to import that data, download the `.csv` template from the UI and fill out the empty cells. Note that users need to enter the exact name of the forecast groups they created. Also, users can add multiple forecast groups in this `.csv` file. For more information, see [Import estimated future shrinkage and available full-time employees](#).

• I am seeing errors during data import in capacity planning.

Confirm that the forecast group names in the `.csv` file match the actual forecast group names in the forecasting module.

**Scheduling**

• The system does not generate schedules for some or all of my agents. What should I check?

This can occur due to the fact that the last date an agent can be scheduled is before the time of the schedule and/or the agent's maximum working hours don’t allow them to work in that shift profile. Review the following steps to address this issue.

1. Check [Staff Rules](#) to ensure that the **End date** is not configured for agents who do not have a schedule. **End date** allows schedulers to specify the last date that an agent can be scheduled until.

2. Check shift profiles to see if the **Start time** and **End time** hourly schedule window is equal to or more than **Maximum working hours** per agent. For example, if the shift profile is configured to generate a schedule of an 8-hour duration, when the agent's staff rule is configured for them to work 4 hours per day, the system will apply the staff rule and only generate a schedule for 4 hours.

• Why am I unable to access the scheduling page while on my company's VPN?

It is possible that your company's VPN has security measures in place that could be preventing access to the needed endpoints. If you are unable to access the scheduling page while connected to your company's VPN, reach out to your admin or network security team to have them allowlist the following endpoints:

   .awsapps.com/connect/markov/schedule-ui/api/graphql

   .my.connect.aws/markov/schedule-ui/api/graphql
• Why are lunch activities for some agents scheduled before the first break activity, even though I have specified a lunch activity to be placed after the break?

This can be caused by having overlaps in the break and lunch activities. Check the specific shift profile to see if the placement window for both activities overlap. For example, you may have configured a break activity to be placed between 11am and 1pm and a lunch activity to be placed between 10am and 3pm, so the system may choose to place the break at 12:30pm and the lunch at 11:30am. Remove or minimize the overlap of activity placement windows to solve this issue.

• Why do I see agents get scheduled at different start times than expected?

This is commonly caused by challenges with time zones. Shift profiles are set using Coordinated Universal Time (UTC), and staff rules specify which time zone agents should use. Review the following steps to address this issue.

• Ensure the shift profile start time and end time are configured in the UTC time-zone.

• Ensure the correct user time-zones are set in the Staff rules UI. For example, if you want to schedule agents in Boston (EST time-zone) from 9am to 5pm, you must do the following.
  • Set Shift profile start time as 1:00pm and end time as 9pm. Usually shift profiles are set once and later re-used.
  • Updated the timezone for all agents to EST time zone in the Staff rules UI.

• Can I view the schedule in my local time?

Yes. Supervisors and schedulers can view schedules in their local time zone for agents they manage. Agents can view their individual schedules in their local time zone. User time zones can be set in the Staff rules UI.

• Do I need to define activities for workloads like phone or chat?

No. Work will be the default activity on the schedule if there is no break or lunch scheduled for the time slot. Only define the activities for the agent when they are not taking a call or responding to a chat.

• Why did some agents did not get added to the roster for certain days?

How agents are added to the roster depends on multiple configurations in staffing groups and staff rules, such as min/max working hours, min staff required, or min/max consecutive work days. The service will take the defined working hours and add an agent to the roster by taking into consideration other rules that have been defined in staffing groups and staff rules. For example, if the minimum working hours are 40 hours, and the agent belongs to a staff group that operates 12 hours per day and 6 days per week, then the agent is likely to have some days without schedules. The service optimizes schedules based on forecasts. As long as the minimum amount of 40 hours per week (4 days with 10 hours per day) is met, the agent may not be staffed on some days when the call volume is low. In cases where you see that an agent doesn't have a schedule for a day, check the agent's minimum working hours. Also, check if the agent has been added to the roster for the remainder of the week.

• Why is my agent's scheduled time different than the shift profile time? For example, my shift profile has 10 hours every weekday, but my agent only gets scheduled for 6 hours?

The shift profile operation hours apply to staffing groups. If you don’t set the staffing groups rule for shift start time, the service will optimize your agent start time based on the forecasted workload. For example, the shift profile has 8 AM - 6 PM Monday - Friday, and the workload is light in the morning, and heavier in the afternoon. Each agent has a minimum of 6 hours and a maximum of 8 hours per day. To save agent cost, the service will schedule less agents in the morning and more agents in the afternoon. Some agents could start at 8 AM, some could start at 8:30 AM, and some could start in the afternoon. Some agents could have 6 hour schedules and some could have 8 hour schedules. In this way, you can maximize your agent resources to meet the service goal. If you want every agent to start at the same time and work an exact number of hours, you can set the rule in the staffing group shift start time to start at the same time and set the working hour to 10 hours every day. In this case, savings on agent cost will be less due to less flexibility to optimize based on forecasts.
• My agents are all full-time employees and they work 8 hours per day. How can I set this up in my schedule?

Set your staffing group's and staff's maximum and minimum working hours to 8 hours a day.

• I have a mix of full-time and temporary employees. What is the best way to define it?

The best practice is to use staffing groups to set the working hours to the 8 hours and then use staff rules to set the individual part-time agent working hours to their specific value. The value in the staff rule will override the value in the staffing group.

• How do I add meetings or one-off events?

Generate a schedule with daily activities first. In the schedule manager view, select any schedule, and use add shift to add a one-off shift activity to the schedule.

Forecasting in Amazon Connect

Forecasting is the starting point for any scheduling and capacity planning activities. Before you can generate a schedule or capacity plan, you must create a corresponding forecast.

A forecast attempts to predict future contact volume and average handle time. We use historical metrics to create the forecast.

Short term forecasts are automatically updated every day. When you come into work, you can review the forecast that was updated overnight with the most current data. You can publish the forecast to make it available to schedulers whenever you want. The Forecasting page displays when a forecast was last updated and published. Use published short term forecasts for scheduling.

Long term forecasts are automatically updated every week, based on the day you created the forecast. For example, if you created the forecast on a Monday, it is updated every Monday. Use published long term forecasts for capacity planning.
Getting started with forecasting

Use the following process to create a forecast and share it with others:

1. Set the forecast and scheduling interval (p. 1124): [This is a one-time activity typically set up by forecasters. It cannot be undone.]
2. Create forecast groups (p. 1125)
3. Import historical data (p. 1127)
4. Create forecasts (p. 1131)
5. Inspect a forecast (p. 1132)
6. Publish a forecast (p. 1135)

There are other things you can do with a forecast, such as download to a .csv file for offline analysis (p. 1133) or override (p. 1134) it, but these steps will get you started.

Set the forecast and schedule interval

You can set the granularity for your short-term forecasts and your schedules.

Important things to know

- You must have security profile permissions for Analytics, Forecast and schedule interval - Edit. For more information, see Security profile permissions for Forecasting, capacity planning, and scheduling (p. 1116).
- You must specify an interval for short-term forecasting and scheduling.
- Amazon Connect supports 15- or 30-minute intervals. For example, if you select 30 minutes as the interval, your short-term forecasts are generated for 30-minute intervals (that is, 20 contacts between 9:00 AM-9:30 AM), and your schedules are computed for 30 minute intervals.
- You must set up a forecast and a schedule interval before you can generate forecasts or create forecast groups.
• After you set the forecast and schedule interval, you cannot change it.

To set the forecast and schedule interval

1. Log in to the Amazon Connect console.
2. On the Amazon Connect navigation menu, select Analytics, Forecasting.
3. Choose the Forecast and schedule interval tab. You'll see this tab only if you have the appropriate security profile permissions.

4. Choose one of the following options:
   • 15 minute interval – Generates short-term forecasts in 15-minute intervals. For example, 20 contacts between 9:00 AM to 9:15 AM, and 30 contacts between 9:15 AM to 9:30 AM.
   • 30 minute interval – Generates short-term forecasts in 30-minute intervals. For example, 20 contacts between 9:00 AM to 9:30 AM, 30 contacts between 9:30 AM to 10:00 AM.

Create forecast groups

Forecast groups are a way for you to combine different queues into one forecast. This enables you to create a forecast from aggregated data from multiple queues, instead of from just one queue.

Important things to know

• Forecast groups are associated with a staffing group for scheduling purposes. Therefore, we recommend you group queues that share the same pool of staff (agents) under the same forecast group. It enables you to generate a more accurate forecast.
• Each queue can belong to only one forecast group. This prevents duplicates in the forecast.
• You must create at least one forecast group before you can generate any forecast.
• We strongly recommend that you create all forecast groups before creating any forecast.

Amazon Connect uses historical data for queues included in all forecast groups to train your forecasting model. By creating forecasts after all forecast groups are created, you ensure historical data of all relevant queues are included in the training.
• If a queue is associated with a forecast group and is later disabled, you don't have to remove this queue from the forecast group. This is because: Although the queue is included by the forecast group and the historical data associated with it is included in the forecast, over time, no contact reaches the disabled queue, and thus stops impacting the forecast. Only the active queues contribute to the forecast.
How to create forecast groups

1. Log in to the Amazon Connect console with an account that has security profile permissions for Analytics, Forecasting - Edit.

   For more information, see Security profile permissions for Forecasting, capacity planning, and scheduling (p. 1116).

2. On the Amazon Connect navigation menu, select Analytics, Forecasting.

3. Select the Forecast groups tab, and then choose Create forecast group.

4. On the Create Forecast Groups page, under Queues, you'll see a list of queues that are not yet associated with a forecast group are listed. If no queues are listed, it means they are all associated with a forecast group already.

5. Drag and drop one or more queues to the forecast group. You can press and hold CTRL (COMMAND for macOS users) or SHIFT to select multiple queues at a time.

   ![Drag and drop the queues to the forecast group.](image)

6. Choose Save. The new forecasting group appears, along with the number of queues in the group and the date it was last changed.

   ![Forecasting](image)

7. After creating a forecast group, you can add or remove queues. However, doing so might initiate an immediate change in associated forecasts. For example, if you made a change for forecast group today, Amazon Connect automatically computes the new short-term and long-term forecasts tomorrow. Your change to the forecast group also impacts downstream capacity plans and schedules that are created based on the forecast group.
8. You can remove the forecast group by using the **Remove** function. First delete the forecasts that are associated with the forecast group you want to delete. For example, a forecast group named *Network_Issues* cannot be deleted because this forecast group was used to create forecasts. Therefore, go to **Forecasts** tab to first delete those associated forecasts and then you can delete this forecast group.

**Next steps**

Now you're ready to create a forecast. For instructions, see Create forecasts (p. 1131).

**Import historical data for forecasting**

Amazon Connect requires sufficient historical data to learn the contact pattern and make good forecasts. By default, it uses historical contact data in Amazon Connect for forecasting. You can import historical data from external applications for Amazon Connect to use for forecasting. When you import data, Amazon Connect uses both its data and the imported data for forecasting. However, the imported data takes precedence over the Amazon Connect data.

**When to import data**

We recommend importing historical data from external applications in the following use cases:

- **Insufficient historical data in Amazon Connect.** If you have less than one year of historical data in Amazon Connect, we strongly recommend that you extract historical data from your previous system.
and upload the data to Amazon Connect. It is fine to have data split between your Amazon Connect
data and uploaded historical data. For example, if you want to generate forecasts on January 1, 2022,
and you have nine months of historical in Amazon Connect (from April 1 to December 31, 2021), we
recommend importing three additional months of data (from January 1 to March 31, 2022) to make a
continuous one-year historical data set available.

**Important**

If you have less than six months of recent historical data in Amazon Connect, the forecast will fail. You must import additional historical data to unblock forecasting. For more information, see Data requirements for forecasting (p. 1130).

- **Incorrect historical data in Amazon Connect.** If the historical contact pattern is incorrect (for example, the contact volume is abnormally low on the day of a wide-spread power outage in the contact center), you can import data that is more representative to override historical data and correct for the anomaly.

If you have more than one year of historical data in Amazon Connect, you can choose to skip data import and start creating forecasts (p. 1131).

**Important things to know**

- The data file must be a .csv file and it must be in the required format. If the file format and data don't meet the requirements, the upload does not work. We recommend downloading and using the template provided through the user interface (see step 4 in How to import historical data (p. 1129)) to help you prepare the historical data.

Following are the requirements for imported data:

- **QueueName**: Enter the Amazon Connect queue name.
- **QueueId**: Enter the Amazon Connect queue ID. To find the queue ID in the Amazon Connect console, on the left navigation, go to **Routing, Queues**, choose the queue, select **Show additional queue information**. The queue ID is the last number after /queue/.
- **ChannelType**: Enter **CHAT** or **VOICE**. You must capitalize the channel type.
- **TimeStamp**: Enter the timestamp in UTC (ISO8601) format, with a letter Z (the abbreviation of Zulu Time - Coordinated Universal Time) at the end.
- **IntervalDuration**: Enter **15mins** or **30mins** for short-term forecast, depending on your forecast and schedule interval. Enter **daily** for long-term forecast.
- **IncomingContactVolume**: Enter the number of inbound, transfer, and callback contacts as an integer.
- **AverageHandleTime**: Enter the amount of average handle time (in seconds) as an integer.
- **ContactsHandled**: Enter the number of inbound, transfer, and callback contacts handled as an integer.
- You can import multiple files. You do not have to consolidate all data in one big file. You can divide data by year, queue, interval duration types, and more, per your preference.

If duplicate data are found across multiple files, the last uploaded records are used. For example:
1. You have the original historical data (from Amazon Connect) from 7/1 to 8/1.
2. You uploaded a new historical data file X to override 7/10 to 8/1.
3. You uploaded another new historical file Y to override 7/15 to 8/1.
4. And now, the historical data baseline is: 7/1 to 7/9 from original, 7/10 to 7/14 from file X, 7/15 to 8/1 from file Y.
- You need to upload historical data *separately* for short-term and long-term forecast.
- Data aggregated in 15- or 30-minute intervals is used for short-term forecasting.
- Data aggregated at daily grain is used for long-term forecasting.
For example, if you only upload data in 15- or 30-minute interval, you won't be able to generate long-term forecasts.

- The following special characters are allowed in the .csv file: -, _, ., (, and ). Space is allowed.

The following table provides an example:

<table>
<thead>
<tr>
<th>Column header</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>QueueName</td>
<td>Queue ID in Connect</td>
</tr>
<tr>
<td>QueueId</td>
<td>Queue ID</td>
</tr>
<tr>
<td>ChannelType</td>
<td>Channel type</td>
</tr>
<tr>
<td>TimeStamp</td>
<td>Timestamp</td>
</tr>
<tr>
<td>IntervalDuration</td>
<td>Interval duration</td>
</tr>
<tr>
<td>IncomingContactVolume</td>
<td>Incoming contact volume</td>
</tr>
<tr>
<td>AverageHandleTime</td>
<td>Average handle time</td>
</tr>
<tr>
<td>ContactsHandled</td>
<td>Contacts handled</td>
</tr>
</tbody>
</table>

How to import historical data

1. Log in to the Amazon Connect console with an account that has security profile permissions for Analytics, Forecasting - Edit.

   For more information, see Security profile permissions for Forecasting, capacity planning, and scheduling (p. 1116).

2. On the Amazon Connect navigation menu, select Analytics, Forecasting, and then choose the Import Data tab.

3. Choose Upload data.

4. On the Upload historical data dialog box, choose download the CSV template for historical data. You will receive a template that looks like the following image:

<table>
<thead>
<tr>
<th>QueueName</th>
<th>QueueId</th>
<th>ChannelType</th>
<th>TimeStamp</th>
<th>IntervalDuration</th>
<th>IncomingContactVolume</th>
<th>AverageHandleTime</th>
<th>ContactsHandled</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

5. Add historical data to the .csv file, and then choose Upload file to upload it. Choose Apply.

6. If the upload fails, choose download details to view the error log message for more information.

   Following is a sample message:

   ![Generated-Brokerage-All-daily.csv-ValidationLog - Notepad](generated-Brokerage-All-daily.csv-ValidationLog - Notepad)

   Row 2 column QueueId is not a valid QueueId for the given instanceId;

7. If the forecast was uploaded successfully, its Status = Complete and Date uploaded = today.
Delete the imported historical data

You can delete the previously imported historical data via UI. Please note that the historical data deletion or addition will trigger an immediate change in associated forecasts, because this action will change the historical data baseline the model is trained for. Also, after the imported historical data is deleted, the last previously uploaded data will be used for the baseline. Take the previous example:

1. You have the original historical data (from Amazon Connect) from 7/1 to 8/1.
2. You uploaded a new historical data file X to override 7/10 to 8/1.
3. You uploaded another new historical file Y to override 7/15 to 8/1.
4. And now, the historical data baseline is: 7/1 to 7/9 from original, 7/10 to 7/14 from file X, 7/15 to 8/1 from file Y.
5. If:
   a. You deleted file Y, the baseline will be: 7/1 to 7/9 from original, 7/10 to 8/1 from X.
   b. You deleted file X, the baseline will be: 7/1 to 7/14 from original, 7/15 to 8/1 is from Y.

Data requirements for forecasting

Amazon Connect generates forecasts using a machine-learning model tailored for contact center operations. It requires a sufficient amount of recent contact data to ensure the model is trained with relevant data and is able to generate high-quality forecasts.

Important things to know

- Amazon Connect generates forecasts using historical data for all queues included in all forecast groups.
- Amazon Connect performs a data sufficiency check (is there enough data) based on the aggregation of all queues included in all forecast groups.
  - At least 2,000 monthly contacts in the past six months are required to successfully generate a forecast.
    - Amazon Connect does not require 2,000 monthly contacts for every queue. All queues in all forecast groups must total to more than 2,000 monthly contacts.
  - While Amazon Connect can generate forecasts with six months of data, we recommend 12 months of recent contact data to ensure contact patterns (for example, seasonality) are properly captured.
- Amazon Connect performs a data recency check (is the data recent enough) based on the aggregation of all queues included in all forecast groups.
  - At least one data point in the past four weeks is required to successfully generate a forecast.
**Do I have a sufficient amount of recent contact data?**

- If you have been using Amazon Connect for more than 12 months, you do not need to provide any additional data.
- If you have been using Amazon Connect for more than six months but less than 12, we recommend providing additional historical data. You can import historical data from a source that is external to Amazon Connect. For instructions, see Import historical data (p. 1127).
- If you have been using Amazon Connect for less than six months, make sure it has at least six months of data. Otherwise, forecasting will fail.

For instructions about how to import more data, see Import historical data (p. 1127).

**Create forecasts**

Forecasts are a projection of the workload in your contact center. Amazon Connect provides long-term and short-term forecasts for you to generate capacity plans and agent schedules. The forecasts include inbound, transfer, and callback contacts in both voice and chat channels.

After creating a forecast, you will not need to generate it manually.

- Short-term forecasts are scheduled to run automatically every day.
- Long-term forecasts are scheduled to run automatically every week, starting from the day of onboarding. For example, if you enable Amazon Connect forecasting on Monday, long-term forecasts will be computed on the day of onboarding and automatically re-computed every Monday.
- Every forecast is computed using the most current contact data.
- The models for short-term and long-term forecasts are retrained on a weekly and monthly basis respectively to incorporate the latest contact pattern.
- You can delete forecasts. Downstream capacity plans and schedules created based on the forecasts will be impacted.

**To create a forecast**

1. Before creating a forecast, you must create at least one forecast group. If you haven't yet done that, see Create forecast groups (p. 1125). We strongly recommend creating all of your forecast groups before creating any forecast.
2. Log in to the Amazon Connect console with an account that has security profile permissions for Analytics, Forecasting - Edit.
   
   For more information, see Security profile permissions for Forecasting, capacity planning, and scheduling (p. 1116).
3. On the Amazon Connect navigation menu, select Analytics, Forecasting.
4. Select the Forecast tab, and then choose Create Forecast.
5. On the Create Forecast page, choose the forecast groups.
6. Choose the forecast type. Amazon Connect creates a forecast for each type you select.
   - **Long term** forecasts are used for capacity planning. For example, how many Full Time Equivalent (FTE) agents you need to hire in the next few months, quarter, and year.
   - **Short term** forecasts are used for scheduling agents and interval level agent headcount estimation.

7. Choose Save. If the forecast group has already been included in a forecast, an error message is displayed.

8. If the forecast was created successfully, it's Status = **Scheduled**.

   The status is **Complete** when the computation finishes. You can use **Search** to find forecasts by forecast group name.

9. Amazon Connect creates a forecast for each forecast type, as shown in the following image:

   ![Forecast Table]

<table>
<thead>
<tr>
<th>Forecasts</th>
<th>Type</th>
<th>Metric</th>
<th>Status</th>
<th>Last computed</th>
<th>Last published</th>
</tr>
</thead>
<tbody>
<tr>
<td>Widget Support</td>
<td>Short Term</td>
<td>Contact Volume</td>
<td>Complete</td>
<td>Mar 14, 2022</td>
<td>Feb 20, 2022</td>
</tr>
<tr>
<td>Widget Support</td>
<td>Short Term</td>
<td>Average Handling Time</td>
<td>Complete</td>
<td>Mar 14, 2022</td>
<td>Feb 20, 2022</td>
</tr>
<tr>
<td>Widget Support</td>
<td>Long Term</td>
<td>Contact Volume</td>
<td>-</td>
<td>Feb 23, 2022</td>
<td>Feb 23, 2022</td>
</tr>
<tr>
<td>Widget Support</td>
<td>Long Term</td>
<td>Average Handling Time</td>
<td>-</td>
<td>Feb 23, 2022</td>
<td>Feb 23, 2022</td>
</tr>
</tbody>
</table>

**Inspect a forecast**

You can inspect your forecasts before publishing them. You can do this in the online user interface, or download the forecasts (p. 1133) for offline analysis.
Download a forecast

To help make it easier to inspect a forecast in the user interface, the forecast data is displayed in both a graph and a table. Use the controls on the report settings panel and calendar picker to adjust and filter the data for a more granular view. For example, you can:

- Use the calendar to change the horizon. You can zoom into specific dates.
- Choose 15 minute intervals if your date range is less than a week. This enables you to see the exact contact pattern of the day.
- Compare Last computed forecast and Last published forecast as shown in the following image.
- Compare Actuals and forecasts to identify any abnormalities in either the line chart or the "Variance" chart.

Choose the Override setting to inspect the effect of any override you uploaded. The Override option is active only after an override has been uploaded. For more information, see Override a forecast (p. 1134).

- Filter by queues or channels to limit your forecast to one or more type.

## Download a forecast

You can download a forecast so you can inspect it offline. A forecast is downloaded as a .csv file of the forecast data. It has the queue name, channel type, timestamp, incoming contact volume and average handle time data.

1. Log in to the Amazon Connect console with an account that has security profile permissions for Analytics, Forecasting - Edit.

   For more information, see Security profile permissions for Forecasting, capacity planning, and scheduling (p. 1116).

2. On the Amazon Connect navigation menu, choose Analytics, Forecasting.

3. On the Forecasts tab, choose the forecast.

4. Choose Actions, and then download either the last computed forecast or the last published forecast.

5. We recommend clicking or tapping click here so that you can choose the name of the file download and where to save it. Otherwise, the file is saved to your Downloads folder and its name is a generated number.
Override a forecast

You can override the forecast at the queue channel level by uploading a .csv file. Override allows you to modify forecasts and make sure the forecasts reflect the contact pattern in special events (for example, a one-off marketing event that can increase volume by 10 percent in a given week).

You can also remove the override if the override is no longer applicable.

Important things to know

- To override a forecast, you need to prepare and upload a .csv file with your override data. Currently Amazon Connect does not support changing the values in forecasting user interface directly.
- The override data file be must a .csv file and it must be in the required format. If the file format and data don't meet the requirements, the upload does not work. We recommend downloading and using the template provided to help you prepare the historical data.

Following are the requirements for imported data:
- QueueName: Enter the Amazon Connect queue name.
- QueueId: Enter the Amazon Connect queue ID. To find the queue ID in the Amazon Connect console, on the left navigation, go to Routing, Queues, choose the queue, select Show additional queue information. The queue ID is the last number after /queue/.
- ChannelType: Enter CHAT or VOICE.
- TimeStamp: Enter the timestamp in UTC (ISO8601) format.
- IntervalDuration: Enter 15mins or 30mins for short-term forecast, depending on your forecast and schedule interval. Enter daily for long-term forecast.
- IncomingContactVolume: Enter the number of inbound, transfer, and callback contacts as an integer.
- AverageHandleTime: Enter the amount of average handle time (in seconds) as an integer.
- You can upload only one override file for a forecast group.
- This means if you previously uploaded an override file (for example, with 120 lines of overrides), you must add new overrides to this override file (for example, add 50 new lines of overrides) and re-upload the file that now has 170 lines of overrides.
- This also means you will need to include overrides for both short-term and long-term forecasts in one file.
- Both contact volume and Average Handle Time metrics are included in one override file. To override only one of them for a selected interval, leave the other metric blank.
• The following special characters are allowed in the .csv file: -, _, ., (, and ). Space is allowed.

The following table provides an example:

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Column header</td>
<td>QueueName</td>
<td>QueueId</td>
<td>ChannelType</td>
<td>TimeStamp</td>
<td>IntervalDuration</td>
<td>AverageHandleTime</td>
<td>IncomingContactVolume</td>
</tr>
<tr>
<td>2 Accepted value/format</td>
<td>Queue name in Connect</td>
<td>36-digit queue id in Connect</td>
<td>- VOICE - CHAT</td>
<td>UTC (ISO8601)</td>
<td>- 15min - 30mins - daily</td>
<td>Integer</td>
<td>Integer</td>
</tr>
<tr>
<td>3 Notes</td>
<td>Queue is available in Connect UI. (Click &quot;Show additional info in queue page&quot;)</td>
<td>Has to be capitalized</td>
<td>Has to be one of the three values above</td>
<td>Average handle time (AHT) for contacts</td>
<td>The number of incoming inbound, transfer, and callback contacts</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4 Example</td>
<td>Queue1</td>
<td>Queue1</td>
<td>Queue1</td>
<td>Queue1</td>
<td>Queue1</td>
<td>Queue1</td>
<td>Queue1</td>
</tr>
<tr>
<td>5</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

How to override a forecast

1. Log in to the Amazon Connect console with an account that has security profile permissions for **Analytics, Forecasting - Edit**.

   For more information, see [Security profile permissions for Forecasting, capacity planning, and scheduling](p. 1116).

2. On the Amazon Connect navigation menu, select **Analytics, Forecasting**, and then choose the **Forecast** tab.

3. Choose the forecast.

4. Choose **Actions, Upload forecast override**.

5. Choose **Download the CSV template for override data**.

   **Note**
   Amazon Connect supports one, which would be the latest, override file per forecast group.

   • If you have never uploaded an override file, your template will contain headings but no data.
   • If you have uploaded override file in the past, your template will be the previously uploaded file.

   You don't need values in all of the columns, but your .csv file must include all column headings.

   If you don't want to override certain data, such as the **AverageHandleTime**, leave that column empty; it won't override the existing values. However, if you need to make changes to **AverageHandleTime** later on, you must download the last uploaded file, make your changes, and then upload the file. Amazon Connect only retains the last uploaded file.

6. Add override data, and then choose **Upload file** to upload it. Choose **Apply** to confirm forecast override.

Publish a forecast

When you publish a forecast, you make it visible to other users, such as capacity planners and schedulers, so that they can use the forecasts for capacity planning and scheduling.

**Important**
Amazon Connect retains only the last published forecast. We strongly advise you to download the last published forecast before publishing a new one because the last forecast will be permanently replaced. For instructions, see [Download last published forecast](p. 1136).

1. Log in to the Amazon Connect console with an account that has security profile permissions for **Analytics, Forecasting - View**.
For more information, see Security profile permissions for Forecasting, capacity planning, and scheduling (p. 1116).

2. On the Amazon Connect navigation menu, select Analytics, Forecasting.
3. On the Forecasts tab, choose the forecast.
4. Choose Actions, Publish forecast.
5. Choose the forecasts.

The status is Complete for successfully published forecasts. When publish fails, the status is Publish failed.

Download the last published forecast

1. Log in to the Amazon Connect console with an account that has security profile permissions for Analytics, Forecasting - View.

   For more information, see Security profile permissions for Forecasting, capacity planning, and scheduling (p. 1116).

2. On the Amazon Connect navigation menu, select Analytics, Forecasting.
3. On the Forecasts tab, choose the forecast.
4. Choose Actions, Download last published forecast.
5. We recommend choosing click here so you can specify the name of the downloaded file and the location. Otherwise, the file is saved to your Downloads folder and its name is a generated number.

Capacity planning in Amazon Connect

A capacity plan helps you estimate the long-term FTE (full-time equivalent) requirements for your contact center, up to 18 months. It specifies how many FTE agents are required to meet the service level target for a certain period of time.

After you generate long term FTE estimations, you can share this information with other stakeholders, such as Human Resources, Finance, and the Training Department, to help facilitate the hiring and training of staff. When a business launches a new product or extends into a new Region, staff hiring is needed to meet the customer service demand.

The capacity planning feature uses published long-term forecasts as input, along with scenario information that you provide. It then creates a long-term capacity plan that you can share with stakeholders. The following diagram illustrates this integration among published long-term forecasts, capacity planning, and capacity planning output.
Getting started

Following is the order of steps for creating a capacity plan and sharing it with others.

1. Create capacity planning scenarios (p. 1137)
2. Import estimated future shrinkage and available full-time employees (p. 1139): This is an optional step but it can improve the accuracy of your capacity plan.
3. Create capacity plans using forecasts and scenarios (p. 1140)
4. Create capacity planning scenarios (p. 1141)
5. Review (p. 1141), override (p. 1142), re-run (p. 1144), or download (p. 1144) a capacity plan.
6. Publish a capacity plan (p. 1145)

Create capacity planning scenarios

A scenario has two parts:

- Scenario inputs: The maximum occupancy, daily attrition, FTE hours per week. For example, you might enter data that represent your best case scenarios (everyone is at work) or worst case scenarios (a large number of people are out sick during winter months).
- Optimization inputs: The service level or average speed of answer (ASA). For example, 85% of calls are answered within 30 seconds of entering the queue.

You can then use this scenario to generate a capacity plan that represents how many people you need to hire accordingly to meet your business goals. The output includes the required FTE employees with and without shrinkage, forecasted occupancy rate, the gap between available required FTEs, and maximum overtime (OT) and voluntary time-off (VTO) rate allowed.

To create a capacity planning scenario

1. Before you can create a capacity plan, you must create and publish a long-term forecast. Amazon Connect uses the published long-term forecast as the input for creating the capacity plan. If you haven’t yet created a forecast, see Getting started with forecasting (p. 1124).
2. Log in to the Amazon Connect console with an account that has security profile permissions for **Analytics, Capacity planning - Edit**.

   For more information, see Security profile permissions for Forecasting, capacity planning, and scheduling (p. 1116).

3. On the Amazon Connect navigation menu, choose **Analytics, Capacity planning**.

4. On the **Planning Scenarios** tab, choose **Create a Scenario**.

5. On the **Create scenario** page, enter a name and description.

6. In the **Scenario inputs** section, enter the following information:

   a. **Max Occupancy (optional)**: The percentage of time agents will spend handling contact volume when they log in.

      i. **Daily attrition**: The percentage of staff leaving your contact center. The percentage of staff leaving your contact center.

         For example, if the annual attrition is 50%, the daily attrition would be 50%/250 working days per year = 0.2%.

      ii. **Full-time equivalent (FTE) hours per week**: How many hours each FTE employee will work per week.

   b. **Outsourced contacts (optional)**: You can outsource a percentage to a third-party.

   c. **Max overtime (OT) allowed (optional)**: Specify the maximum percent of overtime to plan for peaks. As a planner, you don't want to burn out your workforce.

      For example, you specify 40 as FTE hours per week, with 10 percent maximum overtime. The total work week would be up to 44 hours.

   d. **Max voluntary time off (VTO) allowed (optional)**: Specify the maximum percent of time off to plan for troughs, when there is a lull in contacts and you can save in costs. Be sure not to give too much time off in case traffic increases again.

      For example, you specify 40 as FTE hours per week, with 10 percent maximum time off. The total work week would be at least 36 hours.

7. In the **Optimization inputs** section, enter the operational goals for your organization:

   a. **Service level**: The percentage of contacts answered within a defined target time threshold.

      The following image shows service level targets where 80 percent of voice contacts and 70 percent of chat contacts will be answered within 30 seconds.

   b. **Average speed of answer (ASA)**: The average amount of time it takes for contacts to be answered in a call center during a specific time period.

   c. You can create one goal per channel. Choose **Add another goal** to add another goal.
Import estimated future shrinkage and available full-time employees

You can increase capacity planning accuracy by providing estimated future data (Available FTE and Shrinkage) for your existing forecast groups. Providing Available FTE and shrinkage data is optional. Amazon Connect can generate a capacity plan without it, but providing it improves the accuracy of your plan.

How to import data

1. Log in to the Amazon Connect console with an account that has security profile permissions for Analytics, Capacity planning - Edit.

   For more information, see Security profile permissions for Forecasting, capacity planning, and scheduling (p. 1116).

2. On the Amazon Connect navigation menu, select Analytics, Capacity Planning.

3. On the Import Data tab, choose Upload data.

   The .csv file you upload must have the following headings:

   A | B | C | D | E
---|---|---|---|---
1 | FORECAST_GROUP | Date (use ISO 8601 format: YYYY-MM-DDThh:mm:ssZ) | AVAILABLE_FTE | IN_OFFICE_SHRINKAGE | OUT_OFFICE_SHRINKAGE
2 | Forecast For Demo | 2022-01-01T00:00:00Z | 0 | 8% | 12%
3 | Forecast For Demo | 2022-01-02T00:00Z | 0 | 8% | 12%
4 | Forecast For Demo | 2022-01-03T00:00Z | 100 | 8% | 12%
5 | Forecast For Demo | 2022-01-04T00:00Z | 100 | 8% | 12%
6 | Forecast For Demo | 2022-01-05T00:00Z | 100 | 8% | 12%
7 | Forecast For Demo | 2022-01-06T00:00Z | 100 | 8% | 12%
8 | Forecast For Demo | 2022-01-07T00:00Z | 100 | 8% | 12%
9 | Forecast For Demo | 2022-01-08T00:00Z | 0 | 8% | 12%

4. Update values in this template, and then choose Upload CSV to upload it. Choose Upload.

   It usually between 2 - 5 minutes for the .csv file to upload. If the upload fails, check if the FORECAST_GROUP name in the .csv file matches the name of the forecast group that you created.

Important things to know about your .csv file

- FORECAST_GROUP: Enter the EXACT name of the forecast group you created. You can add multiple forecast groups in this .csv file.
- Date: Each row is one day. In the previous image, row 2 is January 1, row 3 is January 2, row 4 is January 3, and so on. Use ISO 8601 format ending with Z.
- AVAILABLE_FTE: Based on your estimation, how many full-time agents will be available for working that day. For example, your contact center currently has 100 FTEs and you expect this number to be the same next year.

   In the previous image, 0 indicates no full-time agents are available on January 1 for the forecast group named Forecast For Demo. On January 3, 100 agents are available.

   Tip
   Required FTE (the output) is how many full-time agents are required to meet the Service Level target. For example, if the Required FTE = 120 and Available FTE = 100 for next year, then that means a deficit = 20.
- **IN_OFFICE_SHRINKAGE**: Percentage of agents in the office but not in production mode. For example, they might be in training or in meetings.
- **OUT_OFFICE_SHRINKAGE**: Percentage of agents absent from work (for example, no show or personal time off).

**Note**
The latest uploaded .csv file always overrides the previous one you updated. Make sure errors aren't introduced to the uploaded .csv file accidentally. For example, don't press **Enter** and add new rows to the end of the file. Otherwise, the data won't validate and an error message is displayed.

**Create capacity plans using forecasts and scenarios**

Before you can create a capacity plan, you must create a planning scenario and publish a long-term forecast. Amazon Connect uses the forecasts and planning scenarios as inputs for creating the capacity plan. If you haven't yet created a forecast and planning scenario, see **Getting started with forecasting** (p. 1124) and **Create capacity planning scenarios** (p. 1137).

**How to create a capacity plan**

1. Go to the **Capacity Plans** tab, and choose **Generate Plan**.
2. Provide the plan name, description, forecast group (which has published long-term forecasts), start/end date, and plan scenario. See the following image for an example:

   ![Generate Plan](image)

3. Choose **Generate Capacity Plan**.
4. To quickly identify the plan that is in processing, choose **Last Computed** to sort the table list. In the following example, the status of the plan is **In Progress**.
It usually takes between 5-10 minutes for the plan to be generated. If the plan generation fails, try publishing the selected long-term forecasts, and then generating the capacity plan again.

**Review capacity plan output**

To review capacity plan output, choose the hyperlink for the plan you generated. The first half of the page summarizes the input you used in scenario and capacity plan generation.

The plan output shows a week-by-week or month-by-month calculation. To switch from weekly to monthly view, select Monthly from the dropdown, as shown in the following image.

Following is a description of the metrics in the plan output:

- **Forecasting Inputs**
  - **Forecasted Contact Volume**: This metric is a sum of both voice and chat volume for the selected forecast group.
  - **Forecasted Average Handling Time (AHT), seconds**: This metric shows the aggregated AHT for the selected forecast group.
  - The forecasted contact volume and AHT in the plan output table reflects only the values from the selected forecast group. After there are newly published forecasts, consider re-running the capacity plan to reflect the latest published contact volume and AHT.

- **Outputs**
  - **Required FTEs (without Shrinkage)**: How many full-time equivalent agents need to be hired to meet the defined business goals (such as service level target), without considering shrinkage.
  - **Forecasted Occupancy %**: How much occupancy is for the agents.
  - **Outputs with additional input**
• **Required FTEs (with Shrinkage)**: How many full-time equivalent agents needed to be hired to meet the defined business goals (such as service level target), with considering shrinkage.

• **Available FTEs**: How many agents are available for working that day. It can be uploaded in the Import data section.

• **Metrics calculated from available FTE input**
  - **Gap between available FTEs and required FTEs**: The difference between available FTEs and required FTEs.
  - **Gap %**: The percentage of the gap.
  - **Required OT %**: if there is a supply deficit (required FTEs higher than available FTEs), required OT% indicates how much overtime would be needed to cover the deficit.
  - **Required OT %**: If there is a supply surplus (the number of required FTEs is lower than the available FTEs), required VTO % indicates how much voluntary time off could be used to lower the amount of agent idle time and thus lower costs.

### Override a capacity plan

You can upload a .csv file that overrides the **Required FTEs (without Shrinkage)** data in the Plan outputs section of a capacity plan. This section is shown in the following image.

![Plan Outputs](image)

You might want to do this, for example, to give your team of agents a buffer.

1. Log in to the Amazon Connect console with an account that has security profile permissions for Analytics, Capacity planning - Edit.

   For more information, see Security profile permissions for Forecasting, capacity planning, and scheduling (p. 1116).

2. On the Amazon Connect navigation menu, select Analytics, Capacity Planning.

3. On the Capacity Plans tab, choose the plan.

4. On the detailed page for the capacity plan, choose Actions, Upload plan override, and then choose download the CSV template file.
5. Make your changes, and save the template file with a different name. Return to the Upload override dialog box (you might need to choose Actions, Upload plan override to redisplay the dialog box), choose Upload CSV, and then choose Override.

6. After you upload the .csv file, the metrics in the **Required FTEs (without Shrinkage)** row are automatically re-calculated and updated. Hover over the blue triangle to see the original value.

7. The rest of the metrics are updated automatically to reflect the latest change for **Required FTEs (without Shrinkage)**.
Re-run a capacity plan

You can re-run capacity plans when you make any changes on the plan start and/or end date, or the scenario. When there are no changes to plan inputs or the scenario, the Re-run plan option is not active, as shown in the following image.

To re-run a plan

1. Go to the Capacity Plans tab, and choose the plan.
2. Change the start and/or end date, or select a different scenario.
3. Choose Actions, Re-run plan.

Download a capacity plan

When you download a capacity plan file, it downloads as a .csv file type with multiple tabs. It's helpful to open this file using Excel.
Following is a description of each tab:

- **Metrics**: The capacity plan output.
- **Capacity Plan**: The capacity plan metadata, such as name, starting date, and ending date of the plan.
- **Scenario**: The input defined for the capacity plan.
- **Generation Details**: The metadata indicating when someone last changed the capacity plan.

**How to download capacity plan results**

1. Log in to the Amazon Connect console with an account that has security profile permissions for **Analytics, Capacity planning - Edit**.
   
   For more information, see Security profile permissions for Forecasting, capacity planning, and scheduling (p. 1116).
2. On the Amazon Connect navigation menu, select **Analytics, Capacity Planning**.
3. On the **Capacity Plans** tab, choose the plan.
4. On the detailed page for the capacity plan, choose **Actions, Download capacity plan**.

**Publish a capacity plan**

When you are satisfied with the capacity plan outputs, choose **Publish plan** to finalize your plan.

**Note**

You cannot edit the plan after it is published.
Your login name and the published date is displayed on the list view of the capacity plans. For example, the following image shows a plan that was first created on January 11, 2022, and then it was published on January 20, 2022 by Admin.

![Capacity Plan Example](image)

## Scheduling in Amazon Connect

Contact center schedulers or managers need to create agent schedules for day-to-day workloads that are flexible and meet business and compliance requirements. Amazon Connect helps you create efficient schedules that are optimized for per-channel Service Level or Average speed of answer targets. You can generate and manage agent schedules based on the following:

- A short-term published forecast
- Shift profiles (templates for weekly shifts)
- Staffing groups (agents that can handle specific types of contacts from a specific forecast group)
- Human resources and business rules

**Note**

Amazon Connect scheduling is not designed to ensure compliance with any particular laws. It is your responsibility to ensure that your actions and your use of scheduling comply with any applicable laws including employment regulations. You should confer with your legal counsel to determine your obligations.

### Getting started

Following is the order of steps for creating a schedule and publishing it so supervisors and agents can view it.

1. Add users (p. 775) to your Amazon Connect instance.
2. Double-check with your Amazon Connect admin that users have the required security profile permissions to access scheduling features. The required permissions are described here (p. 1116).
3. Create staff scheduling rules (p. 1148)
4. Create shift activities (p. 1148)
5. Create shift profiles (p. 1149)
6. Create staffing groups and rules (p. 1150)
7. Generate, review, and publish a schedule by using Schedule Manager (p. 1151)

To learn how supervisors and agents view schedules, see How supervisors view published schedules (p. 1155) and How agents view their schedule (p. 1254).

### Scheduling roles: Who does what

There are a variety of roles for people who might create and manage schedules in a contact center, such as the following:
Amazon Connect Administrator Guide
Terminology

1. **Amazon Connect administrator** – Maintains user profiles, grants security profile permissions, sets up holiday hours for the contact center.

2. **Scheduler** – Creates manages staffing groups, creates staffing rules, configures shift components (such as creating shift activities and profiles), generates schedules, revises, and publishes schedules.
   
   After the scheduler publishes a schedule, the supervisors and agents receive a notification in the user interface that the schedule has been published and they can view it.

3. **Supervisor** – Manages agents and schedules, updates schedules, manages requests for time off, overtime (OT), and voluntary time off (VTO).

4. **Agent** – Answers contacts, views the generated schedule, manages requests for time off, overtime (OT), and voluntary time off (VTO).

Amazon Connect provides security profile permissions that you can assign to each role, so that you can manage access to specific features by role. For more information, see Security profile permissions for Forecasting, capacity planning, and scheduling (p. 1116).

**Scheduling terminology**

**Draft schedule**

A collection of schedules for all agents in a set of staffing groups that the schedule is for.

Only schedulers can view and adjust draft schedules. Agents or their supervisors cannot view these schedules until published.

**Overtime / Time off / Voluntary time off**

- Requesting overtime to agents allows your contact center to handle a contact surge or agent shortages without hiring more employees.
- Requesting time off to agents allows your business to handle contacts while paying employees.
- Requesting voluntary time off to agents allows your business to handle contacts without paying employees to be idle.

**Publish a schedule**

An action taken by schedulers to make agent schedules formal and visible in agent and supervisor Schedule calendars (which are separate user interfaces).

**Schedule**

Multiple shifts tied together between the start and end dates for a specific agent.

**Schedule adjustment**

Before schedule publishing to supervisors or agents, the Scheduler or the person with permission can add, edit, remove, replace agent activities, or edit and remove shifts to orchestrate supply (that is, the number of agents and shift activities) vs demand (the number of contacts).

**Schedule generation**

The ability to generate and publish shift schedules for specific date range for a Forecast Group - Staff Group combination.
Shift activities

Daily activities that the agent does during their shift. For example, meetings, training, and lunch.

Shift profiles

The base structure of a shift, schedule window, daily shift activities that go into it.

Staffing groups

A group or team of agents who are skilled to take specific types of contacts. For example, you might create one staffing group named General Enquiry, and another named Tier 2 Support.

Create staff scheduling rules

Use staff rules to specify details for individual agents and supervisors, such as their local time zone, start and end dates, and contract details. The individual staff rules you specify here override any staffing group rules when their schedule is generated.

For example, you might set up the staffing group to generate a schedule where everyone works 40 hours per week. In the staffing rules, you can choose specific employees to schedule for 20 hours per week.

To create staffing rules for individual users

1. Log in to the Amazon Connect console with an account that has security profile permissions for Scheduling, Schedule manager - Edit.
   
   For more information, see Security profile permissions for Forecasting, capacity planning, and scheduling (p. 1116).
2. On the Amazon Connect navigation menu, select Analytics and Optimization, Scheduling.
3. Choose the Staff Rules tab, and then search and choose one or more staff from the list. Every time a staff is selected, the staff count is displayed in the Apply button.
4. Specify details such as:
   
   • Time zone: Render schedules in the local time zone of the agent.
   • Start and end dates: Schedule specific agent shifts based on start or end dates.
   • Working hours and minutes: Define the minimum and maximum working hours per day and per week. Working hours should include non-productive time, such as breaks and meals. For example, if you want to generate agent schedules that are 8 hours and 30 minutes long each day, then specify 8 hours and 30 minutes in both min and max working hour fields. If you want to allow the system to generate more efficient schedules, you may provide a min and max working hours window and the system will generate the most optimal schedule duration based on forecasts and agent availability.
   • Consecutive days worked or days off: Schedule shifts based on the allowed range of consecutive days worked or days off.
5. Choose Apply to Staff. This saves the rules, and ensures they are applied during the next scheduling cycle.

Create shift activities

Shift activities are daily activities that the staff (agents) does during their shift. For example:

• Productive: At work activities that agents do that are counted as productive work, such as answering contacts.
Create shift profiles

Use shift profiles to create templates for weekly shifts. The template includes the days of the week worked, the earliest start time and the latest end times the staff can be scheduled, and the activities they would do during their shift.

1. Log in to the Amazon Connect console with an account that has security profile permissions for Scheduling, Schedule manager - Edit.

   For more information, see Security profile permissions for Forecasting, capacity planning, and scheduling (p. 1116).
2. On the Amazon Connect navigation menu, select Users, Scheduling.
3. Choose the Shift Profiles tab, and then choose Add shift profiles.
4. Select days of the week staff will be scheduled for, earliest start time and the latest end time for each day. Ensure that these times are configured in UTC instead of local time.

   Depending on the contact demand pattern forecast, Amazon Connect determines the best possible start and end times for shifts, while adhering to the minimum and maximum hours per day and week worked.
5. Choose Add shift activities. Select the shift activities the staff will do during their shift.
6. For each activity, set placement rules. The rules include:
   - The time duration from the beginning to end of the shift where the activities need to be placed.
   - The time window for Amazon Connect to pick the best spot to maximize efficiency of the generated schedules to meet the goals, such as the service level percent (SL%) targets.
7. After saving the shift profile, you can edit or remove it from the list view.

For example, if you set break to start 6 hours after the start of a shift and lunch to start 3 hours after the start of a shift, the lunch is scheduled to occur first.
Create staffing groups and rules

A staffing group is a group or team of agents who are skilled to take specific types of contacts. You add agents who need a schedule generated for them, and supervisors who manage agent schedules. You can also add rules that apply at the staffing group level, such as the minimum staff required and the minimum working hours per day or week for the group.

For example, say your contact center opens at 9AM but the forecast says no contacts arrive between 9-9:30AM. You can add a rule that says, despite what the forecast predicts, there should be a minimum of one agent during this time.

If you don't have a shift start time rule, then the schedule is built using the predictions from the forecast.

Example

For example, you might create one staffing group named General Enquiry, and another named Tier 2 Support. Because you map one or more staffing groups to a forecast group, here's how you would create staffing groups in this case:

1. Group all General Enquiry queues to a General Enquiry forecast group.
2. Map the General Enquiry forecast group to multiple staffing groups that have agents who can take general enquiry contacts.

Create group and add staff

1. Log in to the Amazon Connect console with an account that has security profile permissions for Scheduling, Schedule manager - Edit.
   For more information, see Security profile permissions for Forecasting, capacity planning, and scheduling (p. 1116).
2. On the Amazon Connect navigation menu, select Users, Scheduling.
3. Choose the Staffing Groups tab, and then choose Create staffing group.
4. On the Create Staffing Group page, under Associate to forecast group, use the dropdown to choose the forecast group to associate with this staffing group.
   In the following example, contacts from the queues in the Forecast_Group_20220124 will be routed to the agents in this staffing group.
5. Choose Add staff to add agents and supervisors to this staffing group. A user must be added to Amazon Connect in order to appear in the list of staff.

Add staff

- Add to agent list
- Add to supervisor list

Search staff

Name: Doe, Jane
Login: zzDoeJ
Tip
Every agent must be in a staffing group in order for a schedule to be generated for them. You can add and remove agents in between schedule cycles and manually add shifts.

Add rules

To generate a schedule, Amazon Connect uses information from the forecast group, which reflects the historical demand pattern for your contact center. Staffing rules enable you to specify conditions that must be accounted for in the schedule, regardless of what the forecast predicts.

For example, your contact center opens at 9AM but the forecast says no contacts arrive between 9AM-9:30AM. You can add a rule that, despite what the forecast predicts based on historical demand, there should be a minimum of one agent during this time. This forces Amazon Connect to keep one agent in the schedule from 9-9:30AM. In addition, you can add a rule to set the Working Hours to start at 9AM, even though the forecast would start it at 9:30AM.

To add rules

- In the Rules section, choose + and then use the dropdown to choose the type of rule to create for the staffing group. For example, you can specify:
  - Minimum Staff Required: Specify the minimum number of agents that should be available, despite what the forecast indicates. For example, if the forecast says that you do not need any agents in the first half hour that your contact center opens, you can ensure that there is a minimum of one agent during this time.
  - Shift Start Time: Same Start Time: This creates schedules with the same shift start time for all agents.
  - Working Hours: Specify the group's minimum and maximum working hours per day or week. This setting applies to all staff in the staffing group. You can override this setting for individual staff. For instructions, see Create staff scheduling rules (p. 1148).

Generate, review, and publish a schedule by using Schedule Manager

Amazon Connect is designed to generate the least number of shifts for agents based on the forecasted demand pattern and configured constraints to hit the optimization goal.

After you create shift activities, shift profiles, staffing groups and staffing group rules, you can generate a schedule.

1. Log in to the Amazon Connect console with an account that has security profile permissions for Scheduling, Schedule manager - Edit.
   For more information, see Security profile permissions for Forecasting, capacity planning, and scheduling (p. 1116).
2. On the Amazon Connect navigation menu, select Users, Scheduling.
3. Choose the Schedule Manager tab, and then choose Generate schedule.
4. Enter a name and description for the schedule.
5. In the Schedule input section, select the forecast group from the dropdown menu.
   Currently you cannot schedule for multiple forecast groups.
6. Specify the duration of the schedule - the start and end dates. You can schedule up to 18 weeks out.
7. Under **Optimize schedule for**, choose **Service level** or **Average speed of answer**.

8. **Average speed of answer (ASA)** is an alternative to using service level percentage targets. For example, if an ASA is set to 30 seconds, the capacity planning and scheduling system will optimize headcount / schedules to ensure that the goal is met.

9. Choose **Generate schedule**.

   **Note**
   Amazon Connect generates a draft schedule. It will not visible to agents or supervisors until you publish it.

10. In the list of schedules, the schedule you created shows a status of **In progress**. It takes 5-30 minutes to generate, depending on the number of agents, number of configured rules, schedule duration, and more. After the schedule is generated, it's status is **Complete** or **Failed**.

11. To view any warnings and breaches of rules or constraints breaches, choose the warnings icon to learn more.
12. When the status is **Complete**, choose the draft schedule to view it. The following image shows a sample schedule:

Schedulers can:

- View schedules for all agents.
• Pick a date to view a specific shift.
• Navigate back to today's date.
• View failed rules and goals.

13. When you're satisfied with the schedule, choose **Publish**. You'll get a confirmation page. Choose **Proceed** to make the schedule official!

Staff (agents) and supervisors specified in the staffing groups can now view the schedule. See the following topics to learn about their experience:

• How supervisors view published schedules (p. 1155)
• How agents view their schedule (p. 1156)

**Edit a schedule**

Before publishing a schedule, you might want to edit it. For example, if you notice that all the agents are scheduled to be on break at the same time and no one is scheduled to take contacts.

You can:

• Change agent shift start and/or end time, duration.
• Change activity shift start and/or end time, duration.
• Add an activity to one or more agents shift.
• Remove or replace activity from an agent shift.
• Copy an entire shift from one agent to another.
• Recompute metrics to ensure schedule adjustments result in better service level (SL%) or occupancy.
How supervisors view published schedules

After a scheduler publishes a schedule, it's official. Agents can now view their individual scheduling using their agent application. Supervisors can also view their agents schedules using the Amazon Connect console.

Supervisors with Scheduling, Schedule manager - Edit permissions in their security profile can edit agent schedules.

**Important**

When a supervisor edits an agent schedule and publishes it, the change appears immediately to the agent. The agent receives an email notification that their schedule has been changed. They do not need to refresh their browser for the agent application to reflect the change.

The following image shows a sample schedule for a supervisor's team:
How agents view their schedule

There are two ways agents can access their schedules:

- If your organization uses the Amazon Connect agent application, agents access their schedule by entering `https://instance name/connect/agent-app-v2/` into their browser and then choosing the calendar icon.
- If your organization uses the Contact Control Panel (CCPv1 or CCPv2), Salesforce CTI, or a custom-built agent desktop, agents access their schedule by entering `https://instance name/connect/agent-app-v2/scheduling` into their browser, logging into Amazon Connect, and then choosing the calendar icon.

Following are steps agents use to view their schedule in the agent application.

1. Log on to the agent application using the URL that your admin gives you.
2. Choose the Calendar icon on the application navigation bar to launch the staff schedule manager viewer. Otherwise, the staff schedule manager viewer launches automatically.

The following image shows a sample schedule in the agent application:

![Sample Schedule in Agent Application]

You can see a daily or weekly view of your schedule.

Time off management

Amazon Connect time off management capabilities enable customers to manage agent time off requests that comply with pre-configured regional labor and business rules. Administrators or managers with the correct security profile permissions will be able to configure the various time off settings. The system will automatically approve or reject requests depending on the configured time off rules and the daily maximum allowed time off hours.

Supervisors or managers with permissions will have the ability to view agent time off requests and can override automatically approved or rejected time off.
Enable time off

Enable Time off by selecting the Enable Time off request for this staffing group box for specific Staffing Groups. This is a new card in the Staffing Group UI called Request management. Once this is selected, the supervisor will see the Make request button in the Published schedule calendar UI.

Request management
Configuration for request of this staffing group

Time off:

- Enable Time off request for this staffing group

Group allowance
Set the allowed daily maximum time off hours for this staffing group.
Configure group allowance

Set group allowance

Managers can set the maximum time off hours that agents combined can take within the Staffing Group for each calendar day for specific time off activities.

For example, if your business provides time off in December, managers can allow a group of agents to take time offs of type casual leave and regular P.T.O that add up to a maximum of 12 hours on December 20th and the 21st but can automatically decline those types of time off requests on December 22nd and the 23rd by giving a value of 0 - Zero hours. Adding value 0 allows them to specify blocked days. The system would ignore a group allowance check if no value is specified. This allows the workforce managers to balance an agent's personal time off needs with business headcount needs. Managers can select the + sign to add multiple group allowance hours for different types of time off. This means that a manager can allow 28 hours of health related time offs for November 23rd but only 8 hours of casual time off.
Create time off

Create a time off request

1. Supervisors or managers can go to the Published schedule calendar view, choose the floating icon on the bottom left and create a time off request. The request drawer will open on the right.

2. Select Staff and the time off Type. To select a time off range, you can either select All day or select specific start and end date times. Select Override time off rules if you wish to override the system and allow time off while dismissing group allowance and other rules specified in Staff, Staffing Group or Shift profile rules. Enter a Reason and choose Request.

3. The request will enter a pending state to allow the system to analyze existing rules (even thought rules checks are overridden) and will display a list of any rule failures.
4. The agent will see the pending request in their schedule UI and will receive an in-app notification next to the Request icon which displays as an inbox icon at the top right above the metrics view. This allows the agent to view the request details under the Time off tab.

5. Once the rules validation completes, the time off request status of Approved or Rejected will be displayed in both the agent and supervisor views.

Manager view / Agent view via request drawer

Supervisors can at anytime can go to the request drawer under the time off tab and search for an agent by first name, last name or login ID to view all time off requests for a specific agent.

Update / Cancel

A supervisor can cancel or edit a time off request request by choosing the Cancel Request or Edit Request buttons at the bottom of the request drawer window.

An agent will see the updated time off status in their calendar and request drawer.
Overtime management

Simultaneously achieving Service Level (SL), Average Speed of Answer (ASA), and cost targets requires matching supply (# of agents) and demand (# of contacts * handle time). Overtime (OT) and Voluntary Time Off (VTO) are two mechanisms that the contact center management team can deploy to achieve both targets. OT allows handling a contact surge or agent shortages without the need to hire more employees while VTO allows handling a low volume contact period without the expenses of employees in an idle state.

Contents
- Create overtime slots (p. 1161)
- Agent accept or decline (p. 1162)
- Supervisor override (p. 1163)

Create overtime slots

1. Choose the Make Request button in the Published schedule calendar UI and select OT.
2. A supervisor or manager enters the date and time range for overtime.
3. Select the productive activity from the Activity list.
4. Select by Staffing group or by Staff rules.
   - Staffing Groups send a notification to all agents regarding availability of overtime slots. Agents are approved based on a first come, first served model.
   - Staff rules allow supervisors to select specific agents to send overtime notifications to.
5. Select the number of required overtime slots.
6. Provide the reason for requesting overtime in the Reason text box. Agents will be able to view the reason prior to accepting or declining the overtime request.
7. Choose Request
Agent accept or decline

The contact center manager and agents will see the pending Overtime requests in the agent calendars. Agents can accept or decline overtime in the Agent application schedule calendar. In order to accept or decline the request, the agent will need to have Edit Security Profile permissions. For more information on Security Profile permissions, see Update security profiles.

Required security profile permissions

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<td>Agent application schedule calendar</td>
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Accept and Decline buttons for agents

Supervisor override

Managers can override the system approval for OT/VTO and force Decline a request by clicking on the vertical ellipses next to the agent name.
Voluntary time off management

Simultaneously achieving Service Level (SL), Average Speed of Answer (ASA), and cost targets requires matching supply (# of agents) and demand (# of contacts * handle time). Overtime (OT) and Voluntary Time Off (VTO) are two mechanisms that the contact center management team can deploy to achieve both targets. OT allows handling a contact surge or agent shortages without the need to hire more employees while VTO allows handling a low volume contact period without the expenses of employees in an idle state.

Contents
- Create Voluntary time off slots (p. 1164)
- Agent accept or decline (p. 1164)
- Supervisor override (p. 1166)

Create Voluntary time off slots

1. Choose the **Make Request** button in the Published schedule calendar UI and select **VTO**.
2. A supervisor or manager enters the date and time range for voluntary time off.
3. Select the productive activity from the Activity list.
4. Select by Staffing group or by Staff rules.
   - Staffing Groups send notifications to all agents regarding the availability of overtime slots. Agents are approved based on a first come, first served model.
   - Staff rules allow supervisors to select specific agents to send overtime notifications to.
5. Select the number of required voluntary time off slots.
6. Provide the reason for requesting voluntary time off in the **Reason** text box. Agents will be able to view the reason prior to accepting or declining the overtime request.
7. Choose **Request**

Agent accept or decline

The contact center manager and agents will see the pending voluntary time off requests in the agent calendars.
Agents can accept or decline voluntary time off (VTO) in the Agent application schedule calendar. In order to accept or decline the request, the agent will need to have **Edit** Security Profile permissions. For more information on Security Profile permissions, see [Update security profiles](#).

### Required security profile permissions

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### Accept and Decline buttons for agents
Supervisor override

Managers can override the system approval for OT/VTO and force Decline a request by clicking on the vertical ellipses next to the agent name.

Schedule Adherence

Contact center supervisors or managers track schedule adherence to understand when agents are following the schedule that you have created. This helps ensure you achieve your service level targets, while improving agent productivity and customer satisfaction.

Amazon Connect begins generating schedule adherence automatically as soon as a published schedule starts that has shift activities where Adherence = yes.

You can view Schedule Adherence metrics on the Historical metrics and Real-Time metrics pages. The following image shows an example of choosing Schedule Adherence metrics to appear in a historical metrics report.
Getting started:

1. Schedule Adherence requires that schedules are created and published. For more information, see Scheduling in Amazon Connect (p. 1146).
2. Ensure you have the right permissions to access metrics and scheduling information. For more information on the required permissions, see security profile permissions for forecasting, capacity planning, and scheduling.

Historical Schedule Adherence

This section describes the values used when calculating Historical Schedule Adherence.

Adherence

Percentage of time that an agent correctly follows their schedule. This is measured by tracking if an agent is in an Available agent status when they should be in productive state. This percentage is calculated as follows:

\[
\text{Adherence} \% = \frac{\text{Total Adherent Minutes}}{\text{Total Scheduled Adherence Minutes}}
\]

An agent is considered adherent if the agent is in an Available Status, when the shift activity is Productive, or if the agent is in Non-Productive Status (i.e Custom Status), when the shift activity is Non-Productive. Otherwise the agent is considered non-adherent. This means that if a shift activity is called Lunch but marked as productive, the agent is considered adherent if they are in the Available agent status.

- Type: String
- Min value: 0.00%
- Max value: 100.00%
- Category: Agent activity-driven metric
**Note**

Anytime you change the schedule, Schedule Adherence is re-calculated up to 30 days in the past from the current date (not the date of the schedule), if schedules are changed.

**Adherent time**

Total time an agent was in an *Available* status when their shift activity is productive or was in non-productive status when the shift activity is non-productive.

- Type: String (hh:mm:ss)
- Category: Agent activity-driven metric

**Non-Adherent time**

Total time an agent was not in an *Available* status when their shift activity is productive or not in a non-productive status when their shift activity is non-productive.

- Type: String (hh:mm:ss)
- Category: Agent activity-driven metric

**Scheduled time**

Total time an agent was scheduled (either for productive or non-productive time) and Adherence for those shifts were set to *Yes*.

- Type: String (hh:mm:ss)
- Category: Agent activity-driven metric

**Real-Time Schedule Adherence**

Real-Time agent adherence is available in a new table called *Agent Schedule Adherence*. You can select this table from both the Real-Time metrics landing page or within an existing report. This table has the same functionality as an existing Agents table with the following additions.

**Real-Time Agent Adherence Status**

- This will indicate whether an agent is adherent or non-adherent in near real-time. For a definition of schedule adherence, see *Schedule Adherence* (p. 1166).

**Scheduled Status**

- This will indicate whether an agent is scheduled to be in productive time or non-productive time. If an agent is not scheduled, it will show as blank.

**Agent Adherence Duration**

- The amount of time an agent has currently been adherent or non-adherent. When an agent changes between non-adherent or adherent, this value will reset, as it represents the current amount of time.

**Agent Adherence Percentage**

- The percentage of time an agent has been adherent to their schedule. For a definition of agent adherence percentage, see *Historical Schedule Adherence* (p. 1167).
Schedule adherence usage examples

Shift activities that are tracked for adherence

Any shift activity that is marked as Adherence = Yes. If a shift is marked as Adherence = No, adherence is not calculated for that shift.

How to determine which Agent State an agent should be in for each activity

If an activity is marked as productive, an agent needs to be in an Available agent state. Productivity is determined by the agent being in an available state and is not impacted if the agent isn't handling live contacts. For tracking how many contacts an agent has handled, see the occupancy metric.

If an activity is marked as non-productive, an agent needs to be in a non-productive custom state. An agent does not have to be in a specific custom state to be considered adherent. For example, if the shift activity is Lunch, but the agent switches their status to Break, the agent would still be considered adherent since both states are Non-Productive.

What happens when...

- an agent starts working before their schedule starts
  
  If an agent does not have a schedule, we do not track adherence for that time. This means that if an agent starts working 5 minutes before or 5 minutes after their schedule, it will not count against their adherence. However, if they decide to leave work 5 minutes early because they started 5 minutes early, they would be considered non-adherent for that 5 minute interval.

- an agent flips to offline when they are supposed to be a non-productive state
  
  This would be considered non-adherent because the agent state is offline, rather than Non-Productive Time.

- an agent leaves training to answer contacts because of high contact volume
  
  In this scenario, the agent would be marked as non-adherent. However, if leaving training is intended, you can adjust the schedule retroactively and adherence will be re-calculated with the new shift.

- a historical schedule is changed
  
  If an agent's schedule is changed within the last 30 days from the current date (not the date of the schedule), adherence will be re-calculated with the new schedule. This allows making real-time adjustments to an agent's shift and will correctly evaluate their adherence.

Calculating Agent Adherent and Non-Adherent Time

Example

Example 1:

Agent A is scheduled to work from 8:00 to 11:00.

They begin working at 7:30 and then take a break from 10:30 to 11:00. From 7:30 to 8:00 the agent is neither adherent or non-adherent since there is no schedule.

From 8:00 to 10:30 the agent is adherent and from 10:30 to 11:00 the agent is non-adherent because they were in Non-Productive Time when they should have been productive.

This means that Agent A's Adherence was 83%. (Total Adherent Time was 150 minutes/Total Scheduled Time 180 minutes)

Example 2:
Agent B is scheduled to work from 9:00 to 10:30.

They go on Break from 10:30 to 11:00, and then a team meeting from 11:00 to 12:00. They begin working at 9:00 and end up working until 10:45. Then picking the Break custom Non-Productive Time status from 10:45. They forget to switch their status to Team Meeting and leave it as Break until 12:00.

From 9:00 to 10:30 the agent was adherent but from 10:30 to 10:45 the agent was non-adherent because they were in a productive state when they should have been in a non-productive state. From 10:45 to 12:00 they were adherent because they were in a non-productive state the entire time.

This means that Agent B's adherence was 92% (Total Adherent Time: 165 Minutes / Total Scheduled Time: 180 Minutes)

Private optimization APIs

Amazon Connect forecasting, capacity planning, and scheduling uses the following private API resources as actions in its IAM policy:

- `connect:BatchAssociateAnalyticsDataSet`. Grants access permissions and associates the specified datasets for the specified Amazon Connect instance with the specified AWS account.
- `connect:BatchDisassociateAnalyticsDataSet`. Revokes access permissions and disassociates the specified datasets for the specified Amazon Connect instance with the specified AWS account.

If you remove these actions from the preview role policy, the forecasting, capacity planning, and scheduling features won't work.
Security in Amazon Connect

Cloud security at AWS is the highest priority. As an AWS customer, you benefit from a data center and network architecture that is built to meet the requirements of the most security-sensitive organizations.

Security is a shared responsibility between AWS and you. The shared responsibility model describes this as security of the cloud and security in the cloud:

- **Security of the cloud** – AWS is responsible for protecting the infrastructure that runs AWS services in the AWS Cloud. AWS also provides you with services that you can use securely. Third-party auditors regularly test and verify the effectiveness of our security as part of the AWS compliance programs. To learn about the compliance programs that apply to Amazon Connect, see AWS Services in Scope by Compliance Program.

- **Security in the cloud** – Your responsibility is determined by the AWS service that you use. You are also responsible for other factors including the sensitivity of your data, your company's requirements, and applicable laws and regulations.

This documentation helps you understand how to apply the shared responsibility model when using Amazon Connect. The following topics show you how to configure Amazon Connect to meet your security and compliance objectives. You also learn how to use other AWS services that help you to monitor and secure your Amazon Connect resources.

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- Data protection in Amazon Connect (p. 1171)
- Identity and access management for Amazon Connect (p. 1185)
- Logging and monitoring Amazon Connect (p. 1236)
- Tagging resources in Amazon Connect (p. 1236)
- Compliance validation in Amazon Connect (p. 1238)
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- Security Best Practices for Amazon Connect (p. 1245)

Data protection in Amazon Connect

The AWS shared responsibility model applies to data protection in Amazon Connect. As described in this model, AWS is responsible for protecting the global infrastructure that runs all of the AWS Cloud. You are responsible for maintaining control over your content that is hosted on this infrastructure. This content includes the security configuration and management tasks for the AWS services that you use. For more information about data privacy, see the Data Privacy FAQ. For information about data protection in Europe, see the AWS Shared Responsibility Model and GDPR blog post on the AWS Security Blog.

For data protection purposes, we recommend that you protect AWS account credentials and set up individual user accounts with AWS Identity and Access Management (IAM). That way each user is given only the permissions necessary to fulfill their job duties. We also recommend that you secure your data in the following ways:

- Use multi-factor authentication (MFA) with each account.
- Use SSL/TLS to communicate with AWS resources. We recommend TLS 1.2 or later.
• Set up API and user activity logging with AWS CloudTrail.
• Use AWS encryption solutions, along with all default security controls within AWS services.
• Use advanced managed security services such as Amazon Macie, which assists in discovering and securing sensitive data that is stored in Amazon S3.
• If you require FIPS 140-2 validated cryptographic modules when accessing AWS through a command line interface or an API, use a FIPS endpoint. For more information about the available FIPS endpoints, see Federal Information Processing Standard (FIPS) 140-2.

We strongly recommend that you never put confidential or sensitive information, such as your customers’ email addresses, into tags or free-form fields such as a Name field. This includes when you work with Amazon Connect or other AWS services using the console, API, AWS CLI, or AWS SDKs. Any data that you enter into tags or free-form fields used for names may be used for billing or diagnostic logs. If you provide a URL to an external server, we strongly recommend that you do not include credentials information in the URL to validate your request to that server.

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• Encryption at rest (p. 1175)
• Encryption in transit (p. 1183)
• Key management (p. 1183)
• Amazon Connect and interface VPC endpoints (AWS PrivateLink) (p. 1184)

Data handled by Amazon Connect

Data held within Amazon Connect is segregated by the AWS account ID and the Amazon Connect instance ID. This ensures that data can be accessed only by the authorized users of a specific Amazon Connect instance.

Amazon Connect handles a variety of data related to the contact center, including but not limited to the following categories.

• Resources and configurations -- This includes queues, flows, users, routing profiles, and task templates.
• Contact metadata -- This includes connection time, handle time, source number (ANI), destination number (DNIS), and user defined contact attributes.
• Agent-related performance data -- This includes login time, status changes, and contacts handled.
• Phone call audio streams -- When enabled, this also includes call recordings.
• Chat transcripts -- Included only if enabled.
• Attachments -- Included only if enabled.
• Integration configuration -- Includes user defined name, description and metadata when creating integration with external applications.
• Knowledge documents -- This includes documents used by agents to handle contacts.
• Voiceprints -- When Amazon Connect Voice ID is enabled, a voiceprint is created from the customer's voice for future authentication. Similarly, a voiceprint is created while registering a fraudster in the Voice ID system for future fraud detection.
• Speaker and Fraudster Audio -- When Amazon Connect Voice ID is enabled, the audio used for enrolling speakers and registering fraudsters is stored so that Voice ID can re-enroll and reregister them in future when there is a need to do so.

Amazon Connect stores the following Personally Identifiable Information (PII) data related to your customers:
Data handled by Amazon Connect

- The customer’s phone number: ANI for inbound calls, and DNIS for outbound calls or transfers.
- If you are using Amazon Connect Customer Profiles, all this data could potentially be PII. This data is always encrypted at rest using either a customer-provided KMS key or a service-owned key. The Amazon Connect Customer Profiles data is segregated by the AWS account ID and the domain. Multiple Amazon Connect instances can share a single Customer Profiles domain.
- For outbound campaigns, Amazon Pinpoint passes customer phone numbers and relevant attributes to Amazon Connect. On the Amazon Connect side, these are always encrypted at rest using either a customer managed key or an AWS owned key. The outbound campaigns data is segregated by the Amazon Connect instance ID and are encrypted by instance-specific keys.

External application data

Amazon AppIntegrations enables you to integrate with external applications. It stores references to other AWS resources and client-service specified metadata. No data is stored other than incidentally while being processed. When syncing data periodically with an Amazon Connect service, data is encrypted using a customer managed key and stored temporarily for one month.

Phone call media

Amazon Connect is in the audio path for calls handled by the service. It is therefore responsible for relaying the call’s media stream between participants. This can include the audio between a customer and a flow / IVR, the audio between a customer and an agent, or mixing the audio between multiple parties in a conference or during a transfer. There are two types of phone calls:

- PSTN calls. This includes inbound customer calls, outbound calls placed by agents to customers, and calls to an agent’s physical phone, if this option has been enabled in the Contact Control Panel (CCP).
- Softphone calls placed to the agent’s browser.

PSTN calls are connected between Amazon Connect and various telecommunications carriers using either private circuits maintained between Amazon Connect and our providers or existing AWS internet connectivity. For PSTN calls routed over the public internet, signaling is encrypted with TLS and the audio media is encrypted with SRTP.

Softphone calls are established to the agent’s browser with an encrypted WebSocket connection using TLS. The audio media traffic to the browser is encrypted in transit using DTLS-SRTP.

Call recordings

Call recording is disabled by default in Amazon Connect. You can enable call recording in the flows, which allows for more detailed control over which calls are recorded.

The call recording feature has options for choosing whether to record the agent only, customer only, or agent and customer conversations. When call recording is enabled, the recording begins when the call is connected to an agent and stops when the agent disconnects. Any transfers to external numbers are not recorded after the agent leaves the call.

You can limit access to the call recordings based on user permissions. Recordings can be searched and played back within the Amazon Connect web interface.

Call recording storage

Call recordings are stored in two phases:

- Recordings intermediately held within Amazon Connect during and after the call, but before delivery.
• Recordings delivered to your Amazon S3 bucket.

The recordings that are stored in your Amazon S3 bucket are secured using a AWS KMS key that was configured when your instance was created.

At all times, you maintain full control over the security of call recordings delivered to your Amazon S3 bucket.

**Call recording access**

You can search and listen to call recordings in Amazon Connect. To determine which users can do this, assign them the appropriate security profiles. If AWS CloudTrail is enabled, access to specific recordings by Amazon Connect users is captured in CloudTrail.

The capabilities of Amazon S3, AWS KMS, and IAM put you in full control of who has access to call recording data.

**Contact metadata**

Amazon Connect stores metadata related to contacts that flow through the system and allows authorized users to access this information. The Contact Search feature allows you to search and view contact data, such as origination phone numbers or other attributes set by the flow, that are associated with a contact for diagnostics or reporting purposes.

Contact data classified as PII that is stored by Amazon Connect is encrypted at rest using a key that is time-limited and specific to the Amazon Connect instance. Specifically, the customer origination phone number is cryptographically hashed with a key that is specific to the instance to allow for use in contact search. For contact search, the encryption key is not time-sensitive.

The following data stored by Amazon Connect is treated as sensitive:

- Origination phone number
- Outbound phone number
- External numbers dialed by agents for transfers
- External numbers transferred to by a flow
- Contact name
- Contact description
- All contact attributes
- All contact references

**Contact Lens real-time processing**

Content processed by Contact Lens in real-time is encrypted at rest and in transit. Data is encrypted with keys owned by Contact Lens.

**Voiceprints and Voice ID audio recordings**

When you enable Amazon Connect Voice ID, it computes voiceprints out of your customer's speech for authenticating them in future, and stores the data. Similarly, when you enable fraud detection, it stores the voiceprint for each fraudster registered in Voice ID.

While enrolling a customer into Voice ID for authentication and fraud detection, you must specify a `CustomerSpeakerId` for them. Since Voice ID stores biometric information for each speaker, we strongly recommend that you use an identifier that does not contain PII in the `CustomerSpeakerId` field.
Speaker and Fraudster Audio

When you enable Amazon Connect Voice ID, it stores a compacted version of the audio (called utterances) that it aggregated while enrolling a speaker or registering a fraudster. This audio is used in the future whenever the voiceprints for the speakers and fraudsters need to be regenerated. The data is retained until the speaker/fraudster is deleted. The original audio used for enrollment or evaluation is deleted after a 24 hour retention period.

Outbound campaigns

For outbound campaigns, Amazon Pinpoint passes customer phone numbers and relevant attributes to Amazon Connect. On Amazon Connect, these are always encrypted at rest using either a customer managed key or an AWS owned key. The outbound campaigns data is segregated by the Amazon Connect instance ID and are encrypted by instance specific keys.

Task templates

Any processing of task template resources in Amazon Connect is encrypted at rest and in transit. Data is encrypted with AWS KMS key.

Encryption at rest

Contact data classified as PII, or data that represents customer content being stored by Amazon Connect, is encrypted at rest (that is, before it is put, stored, or saved to a disk) using a key that is time-limited and specific to the Amazon Connect instance.

Amazon S3 server-side encryption is used to encrypt conversation recordings (voice and chat) and knowledge documents at rest with a AWS Key Management Service data key unique per customer account. Amazon AppIntegrations configuration data is encrypted the same way. For information about AWS KMS keys, see What is AWS Key Management Service? in the AWS Key Management Service Developer Guide.

Amazon Connect Voice ID stores customer voiceprints which cannot be reverse-engineered to obtain the enrolled customer's speech or identify a customer. These are encrypted using a customer managed key.

Integration configuration data is encrypted at rest using a key that is time-limited and specific to the user account.

External application data encryption at rest

When you create a DataIntegration encrypted with a customer managed key, Amazon AppIntegrations creates a grant on your behalf by sending a CreateGrant request to AWS KMS. Grants in AWS KMS are used to give Amazon AppIntegrations access to a KMS key in your account.

You can revoke access to the grant, or remove the access that Amazon AppIntegrations has to the customer managed key at any time. If you do, Amazon AppIntegrations can not access any of the data encrypted by the customer managed key, which affects operations that are dependent on that data.

External application data that Amazon AppIntegrations processes is encrypted at rest in an S3 bucket using the customer managed key that you provided during configuration.

Amazon AppIntegrations requires the grant to use the customer managed key for the following internal operations:

- Send GenerateDataKeyRequest to AWS KMS to generate data keys encrypted by your customer managed key.
• Send Decrypt requests to AWS KMS to decrypt encrypted data keys so that they can be used to encrypt your data.

Amazon Connect Customer Profiles encryption at rest

All user data stored in Amazon Connect Customer Profiles is encrypted at rest. Amazon Connect Customer Profiles encryption at rest provides enhanced security by encrypting all your data at rest using encryption keys stored in AWS Key Management Service (AWS KMS). This functionality helps reduce the operational burden and complexity involved in protecting sensitive data. With encryption at rest, you can build security-sensitive applications that meet strict encryption compliance and regulatory requirements.

Organizational policies, industry or government regulations, and compliance requirements often require the use of encryption at rest to increase the data security of your applications. Customer Profiles integrated with AWS KMS to enable its encryption at rest strategy. For more information, see AWS Key Management Service Concepts in the AWS Key Management Service Developer Guide.

When creating a new domain, you must provide a KMS key that the service will use to encrypt your data in transit and at rest. The customer managed key is created, owned, and managed by you. You have full control over the customer managed key (AWS KMS charges apply).

You can specify an encryption key when you create a new domain or profile object type or switch the encryption keys on an existing resources by using the AWS Command Line Interface (AWS CLI), or the Amazon Connect Customer Profiles Encryption API. When you choose a customer managed key, Amazon Connect Customer Profiles creates a grant to the customer managed key that grants it access to the customer managed key.

AWS KMS charges apply for a customer managed key. For more information about pricing, see AWS KMS pricing.

Amazon Connect Wisdom encryption at rest

All user data stored in Amazon Connect Wisdom is encrypted at rest using encryption keys stored in AWS Key Management Service. If you optionally provide a customer managed key, Wisdom uses it to encrypt knowledge content stored at rest outside of Wisdom search indices. Wisdom uses dedicated search indices per customer and they are encrypted at rest by using AWS owned keys stored in AWS Key Management Service. Additionally, you can use CloudTrail to audit any data access via the Wisdom APIs.

AWS KMS charges apply when using a key that you provide. For more information about pricing, see AWS KMS pricing.

Amazon Connect Voice ID encryption at rest

All user data stored in Amazon Connect Voice ID is encrypted at rest. When creating a new Voice ID domain, you must provide a customer managed key that the service uses to encrypt your data at rest. The customer managed key is created, owned, and managed by you. You have full control over the key.

You can update the KMS key in the Voice ID domain by using the update-domain command in AWS Command Line Interface (AWS CLI), or the UpdateDomain Voice ID API.

When you change the KMS key, an asynchronous process will be triggered to re-encrypt the old data with the new KMS key. After this process completes, all of your domain's data will be encrypted under the new KMS key, and you may safely retire the old key. For more information, see UpdateDomain.

Voice ID creates a grant to the customer managed key that grants it access to the key. For more information, see How Amazon Connect Voice ID uses grants in AWS KMS (p. 1177).

Following is a list of data that is encrypted at rest using the customer managed key:
• **Voiceprints**: The voiceprints generated while enrolling the speakers and registering fraudsters into the system.

• **Speaker and fraudster audio**: The audio data used for enrolling the speakers and registering the fraudsters.

• **CustomerSpeakerId**: The customer-provided SpeakerId while enrolling the customer into Voice ID.

• **Customer-provided metadata**: These include free-form strings such as Domain Description, Domain Name, Job Name, and more.

AWS KMS charges apply for a customer managed key. For more information about pricing, see AWS KMS pricing.

### How Amazon Connect Voice ID uses grants in AWS KMS

Amazon Connect Voice ID requires a grant to use your customer managed key. When you create a domain, Voice ID creates a grant on your behalf by sending a see `CreateGrant` request to AWS KMS. The grant is required to use your customer managed key for the following internal operations:

• Send `DescribeKey` requests to AWS KMS to verify that the symmetric customer managed key ID provided is valid.

• Send `GenerateDataKey` requests to KMS key to create data keys with which to encrypt objects.

• Send `Decrypt` requests to AWS KMS to decrypt the encrypted data keys so that they can be used to encrypt your data.

• Send `ReEncrypt` requests to AWS KMS when the key is updated to re-encrypt a limited set of data using the new key.

• Store files in S3 using the AWS KMS key to encrypt the data.

You can revoke access to the grant, or remove the service's access to the customer managed key at any time. If you do, Voice ID won't be able to access any of the data encrypted by the customer managed key, which affects all the operations that are dependent on that data, leading to `AccessDeniedException` errors and failures in the asynchronous workflows.

### Customer managed key policy for Voice ID

Key policies control access to your customer managed key. Every customer managed key must have exactly one key policy, which contains statements that determine who can use the key and how they can use it. When you create your customer managed key, you can specify a key policy. For more information, see Managing access to KMS keys in the AWS Key Management Service Developer Guide.

Following is an example key policy which gives a user the permissions they need to call all Voice ID APIs using the customer managed key:

```json
{
    "Version": "2012-10-17",
    "Statement": [
        {
            "Sid": "Allow key access to Amazon Connect VoiceID.",
            "Effect": "Allow",
            "Principal": {
                "AWS": "your_user_or_role_ARN"
            },
            "Action": [
                "kms:CreateGrant",
                "kms:Decrypt",
                "kms:DescribeKey",
                "kms:ReEncrypt"
            ],
            "Resource": "*",
        }
    ]
}
```
"Condition": {  
  "StringEquals": {  
    "kms:ViaService": [  
      "voiceid.region.amazonaws.com"  
    ]  
  }  
}  
}

For information about specifying permissions in a policy, see Specifying KMS keys in IAM policy statements in the AWS Key Management Service Developer Guide.

For information about troubleshooting key access, see Troubleshooting key access in the AWS Key Management Service Developer Guide.

Voice ID encryption context

An encryption context is an optional set of key-value pairs that contain additional contextual information about the data. AWS KMS uses the encryption context as additional authenticated data to support authenticated encryption.

When you include an encryption context in a request to encrypt data, AWS KMS binds the encryption context to the encrypted data. To decrypt data, you include the same encryption context in the request.

Voice ID uses the same encryption context in all AWS KMS cryptographic operations, where the key is aws:voiceid:domain:arn and the value is the resource Amazon Resource Name (ARN) Amazon Resource Name (ARN).

"encryptionContext": {  
}

You can also use the encryption context in audit records and logs to identify how the customer managed key is being used. The encryption context also appears in logs generated by CloudTrail or Amazon CloudWatch Logs.

Using encryption context to control access to your customer managed key

You can use the encryption context in key policies and IAM policies as conditions to control access to your symmetric customer managed key. You can also use encryption context constraints in a grant.

Amazon Connect Voice ID uses an encryption context constraint in grants to control access to the customer managed key in your account or Region. The grant constraint requires that the operations that the grant allows use the specified encryption context.

The following are example key policy statements to grant access to a customer managed key for a specific encryption context. The condition in this policy statement requires that the grants have an encryption context constraint that specifies the encryption context.

{  
  "Sid": "Enable DescribeKey",  
  "Effect": "Allow",  
  "Principal": {  
    "AWS": "arn:aws:iam::111122223333:role/ExampleReadOnlyRole"  
  },  
  "Action": "kms:DescribeKey",  
  "Resource": "*"  
}
Monitoring your encryption keys for Voice ID

When you use an AWS KMS customer managed key with Voice ID, you can use AWS CloudTrail or Amazon CloudWatch Logs to track requests that Voice ID sends to AWS KMS.

The following examples is a sample AWS CloudTrail event for CreateGrant operation called by Voice ID to access data encrypted by your customer managed key:

CreateGrant

```json
{
   "eventVersion": "1.08",
   "userIdentity": {
      "type": "AssumedRole",
      "principalId": "AROA5STZEPSZE0W7NP3X:SampleUser1",
      "arn": "arn:aws:sts::111122223333:assumed-role/SampleRole/SampleUser",
      "accountId": "111122223333",
      "accessKeyId": "AAAAAAA1111111EXAMPLE",
      "sessionContext": {
         "sessionIssuer": {
            "type": "Role",
            "principalId": "AROA5STZEPSZE0W7NP3X",
            "arn": "arn:aws:sts::111122223333:assumed-role/SampleRole/SampleUser",
            "accountId": "111122223333",
            "userName": "SampleUser"
         },
         "webIdFederationData": {},
         "attributes": {
            "creationDate": "2021-09-14T23:02:23Z",
            "mfaAuthenticated": "false"
         }
      },
      "invokedBy": "voiceid.amazonaws.com"
   },
   "eventTime": "2021-09-14T23:02:50Z",
   "eventSource": "kms.amazonaws.com",
   "eventName": "CreateGrant",
   "awsRegion": "us-west-2",
   "sourceIPAddress": "SampleIpAddress",
   "userAgent": "Example Desktop/1.0 (V1; OS)",
   "requestParameters": {
      "constraints": {
         "encryptionContextSubset": {
         }
      },
      "retiringPrincipal": "voiceid.amazonaws.com",
```
DescribeKey

```json
{
  "eventVersion": "1.08",
  "userIdentity": {
    "type": "AWSService",
    "invokedBy": "voiceid.amazonaws.com"
  },
  "eventTime": "2021-10-13T15:12:39Z",
  "eventSource": "kms.amazonaws.com",
  "eventName": "DescribeKey",
  "awsRegion": "us-west-2",
  "sourceIPAddress": "voiceid.amazonaws.com",
  "userAgent": "voiceid.amazonaws.com",
  "requestParameters": {
    "keyId": "alias/sample-key-alias"
  },
  "responseElements": null,
  "requestID": "ed0fe4ab-305b-4388-8adfe-7e8e3a4e80fe",
  "eventID": "31d0d7c6-ce5b-4caf-901f-025bf71241f6",
  "readOnly": true,
  "resources": [
    {
      "accountId": "111122223333",
      "type": "AWS::KMS::Key",
      "ARN": "arn:aws:kms:us-west-2:111122223333:alias/sample-key-alias"
    }
  ],
  "eventType": "AwsApiCall",
  "managementEvent": true,
  "recipientAccountId": "111122223333",
  "eventCategory": "Management"
}
```

DescribeKey
"eventCategory": "Management"
}

Decrypt
{
  "eventVersion": "1.08",
  "userIdentity": {
    "type": "AWSService",
    "invokedBy": "voiceid.amazonaws.com"
  },
  "eventTime": "2021-10-12T23:59:34Z",
  "eventSource": "kms.amazonaws.com",
  "eventName": "Decrypt",
  "awsRegion": "us-west-2",
  "sourceIPAddress": "voiceid.amazonaws.com",
  "userAgent": "voiceid.amazonaws.com",
  "requestParameters": {
    "encryptionContext": {
      "encryptionContext": {
      },
      "encryptionAlgorithm": "SYMMETRIC_DEFAULT"
    },
    "responseElements": null,
    "requestID": "ed0fe4ab-305b-4388-8adf-7e8e3a4e80fe",
    "eventID": "31d0d7c6-ce5b-4caf-901f-025bf71241f6",
    "readOnly": true,
    "resources": [{
      "accountId": "111122223333",
      "type": "AWS::KMS::Key",
    }],
    "eventType": "AwsApiCall",
    "managementEvent": true,
    "recipientAccountId": "111122223333",
    "sharedEventID": "35d58aa1-26b2-427a-908f-025bf71241f6",
    "eventCategory": "Management"
  }

GenerateDataKeyWithoutPlaintext
{
  "eventVersion": "1.08",
  "userIdentity": {
    "type": "AWSService",
    "invokedBy": "voiceid.amazonaws.com"
  },
  "eventTime": "2021-10-13T00:26:41Z",
  "eventSource": "kms.amazonaws.com",
  "eventName": "GenerateDataKeyWithoutPlaintext",
  "awsRegion": "us-west-2",
  "sourceIPAddress": "voiceid.amazonaws.com",
  "userAgent": "voiceid.amazonaws.com",
  "requestParameters": {
    "encryptionContext": {
    }
  }
}
ReEncrypt

```json
{
  "eventVersion": "1.08",
  "userIdentity": {
    "type": "AWSService",
    "invokedBy": "voiceid.amazonaws.com"
  },
  "eventTime": "2021-10-13T00:59:05Z",
  "eventSource": "kms.amazonaws.com",
  "eventName": "ReEncrypt",
  "awsRegion": "us-west-2",
  "sourceIPAddress": "voiceid.amazonaws.com",
  "userAgent": "voiceid.amazonaws.com",
  "requestParameters": {
    "destinationEncryptionContext": {
    },
    "destinationKeyId": "arn:aws:kms:us-west-2:11112222333:key/44444444-3333-2222-1111-EXAMPLE11111",
    "sourceEncryptionAlgorithm": "SYMMETRIC_DEFAULT",
    "sourceAAD": "SampleSourceAAD+JXBmH+ZJNM73BfHE/dwQALxp75f44Vwvo30rLj",
    "destinationAAD": "SampleDestinationAAD+JXBmH+ZJNM73BfHE/dwQALxp75f44Vwvo30rLj",
    "sourceEncryptionContext": {
    },
    "destinationEncryptionAlgorithm": "SYMMETRIC_DEFAULT",
    "sourceKeyId": "arn:aws:kms:us-west-2:11112222333:key/55555555-3333-2222-1111-EXAMPLE22222"
  },
  "responseElements": null,
  "requestID": "ed0fe6ab-305b-4388-8ad5-7e8e3a4e80fe",
  "eventID": "31d0d7c6-cced5b-4ca9f-025bf71241f6",
  "readOnly": true,
  "resources": [{
    "accountId": "111122223333",
    "type": "AWS::KMS::Key",
  }],
  "eventType": "AwsApiCall",
  "managementEvent": true,
  "recipientAccountID": "111122223333",
  "sharedEventID": "35d58aa1-26b2-427a-908f-025bf71241f6",
  "eventCategory": "Management"
}
```
Outbound campaigns

For outbound campaigns, Amazon Pinpoint passes customer phone numbers and relevant attributes to Amazon Connect. On Amazon Connect, these are always encrypted at rest using either a customer managed key or an AWS owned key. The outbound campaigns data is segregated by the Amazon Connect instance ID and are encrypted by instance specific keys.

You can provide your own customer managed key when onboarding to outbound campaigns.

The service use this customer managed key to encrypt sensitive data at rest. The customer managed key is created, owned, and managed by you. You have full control over the customer managed key.

If you do not provide your own customer managed key, then outbound campaigns encrypts sensitive data at rest using a AWS owned key specific to your Amazon Connect instance.

AWS KMS charges apply for a customer managed key. For more information about pricing, see AWS KMS pricing.

Encryption in transit

All data exchanged with Amazon Connect is protected in transit between the user’s web browser and Amazon Connect using industry-standard TLS encryption. Which version of TLS? (p. 1241)

External data is additionally encrypted while being processed by AWS KMS.

When Amazon Connect integrates with AWS services, such as AWS Lambda, Amazon Kinesis, or Amazon Polly, data is always encrypted in transit using TLS.

When event data is forwarded from external applications to Amazon Connect it is always encrypted in transit using TLS.

Key management

You can specify AWS KMS keys, including bring your own keys (BYOK), to use for envelope encryption with Amazon S3 input/output buckets. This also applies to data used stored in Amazon Connect Customer Profiles.

Amazon Connect Wisdom stores knowledge documents that are encrypted at rest in S3 using a BYOK or a service-owned key. The knowledge documents are encrypted at rest in Amazon OpenSearch Service using a service-owned key. Wisdom stores agent queries and call transcripts using a BYOK or a service-owned key.

Amazon AppIntegrations doesn't support BYOK for encryption of configuration data. When syncing external application data, periodically you are required to BYOK. Amazon AppIntegrations requires a grant to use your customer managed key. When you create a data integration, Amazon AppIntegrations sends a CreateGrant request to AWS KMS on your behalf. You can revoke access to
the grant, or remove the service's access to the customer managed key at any time. If you do, Amazon AppIntegrations won't be able to access any of the data encrypted by the customer managed key, which affects Amazon Connect services that are dependent on that data.

The knowledge documents used by Amazon Connect Wisdom are encrypted by an AWS KMS key.

For using Amazon Connect Voice ID, it is mandatory to provide a customer managed key KMS key (BYOK) while creating a Amazon Connect Voice ID domain, which is used to encrypt all the customer data at rest.

Outbound campaigns encrypts all sensitive data using an AWS owned key or a customer managed key. As the customer managed key is created, owned, and managed by the you, you have full control over the customer managed key (AWS KMS charges apply).

For information about AWS KMS keys see What is AWS Key Management Service? in the AWS Key Management Service Developer Guide.

Amazon Connect and interface VPC endpoints (AWS PrivateLink)

You can establish a private connection between your VPC and a subset of endpoints in Amazon Connect by creating an interface VPC endpoint. Following are the supported endpoints:

- Amazon AppIntegrations
- Customer Profiles
- Outbound campaigns
- Voice ID
- Wisdom

The core Amazon Connect service does not support AWS PrivateLink or VPC endpoints.

Interface endpoints are powered by AWS PrivateLink, a technology that enables you to privately access Amazon Connect APIs without an internet gateway, NAT device, VPN connection, or AWS Direct Connect connection. Instances in your VPC don't need public IP addresses to communicate with the Amazon Connect APIs that integrate with AWS PrivateLink.

For more information, see the AWS PrivateLink Guide.

Creating an interface VPC endpoint for Amazon Connect

You can create an interface endpoint using either the Amazon VPC console or the AWS Command Line Interface (AWS CLI). For more information, see Create an interface endpoint in the AWS PrivateLink Guide.

Amazon Connect supports the following service names:

- com.amazonaws.region.app-integrations
- com.amazonaws.region.profile
- com.amazonaws.region.connect-campaigns
- com.amazonaws.region.voiceid
- com.amazonaws.region.wisdom

If you enable private DNS for an interface endpoint, you can make API requests to Amazon Connect using the default DNS name for the Region. For example, voiceid.us-east-1.amazonaws.com. For more information, see DNS hostnames in the AWS PrivateLink Guide.
Creating a VPC endpoint policy

You can attach an endpoint policy to your VPC endpoint that controls access. The policy specifies the following information:

- The principal that can perform actions.
- The actions that can be performed.
- The resources on which actions can be performed.

For more information, see Control access to services using endpoint policies in the AWS PrivateLink Guide.

Example: VPC endpoint policy

The following VPC endpoint policy grants access to the listed Amazon Connect Voice ID actions for all principals on all resources.

```
{
    "Statement": [
        {
            "Effect": "Allow",
            "Action": [
                "voiceid:CreateDomain",
                "voiceid:EvaluateSession",
                "voiceid:ListSpeakers"
            ],
            "Resource": "*",
            "Principal": "*"
        }
    ]
}
```

Following is another example. In this one, the VPC endpoint policy grants access to the listed outbound campaigns actions for all principals on all resources.

```
{
    "Statement": [
        {
            "Effect": "Allow",
            "Action": [
                "connect-campaigns:CreateCampaign",
                "connect-campaigns:DeleteCampaign",
                "connect-campaigns:ListCampaigns"
            ],
            "Resource": "*",
            "Principal": "*"
        }
    ]
}
```

Identity and access management for Amazon Connect

AWS Identity and Access Management (IAM) is an AWS service that helps an administrator securely control access to AWS resources. IAM administrators control who can be authenticated (signed in) and
authorized (have permissions) to use Amazon Connect resources. IAM is an AWS service that you can use with no additional charge.

**Topics**

- Audience (p. 1186)
- Authenticating with identities (p. 1186)
- Managing access using policies (p. 1188)
- Required permissions for using custom IAM policies to manage access to the Amazon Connect console (p. 1190)
- Restrict AWS resources that can be associated with Amazon Connect (p. 1203)
- How Amazon Connect works with IAM (p. 1206)
- Amazon Connect identity-based policy examples (p. 1209)
- Amazon Connect resource-level policy examples (p. 1216)
- AWS managed policies for Amazon Connect (p. 1220)
- Troubleshooting Amazon Connect identity and access (p. 1226)
- Use service-linked roles for Amazon Connect (p. 1228)
- Use service-linked roles for outbound campaigns (p. 1230)
- Using service-linked roles for Amazon AppIntegrations (p. 1232)

**Audience**

How you use AWS Identity and Access Management (IAM) differs, depending on the work that you do in Amazon Connect.

**Service user** – If you use the Amazon Connect service to do your job, then your administrator provides you with the credentials and permissions that you need. As you use more Amazon Connect features to do your work, you might need additional permissions. Understanding how access is managed can help you request the right permissions from your administrator. If you cannot access a feature in Amazon Connect, see Troubleshooting Amazon Connect identity and access (p. 1226).

**Service administrator** – If you’re in charge of Amazon Connect resources at your company, you probably have full access to Amazon Connect. It’s your job to determine which Amazon Connect features and resources your service users should access. You must then submit requests to your IAM administrator to change the permissions of your service users. Review the information on this page to understand the basic concepts of IAM. To learn more about how your company can use IAM with Amazon Connect, see How Amazon Connect works with IAM (p. 1206).

**IAM administrator** – If you’re an IAM administrator, you might want to learn details about how you can write policies to manage access to Amazon Connect. To view example Amazon Connect identity-based policies that you can use in IAM, see Amazon Connect identity-based policy examples (p. 1209).

**Authenticating with identities**

Authentication is how you sign in to AWS using your identity credentials. You must be authenticated (signed in to AWS) as the AWS account root user, as an IAM user, or by assuming an IAM role.

You can sign in to AWS as a federated identity by using credentials provided through an identity source. AWS IAM Identity Center (successor to AWS Single Sign-On) (IAM Identity Center) users, your company’s single sign-on authentication, and your Google or Facebook credentials are examples of federated identities. When you sign in as a federated identity, your administrator previously set up identity federation using IAM roles. When you access AWS by using federation, you are indirectly assuming a role.
Depending on the type of user you are, you can sign in to the AWS Management Console or the AWS access portal. For more information about signing in to AWS, see How to sign in to your AWS account in the AWS Sign-In User Guide.

If you access AWS programmatically, AWS provides a software development kit (SDK) and a command line interface (CLI) to cryptographically sign your requests using your credentials. If you don’t use AWS tools, you must sign requests yourself. For more information about using the recommended method to sign requests yourself, see Signature Version 4 signing process in the AWS General Reference.

Regardless of the authentication method that you use, you might be required to provide additional security information. For example, AWS recommends that you use multi-factor authentication (MFA) to increase the security of your account. To learn more, see Multi-factor authentication in the AWS IAM Identity Center (successor to AWS Single Sign-On) User Guide and Using multi-factor authentication (MFA) in AWS in the IAM User Guide.

**AWS account root user**

When you create an AWS account, you begin with one sign-in identity that has complete access to all AWS services and resources in the account. This identity is called the AWS account root user and is accessed by signing in with the email address and password that you used to create the account. We strongly recommend that you don’t use the root user for your everyday tasks. Safeguard your root user credentials and use them to perform the tasks that only the root user can perform. For the complete list of tasks that require you to sign in as the root user, see Tasks that require root user credentials in the AWS Account Management Reference Guide.

**IAM users and groups**

An IAM user is an identity within your AWS account that has specific permissions for a single person or application. Where possible, we recommend relying on temporary credentials instead of creating IAM users who have long-term credentials such as passwords and access keys. However, if you have specific use cases that require long-term credentials with IAM users, we recommend that you rotate access keys. For more information, see Rotate access keys regularly for use cases that require long-term credentials in the IAM User Guide.

An IAM group is an identity that specifies a collection of IAM users. You can't sign in as a group. You can use groups to specify permissions for multiple users at a time. Groups make permissions easier to manage for large sets of users. For example, you could have a group named IAMAdmins and give that group permissions to administer IAM resources.

Users are different from roles. A user is uniquely associated with one person or application, but a role is intended to be assumable by anyone who needs it. Users have permanent long-term credentials, but roles provide temporary credentials. To learn more, see When to create an IAM user (instead of a role) in the IAM User Guide.

**IAM roles**

An IAM role is an identity within your AWS account that has specific permissions. It is similar to an IAM user, but is not associated with a specific person. You can temporarily assume an IAM role in the AWS Management Console by switching roles. You can assume a role by calling an AWS CLI or AWS API operation or by using a custom URL. For more information about methods for using roles, see Using IAM roles in the IAM User Guide.

IAM roles with temporary credentials are useful in the following situations:

- **Federated user access** – To assign permissions to a federated identity, you create a role and define permissions for the role. When a federated identity authenticates, the identity is associated with the role and is granted the permissions that are defined by the role. For information about roles for
federation, see Creating a role for a third-party Identity Provider in the IAM User Guide. If you use IAM Identity Center, you configure a permission set. To control what your identities can access after they authenticate, IAM Identity Center correlates the permission set to a role in IAM. For information about permissions sets, see Permission sets in the AWS IAM Identity Center (successor to AWS Single Sign-On) User Guide.

• **Temporary IAM user permissions** – An IAM user or role can assume an IAM role to temporarily take on different permissions for a specific task.

• **Cross-account access** – You can use an IAM role to allow someone (a trusted principal) in a different account to access resources in your account. Roles are the primary way to grant cross-account access. However, with some AWS services, you can attach a policy directly to a resource (instead of using a role as a proxy). To learn the difference between roles and resource-based policies for cross-account access, see How IAM roles differ from resource-based policies in the IAM User Guide.

• **Cross-service access** – Some AWS services use features in other AWS services. For example, when you make a call in a service, it's common for that service to run applications in Amazon EC2 or store objects in Amazon S3. A service might do this using the calling principal's permissions, using a service role, or using a service-linked role.

• **Principal permissions** – When you use an IAM user or role to perform actions in AWS, you are considered a principal. Policies grant permissions to a principal. When you use some services, you might perform an action that then triggers another action in a different service. In this case, you must have permissions to perform both actions. To see whether an action requires additional dependent actions in a policy, see Actions, Resources, and Condition Keys for Amazon Connect in the Service Authorization Reference.

• **Service role** – A service role is an IAM role that a service assumes to perform actions on your behalf. An IAM administrator can create, modify, and delete a service role from within IAM. For more information, see Creating a role to delegate permissions to an AWS service in the IAM User Guide.

• **Service-linked role** – A service-linked role is a type of service role that is linked to an AWS service. The service can assume the role to perform an action on your behalf. Service-linked roles appear in your IAM account and are owned by the service. An IAM administrator can view, but not edit the permissions for service-linked roles.

• **Applications running on Amazon EC2** – You can use an IAM role to manage temporary credentials for applications that are running on an EC2 instance and making AWS CLI or AWS API requests. This is preferable to storing access keys within the EC2 instance. To assign an AWS role to an EC2 instance and make it available to all of its applications, you create an instance profile that is attached to the instance. An instance profile contains the role and enables programs that are running on the EC2 instance to get temporary credentials. For more information, see Using an IAM role to grant permissions to applications running on Amazon EC2 instances in the IAM User Guide.

To learn whether to use IAM roles or IAM users, see When to create an IAM role (instead of a user) in the IAM User Guide.

### Managing access using policies

You control access in AWS by creating policies and attaching them to AWS identities or resources. A policy is an object in AWS that, when associated with an identity or resource, defines their permissions. AWS evaluates these policies when a principal (user, root user, or role session) makes a request. Permissions in the policies determine whether the request is allowed or denied. Most policies are stored in AWS as JSON documents. For more information about the structure and contents of JSON policy documents, see Overview of JSON policies in the IAM User Guide.

Administrators can use AWS JSON policies to specify who has access to what. That is, which principal can perform actions on what resources, and under what conditions.

Every IAM entity (user or role) starts with no permissions. By default, users can do nothing, not even change their own password. To give a user permission to do something, an administrator must attach
a permissions policy to a user. Or the administrator can add the user to a group that has the intended permissions. When an administrator gives permissions to a group, all users in that group are granted those permissions.

IAM policies define permissions for an action regardless of the method that you use to perform the operation. For example, suppose that you have a policy that allows the `iam:GetRole` action. A user with that policy can get role information from the AWS Management Console, the AWS CLI, or the AWS API.

### Identity-based policies

Identity-based policies are JSON permissions policy documents that you can attach to an identity, such as an IAM user, group of users, or role. These policies control what actions users and roles can perform, on which resources, and under what conditions. To learn how to create an identity-based policy, see [Creating IAM policies](https://docs.aws.amazon.com/IAM/latest/userguide/) in the IAM User Guide.

Identity-based policies can be further categorized as **inline policies** or **managed policies**. Inline policies are embedded directly into a single user, group, or role. Managed policies are standalone policies that you can attach to multiple users, groups, and roles in your AWS account. Managed policies include AWS managed policies and customer managed policies. To learn how to choose between a managed policy or an inline policy, see [Choosing between managed policies and inline policies](https://docs.aws.amazon.com/IAM/latest/userguide/) in the IAM User Guide.

### Resource-based policies

Resource-based policies are JSON policy documents that you attach to a resource. Examples of resource-based policies are IAM role trust policies and Amazon S3 bucket policies. In services that support resource-based policies, service administrators can use them to control access to a specific resource. For the resource where the policy is attached, the policy defines what actions a specified principal can perform on that resource and under what conditions. You must specify a principal in a resource-based policy. Principals can include accounts, users, roles, federated users, or AWS services.

Resource-based policies are inline policies that are located in that service. You can't use AWS managed policies from IAM in a resource-based policy.

### Other policy types

AWS supports additional, less-common policy types. These policy types can set the maximum permissions granted to you by the more common policy types.

- **Permissions boundaries** – A permissions boundary is an advanced feature in which you set the maximum permissions that an identity-based policy can grant to an IAM entity (IAM user or role). You can set a permissions boundary for an entity. The resulting permissions are the intersection of entity’s identity-based policies and its permissions boundaries. Resource-based policies that specify the user or role in the Principal field are not limited by the permissions boundary. An explicit deny in any of these policies overrides the allow. For more information about permissions boundaries, see [Permissions boundaries for IAM entities](https://docs.aws.amazon.com/IAM/latest/userguide/) in the IAM User Guide.

- **Service control policies (SCPs)** – SCPs are JSON policies that specify the maximum permissions for an organization or organizational unit (OU) in AWS Organizations. AWS Organizations is a service for grouping and centrally managing multiple AWS accounts that your business owns. If you enable all features in an organization, then you can apply service control policies (SCPs) to any or all of your accounts. The SCP limits permissions for entities in member accounts, including each AWS account root user. For more information about Organizations and SCPs, see [How SCPs work](https://docs.aws.amazon.com/AWSOrganizations/latest/userguide/) in the AWS Organizations User Guide.

- **Session policies** – Session policies are advanced policies that you pass as a parameter when you programmatically create a temporary session for a role or federated user. The resulting session's permissions are the intersection of the user or role's identity-based policies and the session policies.
Permissions can also come from a resource-based policy. An explicit deny in any of these policies overrides the allow. For more information, see Session policies in the IAM User Guide.

Multiple policy types

When multiple types of policies apply to a request, the resulting permissions are more complicated to understand. To learn how AWS determines whether to allow a request when multiple policy types are involved, see Policy evaluation logic in the IAM User Guide.

Required permissions for using custom IAM policies to manage access to the Amazon Connect console

If you're using custom IAM policies to manage access to the Amazon Connect console, your users need some or all of the permissions listed in this article, depending on the tasks they need to do.

Note
Using connect:* in a custom IAM policy grants your users all of the Amazon Connect permissions listed in this article.

Note
Certain pages on the Amazon Connect console, such as Tasks (p. 1198) and Customer Profiles (p. 1200), require that you add permissions to your inline policies.

AmazonConnect_FullAccess policy

To allow full read/write access to Amazon Connect, you must attach two policies to your IAM users, groups, or roles. Attach the AmazonConnect_FullAccess policy and a custom policy with the following contents:

```json
{
    "Version": "2012-10-17",
    "Statement": [
        {
            "Sid": "AttachAnyPolicyToAmazonConnectRole",
            "Effect": "Allow",
            "Action": "iam:PutRolePolicy",
            "Resource": "arn:aws:iam::*:role/aws-service-role/connect.amazonaws.com/AWSServiceRoleForAmazonConnect*",
            "Condition": {
                "StringEquals": {
                    "iam: policyName": "null"
                }
            }
        }
    ]
}
```

To allow an IAM user to create an instance, ensure that they have the permissions granted by the AmazonConnect_FullAccess policy.

When you use AmazonConnect_FullAccess policy, note the following:

- Additional privileges are required to create a Amazon S3 bucket with a name of your choosing, or use an existing bucket while creating or updating an instance from the Amazon Connect console. If you choose default storage locations for your call recordings, chat transcripts, call transcripts, etc, they are now prefixed with "amazon-connect-".
- The aws/connect KMS key is available to use as a default encryption option. To use a custom encryption key, assign users additional KMS privileges.
- Assign users additional privileges to attach other AWS resources like Amazon Polly, Live Media Streaming, Data Streaming, and Lex bots to their Amazon Connect instances.
Amazon Connect ReadOnlyAccess policy

To allow read-only access, you need to attach only the AmazonConnectReadOnlyAccess policy.

Amazon Connect console home page

The following image shows a sample Amazon Connect console home page.

![Amazon Connect virtual contact center instances](image)

Use the permissions listed in the following table to manage access to this page.

<table>
<thead>
<tr>
<th>Action/Use case</th>
<th>Permissions needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>List instance</td>
<td>connect:ListInstances</td>
</tr>
<tr>
<td></td>
<td>ds:DescribeDirectories</td>
</tr>
<tr>
<td>Describe instance: View the details of the instance/ current settings</td>
<td>connect:DescribeInstance</td>
</tr>
<tr>
<td></td>
<td>connect:ListInstanceStorageConfigs</td>
</tr>
<tr>
<td></td>
<td>connect:ListApprovedOrigins</td>
</tr>
<tr>
<td></td>
<td>connect:ListSecurityKeys</td>
</tr>
<tr>
<td></td>
<td>connect:DescribeInstanceAttributes</td>
</tr>
<tr>
<td></td>
<td>connect:DescribeInstanceStorageConfig</td>
</tr>
<tr>
<td></td>
<td>ds:DescribeDirectories</td>
</tr>
<tr>
<td>Create instance</td>
<td>connect:CreateInstance</td>
</tr>
<tr>
<td></td>
<td>connect:DescribeInstance</td>
</tr>
<tr>
<td></td>
<td>connect:ListInstances</td>
</tr>
<tr>
<td></td>
<td>connect:AssociateInstanceStorageConfig</td>
</tr>
<tr>
<td></td>
<td>connect:UpdateInstanceAttribute</td>
</tr>
<tr>
<td></td>
<td>ds:CheckAlias</td>
</tr>
<tr>
<td></td>
<td>ds:CreateAlias</td>
</tr>
<tr>
<td></td>
<td>ds:AuthorizeApplication</td>
</tr>
<tr>
<td>Action/Use case</td>
<td>Permissions needed</td>
</tr>
<tr>
<td>-----------------</td>
<td>--------------------</td>
</tr>
<tr>
<td></td>
<td>ds:UnauthorizeApplication</td>
</tr>
<tr>
<td></td>
<td>ds:CreateIdentityPoolDirectory</td>
</tr>
<tr>
<td></td>
<td>ds:CreateDirectory</td>
</tr>
<tr>
<td></td>
<td>ds:DescribeDirectories</td>
</tr>
<tr>
<td></td>
<td>iam:CreateServiceLinkedRole</td>
</tr>
<tr>
<td></td>
<td>kms:CreateGrant</td>
</tr>
<tr>
<td></td>
<td>kms:DescribeKey</td>
</tr>
<tr>
<td></td>
<td>kms:ListAliases</td>
</tr>
<tr>
<td></td>
<td>kms:RetireGrant</td>
</tr>
<tr>
<td></td>
<td>logs:CreateLogGroup</td>
</tr>
<tr>
<td></td>
<td>s3:CreateBucket</td>
</tr>
<tr>
<td></td>
<td>s3:GetBucketLocation</td>
</tr>
<tr>
<td></td>
<td>s3:ListAllMyBuckets</td>
</tr>
<tr>
<td></td>
<td>servicequotas:GetServiceQuota</td>
</tr>
<tr>
<td></td>
<td>profile:ListAccountIntegrations</td>
</tr>
<tr>
<td></td>
<td>profile:GetDomain</td>
</tr>
<tr>
<td></td>
<td>profile:ListDomains</td>
</tr>
<tr>
<td></td>
<td>profile:GetProfileObjectType</td>
</tr>
<tr>
<td></td>
<td>profile:ListProfileObjectTypeTemplates</td>
</tr>
<tr>
<td>Delete instance</td>
<td>connect:DescribeInstance</td>
</tr>
<tr>
<td></td>
<td>connect:DeleteInstance</td>
</tr>
<tr>
<td></td>
<td>connect:ListInstances</td>
</tr>
<tr>
<td></td>
<td>ds:DescribeDirectories</td>
</tr>
<tr>
<td></td>
<td>ds:DeleteDirectory</td>
</tr>
<tr>
<td></td>
<td>ds:UnauthorizeApplication</td>
</tr>
</tbody>
</table>

**Detailed instance pages**

The following image shows how you navigate to each of the detailed instance pages:
To access the detailed instance pages, you need permissions to the Amazon Connect console home page (describe/list). Or, use the AmazonConnectReadOnlyAccess policy.

The following tables list the granular permissions for each detailed instance page.

**Note**
To perform Edit actions, users also need List and Describe permissions.

## Overview page

<table>
<thead>
<tr>
<th>Action/Use case</th>
<th>Permissions needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create service-linked role</td>
<td>connect:DescribeInstance</td>
</tr>
<tr>
<td></td>
<td>connect:ListInstances</td>
</tr>
<tr>
<td></td>
<td>connect:DescribeInstanceAttribute</td>
</tr>
<tr>
<td></td>
<td>connect:UpdateInstanceAttribute</td>
</tr>
<tr>
<td></td>
<td>connect:ListIntegrationAssociations</td>
</tr>
<tr>
<td></td>
<td>profile:ListAccountIntegrations</td>
</tr>
<tr>
<td></td>
<td>ds:DescribeDirectories</td>
</tr>
<tr>
<td></td>
<td>iam:CreateServiceLinkedRole</td>
</tr>
<tr>
<td></td>
<td>iam:PutRolePolicy</td>
</tr>
</tbody>
</table>

## Telephony page

<table>
<thead>
<tr>
<th>Action/Use case</th>
<th>Permissions needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>View telephony options</td>
<td>connect:DescribeInstance</td>
</tr>
<tr>
<td>Enable/Disable telephony options</td>
<td>connect:UpdateInstanceAttribute</td>
</tr>
<tr>
<td>View outbound campaigns</td>
<td>connect-campaigns:GetConnectInstanceConfig</td>
</tr>
<tr>
<td>Action/Use case</td>
<td>Permissions needed</td>
</tr>
<tr>
<td>----------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>connect-campaigns:GetInstanceOnboardingJobStatus</td>
<td>connect:DescribeInstance connect:DescribeInstanceAttribute kms:DescribeKey</td>
</tr>
</tbody>
</table>
## Data storage page

### Call recording section

<table>
<thead>
<tr>
<th>Action/Use case</th>
<th>Permissions needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>View call recording</td>
<td>connect:DescribeInstance</td>
</tr>
<tr>
<td></td>
<td>connect:ListInstanceStorageConfigs</td>
</tr>
<tr>
<td></td>
<td>connect:DescribeInstanceStorageConfig</td>
</tr>
<tr>
<td>Edit call recording</td>
<td>connect:AssociateInstanceStorageConfig</td>
</tr>
<tr>
<td></td>
<td>connect:UpdateInstanceStorageConfig</td>
</tr>
<tr>
<td></td>
<td>connect:DisassociateInstanceStorageConfig</td>
</tr>
<tr>
<td></td>
<td>s3:ListAllMyBuckets</td>
</tr>
<tr>
<td></td>
<td>s3:GetBucketLocation</td>
</tr>
<tr>
<td></td>
<td>s3:GetBucketAcl</td>
</tr>
<tr>
<td></td>
<td>s3:CreateBucket</td>
</tr>
<tr>
<td></td>
<td>kms:CreateGrant</td>
</tr>
<tr>
<td></td>
<td>kms:DescribeKey</td>
</tr>
<tr>
<td></td>
<td>kms:ListAliases</td>
</tr>
<tr>
<td></td>
<td>kms:RetireGrant</td>
</tr>
</tbody>
</table>

## Chat transcripts section

<table>
<thead>
<tr>
<th>Action/Use case</th>
<th>Permissions needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>View chat transcripts</td>
<td>connect:DescribeInstance</td>
</tr>
<tr>
<td></td>
<td>connect:DescribeInstanceStorageConfig</td>
</tr>
<tr>
<td></td>
<td>connect:ListInstanceStorageConfigs</td>
</tr>
<tr>
<td>Edit chat transcripts</td>
<td>connect:AssociateInstanceStorageConfig</td>
</tr>
<tr>
<td></td>
<td>connect:UpdateInstanceStorageConfig</td>
</tr>
<tr>
<td></td>
<td>connect:DisassociateInstanceStorageConfig</td>
</tr>
<tr>
<td></td>
<td>s3:ListAllMyBuckets</td>
</tr>
<tr>
<td></td>
<td>s3:GetBucketLocation</td>
</tr>
<tr>
<td></td>
<td>s3:GetBucketAcl</td>
</tr>
<tr>
<td></td>
<td>s3:CreateBucket</td>
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<tr>
<td></td>
<td>kms:CreateGrant</td>
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</tbody>
</table>
### Required permissions for custom IAM policies

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<tr>
<th>Action/Use case</th>
<th>Permissions needed</th>
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<tbody>
<tr>
<td></td>
<td>connect:DescribeKey</td>
</tr>
<tr>
<td></td>
<td>connect:ListAliases</td>
</tr>
<tr>
<td></td>
<td>connect:RetireGrant</td>
</tr>
</tbody>
</table>

### Attachments section

<table>
<thead>
<tr>
<th>Action/Use case</th>
<th>Permissions needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>View chat attachments</td>
<td>connect:DescribeInstance</td>
</tr>
<tr>
<td></td>
<td>connect:DescribeInstanceStorageConfig</td>
</tr>
<tr>
<td></td>
<td>connect:ListInstanceStorageConfig</td>
</tr>
<tr>
<td></td>
<td>connect:DescribeInstanceStorageConfig</td>
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<tr>
<td></td>
<td>connect:AssociateInstanceStorageConfig</td>
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<tr>
<td></td>
<td>connect:UpdateInstanceStorageConfig</td>
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<tr>
<td></td>
<td>connect:DisassociateInstanceStorageConfig</td>
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<tr>
<td></td>
<td>s3:ListAllMyBuckets</td>
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<tr>
<td></td>
<td>s3:GetBucketLocation</td>
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<td></td>
<td>s3:CreateBucket</td>
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<td></td>
<td>s3:GetBucketAcl</td>
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<td></td>
<td>kms:CreateGrant</td>
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<tr>
<td></td>
<td>kms:DescribeKey</td>
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<tr>
<td></td>
<td>kms:ListAliases</td>
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<tr>
<td></td>
<td>kms:RetireGrant</td>
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</table>

### Live media streaming section

<table>
<thead>
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<th>Permissions needed</th>
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<tbody>
<tr>
<td>View live media streaming</td>
<td>connect:DescribeInstance</td>
</tr>
<tr>
<td></td>
<td>connect:ListInstanceStorageConfig</td>
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<tr>
<td></td>
<td>connect:DescribeInstanceStorageConfig</td>
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<tr>
<td></td>
<td>connect:AssociateInstanceStorageConfig</td>
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<td>connect:UpdateInstanceStorageConfig</td>
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<tr>
<td></td>
<td>connect:DisassociateInstanceStorageConfig</td>
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<tr>
<td></td>
<td>kms:CreateGrant</td>
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</table>

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<table>
<thead>
<tr>
<th>Action/Use case</th>
<th>Permissions needed</th>
</tr>
</thead>
</table>
| View exported reports | connect:DescribeInstance  
connect:ListInstanceStorageConfigs  
connect:DescribeInstanceStorageConfig |
| Edit exported reports | connect:AssociateInstanceStorageConfig  
connect:UpdateInstanceStorageConfig  
connect:DisassociateInstanceStorageConfig  
s3:ListAllMyBuckets  
s3:GetBucketLocation  
s3:CreateBucket  
kms:DescribeKey  
kms:ListAliases  
kms:RetireGrant  
kms:CreateGrant |

**Data streaming page**

**Contact records section**

<table>
<thead>
<tr>
<th>Action/Use case</th>
<th>Permissions needed</th>
</tr>
</thead>
</table>
| View data streaming - Contact records | connect:DescribeInstance  
connect:ListInstanceStorageConfigs  
connect:DescribeInstanceStorageConfig |
| Edit contact record | connect:AssociateInstanceStorageConfig  
connect:UpdateInstanceStorageConfig  
connect:DisassociateInstanceStorageConfig  
firehose:ListDeliveryStreams  
firehose:DescribeDeliveryStream |
### Required permissions for custom IAM policies

**Agent events section**

<table>
<thead>
<tr>
<th>Action/Use case</th>
<th>Permissions needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>View data streaming - Agent events</td>
<td>connect:DescribeInstance</td>
</tr>
<tr>
<td></td>
<td>connect:ListInstanceStorageConfigs</td>
</tr>
<tr>
<td></td>
<td>connect:DescribeInstanceStorageConfig</td>
</tr>
<tr>
<td>Edit agent events</td>
<td>connect:AssociateInstanceStorageConfig</td>
</tr>
<tr>
<td></td>
<td>connect:UpdateInstanceStorageConfig</td>
</tr>
<tr>
<td></td>
<td>connect:DisassociateInstanceStorageConfig</td>
</tr>
<tr>
<td></td>
<td>kinesis:ListStreams</td>
</tr>
<tr>
<td></td>
<td>kinesis:DescribeStream</td>
</tr>
</tbody>
</table>

**Application integration page**

<table>
<thead>
<tr>
<th>Action/Use case</th>
<th>Permissions needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>View approved origins</td>
<td>connect:DescribeInstance</td>
</tr>
<tr>
<td></td>
<td>connect:ListApprovedOrigins</td>
</tr>
<tr>
<td>Edit approved origins</td>
<td>connect:AssociateApprovedOrigin</td>
</tr>
<tr>
<td></td>
<td>connect:ListApprovedOrigins</td>
</tr>
<tr>
<td></td>
<td>connect:DisassociateApprovedOrigin</td>
</tr>
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</table>

**Tasks page**

<table>
<thead>
<tr>
<th>Action/Use case</th>
<th>Permissions needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>View Tasks integrations</td>
<td>app-integrations:GetEventIntegration</td>
</tr>
<tr>
<td></td>
<td>connect:ListIntegrationAssociations</td>
</tr>
<tr>
<td>Edit Tasks integrations</td>
<td>app-integrations:CreateEventIntegration</td>
</tr>
<tr>
<td></td>
<td>app-integrations:GetEventIntegration</td>
</tr>
<tr>
<td></td>
<td>app-integrations:ListEventIntegrations</td>
</tr>
<tr>
<td></td>
<td>app-integrations:DeleteEventIntegrationAssociation</td>
</tr>
<tr>
<td>Action/Use case</td>
<td>Permissions needed</td>
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<tr>
<td>app-integrations:CreateEventIntegrationAssociation</td>
<td></td>
</tr>
<tr>
<td>appflow:CreateFlow</td>
<td></td>
</tr>
<tr>
<td>appflow:CreateConnectorProfile</td>
<td></td>
</tr>
<tr>
<td>appflow:DescribeFlow</td>
<td></td>
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<tr>
<td>appflow:DeleteFlow</td>
<td></td>
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<tr>
<td>appflow:DeleteConnectorProfile</td>
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<tr>
<td>appflow:DescribeConnectorEntity</td>
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<tr>
<td>appflow:ListFlows</td>
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<tr>
<td>appflow:ListConnectorEntities</td>
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<tr>
<td>appflow:StartFlow</td>
<td></td>
</tr>
<tr>
<td>connect:ListIntegrationAssociations</td>
<td></td>
</tr>
<tr>
<td>connect:DeleteIntegrationAssociation</td>
<td></td>
</tr>
<tr>
<td>connect:ListUseCases</td>
<td></td>
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<tr>
<td>connect:DeleteUseCase</td>
<td></td>
</tr>
<tr>
<td>events:ActivateEventSource</td>
<td></td>
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<tr>
<td>events:CreateEventBus</td>
<td></td>
</tr>
<tr>
<td>events:DescribeEventBus</td>
<td></td>
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<tr>
<td>events:DescribeEventSource</td>
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<tr>
<td>events:ListEventSources</td>
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<tr>
<td>events:ListTargetsByRule</td>
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<tr>
<td>events:PutRule</td>
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<tr>
<td>events:PutTargets</td>
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<tr>
<td>events:DeleteRule</td>
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<tr>
<td>events:RemoveTargets</td>
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<tr>
<td>kms:CreateGrant</td>
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<tr>
<td>kms:DescribeKey</td>
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<tr>
<td>kms:ListAliases</td>
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<tr>
<td>kms:ListKeys</td>
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<tr>
<td>kms:ListGrants</td>
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</tbody>
</table>
## Customer profiles page

<table>
<thead>
<tr>
<th>Action/Use case</th>
<th>Permissions needed</th>
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</thead>
</table>
| View customer profiles| appflow:DescribeFlow  
|                       | appflow:DescribeConnectorEntity  
|                       | appflow:ListFlows  
|                       | appflow:ListConnectorEntities  
|                       | appflow:ListConnectorProfiles  
|                       | kms:ListKeys  
|                       | profile:ListDomains  
|                       | profile:ListAccountIntegrations  
|                       | sqs:ListQueues  |
| Edit customer profiles| appflow:CreateFlow  
|                       | appflow:CreateConnectorProfile  
|                       | appflow:DescribeFlow  
|                       | appflow:DeleteFlow  
|                       | appflow:DescribeConnectorEntity  
|                       | appflow:ListFlows  
|                       | appflow:ListConnectorEntities  
|                       | appflow:ListConnectorProfiles  
|                       | appflow:StartFlow  
|                       | appflow:StopFlow  
|                       | kms:ListKeys  
|                       | profile:CreateDomain  
|                       | profile:DeleteIntegration  
|                       | profile:DeleteDomain  
|                       | profile:ListDomains  
|                       | profile:ListAccountIntegrations  
|                       | profile:PutIntegration  
|                       | profile:UpdateDomain  
|                       | kms:ListGrants  
<p>|                       | kms:DescribeKey |</p>
<table>
<thead>
<tr>
<th>Action/Use case</th>
<th>Permissions needed</th>
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<tbody>
<tr>
<td></td>
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<tr>
<td>Voice ID page</td>
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<tr>
<td></td>
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</tr>
<tr>
<td>Flows page</td>
<td></td>
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<tr>
<td>Flows security keys</td>
<td></td>
</tr>
<tr>
<td>Action/Use case</td>
<td>Permissions needed</td>
</tr>
<tr>
<td>------------------------------</td>
<td>------------------------------------------------</td>
</tr>
<tr>
<td>Add/remove flow security keys</td>
<td>connect:AssociateSecurityKey</td>
</tr>
<tr>
<td></td>
<td>connect:DisassociateSecurityKey</td>
</tr>
</tbody>
</table>

**Lex bots section**

<table>
<thead>
<tr>
<th>Action/Use case</th>
<th>Permissions needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>View Lex bots</td>
<td>connect:ListLexBots</td>
</tr>
<tr>
<td></td>
<td>connect:ListBots</td>
</tr>
<tr>
<td>Add/remove Lex bots</td>
<td>lex:GetBots</td>
</tr>
<tr>
<td></td>
<td>lex:GetBot</td>
</tr>
<tr>
<td></td>
<td>lex:CreateResourcePolicy</td>
</tr>
<tr>
<td></td>
<td>lex:DeleteResourcePolicy</td>
</tr>
<tr>
<td></td>
<td>lex:UpdateResourcePolicy</td>
</tr>
<tr>
<td></td>
<td>lex:DescribeBotAlias</td>
</tr>
<tr>
<td></td>
<td>lex:ListBotAliases</td>
</tr>
<tr>
<td></td>
<td>lex:ListBots</td>
</tr>
<tr>
<td></td>
<td>connect:AssociateBot</td>
</tr>
<tr>
<td></td>
<td>connect:DisassociateBot</td>
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<tr>
<td></td>
<td>connect:ListBots</td>
</tr>
<tr>
<td></td>
<td>connect:AssociateLexBot</td>
</tr>
<tr>
<td></td>
<td>connect:DisassociateLexBot</td>
</tr>
<tr>
<td></td>
<td>connect:ListLexBots</td>
</tr>
</tbody>
</table>

**Lambda functions section**

<table>
<thead>
<tr>
<th>Action/Use case</th>
<th>Permissions needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>View Lambda functions</td>
<td>connect:ListLambdaFunctions</td>
</tr>
<tr>
<td>Add/remove Lambda functions</td>
<td>connect:ListLambdaFunctions</td>
</tr>
<tr>
<td></td>
<td>connect:AssociateLambdaFunction</td>
</tr>
<tr>
<td></td>
<td>connect:DisassociateLambdaFunction</td>
</tr>
<tr>
<td></td>
<td>lambda:ListFunctions</td>
</tr>
<tr>
<td></td>
<td>lambda:AddPermission</td>
</tr>
</tbody>
</table>
Restrict AWS resources that can be associated with Amazon Connect

Each Amazon Connect instance is associated with an IAM service-linked role when the instance is created. Amazon Connect can integrate with other AWS services for use cases such as call recording storage (Amazon S3 bucket), natural language bots (Amazon Lex bots), and data streaming (Amazon Kinesis Data Streams). Amazon Connect assumes the service-linked role to interact with these other services. The policy is first added to the service-linked role as part of corresponding APIs on the Amazon Connect service (that are in turn called by the AWS console). For example, if you want to use a certain Amazon S3 bucket with your Amazon Connect instance, the bucket must be passed to the AssociateInstanceStorageConfig API.
For the set of IAM actions defined by Amazon Connect, see Actions defined by Amazon Connect.

Following are some examples of how to restrict access to other resources that may be associated with an Amazon Connect instance. They should be applied to the IAM User or Role that is interacting with Amazon Connect APIs or the Amazon Connect console.

**Note**
A policy with an explicit Deny would override the Allow policy in these examples.

For more information about what resources, condition keys, and dependent APIs you can use to restrict access, see Actions, resources, and condition keys for Amazon Connect.

**Example 1: Restrict which Amazon S3 buckets can be associated with an Amazon Connect instance**

```json
{
    "Version": "2012-10-17",
    "Statement": [
      {
        "Sid": "VisualEditor0",
        "Effect": "Allow",
        "Action": [
          "connect:UpdateInstanceStorageConfig",
          "connect:AssociateInstanceStorageConfig"
        ],
        "Condition": {
          "StringEquals": {
            "connect:StorageResourceType": "CALL_RECORDINGS"
          }
        }
      },
      {
        "Sid": "VisualEditor1",
        "Effect": "Allow",
        "Action": [
          "iam:PutRolePolicy",
          "s3:GetBucketAcl",
          "s3:GetBucketLocation"
        ],
        "Resource": ["arn:aws:iam::account-id:role/aws-service-role/connect.amazonaws.com/*", "arn:aws:s3:::s3-bucket-name"
      ],
      {
        "Sid": "VisualEditor2",
        "Effect": "Allow",
        "Action": ["s3:ListAllMyBuckets", "Resource": "*"
      }
    ]
}
```

This example allows an IAM principal to associate an Amazon S3 bucket for call recordings for the given Amazon Connect instance ARN, and a specific Amazon S3 bucket named my-connect-recording-bucket. The AttachRolePolicy and PutRolePolicy actions are scoped to the Amazon Connect service-linked role (a wildcard is used in this example, but you can provide the role ARN for the instance if needed).

**Note**
To use an AWS KMS key to encrypt recordings in this bucket, an additional policy is needed.
Example 2: Restrict which AWS Lambda functions can be associated with an Amazon Connect instance

AWS Lambda functions are associated with an Amazon Connect instance, but the Amazon Connect service-linked role is not used to invoke them, and so is not modified. Instead, a policy is added to the function through the `lambda:AddPermission` API that allows the given Amazon Connect instance to invoke the function.

To restrict which functions can be associated with an Amazon Connect instance, you specify the Lambda function ARN that a user can use to invoke `lambda:AddPermission`:

```json
{
   "Version": "2012-10-17",
   "Statement": [
      {
         "Sid": "VisualEditor0",
         "Effect": "Allow",
         "Action": [
            "connect:AssociateLambdaFunction",
            "lambda:AddPermission"
         ],
         "Resource": [
            "arn:aws:lambda:*:*:function:my-function"
         ]
      }
   ]
}
```

Example 3: Restrict which Amazon Kinesis Data Streams can be associated with an Amazon Connect instance

This example follows a similar model to the Amazon S3 example. It restricts which specific Kinesis Data Streams may be associated with a given Amazon Connect instance for delivering contact records.

```json
{
   "Version": "2012-10-17",
   "Statement": [
      {
         "Sid": "VisualEditor0",
         "Effect": "Allow",
         "Action": [
            "connect:UpdateInstanceStorageConfig",
            "connect:AssociateInstanceStorageConfig"
         ],
         "Condition": {
            "StringEquals": {
               "connect:StorageResourceType": "CONTACT_TRACE_RECORDS"
            }
         }
      },
      {
         "Sid": "VisualEditor1",
         "Effect": "Allow",
         "Action": [
            "Kinesis:DescribeStream",
            "iam:PutRolePolicy"
         ],
         "Resource": [
```
How Amazon Connect works with IAM

Before you use IAM to manage access to Amazon Connect, you should understand what IAM features are available to use with Amazon Connect. To get a high-level view of how Amazon Connect and other AWS services work with IAM, see AWS Services That Work with IAM in the IAM User Guide.

Topics
- Amazon Connect identity-based policies (p. 1206)
- Authorization based on Amazon Connect tags (p. 1208)
- Amazon Connect IAM roles (p. 1209)

Amazon Connect identity-based policies

With IAM identity-based policies, you can specify allowed or denied actions and resources as well as the conditions under which actions are allowed or denied. Amazon Connect supports specific actions, resources, and condition keys. To learn about all of the elements that you use in a JSON policy, see IAM JSON Policy Elements Reference in the IAM User Guide.

Actions

Administrators can use AWS JSON policies to specify who has access to what. That is, which principal can perform actions on what resources, and under what conditions.

The Action element of a JSON policy describes the actions that you can use to allow or deny access in a policy. Policy actions usually have the same name as the associated AWS API operation. There are some exceptions, such as permission-only actions that don’t have a matching API operation. There are also some operations that require multiple actions in a policy. These additional actions are called dependent actions.

Include actions in a policy to grant permissions to perform the associated operation.

Policy actions in Amazon Connect use the following prefix before the action: connect:. Policy statements must include either an Action or NotAction element. Amazon Connect defines its own set of actions that describe tasks that you can perform with this service.

To specify multiple actions in a single statement, separate them with commas as follows:

```
"Action": [
  "connect:action1",
  "connect:action2"
]
```

You can specify multiple actions using wildcards (*). For example, to specify all actions that begin with the word Describe, include the following action:

```
"Action": ["connect:Describe*"]
```
"Action": "connect:Describe*"

To see a list of Amazon Connect actions, Actions, Resources, and Condition Keys for Amazon Connect.

**Resources**

Amazon Connect supports resource-level permissions (specifying a resource ARN in an IAM policy). Following is a list of Amazon Connect resources:

- Instance
- Contact
- User
- Routing profile
- Security profile
- Hierarchy group
- Queue
- Flow
- Hours of operation
- Phone number
- Task templates
- Customer profile domain
- Customer profile object type
- Outbound campaigns

Administrators can use AWS JSON policies to specify who has access to what. That is, which **principal** can **perform actions** on what **resources**, and under what **conditions**.

The **Resource** JSON policy element specifies the object or objects to which the action applies. Statements must include either a **Resource** or a **NotResource** element. As a best practice, specify a resource using its Amazon Resource Name (ARN). You can do this for actions that support a specific resource type, known as **resource-level permissions**.

For actions that don’t support resource-level permissions, such as listing operations, use a wildcard (*) to indicate that the statement applies to all resources.

"Resource": "*"

The Amazon Connect instance resource has the following ARN:

```
arn:${Partition}:connect:${Region}:${Account}:instance/${InstanceId}
```

For more information about the format of ARNs, see Amazon Resource Names (ARNs) and AWS Service Namespaces.

For example, to specify the `i-1234567890abcdef0` instance in your statement, use the following ARN:

"Resource": "arn:aws:connect:us-east-1:123456789012:instance/i-1234567890abcdef0"

To specify all instances that belong to a specific account, use the wildcard (*):

"Resource": "arn:aws:connect:us-east-1:123456789012:instance/"
Some Amazon Connect actions, such as those for creating resources, cannot be performed on a specific resource. In those cases, you must use the wildcard (*).

"Resource": "*

Many Amazon Connect API actions involve multiple resources. For example,

To specify multiple resources in a single statement, separate the ARNs with commas.

"Resource": [
  "resource1",
  "resource2"
]

To see a list of Amazon Connect resource types and their ARNs, see Actions, Resources, and Condition Keys for Amazon Connect. The same article explains with which actions you can specify the ARN of each resource.

**Condition keys**

Administrators can use AWS JSON policies to specify who has access to what. That is, which principal can perform actions on what resources, and under what conditions.

The Condition element (or Condition block) lets you specify conditions in which a statement is in effect. The Condition element is optional. You can create conditional expressions that use condition operators, such as equals or less than, to match the condition in the policy with values in the request.

If you specify multiple Condition elements in a statement, or multiple keys in a single Condition element, AWS evaluates them using a logical AND operation. If you specify multiple values for a single condition key, AWS evaluates the condition using a logical OR operation. All of the conditions must be met before the statement's permissions are granted.

You can also use placeholder variables when you specify conditions. For example, you can grant an IAM user permission to access a resource only if it is tagged with their IAM user name. For more information, see IAM policy elements: variables and tags in the IAM User Guide.

AWS supports global condition keys and service-specific condition keys. To see all AWS global condition keys, see AWS global condition context keys in the IAM User Guide.

Amazon Connect defines its own set of condition keys and also supports using some global condition keys. To see all AWS global condition keys, see AWS Global Condition Context Keys in the IAM User Guide.

All Amazon EC2 actions support the aws:RequestedRegion and ec2:Region condition keys. For more information, see Example: Restricting Access to a Specific Region.

To see a list of Amazon Connect condition keys, see Actions, Resources, and Condition Keys for Amazon Connect.

**Examples**

To view examples of Amazon Connect identity-based policies, see Amazon Connect identity-based policy examples (p. 1209).

**Authorization based on Amazon Connect tags**

You can attach tags to Amazon Connect resources or pass tags in a request to Amazon Connect. To control access based on tags, you provide tag information in the condition element of a policy using the connect:ResourceTag/<key-name>, aws:RequestTag/<key-name>, or aws:TagKeys condition keys.

To view an example identity-based policy for limiting access to a resource based on the tags on that resource, see Describe and update Amazon Connect users based on tags (p. 1212).
Amazon Connect IAM roles

An IAM role is an entity within your AWS account that has specific permissions.

Using temporary credentials with Amazon Connect

You can use temporary credentials to sign in with federation, assume an IAM role, or to assume a cross-account role. You obtain temporary security credentials by calling AWS STS API operations such as AssumeRole or GetFederationToken.

Amazon Connect supports using temporary credentials.

Service-linked roles

Service-linked roles allow AWS services to access resources in other services to complete an action on your behalf. Service-linked roles appear in your IAM account and are owned by the service. An IAM administrator can view but not edit the permissions for service-linked roles.

Amazon Connect supports service-linked roles. For details about creating or managing Amazon Connect service-linked roles, see Use service-linked roles for Amazon Connect (p. 1228).

Choosing an IAM role in Amazon Connect

When you create a resource in Amazon Connect, you must choose a role to allow Amazon Connect to access Amazon EC2 on your behalf. If you have previously created a service role or service-linked role, then Amazon Connect provides you with a list of roles to choose from. It's important to choose a role that allows access to start and stop Amazon EC2 instances.

Amazon Connect identity-based policy examples

By default, IAM users and roles don't have permission to create or modify Amazon Connect resources. They also can't perform tasks using the AWS Management Console, AWS CLI, or AWS API. An IAM administrator must create IAM policies that grant users and roles permission to perform specific API operations on the specified resources they need. The administrator must then attach those policies to the IAM users or groups that require those permissions.

To learn how to create an IAM identity-based policy using these example JSON policy documents, see Creating Policies on the JSON Tab in the IAM User Guide.

Topics

- Policy best practices (p. 1209)
- Allow IAM users to view their own permissions (p. 1210)
- Grant "View User" permissions (p. 1211)
- Allow IAM users to integrate with external applications (p. 1211)
- Describe and update Amazon Connect users based on tags (p. 1212)
- Create Amazon Connect users based on tags (p. 1212)
- Create and view Amazon AppIntegrations resources (p. 1213)
- Create and view Amazon Connect Wisdom Assistants (p. 1213)
- Manage outbound campaigns resources (p. 1213)

Policy best practices

Identity-based policies determine whether someone can create, access, or delete Amazon Connect resources in your account. These actions can incur costs for your AWS account. When you create or edit identity-based policies, follow these guidelines and recommendations:
• Get started with AWS managed policies and move toward least-privilege permissions – To get started granting permissions to your users and workloads, use the AWS managed policies that grant permissions for many common use cases. They are available in your AWS account. We recommend that you reduce permissions further by defining AWS customer managed policies that are specific to your use cases. For more information, see AWS managed policies or AWS managed policies for job functions in the IAM User Guide.

• Apply least-privilege permissions – When you set permissions with IAM policies, grant only the permissions required to perform a task. You do this by defining the actions that can be taken on specific resources under specific conditions, also known as least-privilege permissions. For more information about using IAM to apply permissions, see Policies and permissions in IAM in the IAM User Guide.

• Use conditions in IAM policies to further restrict access – You can add a condition to your policies to limit access to actions and resources. For example, you can write a policy condition to specify that all requests must be sent using SSL. You can also use conditions to grant access to service actions if they are used through a specific AWS service, such as AWS CloudFormation. For more information, see IAM JSON policy elements: Condition in the IAM User Guide.

• Use IAM Access Analyzer to validate your IAM policies to ensure secure and functional permissions – IAM Access Analyzer validates new and existing policies so that the policies adhere to the IAM policy language (JSON) and IAM best practices. IAM Access Analyzer provides more than 100 policy checks and actionable recommendations to help you author secure and functional policies. For more information, see IAM Access Analyzer policy validation in the IAM User Guide.

• Require multi-factor authentication (MFA) – If you have a scenario that requires IAM users or root users in your account, turn on MFA for additional security. To require MFA when API operations are called, add MFA conditions to your policies. For more information, see Configuring MFA-protected API access in the IAM User Guide.

For more information about best practices in IAM, see Security best practices in IAM in the IAM User Guide.

Allow IAM users to view their own permissions

This example shows how you might create a policy that allows IAM users to view the inline and managed policies that are attached to their user identity. This policy includes permissions to complete this action on the console or programmatically using the AWS CLI or AWS API.

```json
{
    "Version": "2012-10-17",
    "Statement": [
        {
            "Sid": "ViewOwnUserInfo",
            "Effect": "Allow",
            "Action": [
                "iam:GetUserPolicy",
                "iam:ListGroupsForUser",
                "iam:ListAttachedUserPolicies",
                "iam:ListUserPolicies",
                "iam:GetUser"
            ],
            "Resource": ["arn:aws:iam::*:user/${aws:username}"
        },
        {
            "Sid": "NavigateInConsole",
            "Effect": "Allow",
            "Action": [
                "iam:GetGroupPolicy",
                "iam:GetPolicyVersion",
                "iam:GetPolicy",
                "iam:ListAttachedGroupPolicies",
```
Grant "View User" permissions

When you create an IAM user or group in your AWS account, you can associate an IAM policy with that group or user, which specifies the permissions that you want to grant.

For example, imagine you have a group of entry-level developers. You can create an IAM group named Junior application developers, and include all entry-level developers. Then, associate a policy with that group that grants them permissions to view Amazon Connect users. In this scenario, you might have a policy such as the following sample.

```
{
  "Version": "2012-10-17",
  "Statement": [
    {
      "Effect": "Allow",
      "Action": [
        "connect:DescribeUser",
        "connect:ListUsers"
      ],
      "Resource": "*"
    }
  ]
}
```

This sample policy grants permissions to API actions listed in the `Action` element.

**Note**

If you don't specify a user ARN or ID in your statement, you must also grant the permission to use all resources for the action using the `*` wildcard for the `Resource` element.

Allow IAM users to integrate with external applications

This example shows how you might create a policy that allows IAM users to interact with their external application integrations.

```
{
  "Version": "2012-10-17",
  "Statement": [
    {
      "Sid": "AllowAllAppIntegrationsActions",
      "Effect": "Allow",
      "Action": [
        "app-integrations:ListEventIntegrations",
        "app-integrations:CreateEventIntegration",
        "app-integrations:GetEventIntegration",
        "app-integrations:UpdateEventIntegration",
        "app-integrations:DeleteEventIntegration",
        "app-integrations:ListDataIntegrations",
        "app-integrations:CreateDataIntegration",
        "app-integrations:GetDataIntegration",
        "app-integrations:UpdateDataIntegration",
        "app-integrations:GetEventIntegration",
        "app-integrations:UpdateDataIntegration"
      ],
      "Resource": "*"
    }
  ]
}
```
Describe and update Amazon Connect users based on tags

In an IAM policy, you can optionally specify conditions that control when a policy is in effect. For example, you can define a policy that allows IAM users to update only an Amazon Connect user who is working in the test environment.

You can define some conditions that are specific to Amazon Connect, and define other conditions that apply to all of AWS. For more information and a list of AWS-wide conditions, see Condition in IAM JSON Policy Elements Reference in the IAM User Guide.

The following sample policy allows the "describe" and "update" actions for users with specific tags.

```
{
    "Version": "2012-10-17",
    "Statement": [
        {
            "Effect": "Allow",
            "Action": [
                "connect:DescribeUser",
                "connect:UpdateUser"
            ],
            "Resource": "*",
            "Condition": {
                "StringEquals": {
                    "aws:ResourceTag/Department": "Test"
                }
            }
        }
    ]
}
```

This policy allows "describe user" and "update user" but only for those Amazon Connect users tagged with tag "Department: Test" where "Department" is the tag key and "Test" is the tag value.

Create Amazon Connect users based on tags

The following sample policy allows the create actions for users with specific request tags.

```
{
    "Version": "2012-10-17",
    "Statement": [
        {
            "Effect": "Allow",
            "Action": [
                "connect:CreateUser",
                "connect:TagResource"
            ],
            "Resource": "*",
            "Condition": {
                "StringEquals": {
                    "aws:RequestTag/Owner": "TeamA"
                }
            }
        }
    ]
}
```
This policy allows "create user" and "tag resource" but the tag "Owner: TeamA" must be present in the requests.

Create and view Amazon AppIntegrations resources

The following sample policy allows event integrations to be created, listed, and fetched.

```
{
  "Version": "2012-10-17",
  "Statement": [
    {
      "Effect": "Allow",
      "Action": [
        "app-integrations:CreateEventIntegration",
        "app-integrations:GetEventIntegration",
        "app-integrations::ListEventIntegrations",
      ],
      "Resource": "*"
    }
  ]
}
```

Create and view Amazon Connect Wisdom Assistants

The following sample policy allows Wisdom assistants to be created, listed, fetched, and deleted.

```
{
  "Version": "2012-10-17",
  "Statement": [
    {
      "Effect": "Allow",
      "Action": [
        "wisdom:CreateAssistant",
        "wisdom:GetAssistant",
        "wisdom:ListAssistants",
        "wisdom:DeleteAssistant",
      ],
      "Resource": "*"
    }
  ]
}
```

Manage outbound campaigns resources

Onboarding permissions: The following sample policy allows Amazon Connect instances to be onboarded to outbound campaigns.

```
"Sid": "VisualEditor0",
"Effect": "Allow",
"Action": [
  "kms:DescribeKey",
  "kms:CreateGrant"
],
"Resource": ["arn:aws:kms:region:account-id:key/key-id"
Identity-based policy examples

```
],
{
    "Sid": "VisualEditor1",
    "Effect": "Allow",
    "Action": [
        "connect:DescribeInstance"
    ],
    "Resource": [
        "arn:aws:connect:region:account-id:instance/instance-id"
    ]
},
{
    "Sid": "VisualEditor2",
    "Effect": "Allow",
    "Action": [
        "events:PutTargets",
        "events:PutRule",
        "iam:CreateServiceLinkedRole",
        "iam:AttachRolePolicy",
        "iam:PutRolePolicy",
        "ds:DescribeDirectories",
        "connect-campaigns:StartInstanceOnboardingJob",
        "connect-campaigns:GetConnectInstanceConfig",
        "connect-campaigns:GetInstanceOnboardingJobStatus",
        "connect-campaigns:DeleteInstanceOnboardingJob",
        "connect:DescribeInstanceAttribute",
        "connect:UpdateInstanceAttribute",
        "connect:ListInstances",
        "kms:ListAliases"
    ],
    "Resource": "*"
}
```

To disable outbound campaigns for an instance, add the following permissions:

```
[
    "Version": "2012-10-17",
    "Statement": [
        {
            "Sid": "VisualEditor0",
            "Effect": "Allow",
            "Action": [
                "kms:DescribeKey",
                "kms:RetireGrant"
            ],
            "Resource": [
                "arn:aws:kms:region:account-id:key/key-id"
            ]
        },
        {
            "Sid": "VisualEditor1",
            "Effect": "Allow",
            "Action": [
                "events:DeleteRule",
                "events:RemoveTargets",
                "events:DescribeRule",
                "iam:DeleteRolePolicy",
                "events:ListTargetsByRule",
                "iam:DeleteServiceLinkedRole",
                "connect-campaigns:DeleteConnectInstanceConfig"
            ],
            "Resource": "*"
        }
    ]
]
```
Management permissions: The following sample policy allows all read and write operations on outbound campaigns.

```json
{
   "Sid": "AllowConnectCampaignsOperations",
   "Effect": "Allow",
   "Action": [
      "connect-campaigns:CreateCampaign",
      "connect-campaigns:DeleteCampaign",
      "connect-campaigns:DescribeCampaign",
      "connect-campaigns:UpdateCampaignName",
      "connect-campaigns:GetCampaignState"
      "connect-campaigns:UpdateOutboundCallConfig",
      "connect-campaigns:UpdateDialerConfig",
      "connect-campaigns:PauseCampaign",
      "connect-campaigns:ResumeCampaign",
      "connect-campaigns:StopCampaign",
      "connect-campaigns:GetCampaignStateBatch",
      "connect-campaigns:ListCampaigns"
   ],
   "Resource": "*
}
```

ReadOnly permissions: The following sample policy allows read-only access to the campaigns.

```json
{
   "Sid": "AllowConnectCampaignsReadOnlyOperations",
   "Effect": "Allow",
   "Action": [
      "connect-campaigns:DescribeCampaign",
      "connect-campaigns:GetCampaignState",
      "connect-campaigns:GetCampaignStateBatch",
      "connect-campaigns:ListCampaigns"
   ],
   "Resource": "**",
}
```

Tag-based permissions: The following sample policy restricts access to the campaigns integrated with a particular Amazon Connect instance using tags. More permissions can be added based on the use case.

```json
{
   "Sid": "AllowConnectCampaignsOperations",
   "Effect": "Allow",
   "Action": [
      "connect-campaigns:DescribeCampaign",
      "connect-campaigns:GetCampaignState"
   ],
   "Resource": "**",
   "Condition": {
      "StringEquals": {
         "aws:ResourceTag/owner":
         "arn:aws:connect:region:customer_account_id:instance/connect_instance_id"
      }
   }
}
```

**Note**

connect-campaigns:ListCampaigns and connect-campaigns:GetCampaignStateBatch operations cannot be restricted by Tag.
Amazon Connect resource-level policy examples

Amazon Connect supports resource-level permissions for IAM users, so you can specify actions for them for an instance, as shown in the following policies.

Deny the "delete" and "update" actions

This following sample policy denies the "delete" and "update" actions for users in one Amazon Connect instance. It uses a wild card at the end of the Amazon Connect user ARN so that "delete user" and "update user" are denied on the full user ARN (that is, all Amazon Connect users in the provided instance, such as arn:aws:connect:us-east-1:123456789012:instance/00fbeee1-123e-111e-93e3-11111bfbfcc1/agent/00dtcdd1-123e-111e-93e3-11111bfbfcc1).

```
{
   "Version": "2012-10-17",
   "Statement": [
      {
         "Effect": "Deny",
         "Action": [
            "connect:DeleteUser",
            "connect:UpdateUser*"
         ],
         "Resource": "arn:aws:connect:us-east-1:123456789012:instance/00fbeee1-123e-111e-93e3-11111bfbfcc1/agent/*"
      }
   ]
}
```

Allow actions for integrations with specific names

```
{
   "Version": "2012-10-17",
   "Statement": [
      {
         "Sid": "AllowAllAppIntegrationsActions",
         "Effect": "Allow",
         "Action": [
            "app-integrations:ListEventIntegrations",
            "app-integrations:CreateEventIntegration",
            "app-integrations:GetEventIntegration",
            "app-integrations:UpdateEventIntegration",
            "app-integrations:DeleteEventIntegration"
         ],
         "Resource": "arn:aws:appintegrations:*:*:event-integration/MyNamePrefix-*"
      }
   ]
}
```

Allow "create users" but deny if you're assigned to a specific security profile

The following sample policy allows "create users" but explicitly denies using arn:aws:connect:us-west-2:123456789012:instance/00fbeee1-123e-111e-93e3-11111bfbfcc1/security-profile/11dtcggg1-123e-111e-93e3-11111bfbfcc17 as the parameter for security profile in CreateUser request.

```
{
```

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Resource-level policy examples

```json
"Version": "2012-10-17",
"Statement": [
  
  
  { "Effect": "Allow",
    "Action": [ "connect:CreateUser" ],
    "Resource": "*",
  },
  
  { "Effect": "Deny",
    "Action": [ "connect:CreateUser" ],
    "Effect": "Allow"
  }
]
```

Allow recording actions on a contact

The following sample policy allows "start contact recording" on a contact in a specific instance. Since contactID is dynamic, * is used.

```json
{
  "Version": "2012-10-17",
  "Statement": [
    
    { "Action": [ "connect:StartContactRecording" ],
      "Resource": "arn:aws:connect:us-west-2:accountID:instance/instanceId/contact/"*,
      "Effect": "Allow"
    }
  ]
}
```

Set up a trusted relationship with accountID.

The following actions are defined for the recording APIs:

- "connect:StartContactRecording"
- "connect:StopContactRecording"
- "connect:SuspendContactRecording"
- "connect:ResumeContactRecording"

Allow more contact Actions in the same role

If the same role is used to calling other contact APIs, you can list the following contact actions:

- GetContactAttributes
- ListContactFlows
- StartChatContact
- StartOutboundVoiceContact
- StopContact
• UpdateContactAttributes

Or use a wildcard to allow all contact actions, for example: "connect:*"

Allow more resources

You can also use a wildcard to allow more resources. For example, here’s how to allow all connect actions on all contact resources:

```json
{
   "Version": "2012-10-17",
   "Statement": [
      {
         "Action": ["connect:*"],
         "Resource": "arn:aws:connect:us-west-2:accountID:instance/*/contact/*",
         "Effect": "Allow"
      }
   ]
}
```

View specific Amazon AppIntegrations resources

The following sample policy allows a specific event integrations to be fetched.

```json
{
   "Version": "2012-10-17",
   "Statement": [
      {
         "Effect": "Allow",
         "Action": ["app-integrations:GetEventIntegration"],
         "Resource": "arn:aws:app-integrations:us-west-2:accountID:event-integration/Name"
      }
   ]
}
```

Grant access to Amazon Connect Customer Profiles

Amazon Connect Customer Profiles use profile as the prefix for actions instead of connect. The following policy grants full access to a specific domain in Amazon Connect Customer Profiles.

```json
{
   "Version": "2012-10-17",
   "Statement": [
      {
         "Action": ["profile:*"],
         "Effect": "Allow"
      }
   ]
}
```

Set up a trusted relationship with accountID to domain domainName.
Grant read-only access to Customer Profiles data

Following is an example for granting read access to the data in Amazon Connect Customer Profiles.

```json
{
   "Version": "2012-10-17",
   "Statement": [
      {
         "Action": [
            "profile:SearchProfiles",
            "profile:ListObjects"
         ],
         "Effect": "Allow"
      }
   ]
}
```

Query Amazon Connect Wisdom only for a specific Assistant

The following sample policy allows querying only a specific Assistant.

```json
{
   "Version": "2012-10-17",
   "Statement": [
      {
         "Effect": "Allow",
         "Action": ["wisdom:QueryAssistant "],
         "Resource": "arn:aws:wisdom:us-west-2:accountID:assistant/assistantID"
      }
   ]
}
```

Grant full access to Amazon Connect Voice ID

Amazon Connect Voice ID uses voiceid as the prefix for actions instead of connect. The following policy grants full access to a specific domain in Amazon Connect Voice ID:

```json
{
   "Version": "2012-10-17",
   "Statement": [
      {
         "Action": ["voiceid:*"],
         "Effect": "Allow"
      }
   ]
}
```

Set up a trusted relationship with accountID to domain domainName.

Grant access to Amazon Connect outbound campaigns resources

Outbound campaigns uses connect-campaign as the prefix for actions instead of connect. The following policy grants full access to a specific outbound campaign.

```json
{}
AWS managed policies for Amazon Connect

To add permissions to users, groups, and roles, it is more efficient to use AWS managed policies than to write policies yourself. It takes time and expertise to create IAM customer managed policies that provide your team with only the permissions that they need. To get started quickly, you can use AWS managed policies. These policies cover common use cases and are available in your AWS account. For more information about AWS managed policies, see AWS managed policies in the IAM User Guide.

AWS services maintain and update AWS managed policies. You can't change the permissions in AWS managed policies. Services occasionally add additional permissions to an AWS managed policy to support new features. This type of update affects all identities (users, groups, and roles) where the policy is attached. Services are most likely to update an AWS managed policy when a new feature is launched or when new operations become available. Services do not remove permissions from an AWS managed policy, so policy updates won't break your existing permissions.

Additionally, AWS supports managed policies for job functions that span multiple services. For example, the ReadOnlyAccess AWS managed policy provides read-only access to all AWS services and resources. When a service launches a new feature, AWS adds read-only permissions for new operations and resources. For a list and descriptions of job function policies, see AWS managed policies for job functions in the IAM User Guide.

AWS managed policy: AmazonConnect_FullAccess

To allow full read/write access to Amazon Connect, you must attach two policies to your IAM users, groups, or roles. Attach the AmazonConnect_FullAccess policy and a custom policy with the following contents:

```json
{
  "Version": "2012-10-17",
  "Statement": [
    {
      "Sid": "AttachAnyPolicyToAmazonConnectRole",
      "Effect": "Allow",
      "Action": "iam:PutRolePolicy",
      "Resource": "arn:aws:iam::*:role/aws-service-role/connect.amazonaws.com/AWSServiceRoleForAmazonConnect"
    }
  ]
}
```

To allow an IAM user to create an instance, ensure that they have the permissions granted by the AmazonConnect_FullAccess policy.
When you use AmazonConnect_FullAccess policy, note the following:

- The iam:PutRolePolicy allows the user who gets that policy to configure any resource in the account to work with the Amazon Connect instance. Because it grants such broad permissions, only assign it when necessary. Instead, create the service-linked role with access to the necessary resources and let the user have access to pass the service-linked role to Amazon Connect (which is granted by the AmazonConnect_FullAccess policy).

- Additional privileges are required to create a Amazon S3 bucket with a name of your choosing, or use an existing bucket while creating or updating an instance from the Amazon Connect console. If you choose default storage locations for your call recordings, chat transcripts, call transcripts, etc, they are now prefixed with "amazon-connect-".

- The aws/connect KMS key is available to use as a default encryption option. To use a custom encryption key, assign users additional KMS privileges.

- Assign users additional privileges to attach other AWS resources like Amazon Polly, Live Media Streaming, Data Streaming, and Lex bots to their Amazon Connect instances.

For more information and detailed permissions, see Required permissions for using custom IAM policies to manage access to the Amazon Connect console (p. 1190).

**AWS managed policy: AmazonConnectReadOnlyAccess**

To allow read-only access, you need to attach only the AmazonConnectReadOnlyAccess policy.

**AWS managed policy: AmazonConnectVoiceIDFullAccess**

To allow full access to Amazon Connect Voice ID, you must attach two policies to your IAM users, groups, or roles. Attach the AmazonConnectVoiceIDFullAccess policy and the following custom policy contents to access Voice ID through the Amazon Connect console:

```json
{
    "Version": "2012-10-17",
    "Statement": [
        {
            "Sid": "AttachAnyPolicyToAmazonConnectRole",
            "Effect": "Allow",
            "Action": "iam:PutRolePolicy",
            "Resource": "arn:aws:iam::*:role/aws-service-role/connect.amazonaws.com/AWSServiceRoleForAmazonConnect"
        },
        {
            "Effect": "Allow",
            "Action": [
                "connect:CreateIntegrationAssociation",
                "connect:DeleteIntegrationAssociation",
                "connect:ListIntegrationAssociations"
            ],
            "Resource": "*"
        },
        {
            "Effect": "Allow",
            "Action": [
                "events:DeleteRule",
                "events:PutRule",
                "events:PutTargets",
                "events:RemoveTargets"
            ],
            "Resource": "*",
            "Condition": {
                "StringEquals": {
```
The manual policy configures the following:

- The `iam:PutRolePolicy` allows the user who gets that policy to configure any resource in the account to work with the Amazon Connect instance. Because it grants such broad permissions, only assign it when necessary.

- To attach a Voice ID domain with an Amazon Connect instance, you need additional Amazon Connect and Amazon EventBridge privileges. You need privileges to call Amazon Connect APIs to create, delete, and list integration associations. You need EventBridge permissions to create and delete EventBridge rules which are used to provide contact records related to Voice ID.

Since there is no default encryption option, to use your customer managed key with your Amazon Connect Voice ID, the following API operations must be permitted in the key policy. Also, you must add these permissions on the relevant key. They are not included in the managed policy.

- `kms:Decrypt` to access or store encrypted data.
- `kms:CreateGrant` – when creating or updating a domain, used to create a grant to the customer managed key for the Voice ID domain. The grant controls access to the specified KMS key which allows access to grant operations Amazon Connect Voice ID requires. For more information about using grants, see Using grants in the AWS Key Management Service Developer Guide.
- `kms:DescribeKey` – when creating or updating a domain, allows determining the ARN for KMS key you provided.

For more about creating domains and KMS keys, see Enable Voice ID (p. 948) and Encryption at rest (p. 1175).

### Amazon Connect updates to AWS managed policies

View details about updates to AWS managed policies for Amazon Connect since this service began tracking these changes. For automatic alerts about changes to this page, subscribe to the RSS feed on the Amazon Connect Document history (p. 1387) page.

<table>
<thead>
<tr>
<th>Change</th>
<th>Description</th>
<th>Date</th>
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</thead>
</table>
| AmazonConnectServiceLinkedRolePolicy - Added actions for Amazon CloudWatch | Added the following action to publish usage Amazon Connect metrics for an instance to your account.  
  - `cloudwatch:PutMetricData` | February 22, 2022 |
| AmazonConnect_FullAccess (p. 1222) - Added permissions for managing Amazon Connect Customer Profiles domains | Added all permissions for managing Amazon Connect Customer Profiles domains that are created for new Amazon Connect instances.  
  - `profile:ListAccountIntegrations` - Lists all the integrations | November 12, 2021 |
<table>
<thead>
<tr>
<th>Change</th>
<th>Description</th>
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</tr>
</thead>
<tbody>
<tr>
<td>• profile:ListDomains</td>
<td>- Returns a list of all the domains for an AWS account that have been created.</td>
<td></td>
</tr>
<tr>
<td>• profile:GetDomain</td>
<td>- Returns information about a specific domain.</td>
<td></td>
</tr>
<tr>
<td>• profile:ListProfileObjectTypeTemplates</td>
<td>- Allow the Amazon Connect console to display a list of templates that you can use to create your data mappings.</td>
<td></td>
</tr>
<tr>
<td>• profile:GetObjectTypes</td>
<td>- Allow you to view all the current Object Types (data mappings) that you've created.</td>
<td></td>
</tr>
</tbody>
</table>

The following permissions are allowed to be performed on domains with a name that is prefixed with `amazon-connect-`:

- • profile:AddProfileKey - Allows you to associate a new key value with a specific profile
- • profile:CreateDomain - Allows you to create new domains
- • profile:CreateProfile - Allows you to create new profiles
- • profile:DeleteDomain - Allows you to delete domains
- • profile:DeleteIntegration - Allows you to delete integrations with a domain
- • profile:DeleteProfile - Allows you to delete a profile
- • profile:DeleteProfileKey - Allows you to delete a profile key
- • profile:DeleteProfileObject - Allows you to delete a profile object
<table>
<thead>
<tr>
<th>Change</th>
<th>Description</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>• profile:DeleteProfileObjectType</td>
<td>Allows you to delete a profile object type</td>
<td></td>
</tr>
<tr>
<td>• profile:GetIntegration</td>
<td>Allows you to retrieve information about an integration</td>
<td></td>
</tr>
<tr>
<td>• profile:GetMatches</td>
<td>Allows you to retrieve possible profile matches</td>
<td></td>
</tr>
<tr>
<td>• profile:GetProfileObjectType</td>
<td>Allows you to retrieve profile object types</td>
<td></td>
</tr>
<tr>
<td>• profile:ListIntegrations</td>
<td>Allows you to list integrations</td>
<td></td>
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<tr>
<td>• profile:ListProfileObjects</td>
<td>Allows you to list profile objects</td>
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<tr>
<td>• profile:ListProfileObjectTypes</td>
<td>Allows you to list profile object types</td>
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<tr>
<td>• profile:ListTagsForResource</td>
<td>Allows you to list tags for a resource</td>
<td></td>
</tr>
<tr>
<td>• profile:MergeProfiles</td>
<td>Allows you to merge profile matches</td>
<td></td>
</tr>
<tr>
<td>• profile:PutProfileObject</td>
<td>Allows you to create and update objects</td>
<td></td>
</tr>
<tr>
<td>• profile:PutProfileObjectType</td>
<td>Allows you to create and update object types</td>
<td></td>
</tr>
<tr>
<td>• profile:SearchProfiles</td>
<td>Allows you to search profiles</td>
<td></td>
</tr>
<tr>
<td>• profile:TagResource</td>
<td>Allows you to tag resources</td>
<td></td>
</tr>
<tr>
<td>• profile:UntagResource</td>
<td>Allows you to untag resources</td>
<td></td>
</tr>
<tr>
<td>• profile:UpdateDomain</td>
<td>Allows you to update domains</td>
<td></td>
</tr>
<tr>
<td>• profile:UpdateProfile</td>
<td>Allows you to update profiles</td>
<td></td>
</tr>
<tr>
<td>Change</td>
<td>Description</td>
<td>Date</td>
</tr>
<tr>
<td>---------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-----------------------</td>
</tr>
<tr>
<td>AmazonConnectServiceLinkedRolePolicy</td>
<td>Added the following actions so Amazon Connect flows and the agent experience can interact with the profiles in your default Customer Profiles domain:</td>
<td>November 12, 2021</td>
</tr>
<tr>
<td></td>
<td>• profile:SearchProfiles</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• profile:CreateProfile</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• profile:UpdateProfile</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• profile:AddProfileKey</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Added the following action so Amazon Connect flows and the agent experience can interact with the profile objects in your default Customer Profiles domain:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• profile:ListProfileObjects</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Added the following action so Amazon Connect flows and the agent experience can determine whether Customer Profiles is enabled for your Amazon Connect instance:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• profile:ListAccountIntegrations</td>
<td></td>
</tr>
<tr>
<td>AmazonConnectVoiceIDFullAccess</td>
<td>Added a new AWS managed policy so you can set up your users to use Amazon Connect Voice ID.</td>
<td>September 27, 2021</td>
</tr>
<tr>
<td></td>
<td>This policy provides full access to Amazon Connect Voice ID through the AWS console, SDK, or other means.</td>
<td></td>
</tr>
<tr>
<td>AmazonConnectCampaignsServiceLinkedRole</td>
<td>Added a new service-linked role policy for outbound campaigns.</td>
<td>September 27, 2021</td>
</tr>
<tr>
<td></td>
<td>The policy provides access to retrieve all the outbound campaigns.</td>
<td></td>
</tr>
<tr>
<td>Change</td>
<td>Description</td>
<td>Date</td>
</tr>
<tr>
<td>--------</td>
<td>-------------</td>
<td>------</td>
</tr>
<tr>
<td>AmazonConnectServiceLinkedRolePolicy</td>
<td>Added the following actions for the all bots created in the account across all Regions. These actions were added to support integration with Amazon Lex.</td>
<td>June 15, 2021</td>
</tr>
<tr>
<td></td>
<td>- lex:ListBots - Lists all the bots available in a given Region for your account.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- lex:ListBotAliases - Lists all the aliases for a given bot.</td>
<td></td>
</tr>
<tr>
<td>AmazonConnect_FullAccess (p. 119)</td>
<td>Added the following actions for the all bots created in the account across all Regions. These actions were added to support integration with Amazon Lex.</td>
<td>June 15, 2021</td>
</tr>
<tr>
<td></td>
<td>- lex:ListBots</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- lex:ListBotAliases</td>
<td></td>
</tr>
<tr>
<td>Amazon Connect started tracking changes</td>
<td>Amazon Connect started tracking changes for its AWS managed policies.</td>
<td>June 15, 2021</td>
</tr>
</tbody>
</table>

Troubleshooting Amazon Connect identity and access

Use the following information to help you diagnose and fix common issues that you might encounter when working with Amazon Connect and IAM.

Topics

- I am not authorized to perform iam:PassRole (p. 1226)
- I want to view my access keys (p. 1227)
- I'm an administrator and want to allow others to access Amazon Connect (p. 1227)
- I want to allow people outside of my AWS account to access my Amazon Connect resources (p. 1227)

I am not authorized to perform iam:PassRole

If you receive an error that you're not authorized to perform the iam:PassRole action, your policies must be updated to allow you to pass a role to Amazon Connect.

Some AWS services allow you to pass an existing role to that service instead of creating a new service role or service-linked role. To do this, you must have permissions to pass the role to the service.

The following example error occurs when an IAM user named marymajor tries to use the console to perform an action in Amazon Connect. However, the action requires the service to have permissions that are granted by a service role. Mary does not have permissions to pass the role to the service.

User: arn:aws:iam::123456789012:user/marymajor is not authorized to perform: iam:PassRole
In this case, Mary's policies must be updated to allow her to perform the `iam:PassRole` action.

If you need help, contact your AWS administrator. Your administrator is the person who provided you with your sign-in credentials.

**I want to view my access keys**

After you create your IAM user access keys, you can view your access key ID at any time. However, you can't view your secret access key again. If you lose your secret key, you must create a new access key pair.

Access keys consist of two parts: an access key ID (for example, `AKIAIOSFODNN7EXAMPLE`) and a secret access key (for example, `wJalrXUtNfEMI/K7MDENG/bPxRfYiCYEXAMPLEKEY`). Like a user name and password, you must use both the access key ID and secret access key together to authenticate your requests. Manage your access keys as securely as you do your user name and password.

**Important**
Do not provide your access keys to a third party, even to help find your canonical user ID. By doing this, you might give someone permanent access to your account.

When you create an access key pair, you are prompted to save the access key ID and secret access key in a secure location. The secret access key is available only at the time you create it. If you lose your secret access key, you must add new access keys to your IAM user. You can have a maximum of two access keys. If you already have two, you must delete one key pair before creating a new one. To view instructions, see Managing access keys in the IAM User Guide.

**I'm an administrator and want to allow others to access Amazon Connect**

To allow others to access Amazon Connect, you must create an IAM entity (user or role) for the person or application that needs access. They will use the credentials for that entity to access AWS. You must then attach a policy to the entity that grants them the correct permissions in Amazon Connect.

To get started right away, see Creating your first IAM delegated user and group in the IAM User Guide.

**I want to allow people outside of my AWS account to access my Amazon Connect resources**

You can create a role that users in other accounts or people outside of your organization can use to access your resources. You can specify who is trusted to assume the role. For services that support resource-based policies or access control lists (ACLs), you can use those policies to grant people access to your resources.

To learn more, consult the following:

- To learn whether Amazon Connect supports these features, see How Amazon Connect works with IAM (p. 1206).
- To learn how to provide access to your resources across AWS accounts that you own, see Providing access to an IAM user in another AWS account that you own in the IAM User Guide.
- To learn how to provide access to your resources to third-party AWS accounts, see Providing access to AWS accounts owned by third parties in the IAM User Guide.
- To learn how to provide access through identity federation, see Providing access to externally authenticated users (identity federation) in the IAM User Guide.
- To learn the difference between using roles and resource-based policies for cross-account access, see How IAM roles differ from resource-based policies in the IAM User Guide.
Use service-linked roles for Amazon Connect

What are service-linked roles (SLR) and why are they important?

Amazon Connect uses AWS Identity and Access Management (IAM) service-linked roles. A service-linked role is a unique type of IAM role that is linked directly to an Amazon Connect instance.

Service-linked roles are predefined by Amazon Connect and include all the permissions (p. 1228) that Amazon Connect requires to call other AWS services on your behalf.

You need to enable service-linked roles so you can use new features in Amazon Connect, such as tagging support, the new user interface in User management and Routing profiles, and queues with CloudTrail support.

For information about other services that support service-linked roles, see AWS services that work with IAM and look for the services that have Yes in the Service-Linked Role column. Choose a Yes with a link to view the service-linked role documentation for that service.

Service-linked role permissions for Amazon Connect

Amazon Connect uses the service-linked role with the prefix

AWS::ServiceRoleForAmazonConnect_unique-id – Grants Amazon Connect permission to access AWS resources on your behalf.

The AWS::ServiceRoleForAmazonConnect prefixed service-linked role trusts the following services to assume the role:

- connect.amazonaws.com

The role permissions policy allows Amazon Connect to complete the following actions on the specified resources. As you enable additional features in Amazon Connect, additional permissions are added for the service-linked role to access the resources associated with those features:

- Action: all Amazon Connect actions, connect:* , on all Amazon Connect resources.
- Action: Amazon S3 s3:GetObject, s3:GetObjectAcl, s3:PutObject, s3:PutObjectAcl, s3:DeleteObject, s3:GetBucketLocation, and GetBucketAcl for the S3 bucket specified for recorded conversations.
  
  It also grants s3:PutObject, s3:PutObjectAcl, and s3:GetObjectAcl to the bucket specified for exported reports.
- Action: Amazon Connect Customer Profiles
  - profile:SearchProfiles
  - profile:CreateProfile
  - profile:UpdateProfile
  - profile:AddProfileKey
  - profile:ListProfileObjects
  - profile:ListAccountIntegrations
  - profile:ListProfileObjectTypeTemplates
  - profile:GetProfileObjectTypeTemplate
  - profile:ListProfileObjectTypes
  - profile:GetProfileObjectType
to use your default Customer Profiles domain (including profiles and all object-types in domain) with the Amazon Connect flows and agent experience applications.
• Action: Amazon Kinesis Data Firehose firehose:DescribeDeliveryStream and firehose:PutRecord, and firehose:PutRecordBatch for the delivery stream defined for agent event streams and contact records.

• Action: Amazon Kinesis Data Streams kinesis:PutRecord, kinesis:PutRecords, and kinesis:DescribeStream for the stream specified for agent event streams and contact records.

• Action: Amazon Lex lex:PostContent and lex:ListBots, lex:ListBotAliases for all bots created in the account across all Regions.

• Action: Amazon Kinesis Data Streams kinesis:PutRecord, kinesis:PutRecords, and kinesis:DescribeStream for the stream specified for agent event streams and contact records.

• Action: Amazon CloudWatch Logs logs:CreateLogStream, logs:DescribeLogStreams, and logs:PutLogEvents to the CloudWatch Logs group specified for flow logging.

• Action: Amazon CloudWatch Metrics cloudwatch:PutMetricData to publish Amazon Connect usage metrics for an instance to your account.

• Action: Amazon Connect Voice-ID voiceid: * for the Voice ID domains associated with your instance.

• Action: EventBridge events:PutRule and events:PutTargets for the Amazon Connect managed EventBridge rule for publishing CTR records for your associated Voice ID domains.

• Action: outbound campaigns
  - connect-campaigns:CreateCampaign
  - connect-campaigns:DeleteCampaign
  - connect-campaigns:DescribeCampaign
  - connect-campaigns:UpdateCampaignName
  - connect-campaigns:GetCampaignState
  - connect-campaigns:GetCampaignStateBatch
  - connect-campaigns:ListCampaigns
  - connect-campaigns:UpdateOutboundCallConfig
  - connect-campaigns:UpdateDialerConfig
  - connect-campaigns:PauseCampaign
  - connect-campaigns:ResumeCampaign
  - connect-campaigns:StopCampaign for all operations related to outbound campaigns.

You must configure permissions to allow an IAM entity (such as a user, group, or role) to create, edit, or delete a service-linked role. For more information, see Service-linked role permissions in the IAM User Guide.

Create a service-linked role for Amazon Connect

You don't need to manually create a service-linked role. When you create a new instance in Amazon Connect in the AWS Management Console, Amazon Connect creates the service-linked role for you.

If you delete this service-linked role, and then need to create it again, you can use the same process to recreate the role in your account. When you create a new instance in Amazon Connect, Amazon Connect creates the service-linked role for you again.

You can also use the IAM console to create a service-linked role with the Amazon Connect - Full access use case. In the IAM CLI or the IAM API, create a service-linked role with the connect.amazonaws.com service name. For more information, see Creating a service-linked role in the IAM User Guide. If you delete this service-linked role, you can use this same process to create the role again.

For instances created before October 2018

If your Amazon Connect instance was created before October 2018, you don't have service-linked roles set up. To create a service-linked role, on the Account overview page, choose Create service-linked role.
Use service-linked roles for outbound campaigns

Amazon Connect does not allow you to edit the AWSServiceRoleForAmazonConnect prefixed service-linked role. After you create a service-linked role, you cannot change the name of the role because various entities might reference the role. However, you can edit the description of the role using IAM. For more information, see Editing a service-linked role in the IAM User Guide.

Checking a service-linked role has permissions for Amazon Lex

1. On the navigation pane of the IAM console, choose Roles.
2. Choose the name of the role to modify.

Delete a service-linked role for Amazon Connect

You don't need to manually delete the AWSServiceRoleForAmazonConnect prefixed role. When you delete your Amazon Connect instance in the AWS Management Console, Amazon Connect cleans up the resources and deletes the service-linked role for you.

Supported Regions for Amazon Connect service-linked roles

Amazon Connect supports using service-linked roles in all of the regions where the service is available. For more information, see AWS Regions and Endpoints.

Use service-linked roles for outbound campaigns

Amazon Connect outbound campaigns uses AWS Identity and Access Management service-linked roles. When an Amazon Connect instance is enabled to use outbound campaigns, it creates a unique service linked role that allows it to perform actions on the Amazon Connect instance.
A service-linked role makes setting up outbound campaigns easier because you don't have to manually add the necessary permissions. Outbound campaigns defines the permissions of its service-linked roles, and unless defined otherwise, only outbound campaigns can assume its roles. The defined permissions include the trust policy and the permissions policy, and that permissions policy cannot be attached to any other IAM entity.

For information about other services that support service-linked roles, see AWS services that work with IAM in the IAM User Guide. Look for the services that have Yes in the Service-Linked Role column. Choose a Yes with a link to view the service-linked role documentation for that service.

**Service-linked role permissions for outbound campaigns**

Outbound campaigns uses the service-linked role prefixed AWSServiceRoleForConnectCampaigns—Grants outbound campaigns permission to access AWS resources on your behalf.

The AWSServiceRoleForConnectCampaigns service-linked role trusts the following services to assume the role:

- connect-campaigns.amazonaws.com

The role permissions policy allows outbound campaigns to complete the following actions on the specified resources:

- Action: Outbound campaigns connect-campaigns:ListCampaigns for the AWS account.
- Action: Amazon Connect connect:StartOutboundVoiceContact connect:GetMetricData and connect:GetCurrentMetricData for the Amazon Connect instance specified.

You must configure permissions to allow an IAM entity (such as a user, group, or role) to create, edit, or delete a service-linked role. For more information, see Service-linked role permissions in the IAM User Guide.

**Create a service-linked role for outbound campaigns**

You don't need to manually create a service-linked role. When you associate an Amazon Connect instance with outbound campaigns by invoking the StartInstanceOnboardingJob API, outbound campaigns creates the service-linked role for you.

If you delete this service-linked role, and then need to create it again, you can use the same process to recreate the role in your account. When you associate a new Amazon Connect instance with outbound campaigns, Amazon Connect creates the service-linked role for you again.

**Edit a service-linked role for outbound campaigns**

Outbound campaigns does not allow you to edit the AWSServiceRoleForConnectCampaigns service-linked role. After you create a service-linked role, you cannot change the name of the role because various entities might reference the role. However, you can edit the description of the role using IAM. For more information, see Editing a service-linked role in the IAM User Guide.

**Delete a service-linked role for outbound campaigns**

If you no longer need outbound campaigns, we recommend that you delete the associated service-linked role. That way you don't have an unused entity that is not actively monitored or maintained. However, you must clean up the resources for your service-linked role before you can manually delete it.
To delete outbound campaigns resources used by the AWSServiceRoleForConnectCampaigns

- Delete all campaigns setup for the AWS account.

To manually delete the service-linked role using IAM

- Use the IAM console, the AWS CLI, or the AWS API to delete the AWSServiceRoleForConnectCampaigns service-linked role. For more information, see Deleting a service-linked role in the IAM User Guide.

Supported Regions for outbound campaigns service-linked roles

Outbound campaigns supports using service-linked roles in all of the Regions where the service is available. For more information, see AWS Regions and Endpoints.

Using service-linked roles for Amazon AppIntegrations

Amazon AppIntegrations uses AWS Identity and Access Management (IAM) service-linked roles. A service-linked role is a unique type of IAM role that is linked directly to Amazon AppIntegrations. Service-linked roles are predefined by Amazon AppIntegrations and include all the permissions that the service requires to call other AWS services on your behalf.

A service-linked role makes setting up Amazon AppIntegrations easier because you don't have to manually add the necessary permissions. Amazon AppIntegrations defines the permissions of its service-linked roles, and unless defined otherwise, only Amazon AppIntegrations can assume its roles. The defined permissions include the trust policy and the permissions policy, and that permissions policy cannot be attached to any other IAM entity.

You can delete a service-linked role only after first deleting their related resources. This protects your Amazon AppIntegrations resources because you can't inadvertently remove permission to access the resources.

For information about other services that support service-linked roles, see AWS Services That Work with IAM and look for the services that have Yes in the Service-linked roles column. Choose a Yes with a link to view the service-linked role documentation for that service.

Service-linked role permissions for Amazon AppIntegrations

Amazon AppIntegrations uses the service-linked role named AWSServiceRoleForAppIntegrations which allows AppIntegrations to access AWS services and resources on your behalf.

The AWSServiceRoleForAppIntegrations service-linked role trusts the following service to assume the role:

- app-integrations.amazonaws.com

The role permissions policy named AppIntegrationsServiceLinkedRolePolicy allows Amazon AppIntegrations to complete the following actions on the specified resources:

```json
{
    "Version": "2012-10-17",
    "Statement": [
```
• Action: `cloudwatch:PutMetricData` on "*" using the `StringEquals` condition "cloudwatch:namespace": "AWS/AppIntegrations".
Using service-linked roles for Amazon AppIntegrations

• Action: appflow:DescribeConnectorEntity and appflow:ListConnectorEntities on ".*".
• Action: appflow:DescribeConnectorProfiles and appflow:UseConnectorProfile on arn:aws:appflow:.*:connector-profile/*

You must configure permissions to allow an IAM entity (such as a user, group, or role) to create, edit, or delete a service-linked role. For more information, see Service-linked role permissions in the IAM User Guide.

Creating a service-linked role for Amazon AppIntegrations

You don't need to manually create a service-linked role. When you create a data or event integration using either the Wisdom, Customer Profiles, or Tasks widget in Amazon Connect in the AWS Management Console, the AWS CLI, or the AWS API, Amazon AppIntegrations creates the service-linked role for you.

Important
This service-linked role can appear in your account if you completed an action in another service that uses the features supported by this role. Also, if you created any new Amazon AppIntegrations resources after September 30, 2022, when it began supporting service-linked roles, then Amazon AppIntegrations created the AWSServiceRoleForAppIntegrations role in your account. To learn more, see A new role appeared in my IAM account.

If you delete this service-linked role, and then need to create it again, you can use the same process to recreate the role in your account. When you create a data or event integration using either the Wisdom, Customer Profiles, or Tasks widget in Amazon Connect, Amazon AppIntegrations creates the service-linked role for you again.

You can also use the IAM console to create a service-linked role with the AppIntegrations use case. In the AWS CLI or the AWS API, create a service-linked role with the app-integrations.amazonaws.com service name. For more information, see Creating a service-linked role in the IAM User Guide. If you delete this service-linked role, you can use this same process to create the role again.

Editing a service-linked role for Amazon AppIntegrations

Amazon AppIntegrations does not allow you to edit the AWSServiceRoleForAppIntegrations service-linked role. After you create a service-linked role, you cannot change the name of the role because various entities might reference the role. However, you can edit the description of the role using IAM. For more information, see Editing a service-linked role in the IAM User Guide.

Deleting a service-linked role for Amazon AppIntegrations

If you no longer need to use a feature or service that requires a service-linked role, we recommend that you delete that role. That way you don't have an unused entity that is not actively monitored or maintained. However, you must clean up the resources for your service-linked role before you can manually delete it. You must first delete your data and event integration associations in the AWS Console and then delete your data and event integrations using the AWS CLI.

Note
If the Amazon AppIntegrations service is using the role when you try to delete the resources, then the deletion might fail. If that happens, wait for a few minutes and try the operation again.
To delete data integration associations used by the AWSServiceRoleForAppIntegrations in the AWS Console

1. Go to the Wisdom section of the Amazon Connect Console and choose the name of the data integration association that you wish to delete.
2. Choose Delete on the right hand side of the Integration details section.
3. In the pop-box, enter the name of the integration for confirmation and choose Delete.

To delete data integrations used by the AWSServiceRoleForAppIntegrations using the AWS CLI

1. List your data integrations in order to view the names of your existing integrations.
   
   ```
   aws appintegrations list-data-integrations
   ```
2. Delete each integration using the data integration name.
   
   ```
   aws appintegrations delete-data-integration --data-integration-identifier DATA_INTEGRATION_NAME
   ```

To delete event integration associations used by the AWSServiceRoleForAppIntegrations in the AWS Console

1. Go to the Customer Profiles or the Tasks section of the Amazon Connect Console and choose the name of the event integration association that you wish to delete.
2. Once you choose an event integration on the Tasks section, a pop-up will appear. Choose the Remove connection button and enter the word remove to delete your event integration association.

To delete event integrations used by the AWSServiceRoleForAppIntegrations using the AWS CLI

1. List your event integrations in order to view the names of your existing integrations.
   
   ```
   aws appintegrations list-event-integrations
   ```
2. Delete each integration using the data integration name.
   
   ```
   aws appintegrations delete-event-integration --name EVENT_INTEGRATION_NAME
   ```

To manually delete the service-linked role using IAM

Use the IAM console, the AWS CLI, or the AWS API to delete the AWSServiceRoleForAppIntegrations service-linked role. For more information, see Deleting a service-linked role in the IAM User Guide.

Supported regions for Amazon AppIntegrations service-linked roles

Amazon AppIntegrations supports using service-linked roles in all of the regions where the service is available. For more information, see AWS regions and endpoints.

You can use the AWSServiceRoleForAppIntegrations role in the following regions.
Logging and monitoring Amazon Connect

Monitoring is important for maintaining the reliability, availability, and performance of your contact center.

You should collect monitoring data from all of the parts of your AWS solution so that you can more easily debug a multipoint failure if one occurs. But before you start monitoring Amazon Connect, you should create a monitoring plan that includes answers to the following questions:

• What are your monitoring goals?
• What data about your Amazon Connect instance will you monitor?
• How often will you monitor your instance?
• What monitoring tools will you use?
• Who will perform the monitoring tasks?
• Who should be notified when something goes wrong?

See the following topics to learn how to use Amazon CloudWatch Logs and AWS CloudTrail to monitor Amazon Connect and describes the Amazon Connect metrics sent to CloudWatch:

• Monitoring your instance using CloudWatch (p. 1095)
• Logging Amazon Connect API calls with AWS CloudTrail (p. 1109)

Tagging resources in Amazon Connect

A tag is a custom metadata label that you can add to a resource in order to make it easier to identify, organize, and find in a search. Tags are comprised of two individual parts: A tag key and a tag value. This is referred to as a key:value pair.
A *tag key* typically represents a larger category, while a tag value represents a subset of that category. For example, you could have *tag key=Color* and *tag value=Blue*, which would produce the key:value pair *Color:Blue*. Note that you can set the value of a tag to an empty string, but you can't set the value of a tag to null. Omitting the tag value is the same as using an empty string.

Tag keys can be up to 128 characters in length and tag values can be up to 256 characters in length; both are case sensitive. For more information, see:

- [Amazon Connect TagResource](#)
- [Amazon Connect Customer Profiles TagResource](#)
- [Amazon Connect Voice ID TagResource: You can add tags to the Voice ID domain](#)
- [Amazon AppIntegrations TagResource](#)

Amazon Connect services support up to 50 tags per resource. For a given resource, each tag key must be unique with only one value.

**Note**
Your tags cannot begin with `aws:` because AWS reserves this prefix for system-generated tags. You cannot add, modify, or delete `aws:*` tags, and they don't count against your tags-per-resource limit.

The following table describes the Amazon Connect resources that can be tagged using the AWS CLI or an AWS SDK.

**Tagging support for Amazon Connect resources**

<table>
<thead>
<tr>
<th>Resource</th>
<th>Supports tags</th>
<th>Supports tagging on creation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agent</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Agent group</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Agent group level</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Agent state</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Task template</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Contact</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Flow</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Flow module</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Instance</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Integration association</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Operating hours</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Phone number</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Prompt</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Queue</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Queue agent</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Routing Profile</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>
Tag-based access control

To use tags to control access to resources within your AWS accounts, you need to provide tag information in the condition element of an IAM policy. For example, to control access to your Voice ID domain based on the tags you've assigned to it, use the `aws:ResourceTag/key-name` condition key to specify which tag key:value pair must be attached to the domain, in order to allow given actions for it.

For more detailed information on tag-based access control, see Controlling access to AWS resources using tags in the IAM User Guide.

Compliance validation in Amazon Connect

Third-party auditors assess the security and compliance of AWS services as part of multiple AWS compliance programs, such as SOC, PCI, FedRAMP, and HIPAA.

To learn whether an AWS service is within the scope of specific compliance programs, see AWS services in Scope by Compliance Program and choose the compliance program that you are interested in. For general information, see AWS Compliance Programs.

You can download third-party audit reports using AWS Artifact. For more information, see Downloading Reports in AWS Artifact.

Your compliance responsibility when using AWS services is determined by the sensitivity of your data, your company's compliance objectives, and applicable laws and regulations. AWS provides the following resources to help with compliance:

- **Security and Compliance Quick Start Guides** – These deployment guides discuss architectural considerations and provide steps for deploying baseline environments on AWS that are security and compliance focused.
- **Architecting for HIPAA Security and Compliance on Amazon Web Services** – This whitepaper describes how companies can use AWS to create HIPAA-eligible applications.

  **Note**
  Not all AWS services are HIPAA eligible. For more information, see the HIPAA Eligible Services Reference.

- **AWS Compliance Resources** – This collection of workbooks and guides might apply to your industry and location.
Best practices for PII compliance in Amazon Connect

Following this list of best practices can help you ensure your Amazon Connect contact center is PII (Personally Identifiable Information) compliant.

- Conduct compliance eligibility audits for all services used in your contact center, as well as any third party integration points.
- AWS Key Management Service (KMS) encrypts Amazon S3 contents at the object level, which covers recordings, logs, and saved reports by default for Amazon S3. Make sure encryption in transit and at rest rules apply downstream or to third party apps.
- Use encryption in the Store customer input block for sensitive DTMF information.
- Use your own KMS key when ingesting data in Amazon Connect Customer Profile domains.
- Do not upload content containing customer PII to Amazon Connect Wisdom.
- When using Amazon Connect Voice ID, do not use PII in the CustomerSpeakerId.
- As with any AWS service, we strongly recommend that you not use sensitive information to name resources.

Best practices for PCI compliance in Amazon Connect

Following this list of best practices can help you ensure your Amazon Connect contact center is PCI-compliant.

- Conduct compliance eligibility audits for all services used in your contact center, as well as any third party integration points.
- Payment card information (PCI) should be collected via encrypted DTMF.
- If PCI is captured in call recordings, the PCI data must be scrubbed from the recording and obfuscated from any logs or transcriptions. We recommend working with an Amazon Solution Architect if you need help doing this.
- Use encryption in transit and at rest for any downstream integration points.
- Enable multi-factor authentication (MFA) for any access to PCI as Amazon Connect is a public endpoint.
- For a detailed walkthrough that explains how to encrypt PCI, see Creating a secure IVR solution with Amazon Connect.
- AWS Key Management Service (KMS) encrypts Amazon S3 contents at the object level, which covers recordings, logs, and saved reports by default for Amazon S3. Make sure encryption in transit and at rest rules apply downstream or to third party apps.
- Use encryption in the Store customer input block for sensitive DTMF information.
- Use your own KMS key when ingesting data in Amazon Connect Customer Profile domains.
- Do not upload content containing PCI to Amazon Connect Wisdom.
- For more information, see https://www.pcisecuritystandards.org.
Best practices for HIPAA compliance in Amazon Connect

Note
Amazon Connect Wisdom is currently not HIPAA compliant.

Note
Amazon Connect Voice ID is not currently HIPAA compliant.

Following this list of best practices can help you ensure your Amazon Connect contact center is HIPAA compliant.

- Conduct compliance eligibility audits for all services used in your contact center, as well as any third party integration points.
- AWS Key Management Service (KMS) encrypts Amazon S3 contents at the object level, which covers recordings, logs, and saved reports by default for Amazon S3. Make sure encryption in transit and at rest rules apply downstream or to third party apps.
- Use encryption in the **Store customer input** block for sensitive DTMF information.
- Do not upload content subject to HIPAA to Amazon Connect Wisdom.
- For more information about HIPAA compliance, see [https://www.hipaacompliance.org/](https://www.hipaacompliance.org/).

Resilience in Amazon Connect

The AWS global infrastructure is built around AWS Regions and Availability Zones (AZs). AWS Regions provide multiple physically separated and isolated AZs, which are connected with low-latency, high-throughput, and highly redundant networking. These AZs are physically separated by many miles, but still close enough together (60 miles or less) to be used as a single logical data center.

Each AZ features one or more discrete data centers, each housed in its own facility with redundant power, networking, and connectivity. These measures act as safeguards, and minimize the likelihood of an issue like a power outage or earthquake impacting multiple data centers or multiple AZs.

AZs are more highly available, fault tolerant, and scalable than traditional single or multiple data center infrastructures.

For more information about AWS Regions and Availability Zones, see [AWS Global Infrastructure](https://aws.amazon.com/about-aws/global-infrastructure/).

Amazon Connect runs on AWS proven infrastructure operating in multiple AZs within various geographic regions around the world. This makes Amazon Connect more highly available, fault tolerant, and scalable than would be possible if a contact center solution was run from a single data center.

Within each AWS Region you can create an Amazon Connect instance, with a minimum of 3 AZs. When you create an Amazon Connect instance, that instance is propagated across those AZs in an active-active-active configuration. If there is a failure in one AZ, that node is taken out of rotation without impacting production. This architecture allows you to perform maintenance, release new features, and expand infrastructure without requiring any downtime.

Single-region telephony and softphone architecture

Amazon Connect is integrated with multiple telephony providers with redundant dedicated network paths to three or more AZs in every AWS Region where the service is offered today. If a particular component, data center, or an entire AZ experiences failure, the affected endpoint is automatically taken out of rotation. This allows you to continue providing a consistent quality experience for your customers.
Inbound (US toll-free) and outbound calls in Amazon Connect are processed through multiple telecom carriers. Each carrier is connected to multiple AZs in an active-active configuration. This ensures that impairment of a network path or an entire AZ does not impact your end-customer experience. It also ensures that inbound US toll-free and outbound calls will be placed through multiple carriers so impairment at the carrier level doesn't impact your customer's experience.

The following diagram illustrates this process:

1. Callers reach your contact center using carriers that operate across multiple AZs at all times.
2. RespOrg routes US toll-free traffic across multiple carriers in an active-active fashion.
3. Outbound calling is load balanced across multiple telephony providers.
4. An agent's browser chooses from at least two servers across multiple AZs, based on reachability.

**More resources**

To learn more about resiliency for Amazon Connect, the following resources from AWS Workshop Studio are highly recommended:

- Amazon Connect Global Resiliency Best Practices
- Amazon Connect Global Resiliency and AWS Services Multi-Region Best Practices

**Infrastructure security in Amazon Connect**

As a managed service, Amazon Connect is protected by the AWS global network security procedures that are described on the Best Practices for Security, Identity, and Compliance page.

You use AWS published API calls to access Amazon Connect through the network.

**Supported versions of TLS**

Clients must support Transport Layer Security (TLS) 1.2 or later.

Amazon Connect offers a new website access model with a new domain (instance name.my.connect.aws) that supports TLS 1.2 or newer versions only. It is available by default for instances created after March 2021. Existing customers can opt in to using the new domain using the following methods:

- For non-SAML Amazon Connect instances, change your access URL from .awsapps.com/connect to .my.connect.aws and log in again.
- For SAML-enabled instances, specify an extra query parameter new_domain=true in the relay state URL and log in again. For more information, see Use a destination in your relay state URL (p. 122).
Other requirements

Clients must support cipher suites with perfect forward secrecy (PFS) such as Ephemeral Diffie-Hellman (DHE) or Elliptic Curve Ephemeral Diffie-Hellman (ECDHE). Most modern systems such as Java 7 and later support these modes.

Additionally, requests must be signed by using an access key ID and a secret access key that is associated with an IAM principal. Or you can use the AWS Security Token Service (AWS STS) to generate temporary security credentials to sign requests.

You can call these API operations from any network location, but Amazon Connect does support resource-based access policies, which can include restrictions based on the source IP address.

Cross-service confused deputy prevention

The confused deputy problem is a security issue where an entity that doesn't have permission to perform an action can coerce a more-privileged entity to perform the action. In AWS, cross-service impersonation can result in the confused deputy problem. Cross-service impersonation can occur when one service (the calling service) calls another service (the called service). The calling service can be manipulated to use its permissions to act on another customer's resources in a way it should not otherwise have permission to access. To prevent this, AWS provides tools that help you protect your data for all services with service principals that have been given access to resources in your account.

We recommend using the `aws:SourceArn` and `aws:SourceAccount` global condition context keys in resource policies to limit the permissions that Amazon Connect gives another service to the resource. If you use both global condition context keys, the `aws:SourceAccount` value and the account in the `aws:SourceArn` value must use the same account ID when used in the same policy statement.

The most effective way to protect against the confused deputy problem is to use the exact Amazon Resource Name (ARN) of the resource you want to allow. If you don't know the full ARN of the resource or if you are specifying multiple resources, use the `aws:SourceArn` global context condition key with wildcards (*) for the unknown portions of the ARN. For example, `arn:aws:servicename::region-name::your AWS account ID::*`.

Amazon Connect Customer Profiles cross-service confused deputy prevention

The following examples show policies that apply to cases where someone else is set up as the administrator for Amazon Connect Customer Profiles. Use these policies to prevent the confused deputy problem.

Example Amazon Connect Customer Profiles policy to create Customer Profile domains

```json
{
  "Version": "2012-10-17",
  "Statement": {
    "Sid": "ConfusedDeputyPreventionExamplePolicy",
    "Effect": "Allow",
    "Principal": {
      "Service": "profile.amazonaws.com"
    },
    "Action": ["kms:GenerateDataKey", "kms:CreateGrant", "kms:Decrypt"],
    "Resource": ["arn:aws:kms:your region-name:your AWS account ID:key/your key ARN"]
}
```
Example Amazon Connect Customer Profiles policy to create Customer Profiles object types

```
{
  "Version": "2012-10-17",
  "Statement": {
    "Sid": "ConfusedDeputyPreventionExamplePolicy",
    "Effect": "Allow",
    "Principal": {
      "Service": "profile.amazonaws.com"
    },
    "Action": ["kms:GenerateDataKey", "kms:CreateGrant", "kms:Decrypt"],
    "Resource": [
      "arn:aws:kms:your Region:your AWS account ID:key/your key ARN"
    ],
    "Condition": {
      "ArnEquals": {
        "aws:SourceArn": "arn:aws:profile:your region name:your AWS account ID:domains/your Customer Profiles domain name"
      },
      "StringEquals": {
        "aws:SourceAccount": "your AWS account ID"
      }
    }
  }
}
```

Example Amazon Connect Customer Profiles policy to create and update dead-letter queues

```
{
  "Version": "2012-10-17",
  "Statement": [
    {
      "Sid": "Allow Amazon Connect Customer Profiles to publish messages to your queue",
      "Effect": "Allow",
      "Principal": {
        "Service": "profile.amazonaws.com"
      },
      "Action": "sqs:SendMessage",
      "Resource": "your dead-letter queue ARN",
      "Condition": {
        "StringEquals": {
          "aws:SourceAccount": "your AWS account ID",
          "aws:SourceArn": "arn:aws:profile:your region name:your AWS account ID:domains/your Customer Profiles domain name"
        }
      }
    }
  ]
}
```
Example Amazon Connect Customer Profiles policy to protect the Amazon S3 bucket used as part of the Identity Resolution process

```json
{
  "Sid": "Allow Amazon Connect Customer Profiles to put S3 objects to your bucket",
  "Effect": "Allow",
  "Principal": {
    "Service": "profile.amazonaws.com"
  },
  "Action": "s3:PutObject",
  "Resource": "arn:aws:s3:::your S3 bucket name/*",
  "Condition": {
    "StringEquals": {
      "aws:SourceAccount": "your AWS account ID"
    },
    "ArnEquals": {
      "aws:SourceArn": "arn:aws:profile:your region name:your AWS account ID:domains/*"
    }
  }
}
```

Amazon Connect Voice ID cross-service confused deputy prevention

The following Voice ID example shows a resource policy to apply to prevent the confused deputy problem.

```json
{
  "Version": "2012-10-17",
  "Statement": {
    "Sid": "ConfusedDeputyPreventionExamplePolicy",
    "Effect": "Allow",
    "Principal": {
      "Service": "voiceid.amazonaws.com"
    },
    "Action": "sts:AssumeRole",
    "Condition": {
      "ArnEquals": {
        "aws:SourceArn": "arn:aws:voiceid:your region name:your AWS account ID:domain/your Voice ID domain name"
      },
      "StringEquals": {
        "aws:SourceAccount": "your AWS account ID"
      }
    }
  }
}
```

Amazon Connect chat message streaming cross-service confused deputy prevention

The following Amazon Connect example shows a resource policy to apply to prevent the confused deputy problem.

```json
{
  "Version": "2012-10-17",
  "Statement": [
```
Security Best Practices for Amazon Connect

Amazon Connect provides a number of security features to consider as you develop and implement your own security policies. The following best practices are general guidelines and don’t represent a complete security solution. Because these best practices might not be appropriate or sufficient for your environment, treat them as helpful considerations rather than prescriptions.

Contents

• Amazon Connect Preventative Security Best Practices (p. 1245)
• Amazon Connect Detective Security Best Practices (p. 1246)

Amazon Connect Preventative Security Best Practices

• Ensure that all profile permissions are as restrictive as possible. Allow access to only those resources absolutely required for the user’s role. For example, don’t give agents permissions to create, read, or update users in Amazon Connect.
• Ensure that multi-factor authentication (MFA) is set up through your SAML 2.0 identity provider, or Radius server, if that’s more applicable for your use case. After MFA is set up, a third text box becomes visible on the Amazon Connect login page to provide the second factor.
• If you use an existing directory through AWS Directory Service or SAML-based authentication for identity management, ensure that you follow all security requirements appropriate for your use case.
• Use the Log in for emergency access URL on the instance page of the AWS console only in emergency situations, not for daily use. For more information, see Emergency admin login (p. 138).

Use Service Control Policies (SCPs)

Service control policies (SCPs) are a type of organization policy that you can use to manage permissions in your organization. An SCP defines a guardrail, or sets limits, on the actions that the account’s administrator can delegate to the IAM users and roles in the affected accounts. You can use SCPs to protect critical resources associated with your Amazon Connect workload.

Set a Service Control Policy to prevent the deletion critical resources

If you’re using SAML 2.0-based authentication and delete the AWS IAM Role that is used for authenticating Amazon Connect users, users won’t be able to login to the Amazon Connect instance. You
will need to delete and recreate users to be associated with a new Role. This results in the deletion of all data associated with those users.

To prevent the accidental deletion of critical resources and to protect the availability of your Amazon Connect instance, you can set a Service Control Policy (SCP) as an additional control.

Following is an example SCP that can be applied at the AWS Account, Organizational Unit, or Organizational Root to prevent the deletion of the Amazon Connect instance and associated Role:

```
{
  "Version": "2012-10-17",
  "Statement": [
    {
      "Sid": "AmazonConnectRoleDenyDeletion",
      "Effect": "Deny",
      "Action": [
        "iam:DeleteRole"
      ],
      "Resource": [
        "arn:aws:iam::*:role/Amazon Connect user role"
      ]
    },
    {
      "Sid": "AmazonConnectInstanceDenyDeletion",
      "Effect": "Deny",
      "Action": [
        "connect:DeleteInstance"
      ],
      "Resource": [
        "Amazon Connect instance ARN"
      ]
    }
  ]
}
```

Amazon Connect Detective Security Best Practices

Logging and monitoring are important for the availability, reliability and, performance of contact center. You should log relevant information from Amazon Connect flows to CloudWatch and build alerts and notifications based on the same.

Define log retention requirements and lifecycle policies early on, and plan to move log files to cost-efficient storage locations as soon as practical. Amazon Connect public APIs log to CloudTrail. Review and automate actions based on CloudTrail logs.

We recommend Amazon S3 for long-term retention and archiving of log data, especially for organizations with compliance programs that require log data to be auditable in its native format. Once log data is in an Amazon S3 bucket, define lifecycle rules to automatically enforce retention policies and move these objects to other, cost-effective storage classes, such as Amazon S3 Standard – Infrequent Access (Standard – IA) or Amazon S3 Glacier.

The AWS Cloud provides flexible infrastructure and tools to support both sophisticated partner offerings and self-managed centralized-logging solutions. This includes solutions such as Amazon OpenSearch Service and Amazon CloudWatch Logs.

You can implement fraud detection and prevention for incoming contacts by customizing Amazon Connect flows per your requirements. For example, you can check incoming contacts against previous contact activity in Dynamo DB and then take actions such as disconnecting a contact who is on a deny list.
Agent training guide

Agent workspace

With the agent workspace you can access all Amazon Connect features in a single application. You can:

- Use the Contact Control Panel (CCP) to interact with customer contacts.
- Use Customer Profiles (p. 1291) to view customer information.
- Use Cases (p. 1300) to create, edit, and resolve customer cases.
- Use Amazon Connect Wisdom (p. 1307) to obtain the information you need from your company knowledge base.

To access the agent workspace use the following URL:

- https://instance name.my.connect.aws/agent-app-v2/

Where instance name is provided by your IT department or the individuals that set up Amazon Connect for your business.

The following image shows the agent workspace with the CCP, Customer Profiles, Cases, and Wisdom.

1. Set your status.
2. Access to the number pad, quick connects, and task creation.
3. Log in and out. Set your language preferences, device settings (if enabled), and phone type.
4. Inbox of inbound calls, chats, and tasks.
5. Based on the channel of the contact that is in focus in your inbox, the appropriate content shows here; for example, when a chat is selected, the chat interface appears.
6. View customer information for the contact that is in focus in your inbox.
7. Search and view cases.
8. Search for knowledge articles to solve customer issues.

CCP

You use the Amazon Connect Contact Control Panel (CCP) to interact with customer contacts. It’s how you receive calls, chat with contacts, transfer them to other agents, put them on hold, and perform other key tasks.

The URL to launch the CCP is:

- [https://instance name.my.connect.aws/ccp-v2/](https://instance name.my.connect.aws/ccp-v2/)

Where `instance name` is provided by your IT department or the individuals that set up Amazon Connect for your business.

Large businesses often choose to customize their CCP. For example, they might want to integrate it with a CRM. However, this section describes how CCP works before it is customized.

The following image shows the CCP.

1. Set your status.
2. The channels enabled for your agent routing profile.
3. Log in and out. Set your language preferences, device settings (if enabled), and phone type.
4. Name of the agent that's currently signed in.
5. Choose a predefined destination to transfer the contact. Or call an external number.
6. Call a number or enter digits into an IVR menu.

Training video: How to use the CCP

The following video introduces you to the Contact Control Panel (CCP). It shows how to perform common tasks, such as login and setup, accept incoming calls, place calls, transfer calls, accept chat, and more.

Amazon Connect

Launch the CCP

The URL to launch the CCP is:

- https://instance name.my.connect.aws/ccp-v2/

Where instance name is provided by your IT department or whoever set up Amazon Connect for your business. The following image shows an example URL for the CCP.

With this updated CCP, your agents can manage voice, chat, and tasks from this single interface.

As the administrator, you can also launch the CCP directly from the Amazon Connect console. Just choose the phone icon in the upper right corner.

To provide agents the ability to launch the CCP from their desktop and start handling contacts, there are a few things you need to do:

- Add agents as users to the instance. For more information, see Manage users in Amazon Connect (p. 775).
Log in and log out of the CCP

Before you can log in to the Contact Control Panel (CCP), your administrator must give you the following information:

- The URL to launch the CCP:
  - https://instance name.my.connect.aws/ccp-v2/

  Where instance name is provided by your IT department or whoever set up Amazon Connect for your business.
- Your agent ID.
- Your agent password.

To log in

After you have that information, here's how to log in and get started.

1. Ensure that your USB headset is securely connected to your computer.
2. Using Chrome or Firefox, open the CCP by using the URL that you received from your administrator.
3. Enter your agent ID and password, and then choose Sign In.
4. If you are prompted to allow access to your microphone and speaker, choose **Allow**.

You're all set to go!

**Problems logging in?**

If you have problems logging in to the CCP, contact your manager for help, or the IT Department for your organization.

**Log out of the Amazon Connect CCP**

**Important**
Closing the CCP doesn't automatically sign out an agent. Amazon Connect still tries to route contacts to them. To change this behavior, a developer can customize CCP for your contact center. For instructions, see [CCPv1: Log out agents automatically when they close their CCP](p. 237).

1. At the top of the CCP, choose **Settings**.
2. Choose **Log out**.
Change your audio device settings

If your organization is using a customized version of the Contact Control Panel (CCP), you can use it to change your audio device settings.

**Tip**

**Developers**: for more information about enabling this feature, see the [Amazon Connect Streams](https://aws.amazon.com/connect/stream) documentation on GitHub.

**To change your audio settings**

1. In your CCP, choose **Settings**. The **Settings** dialog box appears, similar to the following image.
2. Under **Audio devices**, use the dropdown to select your **Speaker**, **Microphone**, and **Ringer**.

   **Note**
   If you use Firefox, you can change your **Microphone** device setting. To change your speaker and ringer, use your computer settings.
Change your ringtone

You can change your ringtone if your organization uses a custom CCP. Developers: for more information, see Amazon Connect Streams.

Forward calls to a mobile device (iPhone, Android)

You can take the audio portion of a call on your mobile device, and at the same time use your computer to access the Contact Control Panel. This topic explains how to forward calls to your mobile device.

1. In your Contact Control Panel (CCP), open Settings.
2. Under Phone type, choose Desk phone.
3. Enter the phone number for your mobile device, and choose Save.

When a contact calls, the audio portion of the call goes to your mobile device. At the same time, on your computer you can manage the call using the CCP.

View your schedule

If your organization uses the forecasting, capacity planning, and scheduling features of Amazon Connect you can view your schedule in the agent workspace, the Contact Control Panel (CCPv1 or CCPv2), the Salesforce CTI, or a custom-built agent desktop.

Following are steps you use to view your schedule in the agent workspace.

1. Log on to the agent workspace using the URL that your admin gives you (for example, https://[instance name].my.connect.aws/ccp-v2/).
2. Choose the Calendar icon on the application navigation bar to launch the staff schedule manager viewer. Otherwise, the staff schedule manager viewer launches automatically.

The following image shows a sample schedule in the agent workspace:
Set your status to "Available"

When an agent is ready to handle calls or chats, they need to set their status in the CCP to Available. This tells Amazon Connect they are ready to handle contacts.

Amazon Connect uses information in the agent’s routing profile (p. 230) to determine which contacts to route to them.

For more information about agent statuses, see About agent status (p. 1078). For information about how Amazon Connect counts the Available status in the real-time metrics report, see Available (p. 998).

Set your "Next status"

**Note**

"Next status" is available only to customers who are using the latest Contact Control Panel (CCP). The URL for the latest CCP ends with ccp-v2.

**IT administrators:** For more information about the Next status feature, such as changes to the agent event stream, see July 2021 Updates (p. 1361) in the Release notes.

Use the Next status feature to pause new contacts being routed to you, while you finish your current contacts. When all your slots are cleared, Amazon Connect automatically sets your CCP to the next status, such as Lunch.

The following images of the Contact Control Panel (CCP) show how to use this feature.
1. The agent is on a contact.
2. The agent chooses their next status, such as Lunch. They can choose only a custom (NPT (p. 1001)) status, or Offline.
3. The agent is in Next status: Lunch. They are still on contact. No new contacts can be routed to them.
4. The contact ends. The agent finishes ACW, and chooses Clear contact. Instead of going back to Available, their CCP is automatically set to Lunch.

**How to cancel "Next status"**

You can easily switch from Next status back to Available. The ability to switch your status is useful, for example, if you accidentally choose Next status: Lunch, or if you decide not to go to Lunch before Amazon Connect automatically sets to that status.

The following images show this workflow.
1. While working on the same contact, the agent cancels **Next status: Lunch** and goes back to **Available**.
2. The contact ends and the agent is still **Available** for new contacts to be routed to them.

**Example 1: Set "Next status" while handling only ACW contacts**

Let's say an agent is finishing after contact work (ACW) for one or more contacts, such as a voice contact or multiple chats. They are not on contact with anyone.

Instead of choosing **Clear contact** when the agent finishes ACW, they choose **Lunch**. This puts them in **Next status: Lunch** only briefly.

Here's what happens in this scenario:

1. Agent finishes ACW and chooses **Lunch** instead of **Clear contact**.
2. Amazon Connect stops routing new contacts to them.
3. All their slots are cleared. This is so the agent doesn't have to choose **Clear contact** to end the ACW.
4. Because all the ACWs have been cleared, Amazon Connect immediately starts the automatic transition that sets the agent's status to **Lunch**.

   Agents were put into **Next status - Lunch** only briefly (milliseconds!). They might even see it in the CCP if they look fast enough.

This order of events mirrors how the CCP works when agents change their status while working on ACW. For example, an agent is finishing ACW and they set their status to **Lunch**. Here's what happens next:
Example 2: Set "Next status" while managing some chats on contact and other chats in ACW

Let's say an agent is managing two chats:

- Customer 1 is in ACW.
- Customer 2 is on contact.

While still on a contact, the agent sets their status to Offline. This puts them in the Next status: Offline state.

Here's what happens in this scenario:

1. The agent sets their status to Offline.
2. Amazon Connect stops routing new contacts to them.
3. The contact that is in ACW is cleared so the agent doesn't have to choose Clear contact. Only the connected chat remains.
4. The agent's status is Next status: Offline, and they continue working on their connected chat.
5. After they finish work on that contact, the agent chooses Clear contact to end the ACW.
6. Amazon Connect automatically sets the agent's status to Offline.

Work with chats

The topics in this section explain how to use the Amazon Connect Contact Control Panel to manage customer chats.

Contents
- Chat with contacts (p. 1258)
- Transfer chats to another queue (p. 1263)
- Make a call while on a chat (p. 1265)

Chat with contacts

When you set your status in the CCP to Available, Amazon Connect delivers calls or chats to you, based on the settings in your routing profile (p. 230). An administrator can specify that up to 10 chat conversations can be routed to you at the same time.

You can't initiate chat conversations from the CCP.

Note
IT Administrators: To enable customers and agents to send attachments, such as files, through the chat interface, see Enable attachments to share files using chat (p. 134).

Tip
Amazon Connect routes contacts to you for only one channel at a time. When you're on a call, you won't be routed a chat conversation. And when you're handling chat conversations, you won't be routed a call.
When a chat contact arrives, here’s how you are notified:

1. If you enabled notifications in your browser, you’ll get a pop-up notification at the bottom of your screen, like this:

   ![Incoming chat: John](image1)

   *Incoming chat: John*
   
   Click here to open the contact control panel now.

   [apps.com](apps.com)

2. If you're on the chat tab, the page displays the name of the contact and a button for you to connect to the chat.

   ![Available](image2)

   *Carlos*

   ![Incoming chat](image3)

   ![Accept chat](image4)

   ![Reject chat](image5)

3. If you're on the phone tab, a banner displays the name of the contact and a button for you to connect to the chat.

   ![Amazon Connect Contact](image6)

4. You have 20 seconds to accept or reject a contact. If you're on a chat, and another comes in but you don't accept it, a tab appears indicating the chat was missed.

   ![Chat with Carlos](image7)
5. Choose **Accept chat** to connect to the contact.

**Note**
Chat conversations must be accepted manually. There's no auto-accept for these conversations.

6. You'll see the full transcript of what the contact has already typed. If applicable, you'll also see what a bot or another agent has entered. In the following image, **John** is the name of the customer, **BOT** is the Amazon Lex bot, and **Jane** is the name of the agent.

---

**What do the timers at the top of the chat tabs mean?**

When you're in a chat conversation with a contact, you'll see two timers at the top of the chat tab. These timers tell you:

- How long the contact has been connected to your contact center. This includes the time spent with the bot, if you're using one.
Chat with contacts

- How long since the last text was sent. This can be either from the customer to the agent, or from the agent to the customer. The timer is reset with each text message.

If you have multiple chat tabs open, an hourglass appears letting you know which ones are in an After Contact Work (ACW) state. The timer indicates how long the contact has been in ACW.

What happens to missed chats?

Let's say you take a break but forget to change your status in the CCP from Available to Break. Amazon Connect tries to route a chat to you for 20 seconds. Keep in mind that your admin can't configure this amount of time.

After 20 seconds, the contact is counted as Agent non-response (p. 997) in the real-time metrics report and the historical metrics report.

When you return from break and choose the chat tab, you'll see the missed contacts and how long they've been there. Each contact occupies a slot. This way, with all of your slots are occupied, Amazon Connect won't route any more contacts to you.
You can clear the slots so that chats are routed to you again. For each missed contact, choose the banner, and then choose **Clear contact**.

### How to format messages

When composing a chat message, you have the ability to format your message. This enables you to add structure and clarity to your support messages. You can add the following formatting:

- Bold
- Italic
- Bulleted list
- Numbered list
- Hyperlinks
- Emoji
- Attachments

To get started, highlight the text you want to format, and then select a the formatting options from the toolbar. You can see exactly what the message looks like before sending it.
Transfer chats to another queue

When a chat is transferred from a bot to an agent, or from an agent to another queue, all context is preserved. This context lets the next agent read all previous messages in that contact.

To transfer a customer to another queue

1. Choose the Quick Connect button at the bottom of the CCP page.
Transfer chats to another queue

2. Choose or search for the queue you want to transfer to, and then choose the transfer button.

3. You'll see a confirmation message. You're now doing After Contact Work (ACW) for the customer. Choose Close to end the contact.
Make a call while on a chat

Let's say you're chatting with a contact and you want to consult with someone else. While you're on a chat, you can use the updated CCP to make outbound calls using the number pad and phone number quick connects (p. 470).

Note the following limitations:

• You can't access agent quick connects while you're on a chat.
• Agents can't receive calls while on a chat.

To make an external call while you're on a chat

1. In the CCP, choose the phone tab.
2. Choose **Number pad**.
3. Enter the external number you want to call, and then choose Call.
4. You'll be connected to the call at the same time the chat is still ongoing, as shown in the following image.
5. To go to the chat conversation while you're on the phone, choose the chat tab.

6. To end the phone conversation, choose the phone tab, choose End call, and then choose Clear contact. You're still connected to the chat conversation.

Can't make outbound call to another agent

If you're on a chat and having trouble making an outbound call to another agent, that agent may be handling a chat conversation. They can't receive a call while on a chat.

Can't see phone number quick connects in the CCP

Agent quick connects (p. 470) are not visible in the CCP while you're on a chat.

If you can't see phone number quick connects (p. 470) in your CCP, however, check that the phone number quick connect has been added to your queue as described in Step 2: Enable agents to see quick connects (p. 471).

Enable agent quick connects for calls during a chat

To enable agents to consult over the phone with each other while they are on chats, your Amazon Connect administrator needs to set up a direct dial number (DID) that routes to the agent. This configuration incurs additional costs.
Work with calls

The topics in this section explain how to use the Amazon Connect Contact Control Panel to manage customer calls.

Contents

- Accept incoming calls (p. 1270)
- Transfer calls to a quick connect or external phone number (p. 1271)
- Multi-party calls: Add additional participants to an ongoing call (p. 1277)
- Make outbound calls (p. 1281)
- View a call transcript during ACW (p. 1282)

Accept incoming calls

1. Whenever you set your status in the CCP to Available, Amazon Connect can deliver calls to you, based on the settings in your routing profile (p. 230).

![Accept call button](image)

2. When a call arrives, choose the Accept call button.

   **Note**
   The Accept call button does not appear if your admin has configured your user profile for Auto-Accept Call (p. 236).

3. Before you’re connected to the contact, Amazon Connect announces the name of the originating queue.

4. You’re now talking to the contact.

5. You have 20 seconds to accept or reject a contact. If you miss a call, it will look similar to the following image. Choose Clear contact so you can accept another call.
Transfer calls to a quick connect or external phone number

You can transfer calls to people in a predefined list, called quick connects. You can also transfer calls to external phone numbers that you enter.

To transfer to a quick connect or to an external number

1. While you’re connected to the contact, choose **Quick connects** on the CCP.
2. From the list of quick connects, choose the name of another agent to transfer the call to. (Your Amazon Connect administrator adds the names of agents to the list of quick connects.)

Or, to call an external number, choose **Number pad**, enter the number you want to call, and then choose **Call**.
3. After the call is connected to the transfer destination, you can choose **Join** so the caller, the transfer destination, and you are in a conference call.

These are agent quick connects. Choose to transfer a call to another agent.

Or, choose **Number pad** to enter an external number you want to call.
4. When the call is joined, the three of you can talk. Choose **Leave** to complete the transfer and exit the call.
5. Complete the after contact work and then choose **Clear contact**.
Manage transfer a call

After you initiate a transfer, the customer is placed on hold and you are connected to the transfer destination. The following image shows what actions you can take at this point.
Multi-party calls: Add additional participants to an ongoing call

You can add up to 4 additional participants to an ongoing customer service call, for a total of 6 participants.

By using quick connects or your number pad, you can add other agents, supervisors, or external participants.

For example, to help close a mortgage transaction, an agent at a financial services company can add a mortgage broker, the customer’s spouse, a translator, and a supervisor to the call to help resolve any issues quickly.

For information about how multi-party calls differs from the default three-party calls, see Comparison: Three-party and multi-party calls (p. 1356).

Important things to know

- This feature is only available in CCPv2 and custom CCP using Amazon Connect Streams.js.
- **IT administrators:**
  - Before enabling the multi-party calls feature, if you are using Contact Lens or planning to do so in the future, see Multi-party calls and Contact Lens (p. 816).
  - By default, there can be three participants on a call (for example, two agents and a caller, or an agent, a caller, and an external party). Before enabling multi-party calling, see Comparison: Three-party and multi-party calls (p. 1356). To enable agents to connect up to six parties on a call, see Update telephony options (p. 132).
- **Developers:** In custom CCPs, use the updated Amazon Connect Streams API to enable multi-party calling, up to six parties. See the Amazon Connect Streams documentation on GitHub. Before enabling multi-party calling, see Comparison: Three-party and multi-party calls (p. 1356).
- **AWS GovCloud (US-West):** You can't enable this feature using the console user interface. Instead, use the UpdateInstanceAttribute API or contact AWS Support.

How to add participants to a multi-party call

1. The following image shows the contact and you (the agent) on a call. The customer always appears at the top.
2. While you’re connected to the contact, choose **Quick connects** to add another agent or the **Number pad** to make an external call. The caller is put on hold while you do this.

3. When you add the third participant to the call, you can greet and talk to them before adding them to the call (for example, tell them why you are adding them to the call).

   The following image shows what the CCP looks like when you add a third participant to the call. The contact is on hold, and you’re talking to the third party. Choose **Join** to take all parties off hold. Or, choose **Swap** to toggle between the parties on hold and the party you just called.

4. When there are multiple agents on the call (for example, three agents and a caller), all agents on the call can view all parties and have the option to put any participant or another agent on hold, mute, and disconnect participants from the call.

   **Note**
   Swap is only available when there are three parties on a call (for example, you, the caller, and another agent or external party). It is not available when there are more than three parties on the call.
5. Every time you add a new participant to the call, you are prompted to greet and talk to them before adding them to the call. Choose **Join** to take all parties off hold.

**How to manage participants**

Every agent on the call has access to the controls next to each participant's number to mute, hold, or disconnect individual participants.
You can transfer a multi-party call to another agent, or disconnect yourself from the ongoing call.

Choose the More button to open the number pad and to create a task:

When do multi-party calls end?

A multi-party call stays up as long as the caller or the agent is on the call. For example, add an external party to a call and then you disconnect. The caller and external party continue the call.

If only third-parties are left on the line, the contact is terminated. However, as the agent you can choose to disconnect and allow only the caller and the third-party participants to remain on the call.
Make outbound calls

Before you can make an outbound call, your contact center must be set up to allow agents to make calls. For more information, see Step 3: Set telephony (p. 129) in Create an Amazon Connect instance (p. 127).

For information about the caller ID that’s displayed when you make an outbound call, see Set up outbound caller ID (p. 208).

Note
IT administrators: For a list of countries available for outbound calls based on the Region of your instance, see Amazon Connect pricing. If a country is not available in your dropdown menu, open a ticket to add it to your allow list. For more information, see Countries you can call by default (p. 1336).

To make an outbound call

1. In your Contact Control Panel, choose Number pad.
2. Use the dropdown menu to choose the country, then enter the number.

3. Choose Call.
View a call transcript during ACW

At the end of a call, you can see an unredacted transcript of your conversation in the CCP or agent workspace. You can view the entire transcript for reference, and copy any useful text into your notes.

The call transcript displays any categories (p. 826) identified by Contact Lens. For example, in the following image, an issue has been identified at 22 seconds.

If a call is transferred to you from another agent, you will see an unredacted transcript of their conversation with the customer.

Customer sentiment score is not included in the CCP or agent workspace.

**Note**

**IT administrators**: This feature is available in the CCP and the agent workspace. To make this feature available to agents:

1. [Enable Contact Lens (p. 810)](#) for your Amazon Connect instance.
2. Add the following permissions to the agent's security profile:
   - Analytics and Optimization - Contact Lens - speech analytics
   - Analytics and Optimization - Recorded Conversations - unredacted (access)
   - Contact Control Panel (CCP) - Contact Lens data

Work with tasks

The topics in this section explain how to use the Amazon Connect Contact Control Panel to manage tasks.
Accept a task

1. Whenever you set your status in the CCP to Available, Amazon Connect can deliver tasks to you, based on the settings in your routing profile (p. 230).

2. When a task arrives, choose Accept task.

3. Review the description of the task, and choose the links as needed to complete the task.
4. When you've completed the task, choose **End task**.
5. You will then be in ACW. When finished, choose **Close contact**.
Create a new task

You can create a task any time, even when your status is Offline. And you can assign a task to anyone who has a quick connect, including yourself.

You can create a task, which starts the task immediately. Or you can schedule the task to start on a future date and time.

1. Open the CCP. Select the Task tab, and then choose Create task.
2. Complete the **Create task** page. When you choose **Assign to**, you can assign a task only to someone or a queue that has quick connect.

Choose **Create**.

**CCP only**

The following image shows the option to create a task in the CCP.
3. If you chose yourself, the task is routed to you. Choose **Accept task**.
Create a scheduled task

You can schedule a task to start on a future date and time.

1. Complete the steps to create a task. For example, add a Task name and Assign to a quick connect.
2. In the Scheduled date / time section, choose a future date and time, and specify the timezone. You can schedule a task up to six days in future.
3. If you want to clear all values in the Scheduled date / time section and start over, choose Clear scheduled date / time.
Transfer a task

You can transfer a task that's assigned to you to another agent or queue.

1. Open the task you want to transfer, and then choose the quick connect icon.
2. Choose from the list of people or destinations listed under **Quick connects**, and then choose the transfer icon.
Use Customer Profiles in the agent workspace

To help you deliver more efficient and personalized customer service, Amazon Connect enables you to combine information from external applications, such as Salesforce, with contact history from Amazon Connect. This creates a customer profile that has all the information you need during customer interactions in a single place.

The following image shows an agent's Contact Control Panel (CCP); for the purposes of this documentation, Amazon Connect Customer Profiles is highlighted in the red box.
Accept incoming contacts with Customer Profiles

1. **Product purchase history**: All the assets purchased by a customer can be populated here. The data is ingested from an external app such as Salesforce or Zendesk that you’ve integrated (p. 608) with Customer Profiles.

2. **Contact history**: Date, times, and duration when this customer contacted your contact center in the past.

3. **More information**: Information that an agent can use to verify the contact, such as cell phone number and shipping address.

4. **Actions**: Agents can copy the contact ID, or choose to go directly to the contact’s **Contact record details** page.

**Contents**
- Accept incoming contacts with Customer Profiles (p. 1292)
- Create a new customer profile (p. 1297)
- Search for a customer profile (p. 1299)

**Accept incoming contacts with Customer Profiles**

When a call or chat is connected to your Contact Control Panel (CCP), Amazon Connect, in the same browser window, automatically displays customer profiles that may match the incoming phone number.

Before agents can access customer profiles, the Amazon Connect administrator must enable the Customer Profiles feature, grant agents the appropriate permissions, and integrate Customer Profiles into your agent workspace. For more information, see Enable Customer Profiles for your instance (p. 588).
Example 1: Auto-populate the customer profile

As soon as Amazon Connect matches the phone number (voice) or email address (chat) with an existing customer profile, it automatically displays the profile even though you may not have accepted the contact yet.

The following image shows what your Contact Control Panel (CCP) may look like when there's an incoming chat. A customer profile has been found that matches the customer, and Amazon Connect is loading the data.

This next example shows what it might look like after you've accepted and joined the chat, and Amazon Connect displays the customer's profile. In this case, Amazon Connect found the customer's profile based on their email address. If this were a voice call, by default Amazon Connect would match the customer's profile based on their phone number. Your IT department can customize (p. 605) this behavior to search for the profile based on other information about the contact.
Choose **Associate** to associate the contact record of the current contact with the customer profile, and then choose **Confirm**.
If you choose Associate by mistake, you can continue to browse other customer profiles, and associate the contact with a different customer profile. Or, if you have been assigned Create permission (p. 608), you can create a new profile.

You can associate a contact with customer profile multiple times during an interaction, including during After Contact Work (ACW) time. Only the most recent association remains, before you clear the contact.

**Example 2: Accept incoming contact, no customer profile found**

If no results are returned when a call or chat comes in, do the following:

1. Search for the customer's profile using their email address, name, or account number. An account number is a unique identifier for the customer in your business, such as a member number or a customer relationship number.
2. If no customer profile is found, create a new profile (p. 1297) for the contact. The only required information is first name.

In the following image, the agent searched for John Doe. No matches were found so they chose Create profile.
Example 3: Accept incoming contact, multiple customer profiles found

In some cases, multiple profiles may be returned for the same call or chat. Use the summary information to verify the customer’s identity. For example, ask the customer to verify their email address or account number, and then associate the contact with the right customer profile.

Example 4: Search when not on contact

When there are no incoming contacts, you can search for customer profiles using phone number, name, email address, or profile ID. For example, you might want to use this time to search for previous contacts, or completing a profile.
Create a new customer profile

Let's say you're on a chat and there's no customer profile for the contact. You can create a new customer profile for them.

1. **Choose Create profile.**

2. **Choose This is the current connected customer.** This tells Amazon Connect to link the customer profile to the contact ID for the current customer.
If you don't select this check box, the profile isn't associated with the current contact. This is useful when a contact is calling from someone else's number.

Enter information in the required boxes, and then choose **Save**.

3. You'll receive a verification page that the contact has been created.
4. You can continue the conversation with the customer.

Search for a customer profile

Even when you're not on a contact you can search customer profiles. This is helpful in cases where, for example, you want to return to a customer profile.

1. In the **Search** box, type the customer phone number, name, email, or profile ID.

2. If more than one result is returned, you can review the summary information to identify the contact that you want.
3. Choose **View details** to see profile information and the contact history for that customer.

**Use Cases**

A case represents a customer's issue. A case is created to record the customer's issue, the steps and interactions taken to resolve the customer's issue, and the outcome.

If you have permission to view cases then you will see the **Cases** tab in the Amazon Connect agent workspace. The following image shows an example **Cases** tab.

**Contents**

- Search and view cases (p. 1300)
- Add comments to a case (p. 1302)
- Create a case (p. 1303)
- Associate a contact with a case (p. 1304)
- Edit a case (p. 1305)
- Create a task from a case (p. 1306)

**Search and view cases**

You can search cases using a keyword match. Amazon Connect searches data across all system and custom fields. The results are sorted from most-recently to least-recently updated case.

If you are on a contact, and the contact has been associated to a customer profile, then search automatically filters to cases of current customer.
Regardless of whether you are on a contact, you have the option to do a general search. If you are on a contact and want to search beyond the current customer, clear the selection for Cases of current customer only.

View a case

When you select any of the cases in the search results to view the case, a new tab opens. This enables you to have multiple cases open at the same time.

If you add a Cases block to a flow, and configure it with Link contact to case enabled, then cases will open automatically when the agent accepts the contact.

Activity feed

The activity feed shows calls, chats, tasks, and comments from the most recent to least recent Started data.

Contacts will have an indicator of Ongoing or Completed. If the contact was completed, there will a Completed/Terminated date/time and a link to Contact details that takes user directly to the Contact details page.

Only users that have access to this page will be able to see contact details for a given contact. Even within this page, there are more granular permissions so different users may see different information. Information might include: basic contact details/contact attachments, transcripts and recordings with Contact Lens categories, sentiment, and summaries, recordings, etc.
Add comments to a case

Agents have the ability to view and add comments to a case.

You cannot add a comment to a case in Closed status. You can re-open the case and then leave the comment.
Create a case

To create a case, you must be on a contact (call, chat, or task) and have associated the contact with a customer profile, as shown in the following image.

For a case to be created:

- The Status must be Open.
• All required fields must be filled in.

**Customer name**

Each case that is created is connected to a customer profile from your Amazon Connect instance. While viewing the case details page, an agent can click or tap the customer's name to open the associated Customer Profile in a different tab. Or, the agent can choose More (...) to copy the customer name or profile ID to the clipboard. On new case templates, the customer name appears by default on the case details page. You can rearrange this field on your case template, or even remove it entirely.

**Associate a contact with a case**

You can associate the contact to an existing case, such that the contact will appear on the activity feed of the case with indicator **Ongoing**.
Edit a case

To edit a case, the agent chooses **Edit** and **Save** to save any changes.

You can edit a case only when it is not in a **Closed** status. If the case is **Closed**, you must update the status, then choose **Edit** to make your changes.
Create a task from a case

In the agent workspace, you can add a task from a case. In the Contact Control Panel (CCP), you will see the task creation form.

When you create a task from a case, the task is automatically associated with the case and it appears on the activity feed.
With Amazon Connect Wisdom, you can search and find content across multiple repositories, such as frequently asked questions (FAQs), wikis, articles, and step-by-step instructions for handling different customer issues. You can type questions or phrases in a search box (such as, “how long after purchase can handbags be exchanged?”) without having to guess which keywords will work.

The following image shows how an article may appear in the agent workspace when you are on a call.

1. The agent is on a call.
2. The Customer profile tab is available.
3. The agent can have multiple articles open at the same time.
4. The agent can search for articles.

Contents

- Search for content using Amazon Connect Wisdom (p. 1308)
- Use real-time recommendations (p. 1308)

Search for content using Amazon Connect Wisdom

You can search and find content across multiple repositories, such as frequently asked questions (FAQs), wikis, articles, and step-by-step instructions for handling different customer issues.

For example, you can type questions or phrases in the search box (such as, "how long after purchase can handbags be exchanged?") without having to guess which keywords will work. Wisdom searches the connected sources, and returns relevant information adjacent to your Contact Control Panel (CCP).

You can search for content at any time: while on a contact, on After Contact Work, or between contacts.

To search for content

1. In the search box, type words or phrases.
2. Choose the article that you want to view.
3. The article appears in a new tab.
4. The list of search results is cleared only after you complete ACW and choose Clear contact, or select the Close icon next to the search box.

Use real-time recommendations

If your organization uses Contact Lens for Amazon Connect, you may get real-time recommendations that point you to information related to the current conversation with the customer.

The following image shows how an article may appear in the agent workspace when you're on a call.
Use Voice ID

This topic shows how Voice ID features appear in your Contact Control Panel (CCP).

### Enroll a caller in Voice ID

1. You receive an incoming call.
2. The caller is not yet enrolled in Voice ID so you choose **Enroll**.
3. A message is displayed that Voice ID is sampling the caller's voice. It requires 30 seconds of speech (excluding silence).
4. The caller is now enrolled in Voice ID. This example also shows the caller’s Fraud risk as lower than the threshold.

**Verification of an enrolled caller**

After a customer is enrolled in Voice ID, when they call your contact center again, you can verify they are who they say they are.

1. You receive an incoming call.
2. The caller is already enrolled in Voice ID, and their status is Authenticated. You can choose to re-evaluate authentication using Voice ID.
3. A message is displayed that Voice ID is evaluating the caller’s speech. It requires 10 seconds of speech, not including silence.
4. The caller has been authenticated by Voice ID. This example also shows the caller’s Fraud risk is lower than the threshold.

**Caller has opted out**

The following image shows what appears in your CCP when a caller has opted out of Voice ID.

1. You receive an incoming call.
2. The caller has previously opted out of Voice ID.
3. You have the option to enroll them.

Authentication status = Not authenticated

When an enrolled caller calls your contact center, Voice ID may return a result of **Not authenticated**. This means Voice ID was unable to authenticate a caller's speech. The authentication score for the caller is lower than the configured threshold.

The previous images show that the **Fraud risk** can be **High** or **Low**, independent of whether the caller is authenticated.

Authentication status: Inconclusive

When an enrolled customer calls your contact center, Voice ID may return a result of **Inconclusive**: Voice ID was unable to analyze a caller's speech for authentication. This is usually because Voice ID did not get the required 10 seconds to provide a result for verification.
Troubleshooting Issues with the Contact Control Panel (CCP)

Troubleshooting Contact Control Panel (CCP) issues requires support from your network operations, system administrator, and virtual desktop (VDI) solution teams to collect the appropriate level of information to identify root cause and drive resolution. To help determine the appropriate resources to engage, it's important to break issues down into those with similar symptoms. The following guidance has been helpful in assisting Amazon Connect customers in resolving CCP issues with their operations support teams.

Contents
- Use the Endpoint Test Utility (p. 1313)
- Common Contact Control Panel (CCP) Issues (p. 1314)
- Download CCP logs (p. 1315)
- Troubleshooting Tools and Information (p. 1316)
- Mobile phones (iPhone, Android) and iPads are not supported (p. 1320)
- Microsoft Edge is not supported (p. 1320)
- Can't make an outbound call from the CCP (p. 1320)
- Attachments are not appearing in chats (p. 1320)
- Humming sound in headset: Verify the headset and browser sample rates (p. 1321)
- One-way audio from customers? (p. 1324)
- Troubleshoot problems pausing, rewinding, or fast-forwarding recordings (p. 1324)

Use the Endpoint Test Utility

To validate connectivity to Amazon Connect, or when your agents are experiencing problems with the Contact Control Panel (CCP), we recommend using the Amazon Connect Endpoint Test Utility.

The Amazon Connect Endpoint Test Utility performs the following checks:

- Validates that the browser being used supports WebRTC.
- Determines if the browser has appropriate access to media devices (microphone, speakers, etc).
- Performs latency tests for all active Amazon Connect Regions.
- Performs latency tests to a specific Amazon Connect instance, if provided.
- Validates network connectivity across required ports for media streams.

The complete results are available for download as a JSON file. You can copy the results to include in a support ticket. You can also load the results file into the tool by selecting the Load previous results option. This option displays the contents of the file visually and makes it easier to analyze the results. Additionally, you can download a bookmark specifically for the provided instance to make future tests easier to run.

Parameters to customize the Endpoint Test Utility

You can use the Endpoint Test Utility as is without any customizations. However, if you want to customize it, use the following URL parameters:
• **lng**: Change the language of the tool. Currently supported languages are English, Spanish, and French. It accepts the following values:
  • en (default)
  • es
  • fr
• **autoRun**: Run the tool automatically. It accepts the following values:
  • true
  • false (default)
• **connectInstanceUrl**: Not used by default. You can specify the Amazon Connect instance in the URL. It must start with https.

Example customized URL:

### Common Contact Control Panel (CCP) Issues

The following are common issues encountered when using the Amazon Connect CCP.

• **CCP does not initialize/connect**—The most common causes are missing port/IP allow list entries, not allowing browser microphone access, or not answering your external device. Be sure that you have added to the allow list all IPs covered in the Set up your network (p. 552) section of this guide, and that you have allowed microphone access to your browser when prompted.
• **Periodic connection errors**—The most common cause is network contention, or there may have been an ipranges.json update and the new entries have not been added to the allow list. For more information, see the Set up your network (p. 552) section of this guide.
• **Missed calls, state change delays, and CCP unresponsive**—In most cases, this is intermittent and directly correlated with resource contention in the agent's workstation, network, or both. This can be made worse, or caused directly, by a poor, unstable, or strained connection to AWS resources at the private WAN/LAN, public WAN levels, or local workstation resource contention.

The following are common issues with call quality when using the CCP. Call quality encompasses a large range of potential causes and is best approached by first identifying the types of issues that you're having.

• **Latency/cross-talk**—in a voice connection manifests as a delay between when something is said and when the person on the other end hears it. In some use cases that require a lot of conversation, high latency can create situations in which both parties are talking over each other. The PSTN (public switched telephone network) and agent latency need to be calculated in this scenario to identify contributing factors and take action to reduce PSTN latency, agent latency, or both. For more information, see the PSTN and agent connection latency section of this documentation.
• **One way audio**—is when the agent can't hear the caller or the caller can't hear them. This is normally indicative of an issue with the agent's workstation at the hardware, network, resource levels, or all three. It and can also be related to browser microphone permissions or headset issues. For more information, see the How to determine whether a workstation is the source of problems (p. 295) section of this guide.
• **Volume increase or decrease**— can happen at the beginning or intermittently during the call, and it's important to differentiate the two for troubleshooting purposes. Typically, this relates to forwarding calls to or from Amazon Connect that inherit this from an issue with the third party transfer.
• **Audio choppy, cutting out, echo, reverb, or other signal noise**—could also manifest as a robotic sound or other distortion making it difficult for either the agent, caller, or both parties to understand
what's being said. This is normally indicative of an issue with the agent's workstation at the hardware, network, resource levels, or all three. For more information, see the How to determine whether a workstation is the source of problems (p. 295) section of this guide.

- **Wobble**—is the effect that media codecs can have on audio that manifests as the slowing down and speeding up of audio to combat high jitter and latency. This is normally indicative of an issue with the agent's workstation at the hardware, network, resource levels, or all three. For more information, see the How to determine whether a workstation is the source of problems (p. 295) section of this guide.

- **Disconnects**—can happen at any point in the call. It is important to note when during the call that the disconnections occur to identify a pattern. For example, disconnects on call transfers to a specific external number typically relate to forwarding calls to or from Amazon Connect that inherit this from an issue with the third party transfer. They can also be related to circular transfers, which means transferring calls out of Amazon Connect and back in the same call.

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**Download CCP logs**

The Contact Control Panel logs store agent actions and timing.

**To download CCP logs**

1. On the agent's desktop, in their CCP, choose **Settings, Download logs**.

![Settings](image)

2. The agent-log.txt file is saved to your browser's default directory. After the file is downloaded, you can change the name of the file the same way you rename any other file on your computer. You can't customize the file name before the file it downloaded.
Troubleshooting Tools and Information

The following tools and information can be helpful with troubleshooting issues with Amazon Connect.

- **Instance ARN**—Provide your instance ARN (Amazon Resource Name) when you contact AWS support so that they can see the activity in your Amazon Connect instance. You can find the ARN for your instance on the Overview page that you access by choosing the alias of the instance from the Amazon Connect console.

- **Call recordings**—are very useful, not only to illustrate and determine reported behavior, but also to rule out audio issues from the agent’s side. Recordings in Amazon Connect are done at the instance side of the interaction, before the audio traverses the agent connection. This allows you to determine if the audio issue was isolated to the agent's side of the interaction or if it existed in the audio received by the agent. You can find call recordings associated with a contact in the Contact Search report.

- **Contact IDs from the contact record**—Provide when you contact AWS support.

- **Agent desktop performance/process logs**—can help rule out local resource/network contention.

- **Contact Control Panel (CCP) logs**—to track agent actions and timing. To download CCP logs, choose the settings cogwheel in the CCP, and then choose **Download logs**. The logs are saved to your browser's default download directory.

- **Network utilization logging/monitoring**—specifically for latency and dropped packets on the same network segment as your agents.

- **Private WAN/LAN network diagram**—outlining connection paths to the edge router to AWS to explain network traversal.

- **Firewall allow list access**—to verify that IP/port ranges are added to the allow list (also known as whitelist) as described in Set up your network (p. 552).

- **Audio capturing and analytic tools**—for latency calculations from the agent's workstation.

- **AWS region latency test tools**—use the Endpoint Test Utility tool (p. 1313).

Gathering Helpful Information using the Streams API

For tracking and troubleshooting issues at scale, collecting data surrounding overall call quality is recommended. Anytime poor call quality is experienced, agents can note the current time and corresponding disposition code by using the disposition key chart, as shown in the following chart. Alternatively, you can use the Streams API to incorporate your own report and issue feature in the custom CCP to write these dispositions with corresponding call information to a database, like Amazon DynamoDB. For more information about the Amazon Connect Streams API, see the GitHub repository at https://github.com/aws/amazon-connect-streams.

Example Agent Issue Report Disposition

The following example disposition keys are listed by symptom, scenario, and severity.

**Symptom**

- **S**—Softphone error
- **M**—Missed calls
- **L**—Latency causes poor quality
- **P**—Starts off OK, gets progressively worse over time
- **D**—Disconnected calls
- **W**—One way audio; for example, the agent can hear the customer, but the customer cannot hear the agent
Analyzing the Data

The following guidelines can assist you in analyzing the data to identify issues in your environment.

- Use the Contact record / Contact search report to identify the contact IDs for the contacts during which call quality issues occurred. The contact record includes a link to the associated call recording, and additional details that you can use for symptom verification and to provide to your AWS support representative.
- Use the agent name and timestamp in the contact record to get a sense of the types of issues you're experiencing and their prevalence by agent, symptom, scenario, and severity over time. This will allow you to see if issues are happening around the same time, surround a specific event, or are isolated to specific agents or agent actions. You can also easily identify and access associated call recordings and associated contact IDs available if you need to engage support.
- Correlate data sources, such as local network logs, CPU/disk/memory utilization and process monitor logs from the operating system on the client workstation. This lets you correlate events by agent over time to rule out local resource contention as a cause or contributor.
- Analyze data by symptom and scenario reported per minute or per hour to create heat maps of an issue by type and severity by agent over time. Doing this is especially helpful in environmental troubleshooting as you may find clustered impacts associated with scheduled activity like backups or large file transfers.
- If you can't find any evidence of local resource contention or derive any noteworthy correlations, you can use the contact IDs collected to open a support case. If issues experienced are intermittent in nature, they most likely relate to issues with the agent's workstation, network connectivity, or both.

Validation Testing

Voice quality issues can have many contributing sources. It's important to run controlled tests and monitor the same environment or workstation as those reporting the issue, and be able to reproduce the...
same use cases. Consider the following general testing recommendations for measuring and gathering data to investigate voice quality issues.

**PSTN and Agent Connection Latency**

For troubleshooting cross-talk issues, you need to differentiate and measure agent and raw PSTN latency contributions, as they require different remediation efforts.

- \([\text{overall}_{\text{latency}}]\) is the total latency experienced between caller and agent. This latency can be calculated as \([\text{overall}_{\text{latency}}] = [\text{agent}_{\text{latency}}] + [\text{pstn}_{\text{latency}}]\).

- \([\text{pstn}_{\text{latency}}]\) is the latency between Amazon Connect endpoint and the caller. This latency can be calculated as \([\text{pstn}_{\text{latency}}] = [\text{overall}_{\text{latency}}] - [\text{agent}_{\text{connection}_{\text{latency}}}].\) This latency can be improved by using a different Amazon Connect Region location or avoiding external and circular transfers to geographically distant endpoint locations.

- \([\text{agent}_{\text{latency}}]\) is the latency between Amazon Connect endpoint and the agent. This latency can be calculated as \([\text{agent}_{\text{latency}}] = [\text{overall}_{\text{latency}}] - [\text{recording}_{\text{latency}}].\) This latency can be improved by using AWS Direct Connect for agents on-premises, avoiding the use of VPN connections, improving private WAN/LAN performance/durability, or using an Amazon Connect Region location closer to your agents. Depending on your use case, selecting a different Region selection may also increase \([\text{pstn}_{\text{latency}}]\).

Amazon Connect leverages CloudFront for connectivity. Not all CloudFront ranges are advertised over AWS Direct Connect. This means not all URLs generated by Amazon Connect are reachable over a Public Virtual Interface.

- \([\text{redirect}_{\text{latency}}]\) is the latency resulting in redirecting audio to an external device. This latency can be calculated by measuring \([\text{overall}_{\text{latency}}]\) once with redirect and once without and take the difference between the two.

- \([\text{forward}_{\text{latency}}]\) is the latency resulting in forward calls to or from Amazon Connect. This latency can be calculated by measuring \([\text{overall}_{\text{latency}}]\), once with forward and once without, and take the difference between the two.

**Measuring Latency**

In addition to the steps below, see Measure latency for validation testing and troubleshooting in Amazon Connect.

- Reproduce your use case. Any deviations need to be measured and accounted for, because they skew test results.

- Match production controls and environment as much as possible. Use the same flows, phone numbers, and endpoint locations.

- Note the geographical locations of your callers, agents, and external transfer destinations, where applicable. If you are servicing multiple countries, each country should be tested individually to provide the same test coverage that your agents experience in production.

- Note mobile and land line use in your tests. Mobile networks can add latency and need to be measured and considered for customer, agent, and transfer endpoints, where applicable.

- Reproduce the business use case. If the agents use conference and transfer, be sure to test those scenarios. If circular transfers occur, which are not recommended, be sure to test those as well.

- Reproduce the agent environment by including the workstation environment, located on the same network segment, and using equipment your agents would use.

**Requirements for Testing Latency**

To perform effective testing for latency, the following are required:
Call recording enabled to capture [agent_latency]. Without call recording, you can calculate only [overall_latency].

A customer phone source. For testing, confirm call quality on an actual call from a customer.

An agent phone, if redirecting audio to an external device. You must be able to record the input and output of this device.

A third-party transfer endpoint, if applicable. Testing is best when performed on actual calls or transfers from a third party.

An agent workstation with sound recording or analysis software.

Reproducible use cases. Troubleshooting can be difficult for issues that cannot be reproduced.

NTP or other method to sync timestamps to facilitate identifying specific contacts and when they occurred, especially when activity is occurring across multiple time zones.

**Testing Inbound Calls Using a Soft Phone**

This process allows you to complete a latency test scenario in about 15 seconds. Analyzing the results and marking timestamps takes approximately 1-2 minutes per recording.

1. Go to a quiet location.
2. Configure agent workstation to play audio from external speakers and make sure they are turned up.
3. Use the agent workstation to log in to the CCP.
4. Start recording using an audio capturing tool on the agent workstation.
5. From the customer’s phone source, use a speaker phone to call the incoming number for your Amazon Connect instance. This could really just be any external phone source to simulate a customer call.
6. Answer the incoming call using the soft phone on the agent workstation.
7. Make sure that the customer phone is not muted.
8. On the customer side, use an object or your hand, tap loudly on the desk or table, and then immediately mute the customer phone.
9. Wait 3 or more seconds. Repeat steps 7-8 at least 3 times.
10. Stop recording on the agent workstation.
11. Open the recording in your audio analysis tool. You should be able to see both the initial tapping sound that you made on the desk, and the tapping sound on the agent line on the other end. Take the three deltas and average for your [overall_latency].

12. Optionally, to calculate [agent_latency], open the associated Amazon Connect call recording in your audio analysis tool. You should be able to see both the initial tapping sound and the sound when it arrives to the agent at the other end. Take the three deltas and average for your [recording_latency].

\[
[agent\_latency] = [overall\_latency] - [recording\_latency].
\]

Modify the test plan as necessary to fit your use case. As the steps change, the process of recording and analyzing the audio is the same. If you need to test conferences and transfers, take measurements as normal, and then take another measurement when the conference is active with the third party transfer endpoint.

**Interpreting the Test Results**

The impact of increasing [overall_latency] begins to be noticeable at approximately 300ms and can result in crosstalk above 500ms. The impact, and what level of latency is considered acceptable, depends on your use case. For recommended remediation efforts for decreasing latency, see the [PSTN and Agent Connection Latency](p. 1318).
Mobile phones (iPhone, Android) and iPads are not supported

The default version of the Contact Control Panel (CCP) does not work with mobile devices such as iPhones and iPads.

You can set up your CCP to forward the audio portion of the call to your mobile device. For instructions, see Forward calls to a mobile device (iPhone, Android) (p. 1254).

Microsoft Edge is not supported

Using Microsoft Edge or Edge Chromium with the Contact Control Panel is not supported. For a list of supported browsers, see Browsers supported by Amazon Connect (p. 4).

Can't make an outbound call from the CCP

The top reason most agents can't make outbound calls from the CCP is because their instance of Amazon Connect has not been set up to make outbound calls.

To enable agents to make outbound calls

1. Open the Amazon Connect console at https://console.aws.amazon.com/connect/.
2. On the instances page, choose the instance alias. The instance alias is also your instance name, which appears in your Amazon Connect URL.
3. In the navigation pane, choose Telephony.
4. To enable outbound calling from your contact center, choose I want to make outbound calls with Amazon Connect.
5. Choose Save.

Attachments are not appearing in chats

The following issues may cause attachments to not display for your agents using chat.

Internal firewall settings are preventing access

Check that your firewall isn't preventing agents from accessing the files in your Amazon S3 bucket. You may need to add the Amazon S3 bucket where your files are stored to your domain allow list. For more information, see Set up your network (p. 552).
Attachments are too large, too many, or don't meet file type requirements

Check that the attachments meet the size, number, and file type requirements. For more information, see Amazon Connect feature specifications (p. 1332).

To calculate the size of an attachment (artifactSizeInBytes), use a third-party tool such as File.size.

Humming sound in headset: Verify the headset and browser sample rates

If the agent's audio device does not support up to 48khz and the browser asserts a sample rate of 48khz, audio issues such as an audible humming sound may be present in the agent's outgoing audio. This has been seen with Firefox but not with Chrome.

Perform the following steps to verify your headset and browser sample rates.

Verify Firefox sample rate

1. Open the agent's CCP in FireFox, and set their status to Available.
2. Accept a call.
3. Open a second Firefox tab, and type about:support in the Search box.
4. Scroll down the page to Media.
5. Verify that the sample rates for the input and output devices are 48000, as shown in the following image.

Verify Chrome sample rate

1. Open the agent's CCP in Chrome, and set their status to Available.
2. Accept a call.
3. Open a second Chrome tab, and type chrome://about in the Search box.
4. Scroll down the page and choose chrome://media- internals.
5. On the **Audio** tab, choose the **Input Controllers** and verify that the sample rate is **48000**. Then verify the sample rate for the Output Controllers.
Verify Chrome sample rate

General Information

<table>
<thead>
<tr>
<th>Property</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>AudioServiceLaunchOnStartup</td>
<td>&quot;Disabled&quot;</td>
</tr>
<tr>
<td>AudioServiceOutOfProcess</td>
<td>&quot;Enabled&quot;</td>
</tr>
<tr>
<td>AudioServiceOutOfProcessKillAtHang</td>
<td>&quot;Enabled, timeout = &lt;undefined&gt; seconds&quot;</td>
</tr>
<tr>
<td>AudioServiceSandbox</td>
<td>&quot;Enabled&quot;</td>
</tr>
</tbody>
</table>

Input Controllers

Controller 1:0

Output Controllers

Controller 0:0
Controller 2:0
Controller 3:0

Output Streams

Stream 3:1

Controller 1:0 Properties

<table>
<thead>
<tr>
<th>Property</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>channel_layout</td>
<td>&quot;MONO&quot;</td>
</tr>
<tr>
<td>channels</td>
<td>1</td>
</tr>
<tr>
<td>device_id</td>
<td>&quot;default&quot;</td>
</tr>
<tr>
<td>device_type</td>
<td>&quot;pcm_low_latency&quot;</td>
</tr>
<tr>
<td>effects</td>
<td>&quot;NO_EFFECTS&quot;</td>
</tr>
<tr>
<td>frames_per_buffer</td>
<td>480</td>
</tr>
<tr>
<td>render_process_id</td>
<td>297</td>
</tr>
<tr>
<td>sample_rate</td>
<td>48000</td>
</tr>
<tr>
<td>status</td>
<td>&quot;started&quot;</td>
</tr>
<tr>
<td>web_contents_title</td>
<td>&quot;Amazon Connect Contact Control Panel&quot;</td>
</tr>
</tbody>
</table>
One-way audio from customers?

If an agent can hear the customer, but the customer can't hear the agent, this may be the result of an application taking exclusive control of agent's mic/speaker.

For instructions about how to disable it, see How do I turn off Exclusive-Mode for a Windows audio playback device?

Troubleshoot problems pausing, rewinding, or fast-forwarding recordings

If you are unable to pause, rewind or fast-forward recordings on the Contact search page, one possible reason could be that your network is blocking HTTP range requests. See HTTP range requests on the MDN Web Docs site. Work with your network administrator to unblock HTTP range requests.
Amazon Connect service quotas

All service quotas can be adjusted/increased unless otherwise noted.

Your AWS account has default quotas, formerly referred to as limits, for each AWS service.

To request a quota increase, see Requesting a quota increase in the Service Quotas User Guide. If the quota is not yet available in Service Quotas, use the Amazon Connect service quotas increase form. You must be signed in to your AWS account to access the form.

Important things to know

• You must create your instance before you can request a service quota increase.
• It can take up to a few weeks to increase your service quota. If you’re increasing your quotas as part of a larger project, be sure to add this time to your plan.
• Use the same form to submit a request to port your US phone number from your current carrier to Amazon Connect. For more information about porting phone numbers, see Port your current phone number (p. 149).
• The quotas apply per Region. For example, you can have 2 Amazon Connect instances in each Region.
• This documentation describes the default quotas for new accounts. Because the quotas have been adjusted over time, the default values for your account might be different than the default values described here.

Amazon Connect quotas

<table>
<thead>
<tr>
<th>Name</th>
<th>Default</th>
<th>Adjustable</th>
</tr>
</thead>
<tbody>
<tr>
<td>AWS Lambda functions per instance</td>
<td>35</td>
<td>Yes</td>
</tr>
<tr>
<td>Agent status per instance</td>
<td>50</td>
<td>No</td>
</tr>
<tr>
<td>Amazon Connect instances per account</td>
<td>2</td>
<td>Yes</td>
</tr>
<tr>
<td>Amazon Lex bots per instance</td>
<td>70</td>
<td>No</td>
</tr>
<tr>
<td>Amazon Lex V2 bot aliases per instance</td>
<td>100</td>
<td>Yes</td>
</tr>
<tr>
<td>Concurrent active calls per instance</td>
<td>10</td>
<td>Yes</td>
</tr>
<tr>
<td>For more information, see the section called “How contacts are counted” (p. 1332).</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Concurrent active chats per instance</td>
<td>100</td>
<td>Yes</td>
</tr>
<tr>
<td>This includes chats that are waiting.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## Amazon Connect quotas

<table>
<thead>
<tr>
<th>Name</th>
<th>Default</th>
<th>Adjustable</th>
</tr>
</thead>
<tbody>
<tr>
<td>If this quota is exceeded, the API call fails with a quota exceeded error.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Concurrent active tasks per instance</td>
<td>2500 concurrent active tasks</td>
<td>Yes</td>
</tr>
<tr>
<td>All tasks that have not yet ended are considered active and are counted as concurrent tasks: tasks that are being routed in flows, waiting in a queue for an agent, being handled by agents, or being run in After Contact Work (ACW).</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Flows per instance</td>
<td>100</td>
<td>Yes</td>
</tr>
<tr>
<td>Hours of operation per instance</td>
<td>100</td>
<td>Yes</td>
</tr>
<tr>
<td>Maximum duration that a task can be scheduled in future</td>
<td>6 days</td>
<td>No</td>
</tr>
<tr>
<td>Modules per instance</td>
<td>200</td>
<td>No</td>
</tr>
<tr>
<td>Phone numbers per instance</td>
<td>5</td>
<td>Yes</td>
</tr>
<tr>
<td>It's possible to get an error message that &quot;You've reached the limit of Phone Numbers,&quot; even if it's the first time you've claimed a phone number. All the issues that cause this error message require help from AWS Support to resolve.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prompts per instance</td>
<td>500</td>
<td>Yes</td>
</tr>
<tr>
<td>Queues per instance</td>
<td>50</td>
<td>Yes</td>
</tr>
<tr>
<td>Queues per routing profile per instance</td>
<td>50</td>
<td>Yes</td>
</tr>
<tr>
<td>This quota refers to number of queue/channel combinations per routing profile. For example, in the following image there are two queues, but there are three queue-channel combinations: Escalation queue Voice, Escalation queue Chat, and BasicQueue Voice. This counts three towards the service limit of 50.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quick connects per instance</td>
<td>100</td>
<td>Yes</td>
</tr>
</tbody>
</table>
### Amazon Connect AppIntegrations quotas

<table>
<thead>
<tr>
<th>Name</th>
<th>Default</th>
<th>Adjustable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rate of API requests</td>
<td>See Amazon Connect API throttling quotas (p. 1338).</td>
<td>Yes</td>
</tr>
<tr>
<td>Reports per instance</td>
<td>2000</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>Personal saved reports count towards the reports per instance. For example, if one of your supervisors saves a report every day, it will count towards your overall number of saved reports per instance. As a best practice, we recommend you implement policies so reports don’t pile up.</td>
<td></td>
</tr>
<tr>
<td>Routing profiles per instance</td>
<td>100</td>
<td>Yes</td>
</tr>
<tr>
<td>Scheduled reports per instance</td>
<td>50</td>
<td>Yes</td>
</tr>
<tr>
<td>Security profiles per instance</td>
<td>100</td>
<td>Yes</td>
</tr>
<tr>
<td>Task templates per instance</td>
<td>50</td>
<td>No</td>
</tr>
<tr>
<td>Task template customized fields per instance</td>
<td>50</td>
<td>No</td>
</tr>
<tr>
<td>User hierarchy groups per instance</td>
<td>500</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>This quota applies to the total number of hierarchy groups you have, across all levels. There is no feature limit for how many hierarchy groups you can have for each level. For example, one level could have 500 hierarchy groups, which would reach the quota for your instance.</td>
<td></td>
</tr>
<tr>
<td>Users per instance</td>
<td>500</td>
<td>Yes</td>
</tr>
</tbody>
</table>

### Amazon Connect AppIntegrations service quotas

<table>
<thead>
<tr>
<th>Name</th>
<th>Default</th>
<th>Adjustable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data integration associations per data integration</td>
<td>10</td>
<td>Yes</td>
</tr>
<tr>
<td>Data integrations per Region</td>
<td>10</td>
<td>Yes</td>
</tr>
<tr>
<td>Event integration associations per event integration</td>
<td>10</td>
<td>Yes</td>
</tr>
</tbody>
</table>
### Amazon Connect Cases service quotas

<table>
<thead>
<tr>
<th>Name</th>
<th>Default</th>
<th>Adjustable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Event integrations per Region</td>
<td>10</td>
<td>Yes</td>
</tr>
<tr>
<td>Cases domains per AWS account</td>
<td>5</td>
<td>Yes</td>
</tr>
<tr>
<td>Fields in a Cases domain</td>
<td>50</td>
<td>Yes</td>
</tr>
<tr>
<td>Field options per single-select field in the Cases domain</td>
<td>100</td>
<td>Yes</td>
</tr>
<tr>
<td>Layouts in a Cases domain</td>
<td>25</td>
<td>Yes</td>
</tr>
<tr>
<td>Templates in a Cases domain</td>
<td>25</td>
<td>Yes</td>
</tr>
<tr>
<td>Related items that can be attached to a case</td>
<td>50</td>
<td>Yes</td>
</tr>
<tr>
<td>Case fields per case template</td>
<td>30</td>
<td>No</td>
</tr>
</tbody>
</table>

### Contact Lens service quotas

<table>
<thead>
<tr>
<th>Name</th>
<th>Default</th>
<th>Adjustable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Concurrent real-time calls with analytics</td>
<td>50</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>100 for US East (N. Virginia)</td>
<td></td>
</tr>
<tr>
<td>Concurrent post-call analytics jobs</td>
<td>200</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>See Derive Concurrent post-call analytics jobs based on your Amazon Connect call volume (p. 1329).</td>
<td></td>
</tr>
<tr>
<td>Concurrent post-chat analytics jobs</td>
<td>100</td>
<td>Yes</td>
</tr>
</tbody>
</table>
Derive Concurrent post-call analytics jobs based on your Amazon Connect call volume

A post-contact (call or chat) analytics job is kicked off after the completion of each contact with Contact Lens enabled. The time to complete a post-contact analytics job is about 40% of the call length. To calculate concurrent post-call analytics jobs, use the following formula:

\[(\text{average call duration in minutes}) \times (0.4) \times (\text{calls per hour}) / (60)\]

The following table shows some examples.

<table>
<thead>
<tr>
<th>Average call duration (in minutes)</th>
<th>Calls per hour*</th>
<th>Approximate Concurrent post-call jobs</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>1000</td>
<td>33</td>
</tr>
<tr>
<td>10</td>
<td>500</td>
<td>33</td>
</tr>
<tr>
<td>10</td>
<td>1000</td>
<td>67</td>
</tr>
<tr>
<td>10</td>
<td>3000</td>
<td>200</td>
</tr>
</tbody>
</table>

*For the calculations in the preceding table, we assume a fairly uniform distribution of calls during the hour. If you have more complex traffic patterns, contact AWS Support with details about your anticipated traffic pattern.

Amazon Connect Customer Profiles service quotas

<table>
<thead>
<tr>
<th>Name</th>
<th>Default</th>
<th>Adjustable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amazon Connect Customer Profiles domains count</td>
<td>100</td>
<td>Yes</td>
</tr>
<tr>
<td>Keys per object type</td>
<td>10</td>
<td>Yes</td>
</tr>
<tr>
<td>Maximum expiration in days</td>
<td>1,096 (3 years)</td>
<td>Yes</td>
</tr>
<tr>
<td>This is the expiration of objects and profiles.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maximum number of integrations</td>
<td>50</td>
<td>Yes</td>
</tr>
<tr>
<td>Maximum size of all objects for a profile</td>
<td>50MB</td>
<td>Yes</td>
</tr>
<tr>
<td>Object and profile maximum size</td>
<td>250KB</td>
<td>No</td>
</tr>
<tr>
<td>Object types per domain</td>
<td>100</td>
<td>Yes</td>
</tr>
<tr>
<td>Name</td>
<td>Default</td>
<td>Adjustable</td>
</tr>
<tr>
<td>-------------------------------------------</td>
<td>---------</td>
<td>------------</td>
</tr>
<tr>
<td>Objects per profile</td>
<td>1000</td>
<td>Yes</td>
</tr>
<tr>
<td>This is the maximum number of objects that can be attached to a profile.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maximum number of Identity Resolution Jobs each week for a domain</td>
<td>3</td>
<td>No</td>
</tr>
<tr>
<td>Maximum number of consolidation rules in an Identity Resolution Job</td>
<td>10</td>
<td>No</td>
</tr>
<tr>
<td>Maximum number of attributes in each consolidation rule</td>
<td>20</td>
<td>No</td>
</tr>
</tbody>
</table>

## Outbound campaigns quotas

<table>
<thead>
<tr>
<th>Name</th>
<th>Default</th>
<th>Adjustable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amazon Connect campaigns</td>
<td>25</td>
<td>Yes</td>
</tr>
</tbody>
</table>

## Amazon Connect Voice ID service quotas

<table>
<thead>
<tr>
<th>Item</th>
<th>Default quotas</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domains</td>
<td>3</td>
</tr>
<tr>
<td>This quota applies per account.</td>
<td></td>
</tr>
<tr>
<td>Concurrent active sessions per domain</td>
<td>50</td>
</tr>
<tr>
<td>See the following table (p. 1331) for information about how to derive your Concurrent active sessions quota based on your Amazon Connect call volume.</td>
<td></td>
</tr>
<tr>
<td>Maximum number of fraudsters per domain</td>
<td>500</td>
</tr>
<tr>
<td>Maximum number of speakers per domain</td>
<td>100,000</td>
</tr>
<tr>
<td>Active Batch Speaker Enrollment Jobs per domain</td>
<td>1</td>
</tr>
<tr>
<td>Active Batch Fraudster Registration Jobs per domain</td>
<td>1</td>
</tr>
</tbody>
</table>
Derive Concurrent active sessions based on your Amazon Connect call volume

Use the information in the following table to derive your quota for Voice ID Concurrent active sessions per domain. Base your quota on the number of voice calls handled by your Amazon Connect contact center where Voice ID is enabled.

<table>
<thead>
<tr>
<th>Amazon Connect Voice Contacts (Calls)/Hour*</th>
<th>Voice ID Concurrent active sessions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1,000</td>
<td>50</td>
</tr>
<tr>
<td>5,000</td>
<td>250</td>
</tr>
<tr>
<td>10,000</td>
<td>500</td>
</tr>
<tr>
<td>20,000</td>
<td>1,000</td>
</tr>
<tr>
<td>50,000</td>
<td>2,500</td>
</tr>
</tbody>
</table>

*For the calculations in the preceding table, we assume a fairly uniform distribution of calls during the hour. If you have more complex traffic patterns, contact AWS Support with details about your anticipated traffic pattern.

Amazon Connect Wisdom service quotas

<table>
<thead>
<tr>
<th>Item</th>
<th>Default quotas</th>
<th>Adjustable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assistants</td>
<td>5</td>
<td>No</td>
</tr>
<tr>
<td>Knowledge bases</td>
<td>10</td>
<td>No</td>
</tr>
<tr>
<td>Maximum size of a knowledge base</td>
<td>5GB per knowledge base</td>
<td>Yes</td>
</tr>
<tr>
<td>Content per knowledge base</td>
<td>5,000</td>
<td>Yes</td>
</tr>
<tr>
<td>Examples of content are frequently asked questions (FAQs), wikis, articles, and step-by-step instructions for handling different customer issues.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maximum size per document</td>
<td>1MB</td>
<td>Yes</td>
</tr>
<tr>
<td>RateLimit for all APIs</td>
<td>50TPS</td>
<td>Yes</td>
</tr>
</tbody>
</table>
How contacts are counted

The following contacts are counted:

- Handled by a flow
- Waiting in queue
- Handled by an agent
- Outbound call

The following contacts are not counted:

- Callbacks waiting in a callback queue are not counted until the callback is offered to an available agent.
- External transfers

If the quota for concurrent active calls per instance is exceeded, contacts get a reorder tone (also known as a fast busy tone), which indicates that there is no available transmission path to the called number.

You can calculate your configured quota using CloudWatch metrics. For instructions, see Use CloudWatch metrics to calculate concurrent call quota (p. 1108).

If you're only taking calls you can also determine your concurrent calls quota by editing a queue and entering an exceptionally large number for the contact limit. The resulting error message displays your quota for concurrent calls. For example, in the following image, it shows the call quota for that instance is 9.

Amazon Connect feature specifications

**Note**
Feature specifications cannot be increased.

The following table lists Amazon Connect feature specifications.

<table>
<thead>
<tr>
<th>Item</th>
<th>Feature Specification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maximum size of a real-time metrics report</td>
<td>200KB</td>
</tr>
<tr>
<td>File types supported for chat attachments</td>
<td>.csv, .doc, .docx, .jpeg, .jpg, .pdf, .png, .ppt, .pptx, .txt, .wav, .xls, .xlsx</td>
</tr>
<tr>
<td>Max file size for a chat attachment</td>
<td>20MB</td>
</tr>
</tbody>
</table>
## Feature specifications

<table>
<thead>
<tr>
<th>Item</th>
<th>Feature Specification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attachments per chat conversation</td>
<td>35</td>
</tr>
<tr>
<td>People who can listen in on the same agent call at the same time</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td>For example, you can have a group of 5 people listen in to a call at the same time, and then a different group of 5 people listen in to a different call at the same time, and so on.</td>
</tr>
<tr>
<td>Quick connects you can assign to a queue</td>
<td>700</td>
</tr>
<tr>
<td>Participants on a conference call</td>
<td>6</td>
</tr>
<tr>
<td></td>
<td>The participants are the customer, agent, and others who can be agents or external third-parties.</td>
</tr>
<tr>
<td>Contact record retention</td>
<td>24 months from the time the associated contact was initiated.</td>
</tr>
<tr>
<td></td>
<td>You can choose to stream contact records to Kinesis so you can manage retention and perform advanced analysis.</td>
</tr>
<tr>
<td>Max size of the contact record attributes section</td>
<td>32KB</td>
</tr>
<tr>
<td>Active chats per agent</td>
<td>10</td>
</tr>
<tr>
<td>Total duration per chat</td>
<td>Up to 7 days, including wait time</td>
</tr>
<tr>
<td></td>
<td>• The default is 25 hours. You configure the chat duration using StartChatContact API and add the ChatDurationInMinutes parameter.</td>
</tr>
<tr>
<td></td>
<td>• Minimum configurable chat duration is 1 hour (60 minutes).</td>
</tr>
<tr>
<td></td>
<td>• Maximum configurable chat duration is 7 days (10,080 minutes).</td>
</tr>
<tr>
<td>Characters per chat message</td>
<td>1024</td>
</tr>
<tr>
<td>Open websocket connections per chat participant</td>
<td>5</td>
</tr>
<tr>
<td>Chat Amazon Lex bot integration timeout</td>
<td>6 seconds</td>
</tr>
<tr>
<td></td>
<td>The maximum time within which the Amazon Lex bot must respond to the chat customer’s prompt.</td>
</tr>
<tr>
<td>Task templates per instance</td>
<td>50</td>
</tr>
<tr>
<td>Task template customized fields per instance</td>
<td>50</td>
</tr>
<tr>
<td>Maximum duration of a task</td>
<td>7 days</td>
</tr>
<tr>
<td>Maximum number of transfers for a task</td>
<td>11 transfers</td>
</tr>
<tr>
<td>Maximum number of linked tasks on an existing contact</td>
<td>11</td>
</tr>
</tbody>
</table>
Amazon Connect enforces a limit on the total number of instances that you can create and delete in 30 days. If you exceed this limit, you will get an error message indicating there has been an excessive number of attempts at creating or deleting instances. You must wait 30 days before you can restart creating and deleting instances in your account.

For example, if you create 80 instances and delete 20 over the course of 30 days, you must wait an additional 30 days before you can create or delete any more instances. If you create and delete the same instance 100 times in 30 days, the limit also applies.

### Integration association resource feature specifications

The following table lists feature specifications for the integration association resource. It lists how many of each type of integration association resource can be ingested.

<table>
<thead>
<tr>
<th>Item</th>
<th>Feature Specification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice ID domain</td>
<td>1</td>
</tr>
<tr>
<td>Amazon Pinpoint app</td>
<td>1</td>
</tr>
<tr>
<td>Event</td>
<td>10</td>
</tr>
<tr>
<td></td>
<td>The event integration resource is used for task triggers.</td>
</tr>
<tr>
<td>Wisdom assistant</td>
<td>1</td>
</tr>
<tr>
<td>Wisdom knowledge base</td>
<td>10</td>
</tr>
<tr>
<td>Cases domain</td>
<td>1</td>
</tr>
</tbody>
</table>

### Contact Lens for Amazon Connect feature specifications

<table>
<thead>
<tr>
<th>Item</th>
<th>Feature Specification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Custom vocabularies</td>
<td>20</td>
</tr>
<tr>
<td>Contact Lens rules for post-call</td>
<td>500</td>
</tr>
</tbody>
</table>
### Evaluation forms feature specifications

<table>
<thead>
<tr>
<th>Item</th>
<th>Feature Specification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact Lens rules for post-chat</td>
<td>500</td>
</tr>
<tr>
<td>Contact Lens rules for real-time</td>
<td>500</td>
</tr>
</tbody>
</table>

### Amazon Connect Rules feature specifications

The following table lists feature specifications for Amazon Connect Rules.

<table>
<thead>
<tr>
<th>Item</th>
<th>Feature Specification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conditions in a rule</td>
<td>20</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Condition type</th>
<th>Number of entries or selections</th>
<th>Post-call</th>
<th>Post-chat</th>
<th>Real-time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Words or phrases - Exact match</td>
<td>100</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>
### Countries you can call by default

The Region where your instance is created determines which countries you can call by default.

Submit a service quota increase request to allow calling to additional countries, or to limit the countries that you can call from. You must be signed in to your AWS account to access the form.

For a list of all the countries available for outbound calling, see Amazon Connect pricing.

If you already have an instance, the countries that you are allowed to call may be different that those listed in the following sections because we have changed the service quotas over time.

### Instances created in US East, US West, Canada (Central) and AWS GovCloud (US-West)

You can call the following countries by default:

- United States
- Canada
- Mexico
- Puerto Rico
- United Kingdom: See Prefixes that are not allowed by default (p. 1338)

### Instances created in Africa (Cape Town)

You can call the following countries by default:

<table>
<thead>
<tr>
<th>Condition type</th>
<th>Number of entries or selections</th>
<th>Post-call</th>
<th>Post-chat</th>
<th>Real-time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Words or phrases - Semantic match</td>
<td>4</td>
<td>Yes</td>
<td>Yes</td>
<td>Not supported</td>
</tr>
<tr>
<td>Words or phrases - Pattern match</td>
<td>100</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Queue condition</td>
<td>100</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Agent condition</td>
<td>100</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Custom attributes</td>
<td>5</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Sentiment - Time period</td>
<td>5</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Sentiment - Entire contact</td>
<td>5</td>
<td>Yes</td>
<td>Yes</td>
<td>Not supported</td>
</tr>
<tr>
<td>Interruptions</td>
<td>5</td>
<td>Yes</td>
<td>Yes</td>
<td>Not supported</td>
</tr>
<tr>
<td>Response time</td>
<td>4 hours</td>
<td>Not supported</td>
<td>Yes</td>
<td>Not supported</td>
</tr>
<tr>
<td>Non-talk time</td>
<td>5 hours</td>
<td>Yes</td>
<td>Not supported</td>
<td>Not supported</td>
</tr>
</tbody>
</table>
• South Africa
• United Kingdom
• United States

Instances created in Asia Pacific (Seoul)

You can call the following countries by default:

• South Korea
• United Kingdom
• United States

Instances created in Asia Pacific (Singapore)

You can call the following countries by default:

• Singapore
• Australia
• Hong Kong
• United States
• United Kingdom: See Prefixes that are not allowed by default (p. 1338)

Instances created in Asia Pacific (Sydney)

You can call the following countries by default:

• Australia
• New Zealand
• Philippines
• United States

Instances created in Asia Pacific (Tokyo)

You can call the following countries by default:

• Japan: See Prefixes that are not allowed by default (p. 1338)
• Vietnam
• United States

Instances created in EU (Frankfurt) and EU (London)

You can call the following countries by default:

• United Kingdom: See Prefixes that are not allowed by default (p. 1338)
• Italy
• France
Prefixes that are not allowed by default

UK numbers with the following prefixes are not allowed by default:
- +447, +44111, +44118, +44119, +448, +44826, +449

Before you can dial these UK mobile numbers, you must submit a service quota increase request.

Japanese mobile numbers with the following prefixes are not allowed by default:
- +8170, 8180, and 8190

Before you can dial these Japan mobile numbers, you must submit a service quota increase request.

API throttling quotas

Amazon Connect API throttling quotas

Amazon Connect throttling quotas are by account, and per Region, not by user and not by instance. For example:
- If different IAM users from the same account make requests, they are sharing a throttle bucket.
- If multiple requests are sent from different instances from the same account, they are also sharing a throttle bucket.

When you use the Amazon Connect Service API, the number of requests per second is limited to the following:
- For the GetMetricData and GetCurrentMetricData operations, a RateLimit of 5 requests per second, and a BurstLimit of 8 requests per second.

  **Note**
  The rate limit cannot be increased for GetMetricData and GetCurrentMetricData.

- For StartChatContact, StartContactStreaming, StopContactStreaming, a RateLimit of 5 requests per second, and a BurstLimit of 8 requests per second.
- For all other operations, a RateLimit of 2 requests per second, and a BurstLimit of 5 requests per second.

Amazon Connect Participant Service API throttling quotas

For the Amazon Connect Participant Service, the quotas are by instance.

When you use the Amazon Connect Participant Service API, the number of requests per second is limited to the following:
• **CreateParticipantConnection**: a RateLimit of 6 requests per second, and a BurstLimit of 9 requests per second.

• **DisconnectParticipant**: a RateLimit of 3 requests per second, and a BurstLimit of 5 requests per second.

• **GetTranscript**: a RateLimit of 8 requests per second, and a BurstLimit of 12 requests per second.

• **SendEvent** and **SendMessage**: a RateLimit of 10 requests per second, and a BurstLimit of 15 requests per second.

• **StartAttachmentUpload**: a RateLimit of 2 requests per second, and a BurstLimit of 5 requests per second.

• **CompleteAttachmentUpload**: a RateLimit of 2 requests per second, and a BurstLimit of 5 requests per second.

• **GetAttachment**: a RateLimit of 8 requests per second, and a BurstLimit of 12 requests per second.

### Amazon Connect Contact Lens Service API throttling quotas

Amazon Connect Contact Lens throttling quotas are by account, not by user and not by instance. For example:

• If different IAM users from the same account make requests, they are sharing a throttle bucket.

• If multiple requests are sent from different instances from the same account, they are also sharing a throttle bucket.

When you use the Amazon Connect Contact Lens API, the number of requests per second is limited to the following:

• **ListRealtimeContactAnalysisSegments**: a RateLimit of 1 request per second, and a BurstLimit of 2 requests per second.

### Amazon Connect Cases API throttling quotas

<table>
<thead>
<tr>
<th>API</th>
<th>Default TPS throttling limits</th>
</tr>
</thead>
<tbody>
<tr>
<td>CreateCase, SearchCases, UpdateCase,</td>
<td>10</td>
</tr>
<tr>
<td>AssociateContact, ListTemplates,</td>
<td></td>
</tr>
<tr>
<td>CreateRelatedItem, SearchRelatedItems</td>
<td></td>
</tr>
<tr>
<td>CreateField, ListFields, CreateDomain,</td>
<td>5</td>
</tr>
<tr>
<td>GetDomain, CreateTemplate,</td>
<td></td>
</tr>
<tr>
<td>BatchPutFieldOptions, CreateLayout,</td>
<td></td>
</tr>
<tr>
<td>UpdateLayout, UpdateTemplate, UpdateField</td>
<td></td>
</tr>
<tr>
<td>BatchGetField</td>
<td>25</td>
</tr>
<tr>
<td>GetCase</td>
<td>15</td>
</tr>
<tr>
<td>GetTemplate, GetLayout</td>
<td>20</td>
</tr>
<tr>
<td>ListFieldOptions</td>
<td>15</td>
</tr>
</tbody>
</table>
Amazon Connect Voice ID Service API throttling quotas

<table>
<thead>
<tr>
<th>API</th>
<th>Default TPS throttling limits</th>
</tr>
</thead>
<tbody>
<tr>
<td>EvaluateSession</td>
<td>60</td>
</tr>
<tr>
<td>Domain APIs: CreateDomain, DescribeDomain, UpdateDomain, DeleteDomain, ListDomains</td>
<td>2</td>
</tr>
<tr>
<td>Batch APIs: StartSpeakerEnrollmentJob, DescribeSpeakerEnrollmentJob, ListSpeakerEnrollmentJobs, StartFraudsterRegistrationJob, DescribeFraudsterRegistrationJob, ListFraudsterRegistrationJobs</td>
<td>2</td>
</tr>
<tr>
<td>ListSpeakers</td>
<td>5</td>
</tr>
<tr>
<td>DescribeSpeaker, OptOutSpeaker, DeleteSpeaker, DescribeFraudster, DeleteFraudster</td>
<td>10</td>
</tr>
<tr>
<td>CreateIntegrationAssociation, DeleteIntegrationAssociation, ListIntegrationAssociation</td>
<td>2</td>
</tr>
<tr>
<td>TagResource, UnTagResource, ListTagsForResource</td>
<td>2</td>
</tr>
</tbody>
</table>
Additional resources for Amazon Connect

In addition to using the contents of this guide, you can learn more about Amazon Connect by using the following resources.

**Resources**

- Amazon Connect API Reference (p. 1341)
- Amazon Connect Participant Service API Reference (p. 1341)
- Amazon AppIntegrations Service API Reference (p. 1341)
- Contact Lens for Amazon Connect API Reference (p. 1341)
- Amazon Connect Customer Profiles API (p. 1342)
- Amazon Connect Voice ID API Reference (p. 1342)
- Amazon Connect Wisdom API Reference (p. 1342)
- Amazon Connect Streams (p. 1342)
- Amazon Connect Chat UI Examples (p. 1342)

**Amazon Connect API Reference**

The Amazon Connect API Reference describes the API actions that are used to set up and manage your contact center.

**Amazon Connect Participant Service API Reference**

The Amazon Connect Participant Service API Reference describes the API actions that are used to manage chat participants, such as agents and customers.

**Amazon AppIntegrations Service API Reference**

The Amazon AppIntegrations Service API Reference describes the API actions that you can use to configure connections to external applications.

**Contact Lens for Amazon Connect API Reference**

The Amazon Connect Contact Lens API Reference describes the API actions that you can use to access an up-to-date transcript, along with all the associated conversation characteristics while a call is still in progress. This helps to reduce the need for agents to write detailed call summaries and enables a seamless handoff from one agent to another during a call transfer.
Amazon Connect Customer Profiles API

The Amazon Connect Customer Profiles API Reference describes the API actions that you can use to manage domains and profiles.

Amazon Connect Voice ID API Reference

The Amazon Connect Voice ID API Reference describes the API actions that provide real-time caller authentication and fraud screening.

Amazon Connect Wisdom API Reference

The Amazon Connect Wisdom API Reference describes the API actions that deliver information to agents to help them solve customer issues.

Amazon Connect Streams

The Amazon Connect Streams documentation describes how to integrate your existing web applications with Amazon Connect. Streams gives you the power to embed the Contact Control Panel (CCP) UI components into your page, and/or handle agent and contact state events directly giving you the power to control agent and contact state through an object oriented event driven interface. You can use the built in interface or build your own from scratch: Streams gives you the power to choose.

Amazon Connect Chat UI Examples

The Amazon Connect Chat SDK and Sample Implementations provides examples of how to enable your app to engage with Amazon Connect chat.
Release notes for Amazon Connect

To help you keep track of the ongoing updates and improvements to Amazon Connect, we publish release notices that describe recent changes.

December 2022 Updates

Released Rules Function language

The Rules Function language is a JSON-based representation of a series of rule conditions. Use it to programmatically add conditions to rules. For more information, see Amazon Connect Rules Function language in the Amazon Connect API Reference Guide.

GA for Rules APIs

Released a set of Rules APIs that enable you to programmatically create and manage rules. For more information, see Rules actions in the Amazon Connect API Reference.

Search contacts by agent's first or last name is available in AWS GovCloud

For more information, see Search contacts by agent's first or last name.

November 2022 Updates

Create step-by-step guides for your agents

Inside the out-of-the-box Connect agent workspace, you can now create workflows that walk agents through custom UI pages that suggest what to do at a given moment during a customer interaction. You can create guides that help agents identify customer issues and recommend subsequent actions, as well as surface screen-pops and forms for submitting transactions and disposition codes. For more information, see Agent Workspace guided experience.

GA for Forecasting, capacity planning, and scheduling

Amazon Connect provides a set of services powered by machine learning that help you optimize your contact center by offering the following:

- Forecasting. Analyze and predict contact volume based on historical data.
- Scheduling. Generate agent schedules for day-to-day workloads that are flexible, and meet business and compliance requirements.
- Capacity planning. Predict how many agents your contact center will require.
For more information, see Forecasting, capacity planning, and scheduling.

**Released Contact Lens evaluation forms for preview**

You can create evaluation forms, and then make them available to managers to review conversations alongside contact details, recordings, transcripts, and summaries, without the need to switch applications. Conversational analytics automatically pre-populates evaluation scores for criteria like script adherence, sensitive data collection, and customer greetings. For more information, see Evaluate performance (Preview).

**Released Contact Lens conversational analytics capabilities for Amazon Connect chat**

Contact Lens for Amazon Connect provides conversational analytics capabilities for Amazon Connect chat, extending the machine learning powered analytics to better assess chat contacts. For more information, see Analyze conversations using Contact Lens for Amazon Connect.

**Added configurable Lex timeouts in chat**

You can configure how long to wait for a response from a customer in a chatbot conversation before the session expires. For more information, see Configurable time-outs for chat input in the Get customer input topic.

**Create rules that send email notifications**

You can create Contact Lens rules that send email notifications to people in your organization. For more information, see Create Contact Lens rules that send email notifications.

**Added MonitorContact API**

Added a new API for programmatically initiating monitoring of ongoing contacts. For more information, see MonitorContact API.

**Manage saved reports (admin)**

You can view and delete all saved reports in your instance, including reports that were not created by you or that are not currently published. For more information, see Manage saved reports (admin).

**Search for profiles using multiple search keys**

In addition to searching for profiles with a single search key (i.e., a key-values(s) pair), the SearchProfiles API has been enhanced to support searching for profiles using multiple keys and logical operators. This new functionality allows you to use between 1 and 5 search keys with AND or OR logic to find profiles with attributes that match the search criteria. For more information, see the SearchProfiles API reference.

**Delete quick connects using the Amazon Connect console**

In addition to deleting quick connects programmatically, you can now delete them using the Amazon Connect console. For more information, see Delete quick connects.
Added DismissUserContact API

Added a new API for programmatically clearing the notifications agents receive after they have missed or rejected a contact, making them eligible to be routed new contacts. This API can also be used to clear similar notifications when an agent encounters an error with accepting the contact or is handling After Contact Work. For more information, see the DismissUserContact API reference.

October 2022 Updates

Add secondary email address and mobile number to user accounts

For more information, see Add users to Amazon Connect.

Emojis for chat messages

Added support for emojis for your customer’s chat experience. Agents and customers can now send emojis when composing a chat message, enabling them to visually convey sentiment or emphasis during a chat conversation. For more information, see Enable text formatting for your customer’s chat experience.

Released support for Enhanced 911 (E911)

Enhanced 911 (E911) enables location information to be sent to 911 dispatch when a 911 call is placed. In addition to connecting a user with 911 emergency services, customers in the United States can build E911 capabilities to automatically provide the caller’s address information to 911 dispatchers. For more information, see Set up US emergency calling in Amazon Connect.

GA for Amazon Connect Global Resiliency

Released Amazon Connect Global Resiliency for General Availability. Global Resiliency enables you to provide customer service anywhere in the world with the highest reliability, performance, and efficiency, while meeting international regulatory requirements. For more information, see Set up Amazon Connect Global Resiliency.

Added Ctrl+Shift+F to search flow block titles and metadata

Press Ctrl+Shift+F to display a search box in the flow designer, and then search the block titles and metadata. To hide the search box, go to Settings, Toolbar, and set the toggle.

The following GIF shows how to use the search box to find flow blocks that have attributes in their title. It also shows how to display or hide the search box using the toggle.
Released Amazon Connect Cases for General Availability

Amazon Connect Cases allows your agents to quickly track and manage customer issues that require multiple interactions, follow-up tasks, and teams in your contact center. For more information, see Amazon Connect Cases and Amazon Connect Cases API Reference.

September 2022 Updates

Searching for a contact? Choose from a list of categories

When you search a contact and filter results by Contact Lens categories, you can pick from a list of categories, rather than manually typing the name of a category.

Updated flow designer

We've released a number of improvements to the flow designer experience to make building and editing flows easier.

- Updated look and feel of block dock, blocks, and flow designer canvas.
Import / Export uses a standard flow language so you can interchangeably build flows in APIs or in the UI.

**Important**
To copy and paste flows and blocks in the updated flow designer, the flow must be in the new flow language. To convert a legacy flow into the new format, you have two options:

- **Option 1:** In the flow designer user interface, opt in to the updated flow designer. Your legacy flows are automatically converted.
- **Option 2:** Manually import (p. 491) a legacy flow using the updated flow designer.

This option is most useful for scenarios where you have stored your flows in JSON offline. For example, for configuration control, you may have flow configurations in an offline data store. To copy a part of that flow and paste it into the updated flow designer, you need to import it into the updated flow designer. The importing process converts it to the new flow language. After that, you can copy and paste within the updated flow designer. If you want to keep using your offline data store as a source of truth, update the flow with the new format.

- You can use **Search** to filter blocks in the block dock.
• Multi-line block metadata allows you to click and expand to see block configurations.

• Color-coded branches and connectors help you distinguish paths.
• Improved zooming.

• Flow/module metadata appears at the bottom of the block dock.
• New, more intuitive categories (Check, Analyze, and Logic) to make it easier to find the blocks you are looking for.
Updated user interface in the block **Property** pages.
Search for Amazon Connect users by first name, last name, login, and more

You can search for Amazon Connect users by first name, last name, user login, agent hierarchy, security profile, and routing profile. For example, you can search for all Amazon Connect users who have the first name "Jane."

Queue dashboard

You can visualize historical queue data via time series graphs to help identify patterns, trends, and outliers specifically for Service Level, Contacts Queued, and Average Handle Time. For more information, see Visualize: Queue dashboard.
August 2022 Updates

Contact search: Apply "Match any" or "Match all" to Contact Lens category searches

When you search for contacts, and filter by Contact Lens categories, you can apply Match any or Match all to the search. For example, you can search contacts with both "category A" and "category B," or with either one of the two categories.

Evaluate calls for voice spoofing

Use Voice ID to evaluate calls for voice spoofing. For more information, see Voice spoofing detection and the Amazon Connect Voice ID API Reference.

Added SearchSecurityProfiles API

Added a new API for programmatically searching security profiles. For more information, see https://docs.aws.amazon.com/connect/latest/APIReference/API_SearchSecurityProfiles.html.

Released Schedule Adherence (Preview)

Contact center supervisors or managers track schedule adherence to understand when agents are following the schedule that you have created. This helps ensure you achieve your service level targets, while improving agent productivity and customer satisfaction. For more information, see Schedule Adherence.

July 2022 Updates

Search for contacts by using the agent's first or last name

You can search for contacts using the agent's first or last name. The filter name is Agent. To view an image of this experience, see Search contacts by agent's first or last name (p. 935).

Released updates for rich text format rendering

On the Contact Search and Contact Detail pages, you can now view chat transcripts that have rich text formatting, such as bold or italic font, bullet points, numbered lists, and hyperlinks. For more information about getting started with Amazon Connect Chat, see Set up your customer's chat experience.

View call transcript using the CCP or agent application

Agents can view call unredacted transcripts in the CCP and agent application. For more information, see View a call transcript during ACW.
June 2022 Updates

Support for Lex intent confidence scores and sentiment analysis

You can further personalize the automated self-service customer experience using Amazon Lex intent confidence scores and sentiment analysis as a branch within your flows. For more information, see the Get customer input block. For a list of new contact attributes, see Amazon Lex contact attributes.

Released Amazon Connect Cases (Preview)

Amazon Connect Cases (Preview) allows your agents to quickly track and manage customer issues that require multiple interactions, follow-up tasks, and teams in your contact center. For more information, see Amazon Connect Cases (Preview) and Amazon Connect Cases API Reference (Preview).

GA for Amazon Connect outbound campaigns

Released Amazon Connect outbound campaigns, formerly known as High-volume outbound communications. This release includes a set of APIs for creating and managing outbound campaigns. For more information, see Enable Amazon Connect outbound campaigns and Amazon Connect Outbound Campaigns API Reference.

Released GetCurrentUserData API

Released the GetCurrentUserData API. It enables you to return the real-time active user data from the specified Amazon Connect instance.

Released task templates

You can now create custom task templates, making it easy for agents to consistently capture the relevant and required information to create or complete tasks. For more information, see Create task templates. For information about using the API to programmatically create and manage task templates, see the Amazon Connect API Reference and the Amazon Connect Resource Type Reference in the AWS CloudFormation User Guide.

New API to transfer contacts

Added a new API that you can use to transfer contacts from one agent or queue to another agent or queue at any point after a contact is created. You can transfer a contact to another queue by providing the flow which orchestrates the contact to the destination queue. This gives you more control over contact handling and helps you adhere to the service level agreement (SLA) guaranteed to your customers.

For information, see TransferContact in the Amazon Connect API Reference.

May 2022 Updates

Updated workflow for outbound campaigns

Updated the workflow for onboarding to outbound campaigns using the Amazon Connect and Amazon Pinpoint user interface. For more information, see Enable outbound campaigns.
Voice ID expires speakers

For BIPA Compliance, Amazon Connect Voice ID automatically expires speakers that have not been accessed for enrollment, re-enrollment, or successful authentication for three years. You can see a speaker's last access time by looking at the `lastAccessedAt` attribute returned by the `DescribeSpeaker` and `ListSpeakers` APIs.

For more information, see What data is stored? in the Use real-time caller authentication with Voice ID topic.

April 2022 Updates

New API to change an agent's current status

Amazon Connect provides an API to programmatically change the current status of an agent. Agent statuses (p. 1078) are used to determine when an agent is Available to be routed contacts in Amazon Connect, versus when they are set to Offline or a custom status such as Lunch or Break and should not be routed contacts. For more information, see `PutUserStatus` in the Amazon Connect API Reference.

New API to search for users by name, agent hierarchies, and tags

Added API to search for user records in your Amazon Connect instance. This new API provides a programmatic and flexible way to search for users by first name, last name, username, routing profile, security profile, agent hierarchies or tags. For example, you can now use this API to search for all users tagged with a Department:tag value pair. You can also quickly find a list of all users assigned to a specific security profile, routing profile, or agent hierarchy. For more information, see the Amazon Connect API Reference.

New APIs to claim and configure phone numbers

Added new APIs to claim new phone numbers and configure them programmatically. Using these APIs, you can programmatically search for and claim available phone numbers, associate phone numbers to flows, or release phone numbers that are no longer needed. Additionally, the phone number APIs come with support for AWS CloudFormation. For more information, see the Amazon Connect API Reference and the Amazon Connect Resource Type Reference in the AWS CloudFormation User Guide.

Telephony: Multi-party calls

You can enable Amazon Connect to allow up to six parties on a call: the agent, the caller, and four more participants. (By default, Amazon Connect allows agents to have up to three parties on a call: the agent, and caller, and another participant.) For more information, see Update instance settings. For more information, see Host multi-party calls (p. 1277).

For information about new functionality on the existing Connection and Contact API in Amazon Connect Streams, see the Amazon Connect Streams Readme.

The following sections describes how managing multi-party calls differs from managing three-party calls.

Contents

- New behavior with multi-party calls (p. 1356)
- Comparison: Three-party and multi-party calls (p. 1356)
New behavior with multi-party calls

- All agents see all of the connections in a call.
- All agents have exactly the same capabilities as any other agent on the call. This takes into affect the moment an agent accepts the invitation to join the call.
- Before a warm transfer is complete, an agent can start talking to the caller as well as disconnect any other agent on the call.

Comparison: Three-party and multi-party calls

The following table summarizes the differences between the agent's experience using the Contact Control Panel (CCP) for three-party calls and multi-party calls.

- Primary agent: the first agent on the call.
- Secondary agent: any agent other than the first agent on the call.

<table>
<thead>
<tr>
<th>Three-party calls</th>
<th>Multi-party calls</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agent can control hold, resume, and disconnect only the parties they added.</td>
<td>All agents are have the same call control capabilities.</td>
</tr>
<tr>
<td>Agent can add one other participant to an existing call, for a total of three participants (the agent, the caller, and another participant).</td>
<td>Any agent on the call can add additional participants, as long as the total number of participants on the call, including themselves, does not exceed six.</td>
</tr>
<tr>
<td>Agent can put only the party they added on hold.</td>
<td>Any agent on the call can put any party on hold.</td>
</tr>
<tr>
<td>When a primary agent places a secondary agent on hold, the secondary agent can't take themselves off hold.</td>
<td>Any agent on the call can take themselves off hold.</td>
</tr>
<tr>
<td>Secondary agent can talk to the primary agent during hold.</td>
<td>Secondary agents cannot talk to each other until they are taken off hold.</td>
</tr>
<tr>
<td>Primary agent can only mute themselves.</td>
<td>Any agent on the call can mute any other participant on the call.</td>
</tr>
<tr>
<td>Secondary agent can only mute themselves.</td>
<td></td>
</tr>
<tr>
<td>When an agent disconnects (leaves or is disconnected), call control continues to be available to the remaining agent(s) on the call.</td>
<td>When an agent disconnects, control of the call is transferred to the remaining agents.</td>
</tr>
<tr>
<td>Only the primary agent can disconnect a party on the call. The secondary agent can disconnect the caller only if the primary agent has disconnected.</td>
<td>All agents have the capability to disconnect any other party.</td>
</tr>
<tr>
<td>The primary agent can see two connections (caller and another party), while a secondary agent sees only the transfer connection.</td>
<td>All agents can see all connections.</td>
</tr>
<tr>
<td>An agent only see internal transfer for another agent on the call.</td>
<td>An agent sees the quick connect ID for other agents, instead of just internal transfer.</td>
</tr>
<tr>
<td>Not applicable.</td>
<td>When an party is being dialed, an agent on a multi-party call cannot add another party until</td>
</tr>
</tbody>
</table>
### Play prompts from an Amazon S3 bucket

Added the ability to source prompts from an Amazon S3 bucket. You can store as many voice prompts as needed in Amazon S3 and access them in real time by using contact attributes in the following contact blocks that play prompts: Get customer input (p. 372), Loop prompts (p. 393), Play prompt (p. 396), and Store customer input (p. 432).

For more information, see the Play prompt (p. 396) block. For information about the policy required for Amazon Connect to access the Amazon S3 bucket, see Set up prompts to play from an S3 bucket (p. 465).

### CloudTrail support for queues and routing profiles

Amazon Connect records all changes made to users, routing profiles, and queues as events in AWS CloudTrail. For example, you can identify who took which action, what resources were acted upon, and when an event occurred. For more information, see the section called “Logging service API calls” (p. 1109).

### March 2022 Updates

#### Rich messaging for chat

Added support for rich messaging for your customer’s chat experience. Agents and customers can use bold, italics, bulleted lists, numbered lists, hyperlinks, and attachments. For more information, see Enable text formatting for your customer's chat experience.

#### Customer Profiles: Object type mapping user interface

Added a user interface for creating object type mapping by using the Amazon Connect admin console. For more information, see Create an object type mapping.

### February 2022 Updates

#### Added bulk ingestion of data for Customer Profiles

Added support for the bulk ingestion of data for Customer Profiles. For more information, see Bulk ingestion of data in the Set up integration for Salesforce, ServiceNow, Marketo, or Zendesk topic.

#### New CloudWatch metrics for chat

Added the following Amazon CloudWatch metrics for chat: ConcurrentActiveChats, ConcurrentActiveChatsPercentage, ChatBreachingActiveChatQuota, and SuccessfulChatsPerInterval. For more information, see Monitoring your instance using CloudWatch (p. 1095).
January 2022 Updates

Configure maximum chat duration up to 7 days

You can configure the maximum chat duration to last up to 7 days. For more information, see the ChatDurationInMinutes parameter in the StartChatContact API.

Add custom vocabularies to Contact Lens

Improve the accuracy of speech recognition for product names, brand names, and domain-specific terminology, by expanding and tailoring the vocabulary of the speech-to-text engine in Contact Lens. For more information, see Add custom vocabularies (p. 819).

Earlier Updates

December 2021 Updates

Chat widget supports browser notifications

The chat widget supports browser notifications for desktop devices. For more information, see Browser notifications (p. 256).

Ingest data into Customer Profiles from Segment and Shopify

For more information, see Set up integration for Segment and Set up integration for Shopify.

November 2021 Updates

Released unified agent application

Amazon Connect released the unified agent application to improve the agent experience and customer interactions. For more information, see Agent training guide.

Released call summarization

Contact Lens for Amazon Connect provides the option for you to view a transcript summary. The summary shows only those lines where Contact Lens has identified an issue, outcome, or action item in the transcript. For more information, see View call summary.

Released Identity Resolution to consolidate similar profiles

Amazon Connect Customer Profiles offers Identity Resolution, a feature that is designed to automatically detect similar customer profiles by comparing name, email address, phone number, date of birth, and address. For example, two or more profiles with spelling mistakes, such as "John Doe" and "Jhn Doe," can be detected as belonging to the same customer "John Doe" using clustering and matching machine learning (ML) algorithms. Once a group of profiles are detected to be similar, admins can configure how profiles should be merged together by setting up consolidation rules by using the Amazon Connect admin console or Amazon Connect Customer Profiles APIs.
Amazon Connect Customer Profiles stores contact history at no charge

Amazon Connect Customer Profiles now provides contact history and customer information together in unified customer profiles at no charge, helping contact center managers personalize the contact center experience. In new instances, Customer Profiles is enabled by default. For more information, see Step 4: Data Storage in the Create an Amazon Connect Instance topic.

Added modular flows to help you create common functions

Flow modules are reusable sections of a flow. You can create them to extract repeatable logic across your flows, and create common functions. For more information, see Flow modules for reusable functions.

New APIs to archive/unarchive and delete contact flows

Added new APIs that provide a programmatic and flexible way to manage your library of flows at scale. For example, flows used only during certain times of the year can be archived when not in use and then unarchived when needed. You can now also delete a flow so it is no longer available for use. For more information, see the Amazon Connect API Reference.

Search contacts by custom contact attributes

Added support for searching contacts by custom contact attributes (also called user-defined attributes). For more information, see Search by custom contact attributes.

Added Customer profiles block

Added the Customer profiles block. It enables you to retrieve, create, and update a customer profile.

Released Contact APIs

Added APIs so you can get and update contact details programmatically. For example, you can describe contact details such as queue information, chat attachments, task references, and update contact information such as task name. For more information, see DescribeContact, UpdateContact, and ListReferences in the Amazon Connect API Reference.

Released scheduled tasks

Added the ability to schedule tasks up to six days in the future to follow-up on customer issues when promised. You can also update the scheduled date and time using the UpdateContactSchedule API. For more information, see the Create task block and the Create a task topic in the Agent training guide.

Released security profiles APIs

Added APIs so you can create and manage security profiles programmatically. Security profiles help you manage who can access the Amazon Connect dashboard and Contact Control Panel (CCP), and who can perform specific tasks. For more information, see the Amazon Connect API Reference.

Changes to real-time metrics agent tables

We are rolling out a new service to maintain the high availability from metrics that you expect from Amazon Connect. Due to this change, the agent tables are sorted by agent status (p. 1078) instead of by agent login.
Additionally, the queues and routing profiles table are sorted by agents online instead of by queue or routing profile name.

**Added new metrics**

Added following new historical metrics: **Contacts transferred in by agent** and **Contacts transferred out by agent**. Added new real-time metrics: **Transferred in by agent** and **Transferred out by agent**. For more information, see Historical metrics definitions and Real-time metrics definitions.

**October 2021 Updates**

**Released real-time chat message streaming**

You can subscribe to a real-time stream of chat messages. For more information, see Enable real-time chat message streaming.

**Released HoursOfOperation APIs for General Availability**

Released the Amazon Connect HoursOfOperation APIs for general availability (GA). Also launched AWS CloudFormation support for Users, User Hierarchies, and Hours of Operation. For more information, see the Amazon Connect API Reference and the AWS CloudFormation User Guide.

**September 2021 Updates**

**Released Amazon Connect Wisdom General Availability**

For more information, see Deliver information to agents using Amazon Connect Wisdom and the Amazon Connect Wisdom API Reference.

**Amazon Connect Voice ID - General Availability**

For more information, see Use real-time caller authentication with Voice ID and the Amazon Connect Voice ID API Reference.

**Preview release of Amazon Connect outbound campaigns**

Added content for the preview release of outbound campaigns. By using Amazon Pinpoint Journeys and Amazon Connect, you can now create outbound campaigns for voice, SMS, and email. For more information, see Enable outbound campaigns.

**New Amazon AppIntegrations Service APIs**

New DataIntegration APIs for the Amazon AppIntegrations Service: CreateDataIntegration, DeleteDataIntegration, GetDataIntegration, ListDataIntegrationAssociations, ListDataIntegrations, UpdateDataIntegration.

For more information, see Amazon AppIntegrations Service API Reference.

**Display name and contact attributes in chat**

You can now personalize the chat experience, as you can specify the name of your customer that interacts using the chat user interface. You can also securely pass the contact attributes to capture information about the contact which can be used in the flow to further personalize the experience.
more information, see Pass the customer display name when a chat initializes and Pass contact attributes when a chat initializes.

**Preview of agent application**

Launched an updated UI for the agent application preview that combines Customer Profiles and the Contact Control Panel (CCP). For more information, see Access Customer Profiles in the agent application.

**Added Create task block**

Added the Create task block. It creates a new task, sets the tasks attributes, and initiates a flow to start the task. For more information, see Flow block: Create task.

**August 2021 Updates**

**Improved user interface for Amazon Connect console**

Released a redesigned and improved user interface for the Amazon Connect console, making it easier and faster to manage Amazon Connect instances. For more information, see Create an Amazon Connect instance (p. 127).

**APIs for Hours of Operation and Agent Status (Preview)**

Released for ungated preview new APIs for managing hours of operation and agent status. For more information, see Amazon Connect Service API Reference.

**Contact Lens: Build rules that generate tasks and EventBridge events**

Contact Lens rules now allow you to automatically generate tasks and EventBridge events based on uttered keywords, sentiment scores, customer attributes, and other criteria. For more information, see Create rules with Contact Lens (p. 822).

**Networking: Allow AWS Global Accelerator**

When using SAML Sign-In to your Amazon Connect instance, you now need to add the AWS Global Accelerator domain, *awsglobalaccelerator.com*, to your allow list. For more information, see Set up your network (p. 552).

**July 2021 Updates**

"Next status" feature for the CCP

In busy contact centers, it can be difficult for agents to take a break or go offline when contacts are being quickly routed to them. To help agents manage their time, we have released a feature that lets agents pause new contacts being routed to them while they finish their current contacts. When all their slots are cleared, Amazon Connect automatically sets agents to the next status, such as Lunch.

For details about how agents use this feature, see Set your "Next status" (p. 1255).

**Metrics: No changes due to "Next status"**

When an agent is in Next status, their metrics are the same as when their status is Available.
For example, an agent is handling one contact and chooses **Next status**. Here's what you'll see in the real-time metrics report:

- Agent Activity state = On Contact
- Agent - Staffed = 1

**Non-productive time** (NPT) is not incremented when an agent is in **Next status** because the agent is still **Available**. NPT increments only when the agent actually enters the non-productive status, such as **Lunch**.

**Agent event stream has new NextAgentStatus field**

When an agent sets their status to **Next status**, Amazon Connect populates a new **NextAgentStatus** field with the next status selected by the agent.

At the same time, the **AgentStatus** field continues to display **Available**.

The following code snippet shows what the agent event stream looks like when an agent has set their CCP to **Next status**: Lunch.

```json
"CurrentAgentSnapshot": {
  "AgentStatus": {
    "ARN": "example-ARN",
    "Name": "Available",
    "StartTimestamp": "2019-08-13T20:52:30.704Z"
  },
  "NextAgentStatus": {
    "Name": "Lunch",
    "ARN": "example-ARN2",
    "EnqueueTimestamp": "2019-08-13T20:58:00.004Z"
  }
}
```

When an agent has not selected a **Next status**, the field is null, as shown in the following snippet:

```json
"CurrentAgentSnapshot": {
  "AgentStatus": {
    "ARN": "example-ARN",
    "Name": "Available",
    "StartTimestamp": "2019-08-13T20:52:30.704Z"
  },
  "NextAgentStatus": null
}
```

**Amazon Connect Streams API and "Next status"**

The feature has the following effect:

- If you integrate with Amazon Connect Streams API and your agents interact directly with the native CCP user interface, your agents will start using this new feature immediately.
- If you integrate with Amazon Connect Streams API but your agents don’t interact directly with the native CCP user interface, your contact center will continue to have the previous behavior when `agent.setState()` is called: an agent will not be able to select an NPT or Offline status while connected to at least one contact.

If you are handling state change logic yourself from Amazon Connect Streams, you will need to make additional changes explained in the Amazon Connect Streams README.
Contact search: To search contacts by Agent login requires Users - View permissions in your security profile

To use the Agent filter on the Contact search page, in your Amazon Connect security profile you must have Users - View permissions, as shown in the following image:

![Users and permissions](image)

When you have Users - View permissions, on the Contact search page the Agent filter appears, as shown in the following image:

![Contact search page with Agent filter](image)

Without User - View permissions, the Agent filter is not visible, and searching contacts by Agent login is not supported, as shown in the following image:
June 2021 Updates

Apple Messages for Business GA

Released Apple Messages for Business for general availability (GA). For more information, see Enable Apple Messages for Business (p. 261).

Quick connects management API GA

Released Amazon Connect quick connects management API for general availability (GA). For more information, see Amazon Connect Service API Reference. The quick connects API also supports AWS CloudFormation. For more information, see Amazon Connect Resource Type Reference in the AWS CloudFormation User Guide.

Support for Amazon Lex V2 console and APIs

For more information on using the Amazon Lex V2 console with Amazon Connect, see Add an Amazon Lex bot. Added these three APIs: AssociateLexBot, DisassociateLexBot, and ListLexBots. See the Amazon Connect Service API Reference.

Chat: Increase to chat agent concurrency

Chat agents can now handle up to 10 concurrent chat contacts. For more information, see Create a routing profile.

May 2021 Updates

Added contact events

Subscribe to a near real-time stream of contact events (for example, call is queued) in your Amazon Connect contact center. For more information, see Amazon Connect contact events (p. 1059).

Contact search

The following changes were release for Contact search:
• Download increase: You are able to download 3,000 rows of search results to a CSV file, instead of 1,000 rows. This increase applies to contacts that occurred after Dec 01, 2020.

• Contact search supports Disconnect Reason as a new filter on the Contact search page.

The following image shows how Disconnect reason appears in the user interface as a filter.

The following image shows how you can filter by type of disconnect reason. For a definition of each disconnect reason, see the ContactTraceRecord (p. 1068) section of the Contact records data model topic.
The following image shows how you add **Disconnect reason** as a column to your search results.

### April 2021 Updates

#### Customer Profiles: Identity resolution

Added identity resolution APIs to Customer Profiles. For more information, see the `GetMatches` and `MergeProfiles` APIs in the Amazon Connect Customer Profiles API reference.

#### Contact Lens: Use category tags to navigate transcript

For more information, see [Tap or click category tags to navigate through transcript](#).

#### Fixes for chat metrics

We released fixes for the following issues identified in chat metrics:

- Amazon Connect incorrectly reported that chat contacts that were created from disconnect flows were created from transfer flows.
- When these fixes, Amazon Connect correctly reflects in the contact records and agent event stream that these chat contacts were created from disconnect flows.

There is no impact to voice or task contacts.

Chat contacts created through disconnect flows no longer increment the following metrics:

- Contact flow time (p. 1024)
- Contacts incoming (p. 1027)
- Contacts handled incoming (p. 1026)
- Contacts transferred in (p. 1027)

In addition, note the following fixes for contact records and the agent event stream for chat contacts:

- Contact records: There was an issue in the Attributes section of a chat contact record where the initiation method is **API** for both disconnect and transfer contacts. With this fix, the initiation method correctly reflects **Disconnect** and **Transfer**, respectively.
- Agent event stream: Chat contacts created from disconnect flows now have **Disconnect** as the initiation method.
March 2021 Updates

Amazon Connect is now available in the Canada (Central) Region

Amazon Connect is now available in the Canada (Central) Region. You can claim toll-free and local telephone numbers from Canadian telephony suppliers. For a list of countries where the Canada (Central) Region is supported, see Region requirements for phone numbers. For a list of Contact Lens features available in the Canada (Central) Region, see Availability of Contact Lens features by Region.

Domain for new Amazon Connect instances is "my.connect.aws"

The domain for the Amazon Connect access URL has changed to my.connect.aws.

For example:
- Current: https://[instance name].awsapps.com/connect/
- New: https://[instance name].my.connect.aws/

How does this change impact logging in to Amazon Connect?

The current access URL continues to work for Amazon Connect instances created before the release of the my.connect.aws domain. Any Amazon Connect instances created after the release automatically use the new domain.

Also, if you create new Amazon Connect instances after the release of the new domain, you must add new domains to your allow list. These domains are in addition to the ones that are currently required.

Currently required domains added to your allow list:
- {myInstanceName}.awsapps.com/connect/ccp-v2
- {myInstanceName}.awsapps.com/connect/api
- *.cloudfront.net

New additional domains to add to your allow list:
- {myInstanceName}.my.connect.aws/ccp-v2
- {myInstanceName}.my.connect.aws/api
- *.static.connect.aws

For more information, see Set up your network (p. 552).

Schedule for domain change

The change has been rolled out to all Regions.

Chat: Add a chat user interface your website

Added a chat widget that you can customize and secure so it can only be launched from your widget. For more information, see Set up your customer’s chat experience (p. 245).

Provided an open source example. For more information, see Download and customize our open source example (p. 255).
Amazon Connect Endpoint Test Utility

To help you validate connectivity to Amazon Connect, or troubleshoot when your agents are experiencing problems with the Contact Control Panel (CCP), we've added the Amazon Connect Endpoint Test Utility. For more information, see Use the Endpoint Test Utility (p. 1313).

February 2021 Updates

Contact Lens: Availability of real-time analytics

Content Lens real-time analytics is available in Europe (London), Europe (Frankfurt), and Asia (Tokyo). For more information, see Availability of Contact Lens features by Region (p. 815).

Ingest data into Customer Profiles using Amazon S3

Added the ability to create and ingest data from Amazon S3. For more information, see Create and ingest customer data into Customer Profiles by using Amazon S3 (p. 690).

Disconnect reason in contact record stream

The Amazon Connect contact records stream now includes DisconnectReason for voice calls and tasks. DisconnectReason indicates whether an agent or customer disconnected the call, or whether a telecom or network issue caused a call to disconnect. You can also determine whether a task was completed by an agent or an automatic flow, or it expired. For more information, see ContactTraceRecord (p. 1068).

Custom service levels

Added the ability to create custom service levels. For details, see New metric groupings and categories (p. 984).

January 2021 Updates

CCP: Change your audio settings

Added the ability to change audio settings from the Contact Control Panel (CCP). This applies to organizations using a customized CCP. For more information, see Change your audio device settings (p. 1252).

Queue APIs (Preview)

Added APIs so you can programmatically create and manage queues. For more information, see Amazon Connect Service API Reference.

Amazon AppIntegrations APIs - GA

Released Amazon AppIntegrations APIs for general availability (GA). For more information, see Amazon AppIntegrations Service API Reference.

December 2020 Updates

Quick Connect APIs (Preview)

Added APIs so you can programmatically create and manage quick connects. For more information, see Amazon Connect Service API Reference.
Chat: Support for attachments

Added support for chat attachments. For more information, see Enable attachments to share files using chat (p. 134).

Added the following APIs:

- CompleteAttachmentUpload
- GetAttachment
- StartAttachmentUpload

Configurable DTMF timeouts for Lex bots

For more information, see Configurable fields for DTMF input (p. 379).

Tasks

Added support for tasks, allowing you to prioritize, assign, track, and even automate tasks across the disparate tools agents use to support customers. For more information, see Tasks (p. 16).

Amazon Connect APIs

Added an Amazon Connect API that provides the ability to create tasks (StartTaskContact), and a set of preview APIs.

Preview APIs:

- CreateIntegrationAssociation
- DeleteIntegrationAssociation
- ListIntegrationAssociations
- CreateUseCase
- DeleteUseCase
- ListUseCases

Amazon AppIntegrations APIs (Preview)

Added the Amazon AppIntegrations APIs (Preview), which enables you to configure and reuse connections to external applications. For more information, see Amazon AppIntegrations Service API Reference (Preview).

Customer Profiles

Added Amazon Connect Customer Profiles, enabling agents to create a customer profile for every new contact that comes in. You can also integrate with external applications that provide customer profile data. For more information, see Use Customer Profiles (p. 587) and the Amazon Connect Customer Profiles API Reference.

Real-time analytics using Contact Lens

Added real-time analytics for Contact Lens so you can detect and resolve customer issues more proactively while the call is in progress. For more information, see Analyze conversations using Contact Lens for Amazon Connect (p. 807) and the Amazon Connect Contact Lens API Reference.
Amazon Connect Voice ID (Preview)

Added Amazon Connect Voice ID (Preview), which provides for real-time caller authentication. For more information, see Use real-time caller authentication with Voice ID (p. 944).

Amazon Connect Wisdom (Preview)

Added Amazon Connect Wisdom (Preview), which enables agents to search and find content across multiple repositories, such as frequently asked questions (FAQs), wikis, articles, and step-by-step instructions for handling different customer issues. For more information, see Deliver information to agents using Amazon Connect Wisdom (p. 968).

Amazon Connect with Apple Messages for Business (Preview)

Added support for using Amazon Connect with Apple Messages for Business. For more information, see Enable Apple Messages for Business (p. 261).

November 2020 Updates

Contact search

- Made several improvements to contact search. For more information, see What's new in contact search (p. 935).

Telephony call metadata attributes

- Added call attributes to improve fraud detection and routing. For more information, see Telephony call metadata attributes (call attributes) (p. 528).

View historical changes

- The ability to View historical changes on the resource configuration pages is now available for the London Region. The following differences appear as the changes are rolled out to other Regions.
  - Total results: The number feature in the View historical changes search page, and page numbers, are replaced with Previous and Next icons.
  - The Username filter requires the entire login name.

Chat

- Added interactive message templates. For more information, see Add interactive messages to chat (p. 580).

APIs

- Added APIs so you can programmatically manage your agent hierarchies and agent groups. For more information, see Amazon Connect Service API Reference.
- Added the following APIs (in an ungated preview release):
  - CreateInstance
  - DescribeInstance
October 2020 Updates

The following updates were released in October 2020:

Contact flows

- Added chat support for whisper flows. For more information, see Flow block: Set whisper flow (p. 422).

Metrics

- Released the following real-time metrics:
  - Avg callback connecting time (p. 998)
  - Avg incoming connecting time (p. 999)
  - Avg outbound connecting time (p. 1000)

- Released the following historical metrics:
  - Agent API connecting time (p. 1019)
  - Agent callback connecting time (p. 1019)
  - Agent incoming connecting time (p. 1020)
  - Agent outbound connecting time (p. 1021)
  - Average agent API connecting time (p. 1022)
  - Average agent callback connecting time (p. 1022)
  - Average agent incoming connecting time (p. 1022)
  - Average agent outbound connecting time (p. 1022)

- In real-time metrics reports, added one-click drill-downs. These allow you to drill down into queue and routing profile data in one click. For more information, see Use one-click drill-downs for Routing profiles and Queues tables (p. 1005).

- Added the Restrict contact access permission which enables you to manage a user's access to results on the Contact search page based on their agent hierarchy group. For more information, see Search for contacts (p. 935).

- Added ContactDetails and References to the contact record. For more information, see Contact records data model (p. 1065).

September 2020 Updates

The following updates were released in September 2020:

Service quotas

- Updated the service quotas for the following Amazon Connect Participant Service APIs:
  - CreateParticipantConnection (p. 1338)
  - DisconnectParticipant (p. 1338)
Contact flows

- Added the Amazon Connect Flow language, a JSON-based representation of a series of flow actions, and the criteria for moving between them. For more information, see Flow language.

APIs

Added the following APIs for contact flows:

- CreateContactFlow
- DescribeContactFlow
- UpdateContactFlowContent
- UpdateContactFlowName

Added the following API to list prompts:

- ListPrompts

Added the following APIs for routing profiles:

- AssociateRoutingProfileQueues
- CreateRoutingProfile
- DescribeRoutingProfile
- DisassociateRoutingProfileQueues
- ListRoutingProfileQueues
- UpdateRoutingProfileConcurrency
- UpdateRoutingProfileName
- UpdateRoutingProfileQueues

August 2020 Updates

The following updates were released in August 2020:

Contact flows

- Added the ability to automatically use the best sounding voice available from Amazon Polly for text-to-speech. For more information, see Amazon Polly best sounding voice (p. 460).
- Added the ability to select, cut, copy, and paste flows. For more information, see Copy and paste contact flows (p. 455).

Telephony

- Added the ability for all customers to enable/disable media support for outbound phone calls. For more information, see Step 3: Set telephony (p. 129) in the Create an Amazon Connect instance (p. 127) topic.
Monitoring

- Added logging of Amazon Connect Participant Service calls with AWS CloudTrail. For more information, see Logging Amazon Connect API calls with AWS CloudTrail (p. 1109).

Contact Lens for Amazon Connect

- Updated the security profile permissions for the redaction feature. For more information, see Security profile permissions for Contact Lens (p. 816).

July 2020 Updates

The following updates were released in July 2020:

Contact flows

- The Set voice block supports speaking styles with neural text-to-speech (TTS) voices. For more information, see Flow block: Set voice (p. 419).

APIs

- Added StartContactRecording, StopContactRecording, SuspendContactRecording, ResumeContactRecording to the Amazon Connect Service API.

Contact Lens for Amazon Connect

- Updated Contact Lens for Amazon Connect for general availability. This feature lets you analyze customer-agent conversations, by using speech transcription, natural language processing, and intelligent search capabilities. For more information, see Analyze conversations using Contact Lens for Amazon Connect (p. 807).

Metrics

- Fixed content that was added in June 2020 that said Agent idle time, Agent on contact time, and Occupancy had been deprecated. That was incorrect. Rather, they are no longer available for queue groupings only. For more information, see What's new in metrics (p. 979).
- Corrected how Occupancy is calculated. The correct calculation is:

\[
\text{Occupancy} = \frac{\text{Agent on contact (wall clock time)}}{\text{Agent on contact (wall clock time) + Agent idle time}}
\]

June 2020 Updates

The following updates were released in June 2020:

Metrics

- The following historical metrics no longer appear in queue groupings:
  - Agent idle time
• Agent on contact time
• Occupancy
• Added upcoming metric changes: new real-time and historical metrics for inbound and outbound contact time. For more information, see What's new in metrics (p. 979).

Contact Control Panel (CCP)
• Released the following improvements:
  • DTMF input is passed to all lines in a three-way call. Any party can enter DTMF input.
  • Resolved an issue where the DTMF tone degraded when agents interacted with Quick connect and/or Number pad during a session.
  • Resolved an issue where quick connects sometimes did not appear on a page, even after an agent refreshed it.
  • Improved the experience when a manager "listens in" to multiple chat conversations. Updated the unread message count on the CCP to include messages sent by the customer and those sent by the agent. Previously, the unread message count only included messages sent by the customer.
  • Published instructions for upgrading to the latest CCP. For more information, see Upgrade to the latest CCP (p. 279).
  • Published a training video that explains how to use the CCP. For more information, see Training video: How to use the CCP (p. 1249).

Contact flows
• The Set disconnect flow block supports voice conversations. For more information, see Flow block: Set disconnect flow (p. 406).
• The Set Voice block supports Amazon Polly Neural Text-to-Speech (NTTS) voices. For more information, see Flow block: Set voice (p. 419).
• The Get queue metrics block can return metrics by channel, for example, by voice or chat. For more information, see Flow block: Get queue metrics (p. 382).

May 2020 Update
The following updates were released in May 2020:

Contact flows
• Added the ability to select multiple blocks at the same time and rearrange them as a group within a flow. For more information, see Create an inbound flow (p. 450).

April 2020 Update
The following updates were released in April 2020:

Telephony
• Added early media support for outbound phone calls. Enabled by default, an agent hears tones and audio messages played by phone companies—such as busy signals, failure to connect errors, or other informational messages—through their headset or audio device. For more information, see Step 3: Set telephony (p. 129) in the Create an Amazon Connect instance (p. 127) topic.
March 2020 Update

The following updates were released in March 2020:

Contact flows

- Updated the Store customer input (p. 432) block to allow you to specify a custom terminating keypress.

Metrics

- Announced June 2020: Changes for omnichannel support (p. 989).

Networking

- Updated softphone requirements in Set up your network (p. 552).

February 2020 Update

The following updates were released in February 2020:

Service Quotas

- Adjusted Amazon Connect service quotas (p. 1325) for new accounts.

Contact Flows

Updated the following blocks so you can set contact attributes:

- Set customer queue flow (p. 405)
- Set hold flow (p. 409)
- Set whisper flow (p. 422)

January 2020 Update

The following updates were released in January 2020:

Contact Control Panel (CCP)

The following updates were made to the updated Contact Control Panel (ccp-v2):

- Agents can now transfer a contact by double-clicking a quick connect. For more information, see Transfer calls to a quick connect or external phone number (p. 1271).
- The number pad now retains the previously selected country flag so agents don't need to select it every time.

* Added the barge-in-enabled session attribute to the Get customer input (p. 372) block so customers can interrupt Amazon Lex bots with their voice.*
• All strings in the CCP user interface are now localized in available languages.
• Resolved an issue where the color of the call status bar incorrectly displayed as green during a conference call when the call was in the Joined state. It is now blue.
• Resolved an issue where the agent’s name was displayed in error messages for missed chats, rather than the customer’s name.

Networking

• Updated Set up your network (p. 552) to include requirements for the updated Contact Control Panel (ccp-v2).

December 2019 Update

The following update was released in December 2019:

Monitoring

• Added Contact Lens for Amazon Connect for preview. This feature enables you search conversations for keywords, sentiment scores, and non-talk time. For more information, see Analyze conversations using Contact Lens for Amazon Connect (p. 807).
• Added logging of Amazon Connect API calls with AWS CloudTrail. For more information, see Logging Amazon Connect API calls with AWS CloudTrail (p. 1109).

November 2019 Update

The following updates were released in November 2019:

Omnichannel Support

• Added support for chat communications. For more information, see Concepts (p. 10).

Metrics

• For a description of changes, see What's new in metrics (p. 979).

Contact Flows

Added the following contact flow blocks:
• the section called “Wait”
• the section called “Set disconnect flow”

Updated the following contact flow blocks for chat:
• the section called “Play prompt”
• the section called “Get customer input”
• the section called “Store customer input”
• the section called “Set recording and analytics behavior”
User Management

- Added that you can use AWS Identity and Access Management (IAM) with Amazon Connect. For more information, see Identity and access management for Amazon Connect (p. 1185).

Live Media Streaming

- Added that you can capture customer audio for the entire interaction with your contact center. For more information, see Capture customer audio: live media streaming (p. 765).

API

- Added StartChatContact, ListTagsForResource, TagResource, UntagResource to the Amazon Connect Service API.
- Added the Amazon Connect Participant Service API. These APIs are used chat participants, such as agents and customers.

Contact Control Panel (CCP)

- Updated the CCP so it supports chat. For more information, see Agent training guide (p. 1247).

October 2019 Update

The following update was released in October 2019:

Metrics

- The real time metric **On call** is now incremented whenever an agent is handling a contact who is connected, on hold, in After Contact Work, or the agent is dialog out to a customer.

This metric is available in the Queues tables and Routing Profile tables on the Real time metrics page. It’s also returned by the GetCurrentMetricData API as AGENTS_ON_CALL.

June 2019 Update

The following update was released in June 2019:

Contact Flows

- Added flow versioning so you can choose between a saved or published version when you roll back.

May 2019 Updates

The following updates were released in May 2019:

Metrics and Reporting

- Improved the error messages you might encounter when creating, editing, or deleting a scheduled report.
• In the Historical metrics report UI, changed Contacts missed to Agent non-response. This metric appears as Contacts missed in scheduled reports and exported CSV files.

• In the agent event stream, fixed the formatting of the timestamp millisecond so you can better order and analyze the data. To learn more, see Amazon Connect agent event streams (p. 1045).

Contact Control Panel

• Resolved an issue where calling a destroy action (such as connection.destroy) using the Amazon Connect Streams API resulted in different behavior depending on which leg of the conversation it was called from: the agent or the customer. Now calling a destroy action results in the same behavior for both: a busy conversation is moved to After Call Work (ACW) and a conversation in any other state is cleared. If you used the native Contact Control Panel instead of the Amazon Connect Streams API, you weren't impacted by this issue.

April 2019 Updates

The following updates were released in April 2019:

Contact Control Panel

• Resolved an issue where the hold flow didn't run in this case:
  • The agent missed a call and then set themselves back to Available.
  • Then they were re-routed the same call.
  • The agent put that customer on hold while handling the call.

  However, taking the customer off hold worked as expected and no other impact occurred.

• Resolved an issue where the Amazon Connect Streams API returned softphoneAutoAccept = FALSE even though Auto-Accept Call was enabled for the agent.

March 2019 Update

The following updates were released in March 2019:

Metrics and Reporting

• Improved the error messages you might encounter when running real-time metrics reports. For example, if you manually configure a real-time metrics report to contain more than 100 queues, we'll display this message: "You've hit the maximum limit of 100 queues. Please reconfigure your report to contain no more than 100 queues." To learn more, see No metrics or too few rows in a queues report? (p. 1012)

Contact Control Panel

• Resolved an issue where, in rare cases, an agent already handling an outbound call could have been incorrectly presented with an additional queued callback, even though they are only allowed to handle one contact at a time. Since that agent would have been on contact and not idle, the agent wouldn't have been able to accept the queued callback.

  In these cases, the outbound call was not impacted; the agent wouldn't have noticed any differences in the CCP. The callback was presented to another agent instead of being dropped.
February 2019 Updates

The following updates were released in February 2019:

**Updates by category**

- **Contact Routing (p. 1379)**
- **Contact Flows (p. 1379)**
- **Metrics and Reporting (p. 1379)**
- **Contact Control Panel (CCP) (p. 1379)**

**Contact Routing**

- Resolved an issue where in rare cases some contacts were not routed to the agent that was available for the longest time.
- Resolved an issue in the user interface where the value displayed for No. of agents staffed for the Basic Routing Profile on the Routing Profiles page was incorrect. The correct number of agents for the routing profile was displayed on the User Management page.

**Contact Flows**

- Resolved an issue with the contact flow editor when adding intents in Chrome.
- Resolved an issue where routing priority and age for queued callbacks were not saved.
- Resolved an issue where contact attributes for an outbound whisper flow were not saved.

**Metrics and Reporting**

- Added EnqueueTimestamp, Duration, and DequeueTimestamp to the contact record for callback contacts.
- Resolved an issue where InitiationTimestamp for callback contacts did not match the time that the callback was created.
- Resolved an issue where users were given an incorrect message when they did not have permissions to edit a report.

**Contact Control Panel (CCP)**

- Resolved an issue where callbacks were not ringing in the CCP.

January 2019 Updates

The following updates were released in January 2019:

**Updates by category**

- **Contact Routing (p. 1380)**
- **Contact Flows (p. 1380)**
- **Metrics and Reporting (p. 1380)**


Contact Routing

• Resolved an issue where in rare cases agent transfers were failing.

Contact Flows

• Resolved an issue where agent transfers were failing.
• Resolved an issue that resulted in periodic delays in publishing flow logs.

Metrics and Reporting

• Resolved an issue in real-time metrics reports where the page showed the wrong calculation for Avg queue answer time.
• Resolved an issue where some events were missing from an agent event stream.

December 2018 Updates

The following updates were released in December 2018:

Updates by category

• Metrics and Reporting (p. 1380)
• Contact Control Panel (CCP) (p. 1380)

Metrics and Reporting

• Resolved an issue where agent event streams were missing agent snapshots during login and logout events.
• Resolved an issue where the contact record detail page displayed timestamps using the timezone selected on the search page.
• Resolved an issue where the AfterContactWork status was overridden.
• Resolved an issue where the timestamps are incorrect if an agent accidentally disconnects while placing a customer on hold.

Contact Control Panel (CCP)

• Resolved an intermittent issue with initialization when an agent configuration is corrupted or null.
• Resolved an issue where pressing Enter to transfer a call did not work.

November 2018 Updates

The following updates were released in November 2018:

Updates by category

• General (p. 1381)
• Contact Flows (p. 1381)
• Metrics and Reporting (p. 1381)
General

- Resolved an issue with auditing.
- Resolved an issue that sometimes resulted in agents being placed in a default state when a contact disconnected when attempting to connect to an agent.
- Resolved an issue that sometimes resulted in newly created agents not being able to log in correctly if the log in attempt occurred immediately after user account was created.

Contact Flows

- Added the new Loop block, which lets you loop through segments of a flow, such as requesting customer information additional times if valid data is not entered.

Metrics and Reporting

- Resolved an issue where callbacks handled were included in the count for incoming contacts in historical reports, but not counted in scheduled reports. Callbacks handled are no longer included in the count for incoming contacts handled in historical reports.
- Improved performance of report generation for reports with a large number of queues and agents in an instance.
- Resolved an issue with how ACW was reported, and backfilled data in customer instances to correct the ACW data for September, October, and November.

October 2018 Updates

The following updates were released in October 2018:

**Updates by category**

- General (p. 1381)
- Metrics and Reporting (p. 1381)
- API (p. 1381)

**General**

- Resolved an issue that sometimes resulted in stuck media sessions.

**Metrics and Reporting**

- Resolved an issue that sometimes resulted in agent names not being displayed correctly in historical reports.
- Resolved an issue that sometimes resulted in the data related to agent Auxiliary states were incorrectly overwritten.

**API**

- Resolved an issue where the GetCurrentMetrics operation returned the metric OLDEST_CONTACT_AGE in milliseconds instead of seconds.
September 2018 Updates

The following updates were released in September 2018:

Updates by category
• General (p. 1382)
• API (p. 1382)

General

• Improved page loading times for the User management page.
• Resolved an issue that sometimes caused issues loading the Queues page when there were a large number of quick connects associated with a queue.

API

• Released the UpdateContactAttributes operation for the Amazon Connect API.

August 2018 Updates

The following updates were released in August 2018:

Updates by category
• General (p. 1382)
• Contact Routing (p. 1382)
• Metrics and Reporting (p. 1382)

General

• Added a restriction of 64 characters for the password length for the administrator account created during instance creation.
• Resolved an issue where the Hours of operation page would not load when no days were selected for a saved Hours of operation configuration.

Contact Routing

• Increased the timeout for whispers to 2 minutes for outbound and queued callbacks so that agents have longer to prepare for the incoming call.

Metrics and Reporting

• Modified how the value for the Contacts abandoned metric so that calls that transfer to callbacks are not counted as abandoned contacts.

July 2018 Updates

The following updates were released in July 2018:
Updates by category

- New Features (p. 1383)
  - Caller ID number: Set in the queue or Call phone number block (p. 209)
  - Add an Amazon Lex bot to Amazon Connect (p. 564)
  - User Management APIs
  - Manage contacts in a queue (p. 480)

- General (p. 1383)
  - Added an error message when attempting to create an admin user during instance creation using "Administrator" as the user name. The user name Administrator is reserved for internal use, and cannot be used to create a user account in Amazon Connect.
  - Added support for directory user names that include consecutive dashes.
  - Added pagination when displaying security profiles in your instance so that more than 25 security profiles can be displayed.
  - Performance optimizations to reduce latency when using the StartOutboundVoiceContact API.

- Metrics and Reporting (p. 1383)
  - Resolved an issue in real-time metrics reports where applied filters were not displayed in the settings page when an additional filter was applied. The settings page now displays the applied filters correctly.

- Contact Flows (p. 1383)
  - Added drop-down menus for contact attributes to make it easier to reference attributes in a contact flows.

June 2018 Updates

The following updates were released in June 2018:

Updates by category

- General (p. 1384)
  - Telephony and Voice (p. 1384)
  - Contact Flows (p. 1384)
  - Metrics and Reporting (p. 1384)
  - Contact Control Panel (CCP) (p. 1384)
General

- Changed the font in the UI to Amazon Ember for better readability.

Telephony and Voice

- Introduced support for using Amazon Lex bots with Amazon Connect in the US West (Oregon) Region.
- Fixed a bug that in some cases caused a call to drop when a Loop prompt occurred at the same as a call connecting to an agent.

Contact Flows

- Renamed the Set queue block to Set working queue.
- Added a Copy to clipboard button next to the ARN of a flow so you can easily copy the ARN. Choose Show additional flow information under the name of the flow in the designer to display the ARN.
- Added a new Call phone number block, which lets you choose the phone number from your instance to display as the caller ID in an outbound whisper flow. For more information, see Caller ID number: Set in the queue or Call phone number block (p. 209).
- Released contact attributes for system metrics, including a new Get metrics block in contact flows. For more information, see Route based on number of contacts in a queue (p. 537).

Metrics and Reporting

- Fixed an issue that caused incorrect rendering of the search field in the filters settings for some historical metrics reports.
- Fixed an issue in downloaded reports where the phone number would be blank instead of listing the phone number for calls that were callbacks.
- Login/Logout reports now support 20,000 rows per report generation, up from 10,000.

Contact Control Panel (CCP)

- Added a mute button to the CCP and a mute function to the Streams API so agents can mute and unmute active calls.

April and May 2018 Updates

The following updates were released in April and May 2018:

Updates by category

- General (p. 1385)
- Telephony and Voice (p. 1385)
- Contact Flows (p. 1385)
- Metrics and Reporting (p. 1385)
- Contact Control Panel (CCP) (p. 1385)
General

- New Amazon Polly voices are now automatically made available in Amazon Connect as soon as they are launched. You can use new voices, such as Matthew and Léa, in your contact flows.
- Updated password enforcement for Amazon Connect user accounts to match requirements for the Amazon Connect admin account created during instance creation.
- Resolved an issue that sometimes resulted in the email addresses not being saved when updating an existing user account.

Telephony and Voice

- Service optimizations to reduce latency and improve caller ID for Japanese telephony.
- Customers can now place calls to Jersey and Guernsey in the Channel Islands.
- Added support for keypad numeric input to an Amazon Lex bots when used in an Amazon Connect contact flow. For more information, see Amazon Connect Now Supports Keypad Input with an Amazon Lex Chatbot.
- Reduced latency for the contact control panel, improving the agent user experience.

Contact Flows

- Resolved an issue with publishing a flow in the case where an AWS Lambda function block is used in a flow, and the input type for a parameter was changed from Send attribute with a System attribute is changed to Send text. These flows now publish successfully.
- Agent and customer whispers are now maintained with queued callbacks.
- Attributes now correctly persist with queue callbacks.
- Contact attributes are now maintained when using a Loop prompt block in a queue flow.

Metrics and Reporting

- Data for scheduled reports is now delayed by 15 minutes to allow for most recent data to be incorporated in to reports. Previously, in some cases, report data for the final 15 minute period during the scheduled report interval did not get included in scheduled reports. This applies to all report types.
- In metric calculations, the time that an incoming call rings is attributed to idle time if the agent is in idle state before an incoming call.
- The metric Agent on contact time now includes time that an agent spent in an auxiliary busy state.
- Published new documentation about metrics.

Contact Control Panel (CCP)

- Added a Save button to the settings menu for the CCP when an agent is using a desk phone. The Save button saves the deskphone configuration between sessions.
- Agent username is now available as part of agent configuration data in the Amazon Connect Streams API.
- Contact attributes are now available when using the streams.js (Streams API) for screenpops after queued callbacks.
- Fixed issue where for some auto-accept calls, the agent continued to hear ringing after accepting and joining the call.
Get administrative support for Amazon Connect

If you are an administrator and need to contact support for Amazon Connect, choose one of the following options:

- If you have an AWS Support account, go to Support Center and submit a ticket.
- Otherwise, open the AWS Management Console and choose Amazon Connect, Support, Create case.

It's helpful to provide the following information:

- Your contact center instance ID/ARN. To find your instance ARN, see Find your Amazon Connect instance ID/ARN (p. 131).
- Your region.
- A detailed description of the issue.
The following table describes important changes in each release of the Amazon Connect Administrator Guide. For notification about updates to this documentation, subscribe to the RSS feed.

<table>
<thead>
<tr>
<th>Change</th>
<th>Description</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rules Function language (p. 1387)</td>
<td>The Rules Function language is a JSON-based representation of a series of rule conditions. Use it to programmatically add conditions to rules. For more information, see Amazon Connect Rules Function language in the Amazon Connect API Reference Guide.</td>
<td>December 7, 2022</td>
</tr>
<tr>
<td>Search contacts by agent's first or last name is available in AWS GovCloud (p. 1387)</td>
<td>For more information, see Search contacts by agent's first or last name.</td>
<td>December 5, 2022</td>
</tr>
<tr>
<td>GA for Rules APIs (p. 1387)</td>
<td>Released a set of Rules APIs that enable you to programmatically create and manage rules. For more information, see Rules actions in the Amazon Connect API Reference.</td>
<td>December 5, 2022</td>
</tr>
<tr>
<td>GA for Forecasting, scheduling, and capacity planning (p. 1387)</td>
<td>Released Forecasting, scheduling, and capacity planning for General Availability. These features help you have the right number of agents working at the right times to achieve your operational goals. For more information, see Forecasting, capacity planning, and scheduling.</td>
<td>November 29, 2022</td>
</tr>
<tr>
<td>Create step-by-step guides for your agents (p. 1387)</td>
<td>Inside the out-of-the-box Connect agent workspace, you can now create workflows that walk agents through custom UI pages that suggest what to do at a given moment during a customer interaction. You can create guides that help agents identify customer issues and recommend subsequent actions, as well as surface screen-pops and forms for submitting transactions and disposition codes. For more information, see Agent Workspace guided experience.</td>
<td>November 29, 2022</td>
</tr>
<tr>
<td>Feature</td>
<td>Description</td>
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<tr>
<td>Contact Lens supports chat (p. 1387)</td>
<td>Contact Lens for Amazon Connect provides conversational analytics capabilities for Amazon Connect chat, extending the machine learning powered analytics to better assess chat contacts. For more information, see <a href="#">Analyze conversations using Contact Lens for Amazon Connect</a>.</td>
<td>November 29, 2022</td>
</tr>
<tr>
<td>Added evaluation form features to Contact Lens (Preview) (p. 1387)</td>
<td>You can create evaluation forms, and then make them available to managers to review conversations along side contact details, recordings, transcripts, and summaries, without the need to switch applications. Conversational analytics automatically pre-populates evaluation scores for criteria like script adherence, sensitive data collection, and customer greetings. For more information, see <a href="#">Evaluate performance (Preview)</a>.</td>
<td>November 29, 2022</td>
</tr>
<tr>
<td>Added configurable Lex timeouts in chat (p. 1387)</td>
<td>You can configure how long to wait for a response from a customer in a chatbot conversation before the session expires. For more information, see <a href="#">Configurable time-outs for chat input</a> in the Get customer input topic.</td>
<td>November 22, 2022</td>
</tr>
<tr>
<td>Create rules that send email notifications (p. 1387)</td>
<td>You can create Contact Lens rules that send email notifications to people in your organization. For more information, see <a href="#">Create Contact Lens rules that send email notifications</a>.</td>
<td>November 17, 2022</td>
</tr>
<tr>
<td>Added MonitorContact API (p. 1387)</td>
<td>Added a new API for programmatically initiating monitoring of ongoing contacts. For more information, see <a href="#">MonitorContact API</a>.</td>
<td>November 17, 2022</td>
</tr>
<tr>
<td>Feature</td>
<td>Description</td>
<td>Date</td>
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</tr>
<tr>
<td>Search for profiles using multiple search keys (p. 1387)</td>
<td>In addition to searching for profiles with a single search key (i.e., a key-values(s) pair), the SearchProfiles API has been enhanced to support searching for profiles using multiple keys and logical operators. This new functionality allows you to use between 1 and 5 search keys with AND or OR logic to find profiles with attributes that match the search criteria. For more information, see the SearchProfiles API reference.</td>
<td>November 14, 2022</td>
</tr>
<tr>
<td>Increased Cases domain quota from 2 to 5 (p. 1387)</td>
<td>Increased the default maximum number of Cases domains per AWS account from 2 to 5. For more information, see Amazon Connect Cases service quotas.</td>
<td>November 9, 2022</td>
</tr>
<tr>
<td>Added new fields to the GetFederationToken response payload (p. 1387)</td>
<td>Added SignInUrl, UserArn, and UserId to the GetFederationToken response payload.</td>
<td>November 9, 2022</td>
</tr>
<tr>
<td>Added ability to disable case templates through the UpdateTemplate API (p. 1387)</td>
<td>Disabling templates prevents users from creating cases by using the template. For more information, see the Amazon Connect Cases API Reference.</td>
<td>November 9, 2022</td>
</tr>
<tr>
<td>Renamed external quick connects to phone number quick connects (p. 1387)</td>
<td>For more information, see Types of quick connects.</td>
<td>November 8, 2022</td>
</tr>
<tr>
<td>Delete quick connects using the Amazon Connect console (p. 1387)</td>
<td>For more information, see Delete quick connects.</td>
<td>November 4, 2022</td>
</tr>
<tr>
<td>Added DismissUserContact API (p. 1387)</td>
<td>Added a new API for programmatically clearing the notifications agents receive after they have missed or rejected a contact, making them eligible to be routed new contacts. This API can also be used to clear similar notifications when an agent encounters an error with accepting the contact or is handling After Contact Work. For more information, see the DismissUserContact API reference.</td>
<td>November 1, 2022</td>
</tr>
<tr>
<td>Feature</td>
<td>Description</td>
<td>Date</td>
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</tr>
<tr>
<td>Added secondary email address and mobile number to user account</td>
<td>You can now add a secondary email address and mobile number to a user account. For more information, see Add users to Amazon Connect.</td>
<td>October 28, 2022</td>
</tr>
<tr>
<td>Enhanced 911 (E911)</td>
<td>Enhanced 911 (E911) enables location information to be sent to 911 dispatch when a 911 call is placed. In addition to connecting a user with 911 emergency services, customers in the United States can build E911 capabilities to automatically provide the caller's address information to 911 dispatchers. For more information, see Set up US emergency calling in Amazon Connect.</td>
<td>October 21, 2022</td>
</tr>
<tr>
<td>GA for Amazon Connect Global Resiliency</td>
<td>Released Amazon Connect Global Resiliency for General Availability. It enables you to provide customer service anywhere in the world with the highest reliability, performance, and efficiency, while meeting international regulatory requirements. For more information, see Set up Amazon Connect Global Resiliency.</td>
<td>October 19, 2022</td>
</tr>
<tr>
<td>Corrected Wisdom service quota</td>
<td>The originally published quota for Content per knowledge base was incorrect. Corrected the documentation to indicate the quota is 5,000.</td>
<td>October 17, 2022</td>
</tr>
<tr>
<td>Feature specifications for the integration association resource</td>
<td>For more information, see Integration association resource feature specifications.</td>
<td>October 13, 2022</td>
</tr>
<tr>
<td>Added Ctrl+Shift+F to search flow block titles and metadata</td>
<td>For more information, see the Release notes.</td>
<td>October 10, 2022</td>
</tr>
<tr>
<td>GA for Amazon Connect Cases</td>
<td>We've released Amazon Connect Cases for General Availability. Amazon Connect Cases allows your agents to quickly track and manage customer issues that require multiple interactions, follow-up tasks, and teams in your contact center. For more information, see Amazon Connect Cases and Amazon Connect Cases API Reference.</td>
<td>October 3, 2022</td>
</tr>
<tr>
<td>Feature</td>
<td>Description</td>
<td>Date</td>
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</tr>
<tr>
<td>Updated flow designer</td>
<td>We've released a number of improvements to the flow designer experience to make building and editing flows easier. For a detailed list of changes, see Updated flow designer in the Release notes.</td>
<td>September 24, 2022</td>
</tr>
<tr>
<td>Search for Amazon Connect users by first name, last name, and more</td>
<td>You can search for Amazon Connect users by first name, last name, user login, agent hierarchy, security profile, and routing profile. For example, you can search for all Amazon Connect users who have the first name &quot;Jane.&quot;</td>
<td>September 22, 2022</td>
</tr>
<tr>
<td>Visualize historical queue data</td>
<td>You can now visualize historical queue data via time series graphs to help identify patterns, trends, and outliers specifically for Service Level, Contacts Queued, and Average Handle Time. For more information, see Visualize: Queue dashboard.</td>
<td>September 21, 2022</td>
</tr>
<tr>
<td>Voice spoofing</td>
<td>Use Voice ID to evaluate calls for voice spoofing. For more information, see Voice spoofing detection and the Amazon Connect Voice ID API Reference.</td>
<td>August 29, 2022</td>
</tr>
<tr>
<td>Released SearchSecurityProfiles API</td>
<td>Added a new API for programmatically searching security profiles. For more information, see SearchSecurityProfiles.</td>
<td>August 19, 2022</td>
</tr>
<tr>
<td>Released Schedule Adherence (Preview)</td>
<td>Contact center supervisors or managers track schedule adherence to understand when agents are following the schedule that you have created. This helps ensure you achieve your service level targets, while improving agent productivity and customer satisfaction. For more information, see Schedule Adherence.</td>
<td>August 1, 2022</td>
</tr>
<tr>
<td>Attachments per chat conversation now at 35</td>
<td>Updated the limit for attachments per chat conversations from 5 to 35. See Feature specifications.</td>
<td>July 20, 2022</td>
</tr>
<tr>
<td>Added Voice ID Flow language actions (p. 1387)</td>
<td>Added topics for the following Voice ID Flow language actions: CheckOutboundCallStatus, CheckVoiceId, and StartVoiceIdStream.</td>
<td>July 19, 2022</td>
</tr>
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<tr>
<td>Search for contacts by using the agent's first or last name (p. 1387)</td>
<td>You can search for contacts using the agent's first or last name. The filter name is Agent. To view an image of this experience, see Search for contacts by using the agent's first or last name.</td>
<td>July 15, 2022</td>
</tr>
<tr>
<td>Released updates for rich text format rendering (p. 1387)</td>
<td>On the Contact Search and Contact Detail pages, you can now view chat transcripts that have rich text formatting, such as bold or italic font, bullet points, numbered lists, and hyperlinks. For more information about getting started with Amazon Connect Chat, see Set up your customer's chat experience.</td>
<td>July 13, 2022</td>
</tr>
<tr>
<td>View call transcript in CCP or agent application (p. 1387)</td>
<td>For more information, see View a call transcript during ACW.</td>
<td>July 7, 2022</td>
</tr>
<tr>
<td>Added feature specifications for Contact Lens (p. 1387)</td>
<td>For more information, see Contact Lens for Amazon Connect feature specifications.</td>
<td>July 1, 2022</td>
</tr>
<tr>
<td>Support for Lex intent confidence scores and sentiment analysis (p. 1387)</td>
<td>You can further personalize the automated self-service customer experience using Amazon Lex intent confidence scores and sentiment analysis as a branch within your flows. For more information, see the Get customer input block. For a list of new contact attributes see Amazon Lex contact attributes.</td>
<td>June 29, 2022</td>
</tr>
<tr>
<td>GA for Amazon Connect Outbound Campaigns (p. 1387)</td>
<td>Released Amazon Connect Outbound Campaigns, formally known as High-volume outbound communications, for General Availability. This release includes a set of APIs for creating and managing outbound campaigns. For more information, see Enable Amazon Connect outbound campaigns and Amazon Connect Amazon Connect Outbound Campaigns API Reference.</td>
<td>June 20, 2022</td>
</tr>
<tr>
<td>Feature</td>
<td>Description</td>
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<tr>
<td><strong>Amazon Connect Cases (Preview)</strong> (p. 1387)</td>
<td>Amazon Connect Cases (Preview) allows your agents to quickly track and manage customer issues that require multiple interactions, follow-up tasks, and teams in your contact center. For more information, see Amazon Connect Cases (Preview) and Amazon Connect Cases API Reference (Preview).</td>
<td>June 20, 2022</td>
</tr>
<tr>
<td><strong>Updated Amazon Lex bot per instance quota</strong> (p. 1387)</td>
<td>Updated the Amazon Lex bot per instance quota from 50 to 70. For more information, see Amazon Connect service quotas.</td>
<td>June 7, 2022</td>
</tr>
<tr>
<td><strong>New GetCurrentUserData API</strong> (p. 1387)</td>
<td>Released the GetCurrentUserData API. It enables you to return the real-time active user data from the specified Amazon Connect instance.</td>
<td>June 6, 2022</td>
</tr>
<tr>
<td><strong>Released task templates</strong> (p. 1387)</td>
<td>You can now create custom task templates, making it easy for agents to consistently capture the relevant and required information to create or complete tasks. For more information, see Create task templates. For information about using the API to programmatically create and manage task templates, see the Amazon Connect API Reference and the Amazon Connect Resource Type Reference in the AWS CloudFormation User Guide.</td>
<td>June 2, 2022</td>
</tr>
<tr>
<td><strong>New API to transfer contacts</strong> (p. 1387)</td>
<td>Added a new API that you can use to transfer contacts from one agent or queue to another agent or queue at any point after a contact is created. For information, see TransferContact in the Amazon Connect API Reference.</td>
<td>June 2, 2022</td>
</tr>
<tr>
<td><strong>Updated workflow for outbound campaigns</strong> (p. 1387)</td>
<td>Updated the workflow for onboarding to outbound campaigns using the Amazon Connect and Amazon Pinpoint user interface. For more information, see Enable outbound campaigns.</td>
<td>May 27, 2022</td>
</tr>
<tr>
<td>Category</td>
<td>Description</td>
<td>Date</td>
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<tr>
<td>Voice ID expires speakers (p. 1387)</td>
<td>For BIPA Compliance, Amazon Connect Voice ID automatically expires speakers that have not been accessed for enrollment, re-enrollment, or successful authentication for three years. You can see a speaker's last access time by looking at the <code>last Accessed At</code> attribute returned by the <code>DescribeSpeaker</code> and <code>ListSpeakers</code> APIs, and the <code>What data is stored?</code> section of the Amazon Connect Admin Guide.</td>
<td>May 25, 2022</td>
</tr>
<tr>
<td>Search Voice ID results (p. 1387)</td>
<td>Added topic Search and review Voice ID results.</td>
<td>April 28, 2022</td>
</tr>
<tr>
<td>New API to change agent's current status (p. 1387)</td>
<td>Amazon Connect provides an API to programmatically change the current status of an agent. <code>Agent statuses</code> are used to determine when an agent is <code>Available</code> to be routed contacts in Amazon Connect, versus when they are set to <code>Offline</code> or a custom status such as <code>Lunch</code> or <code>Break</code> and should not be routed contacts. For more information, see <code>PutUserStatus</code> in the Amazon Connect API Reference.</td>
<td>April 28, 2022</td>
</tr>
<tr>
<td>New APIs (p. 1387)</td>
<td>Added API to search for user records by first name, last name, username, routing profile, security profile, agent hierarchies or tags. Added API to claim new phone numbers and configure them programmatically. For more information, see the Amazon Connect API Reference.</td>
<td>April 25, 2022</td>
</tr>
<tr>
<td>Multi-party calls (p. 1387)</td>
<td>You can enable Amazon Connect to allow up to six parties on a call: the agent, the caller, and four more participants. For more information, including a comparison of how multi-party calling differs from the default three-party calling, see <code>Telephony: Multi-party calls</code>.</td>
<td>April 6, 2022</td>
</tr>
<tr>
<td>Feature</td>
<td>Description</td>
<td>Date</td>
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<tr>
<td>Play prompts from an Amazon S3 bucket (p. 1387)</td>
<td>Added the ability to source prompts from an Amazon S3 bucket. This enables you to store as many voice prompts as needed in Amazon S3 and access them in real time using contact attributes in the following flow blocks that play prompts: Get customer input, Loop prompts, Play prompt, and Store customer input.</td>
<td>April 5, 2022</td>
</tr>
<tr>
<td>Real-time contact analysis segment streams (p. 1387)</td>
<td>Added support for accessing Contact Lens analytics in near real-time. For more information, see Use streaming for real-time contact analysis.</td>
<td>March 28, 2022</td>
</tr>
<tr>
<td>Rich messaging for chat (p. 1387)</td>
<td>Added support for rich messaging for your customer's chat experience. Agents and customers can use bold, italic, bulleted lists, numbered list, hyperlinks, and attachments. For more information, see Enable text formatting for your customer's chat experience.</td>
<td>March 13, 2022</td>
</tr>
<tr>
<td>Object type mapping user interface (p. 1387)</td>
<td>Added a user interface for creating object type mapping by using the Amazon Connect admin console. For more information, see Create an object type mapping.</td>
<td>March 8, 2022</td>
</tr>
<tr>
<td>Updates to AmazonConnectServiceLinkedRolePolicy (p. 1387)</td>
<td>Added actions for Amazon CloudWatch metrics. For more information, see Amazon Connect updates to AWS managed policies.</td>
<td>February 22, 2022</td>
</tr>
<tr>
<td>Added bulk ingestion of data for Customer Profiles (p. 1387)</td>
<td>For more information, see Bulk ingestion of data in the Set up integration for Salesforce, ServiceNow, Marketo, or Zendesk topic.</td>
<td>February 21, 2022</td>
</tr>
<tr>
<td>New quotas for APIs (p. 1387)</td>
<td>For StartChatContact, StartContactStreaming, StopContactStreaming, a RateLimit of 5 requests per second, and a BurstLimit of 8 requests per second.</td>
<td>February 11, 2022</td>
</tr>
<tr>
<td>Feature and Changes</td>
<td>Added</td>
<td>Date</td>
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<tr>
<td>New CloudWatch metrics for chat (p. 1387)</td>
<td>Added the following Amazon CloudWatch metrics for chat: <code>ConcurrentActiveChats</code>, <code>ConcurrentActiveChatsPercentage</code>, <code>ChatBreachingActiveChatQuota</code>, and <code>SuccessfulChatsPerInterval</code>. For more information, see Monitoring your instance using CloudWatch.</td>
<td>February 11, 2022</td>
</tr>
<tr>
<td>Documented Rules feature specifications (p. 1387)</td>
<td>Documented the feature specifications for Amazon Connect Rules. For more information, see Amazon Connect Rules feature specifications.</td>
<td>January 28, 2022</td>
</tr>
<tr>
<td>Documented Identity Resolution quotas (p. 1387)</td>
<td>Documented three quotas for Identity Resolution. For more information, see Customer Profiles quotas.</td>
<td>January 28, 2022</td>
</tr>
<tr>
<td>Configure maximum chat duration (p. 1387)</td>
<td>You can configure the total duration per chat to be up to 7 days, including wait time. For more information, see the ChatDurationInMinutes parameter in the StartChatContact API.</td>
<td>January 27, 2022</td>
</tr>
<tr>
<td>Contact Lens supports custom vocabularies (p. 1387)</td>
<td>For more information, see Add custom vocabularies.</td>
<td>January 25, 2022</td>
</tr>
<tr>
<td>Released tagging support for UserHierarchyGroup resource (p. 1387)</td>
<td>For more information, see CreateUserHierarchyGroup.</td>
<td>January 20, 2022</td>
</tr>
<tr>
<td>Chat widget supports browser notifications (p. 1387)</td>
<td>For more information, see Browser notifications.</td>
<td>December 21, 2021</td>
</tr>
<tr>
<td>Integrate Customer Profiles with Segment and Shopify (p. 1387)</td>
<td>For more information, see Set up integration for Segment and Set up integration for Shopify.</td>
<td>December 20, 2021</td>
</tr>
<tr>
<td>Updated compliance for tasks (p. 1387)</td>
<td>Tasks is in compliance with GDPR, and is approved for SOC, PIC, HITRUST, ISO, and HIPAA.</td>
<td>December 17, 2021</td>
</tr>
<tr>
<td>Released unified agent application (p. 1387)</td>
<td>Amazon Connect released the unified agent application to improve the agent experience and customer interactions. For more information, see Agent training guide.</td>
<td>November 30, 2021</td>
</tr>
<tr>
<td>Event Description</td>
<td>Details</td>
<td>Date</td>
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</tr>
<tr>
<td>Released call summarization (p. 1387)</td>
<td>Contact Lens for Amazon Connect provides the option for you to view a transcript summary. The summary shows only those lines where Contact Lens has identified an issue, outcome, or action item in the transcript. For more information, see View call summary.</td>
<td>November 30, 2021</td>
</tr>
<tr>
<td>Documented Average API Connecting Time (p. 1387)</td>
<td>Documented the real-time metric Average API Connecting Time. For more information, see Average API Connecting Time.</td>
<td>November 26, 2021</td>
</tr>
<tr>
<td>Released Identity Resolution to consolidate similar profiles (p. 1387)</td>
<td>Amazon Connect Customer Profiles offers Identity Resolution, a feature that is designed to automatically detect similar customer profiles by comparing name, email address, phone number, date of birth, and address. For more information, see Use Identity Resolution to consolidate similar profiles and the Amazon Connect Customer Profiles API Reference.</td>
<td>November 24, 2021</td>
</tr>
<tr>
<td>Updated Customer Profiles service quotas (p. 1387)</td>
<td>Amazon Connect Customer Profiles now supports 1000 objects per profile (increased from 100), and 50MB Maximum size of all objects for a profile (increased from 5MB). For more information, see Amazon Connect Customer Profiles service quotas.</td>
<td>November 23, 2021</td>
</tr>
<tr>
<td>Amazon Connect Customer Profiles stores contact history at no charge (p. 1387)</td>
<td>Amazon Connect Customer Profiles now provides contact history and customer information together in unified customer profiles at no charge, helping contact center managers personalize the contact center experience. In new instances, Customer Profiles is enabled by default. For more information, see Step 4: Data Storage in the Create an Amazon Connect instance topic.</td>
<td>November 23, 2021</td>
</tr>
<tr>
<td>Feature</td>
<td>Description</td>
<td>Date</td>
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</tr>
<tr>
<td>New APIs to archive/unarchive and delete flows (p. 1387)</td>
<td>Added new APIs that provide a programmatic and flexible way to manage your library of flows at scale. For example, flows used only during certain times of the year can be archived when not in use and then unarchived when needed. You can now also delete a flow so it is no longer available for use. For more information, see the Amazon Connect API Reference.</td>
<td>November 22, 2021</td>
</tr>
<tr>
<td>Added modular flows to help you create common functions (p. 1387)</td>
<td>Flow modules are reusable sections of a flow. You can create them to extract repeatable logic across your flows, and create common functions. For more information, see Flow modules for reusable functions.</td>
<td>November 22, 2021</td>
</tr>
<tr>
<td>Search contacts by custom contact attributes (p. 1387)</td>
<td>Added support for searching contacts by custom contact attributes (also called user-defined attributes). For more information, see Search by custom contact attributes.</td>
<td>November 15, 2021</td>
</tr>
<tr>
<td>Added Customer profiles block (p. 1387)</td>
<td>Added the Customer profiles block. It enables you to retrieve, create, and update a customer profile.</td>
<td>November 15, 2021</td>
</tr>
<tr>
<td>Updated AmazonConnect_FullAccess (p. 1387)</td>
<td>Added permissions for managing Amazon Connect Customer Profiles. See Amazon Connect updates to AWS managed policies.</td>
<td>November 12, 2021</td>
</tr>
<tr>
<td>Released security profiles APIs (p. 1387)</td>
<td>Added APIs so you can create and manage security profiles programmatically. For more information, see the Amazon Connect API Reference.</td>
<td>November 12, 2021</td>
</tr>
<tr>
<td>Released scheduled tasks (p. 1387)</td>
<td>Added the ability to schedule tasks up to six days in the future to follow-up on customer issues when promised. You can also update the scheduled date and time using the UpdateContactSchedule API. For more information, see the Create task block and the Create a task topic in the Agent training guide.</td>
<td>November 12, 2021</td>
</tr>
<tr>
<td><strong>Released Contact APIs (p. 1387)</strong></td>
<td>Added APIs so you can get and update contact details programmatically. For example, you can describe contact details such as queue information, chat attachments, task references, and update contact information such as task name. For more information, see DescribeContact, UpdateContact, and ListReferences in the Amazon Connect API Reference.</td>
<td>November 12, 2021</td>
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</tr>
<tr>
<td><strong>Changes to real-time metrics agent tables (p. 1387)</strong></td>
<td>We are rolling out a new service to maintain the high availability from metrics that you expect from Amazon Connect. Due to this change, the agent tables are sorted by agent status instead of by agent login. Additionally, the queues and routing profiles table are sorted by agents online instead of by queue or routing profile name.</td>
<td>November 12, 2021</td>
</tr>
<tr>
<td><strong>Added actions to AmazonConnectServiceLinkedRolePolicy</strong></td>
<td>Added actions for Amazon Connect Customer Profiles. See Amazon Connect updates to AWS managed policies.</td>
<td>November 12, 2021</td>
</tr>
<tr>
<td><strong>Added new metrics (p. 1387)</strong></td>
<td>Added following new historical metrics: Contacts transferred in by agent and Contacts transferred out by agent. Added new real-time metrics: Transferred in by agent and Transferred out by agent. See Historical metrics definitions and Real-time metrics definitions.</td>
<td>November 9, 2021</td>
</tr>
<tr>
<td><strong>Released real-time chat message streaming (p. 1387)</strong></td>
<td>You can subscribe to a real-time stream of chat messages. For more information, see Enable real-time chat message streaming.</td>
<td>October 29, 2021</td>
</tr>
<tr>
<td><strong>Cross-service confused deputy prevention for Customer Profiles (p. 1387)</strong></td>
<td>Updated Cross-service confused deputy prevention with more sample policies you can apply for Amazon Connect Customer Profiles.</td>
<td>October 26, 2021</td>
</tr>
<tr>
<td>Change</td>
<td>Details</td>
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<tr>
<td>GA for HoursOfOperation APIs (p. 1387)</td>
<td>Released the Amazon Connect HoursOfOperation APIs for general availability (GA). Also launched AWS CloudFormation support for Users, User Hierarchies, and Hours of Operation. For more information, see the Amazon Connect API Reference and the AWS CloudFormation User Guide.</td>
<td></td>
</tr>
<tr>
<td>Example: Programmatically integrate S3 with Customer Profiles (p. 1387)</td>
<td>Added a topic that shows how to programmatically integrate S3 with Customer Profiles.</td>
<td></td>
</tr>
<tr>
<td>Cross-service confused deputy prevention (p. 1387)</td>
<td>Added a topic with example policies you can apply for Cross-service confused deputy prevention.</td>
<td></td>
</tr>
<tr>
<td>How long unanswered callbacks stay in queue (p. 1387)</td>
<td>In the Set up queued callback topic, clarified that unanswered queued callbacks stay in queue at least 7 days and up to 14 days before Amazon Connect automatically removes them.</td>
<td></td>
</tr>
<tr>
<td>Corrected errors in Service quota topic (p. 1387)</td>
<td>Corrected errors in the Service quotas topic: For Amazon Connect Wisdom, Maximum size per document is 1MB not 10MB. For Amazon Connect Customer Profiles, the name of the quota is Object Types per domain not Objects per domain. Updated the Amazon Connect Voice ID quotas table with correct information.</td>
<td></td>
</tr>
<tr>
<td>Preview release of outbound campaigns (p. 1387)</td>
<td>Added content for the preview release of outbound campaigns. By using Amazon Pinpoint Journeys and Amazon Connect, you can now create outbound campaigns for voice, SMS, and email. For more information, see Enable outbound campaigns.</td>
<td></td>
</tr>
<tr>
<td>Feature/Update</td>
<td>Description</td>
<td>Date</td>
</tr>
<tr>
<td>-------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>--------------------</td>
</tr>
<tr>
<td><strong>New Amazon AppIntegrations Service APIs (p. 1387)</strong></td>
<td>New DataIntegration APIs for the Amazon AppIntegrations Service: CreateDataIntegration, DeleteDataIntegration, GetDataIntegration, ListDataIntegrationAssociations, ListDataIntegrations, UpdateDataIntegration. For more information, see Amazon AppIntegrations Service API Reference.</td>
<td>September 27, 2021</td>
</tr>
<tr>
<td><strong>Amazon Connect Wisdom - General Availability (p. 1387)</strong></td>
<td>For more information, see Deliver information to agents using Amazon Connect Wisdom and the Amazon Connect Wisdom API Reference.</td>
<td>September 27, 2021</td>
</tr>
<tr>
<td><strong>Amazon Connect Voice ID - General Availability (p. 1387)</strong></td>
<td>For more information, see Use real-time caller authentication with Voice ID and the Amazon Connect Voice ID API Reference.</td>
<td>September 27, 2021</td>
</tr>
<tr>
<td><strong>Added new service-linked role policy (p. 1387)</strong></td>
<td>Added AmazonConnectVoiceIDFullAccess. Use this AWS managed policy so you can set up your users to use Voice ID. This policy provides full access to Amazon Connect Voice ID through the AWS console, SDK, or other means. For more information, see AWS managed policy: AmazonConnectVoiceIDFullAccess.</td>
<td>September 27, 2021</td>
</tr>
<tr>
<td><strong>Added new service-linked role policy (p. 1387)</strong></td>
<td>Added AmazonConnectCampaignsServiceLinkedRolePolicy, a new service-linked role policy for outbound campaigns. The policy provides access to retrieve all the outbound campaigns. For more information, see Enable outbound campaigns.</td>
<td>September 27, 2021</td>
</tr>
<tr>
<td>Feature</td>
<td>Description</td>
<td>Date</td>
</tr>
<tr>
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</tr>
<tr>
<td>Display name and contact attributes in chat (p. 1387)</td>
<td>You can now personalize the chat experience, as you can specify the name of your customer that interacts using the chat user interface. You can also securely pass the contact attributes to capture information about the contact which can be used in the flow to further personalize the experience. For more information, see Pass the customer display name when a chat initializes and Pass contact attributes when a chat initializes.</td>
<td>September 17, 2021</td>
</tr>
<tr>
<td>Preview of agent application (p. 1387)</td>
<td>Launched an updated UI for the agent application preview that combines Customer Profiles and the Contact Control Panel (CCP). For more information, see Access Customer Profiles in the agent application.</td>
<td>September 16, 2021</td>
</tr>
<tr>
<td>Added Create task block (p. 1387)</td>
<td>Added the Create task block. It creates a new task, sets the tasks attributes, and initiates a flow to start the task. For more information, see Flow block: Create task.</td>
<td>September 16, 2021</td>
</tr>
<tr>
<td>More languages for Contact Lens (p. 1387)</td>
<td>Contact Lens now supports the following languages for post-call and real-time analytics: Japanese, Korean, and Mandarin. The following languages are supported for real-time analytics: French (Canada), French (France), Portuguese (Brazil), German (Germany), and Italian (Italy). For more information, see Contact Lens for Amazon Connect in the Languages supported by Amazon Connect topic.</td>
<td>September 13, 2021</td>
</tr>
<tr>
<td>Updated historical metrics definitions (p. 1387)</td>
<td>Updated the definitions of Contacts transferred in and Contacts transferred out. For more information, see Historical metrics definitions.</td>
<td>September 10, 2021</td>
</tr>
<tr>
<td>Feature</td>
<td>Description</td>
<td>Date</td>
</tr>
<tr>
<td>---------</td>
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</tr>
<tr>
<td>Improved user interface for Amazon Connect console (p. 1387)</td>
<td>Released a redesigned user interface for the Amazon Connect console, making it easier and faster to manage Amazon Connect instances. For more information, see Create an Amazon Connect instance.</td>
<td>August 27, 2021</td>
</tr>
<tr>
<td>Customer Profiles is HIPAA compliant (p. 1387)</td>
<td>Customer Profiles is now HIPAA compliant. Removed note stating it is not.</td>
<td>August 23, 2021</td>
</tr>
<tr>
<td>Porting numbers in Singapore (p. 1387)</td>
<td>Updated documentation requirements. For more information, see Singapore in the Region requirements for ordering and porting phone numbers topic.</td>
<td>August 10, 2021</td>
</tr>
<tr>
<td>APIs for hours of operation and agent status (p. 1387)</td>
<td>Released for ungated preview new APIs for managing hours of operation and agent status. For more information, see Amazon Connect Service API Reference.</td>
<td>August 6, 2021</td>
</tr>
<tr>
<td>Contact Lens rules create tasks and EventBridge events (p. 1387)</td>
<td>Contact Lens rules now allow you to generate tasks and EventBridge events based on uttered keywords, sentiment scores, customer attributes, and other criteria. For more information, see Build rule with Contact Lens.</td>
<td>August 5, 2021</td>
</tr>
<tr>
<td>Countries you can call by default (p. 1387)</td>
<td>We have updated the list of countries you can call by default when you create a new instance in a given Region. For more information, see Countries you can call.</td>
<td>August 4, 2021</td>
</tr>
<tr>
<td>Add AWS Global Accelerator to your allowlist (p. 1387)</td>
<td>When using SAML Sign-In to your Amazon Connect instance, you now need to add the AWS Global Accelerator domain, *awsglobalaccelerator.com, to your allow list. For more information, see Set up your network.</td>
<td>August 3, 2021</td>
</tr>
<tr>
<td>New &quot;Next status&quot; feature (p. 1387)</td>
<td>To help agents manage their time, we have released a feature that lets agents pause new contacts being routed to them while they finish their current contacts. For more information, see &quot;Next status&quot; feature for the CCP.</td>
<td>July 30, 2021</td>
</tr>
<tr>
<td>Update to Contact search functionality (p. 1387)</td>
<td>To use the <strong>Agent</strong> filter on the <strong>Contact search</strong> page, in your Amazon Connect security profile you must have <strong>Users - View</strong> permissions. For more information, see <strong>Contact search:</strong> To search contacts by Agent login requires Users - View permissions in your security profile.</td>
<td>July 23, 2021</td>
</tr>
<tr>
<td>Added two task metrics sent to CloudWatch (p. 1387)</td>
<td>Amazon Connect sends the following two new metrics to CloudWatch: <strong>ConcurrentTasks</strong> and <strong>ConcurrentTasksPercentage</strong>. For more information, see <strong>Monitoring your instance using CloudWatch.</strong></td>
<td>July 7, 2021</td>
</tr>
<tr>
<td>Updated required permissions for custom IAM policies (p. 1387)</td>
<td>Added permissions for Amazon Lex. For more information, see <strong>Amazon Connect updates to AWS managed policies.</strong></td>
<td>June 29, 2021</td>
</tr>
<tr>
<td>Apple Messages for Business GA (p. 1387)</td>
<td>Released Apple Messages for Business for general availability (GA). For more information, see <strong>Enable Apple Messages for Business.</strong></td>
<td>June 28, 2021</td>
</tr>
<tr>
<td>Quick connects management API GA (p. 1387)</td>
<td>Released Amazon Connect quick connects management API for general availability (GA). For more information, see <strong>Amazon Connect Service API Reference.</strong> The quick connects API also supports AWS CloudFormation. For more information, see <strong>Amazon Connect Resource Type Reference in the AWS CloudFormation User Guide.</strong></td>
<td>June 24, 2021</td>
</tr>
<tr>
<td>Added service quota for Amazon Lex V2 bot aliases per instance = 100 (p. 1387)</td>
<td>For more information about service quotas, see <strong>Amazon Connect service quotas.</strong></td>
<td>June 17, 2021</td>
</tr>
<tr>
<td>Support for Amazon Lex V2 console and APIs (p. 1387)</td>
<td>For information on using the Amazon Lex V2 console, see <strong>Add an Amazon Lex bot.</strong> Added these three APIs: AssociateLexBot, DisassociateLexBot, and ListLexBots. See the <strong>Amazon Connect Service API Reference.</strong></td>
<td>June 15, 2021</td>
</tr>
<tr>
<td>Coming soon: Faster load times for Real-time metrics page (p. 1387)</td>
<td>Rollout to all Regions July 19, 2021, to September 19, 2021, subject to change. For more information, see Upcoming change: Faster reload times for the Real-time metrics page.</td>
<td>June 11, 2021</td>
</tr>
<tr>
<td>---</td>
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</tr>
<tr>
<td>Coming soon: New DatIntegation APIs (p. 1387)</td>
<td>On May 20, 2021, we published that new DatIntegation APIs were added to the Amazon AppIntegrations service. These APIs are not yet available.</td>
<td>June 8, 2021</td>
</tr>
<tr>
<td>Chat agent concurrency increased (p. 1387)</td>
<td>Increased chat agent concurrency from 5 to 10. For more information, see Create a routing profile.</td>
<td>June 7, 2021</td>
</tr>
<tr>
<td>Object type mapping for Customer Profiles (p. 1387)</td>
<td>Added object type mapping for the Customer Profiles standard profile. For more information, see the Object type mapping for the standard profile.</td>
<td>June 1, 2021</td>
</tr>
<tr>
<td>Channels supported by blocks (p. 1387)</td>
<td>Added a topic that lists all the blocks and which channels each one supports. For more information, see the Channels each block supports.</td>
<td>May 18, 2021</td>
</tr>
<tr>
<td>Added contact events (p. 1387)</td>
<td>For more information, see the Amazon Connect contact events.</td>
<td>May 12, 2021</td>
</tr>
<tr>
<td>Announced upcoming change to Agent audit report (p. 1387)</td>
<td>In a future release, you'll be able to download the Agent audit report. For more information, see the Upcoming changes: Download the Agent audit report.</td>
<td>May 4, 2021</td>
</tr>
<tr>
<td>Added identity resolution APIs (preview) to Customer Profiles. (p. 1387)</td>
<td>For more information, see the GetMatches and MergeProfiles APIs in the Amazon Connect Customer Profiles API reference.</td>
<td>April 30, 2021</td>
</tr>
<tr>
<td>Added topic on how to apply permissions that restrict which AWS resources can be associated with Amazon Connect. (p. 1387)</td>
<td>For more information, see Restrict AWS resources that can be associated with Amazon Connect.</td>
<td>April 28, 2021</td>
</tr>
<tr>
<td>Added chapter on architectural guidance, authored by AWS Solution Architects (p. 1387)</td>
<td>For more information, see Architectural guidance for Amazon Connect.</td>
<td>April 28, 2021</td>
</tr>
<tr>
<td>Announced upcoming fix to agent event stream (p. 1387)</td>
<td>For more information, see Upcoming change: Fix for agent event stream.</td>
<td>April 27, 2021</td>
</tr>
<tr>
<td>Topic</td>
<td>Description</td>
<td>Date</td>
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</tr>
<tr>
<td>Revised the topics on porting phone numbers (p. 1387)</td>
<td>For more information, see Port your phone number.</td>
<td>April 24, 2021</td>
</tr>
<tr>
<td>Using Customer Profiles with CCP out-of-the-box is in ungated preview (p. 1387)</td>
<td>For more information, see Access the Customer Profiles Agent UI.</td>
<td>April 22, 2021</td>
</tr>
<tr>
<td>Announced upcoming changes for Contact search (p. 1387)</td>
<td>For more information, see Upcoming changes: Contact search.</td>
<td>April 20, 2021</td>
</tr>
<tr>
<td>Added NLB endpoint for Canada (Central) Region (p. 1387)</td>
<td>Updated Set up your network with the NLB endpoint for Canada (Central) Region.</td>
<td>April 15, 2021</td>
</tr>
<tr>
<td>Amazon Connect is now available in the Canada (Central) Region (p. 1387)</td>
<td>You can claim toll-free and local telephone numbers from Canadian telephony suppliers. For a list of countries that support the Canada (Central) Region, see Region requirements for phone numbers. Also see Availability of Contact Lens features by Region.</td>
<td>March 31, 2021</td>
</tr>
<tr>
<td>Announced upcoming fixes for chat metrics (p. 1387)</td>
<td>Currently Amazon Connect incorrectly reports that chat contacts that were created from disconnect flows were created from transfer flows. When the fixes are released, Amazon Connect will correctly reflect in the contact records and agent event stream that these chat contacts were created from disconnect flows. For more information, see Upcoming change: Fixes for chat metrics in the Release notes.</td>
<td>March 25, 2021</td>
</tr>
<tr>
<td>Completed release of new domain name (p. 1387)</td>
<td>The domain for the Amazon Connect access URL has changed to my.connect.aws. For more information, see March 2021 Updates in the Release notes.</td>
<td>March 22, 2021</td>
</tr>
<tr>
<td>Default service quota for reports per instance (p. 1387)</td>
<td>Updated the default service quota for reports per instance to 2000. This default applies to accounts created in October, 2020 or later. For more information, see Amazon Connect service quotas.</td>
<td>March 16, 2021</td>
</tr>
<tr>
<td>Feature</td>
<td>Description</td>
<td>Date</td>
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</tr>
<tr>
<td>Identification requirements for ordering and porting phone numbers (p. 1387)</td>
<td>Added identification requirements for ordering phone numbers. Added requirements for ordering and porting phone numbers from Argentina, Chile, Mexico, Peru, and Puerto Rico. For more information, see Region requirements for phone numbers.</td>
<td>March 11, 2021</td>
</tr>
<tr>
<td>Use the Amazon Connect Endpoint Test Utility (p. 1387)</td>
<td>To help you validate connectivity to Amazon Connect, or troubleshoot when your agents are experiencing problems with the Contact Control Panel (CCP), we added the Amazon Connect Endpoint Test Utility. For more information, see Use the Endpoint Test Utility.</td>
<td>March 5, 2021</td>
</tr>
<tr>
<td>Add a chat user interface to your website. (p. 1387)</td>
<td>Added a chat widget that you can customize and add to your website. Also provided an open source example to help you get started with adding chat to your website. For more information, see Set up your customer’s chat experience.</td>
<td>March 5, 2021</td>
</tr>
<tr>
<td>Content Lens real-time analytics is available in Europe (London), Europe (Frankfurt), and Asia (Tokyo). (p. 1387)</td>
<td>For more information, see Availability of Contact Lens features by Region.</td>
<td>February 26, 2021</td>
</tr>
<tr>
<td>Added ability to create and ingest data into Customer Profiles from Amazon S3 (p. 1387)</td>
<td>For more information, see Create and Ingest data into Customer Profiles from Amazon S3.</td>
<td>February 25, 2021</td>
</tr>
<tr>
<td>Added DisconnectReason to the contact record stream (p. 1387)</td>
<td>The Amazon Connect contact records stream now includes DisconnectReason for voice calls and tasks. For more information, see ContactTraceRecord.</td>
<td>February 19, 2021</td>
</tr>
<tr>
<td>Added custom service levels (p. 1387)</td>
<td>Added the ability to create custom service levels, and update the metrics user interface. For details, see New metric groups and categories.</td>
<td>February 16, 2021</td>
</tr>
<tr>
<td>Change audio device settings from the CCP (p. 1387)</td>
<td>Added the ability to change audio settings from the Contact Control Panel (CCP). This applies to organizations using a customized CCP. CCP: Change audio device settings.</td>
<td>January 30, 2021</td>
</tr>
<tr>
<td>Feature (p. 1387)</td>
<td>Description</td>
<td>Date</td>
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</tr>
<tr>
<td>Queue APIs (Preview)</td>
<td>Added APIs so you can programmatically create and manage queues. Queue APIs (Preview).</td>
<td>January 29, 2021</td>
</tr>
<tr>
<td>Amazon AppIntegrations APIs - GA</td>
<td>Released Amazon AppIntegrations APIs for general availability (GA). For more information, see Amazon AppIntegrations APIs - GA.</td>
<td>January 29, 2021</td>
</tr>
<tr>
<td>New Contact search page</td>
<td>Updated the Contact search page. For more information, see Search for contacts.</td>
<td>January 5, 2021</td>
</tr>
<tr>
<td>Amazon Connect Service API Reference</td>
<td>Added APIs so you can programmatically create and manage quick connects. For more information, see Amazon Connect Service API Reference.</td>
<td>December 22, 2020</td>
</tr>
<tr>
<td>Chat: Support for sharing attachments</td>
<td>Added support for sharing chat attachments. For more information, see Chat: Support for attachments.</td>
<td>December 21, 2020</td>
</tr>
<tr>
<td>Configurable DTMF timeouts for Lex bots</td>
<td>Added support for configurable DTMF timeouts for Lex bots. For more information, see Configurable DTMF timeouts for Lex bots.</td>
<td>December 4, 2020</td>
</tr>
<tr>
<td>Amazon Connect with Apple Messages for Business (Preview)</td>
<td>Added support for using Amazon Connect with Apple Messages for Business. For more information, see Amazon Connect with Apple Messages for Business (Preview)</td>
<td>December 3, 2020</td>
</tr>
<tr>
<td>Tasks</td>
<td>Added support for tasks, allowing you to prioritize, assign, track, and even automate tasks across the disparate tools agents use to support customers. For more information, see Tasks.</td>
<td>December 1, 2020</td>
</tr>
<tr>
<td>Real-time analytics using Contact Lens for Amazon Connect</td>
<td>Added real-time analytics for Contact Lens so you can detect and resolve customer issues more proactively while the call is in progress. For more information, see Analyze Conversations with Contact Lens for Amazon Connect.</td>
<td>December 1, 2020</td>
</tr>
<tr>
<td>Feature</td>
<td>Description</td>
<td>Date</td>
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</tr>
<tr>
<td><strong>Amazon Connect Wisdom (Preview) (p. 1387)</strong></td>
<td>Added Amazon Connect Wisdom (Preview), which enables agents to search and find content across multiple repositories, such as frequently asked questions (FAQs), wikis, articles, and step-by-step instructions for handling different customer issues. For more information, see Amazon Connect Wisdom (Preview).</td>
<td>December 1, 2020</td>
</tr>
<tr>
<td><strong>Amazon Connect Voice ID (Preview) (p. 1387)</strong></td>
<td>Added Amazon Connect Voice ID (Preview), which provides for real-time caller authentication. For more information, see Amazon Connect Voice ID (Preview).</td>
<td>December 1, 2020</td>
</tr>
<tr>
<td><strong>Amazon Connect Customer Profiles (p. 1387)</strong></td>
<td>Added Amazon Connect Customer Profiles, enabling agents to create a customer profile for every new contact that comes in. You can also integrate with external applications that provide customer profile data. For more information, see Amazon Connect APIs.</td>
<td>December 1, 2020</td>
</tr>
<tr>
<td><strong>Amazon Connect APIs (p. 1387)</strong></td>
<td>Added an Amazon Connect API that provides the ability to create tasks (<a href="#">StartTaskContact</a>), and added a set of preview APIs. For more information, see Amazon Connect APIs.</td>
<td>December 1, 2020</td>
</tr>
<tr>
<td><strong>Amazon Connect supports interact messages for chat (p. 1387)</strong></td>
<td>Added interactive message templates. For more information, see Add interactive messages to chat.</td>
<td>November 24, 2020</td>
</tr>
<tr>
<td><strong>Telephony call metadata attributes (p. 1387)</strong></td>
<td>Added call attributes to improve fraud detection and routing. For more information, see Telephony call metadata attributes (call attributes).</td>
<td>November 20, 2020</td>
</tr>
<tr>
<td><strong>APIs to manage user hierarchies (p. 1387)</strong></td>
<td>Added APIs so you can programmatically manage your agent hierarchies and agent groups. For more information, see Amazon Connect Service API Reference.</td>
<td>November 18, 2020</td>
</tr>
<tr>
<td>Topic</td>
<td>Description</td>
<td>Date</td>
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</tr>
<tr>
<td>Service quotas (p. 1387)</td>
<td>Noted that up to 700 quick connects can be added to a queue. See Feature specifications. (This update was published erroneously and has since been removed.)</td>
<td>October 5, 2020</td>
</tr>
<tr>
<td>Security (p. 1387)</td>
<td>Added new topic on Required permissions for managing access to the Amazon Connect console.</td>
<td>September 24, 2020</td>
</tr>
<tr>
<td>Quick filters (p. 1387)</td>
<td>Added new topic that explains how to use quick filters in real-time metrics reports. For more information, see Use quick filters to drill into Routing profiles and Queues tables.</td>
<td>September 23, 2020</td>
</tr>
<tr>
<td>Service quotas (p. 1387)</td>
<td>Updated the service quotas for the following Amazon Connect Participant Service APIs: CreateParticipantConnection, DisconnectParticipant, and GetTranscript. For more information, see Amazon Connect Participant Service API throttling quotas.</td>
<td>September 22, 2020</td>
</tr>
<tr>
<td>Show agent queues in a Queues table. (p. 1387)</td>
<td>By default, agent queues don’t appear in a Queues table in a historical metrics report. You can choose to show them. For more information, see Show agent queues in a Queues table.</td>
<td>September 18, 2020</td>
</tr>
<tr>
<td>Migrate contact flows to a different instance (p. 1387)</td>
<td>You can migrate hundreds of flows using a set of flow APIs. For more information, see Migrate contact flows to a different instance.</td>
<td>September 18, 2020</td>
</tr>
<tr>
<td>Languages supported by Amazon Connect (p. 1387)</td>
<td>Learn about which languages are supported in the Amazon Connect console, Contact Control Panel, Contact Lens, Amazon Lex, and Amazon Polly. For more information, see Languages supported by Amazon Connect.</td>
<td>September 18, 2020</td>
</tr>
</tbody>
</table>
### Amazon Connect Flow language (p. 1387)
You can use the Amazon Connect Flow language to efficiently update flows that you’re migrating from one instance to another, and Write flows rather than drag blocks onto the flow designer. For more information, see Amazon Connect Flow language in the Amazon Connect API Reference Guide.

**September 18, 2020**

### Option 2 (not recommended): Allow IP address ranges (p. 1387)
Removed tip from Option 2: Allow IP address ranges, that said if you don’t see an entry for your region, use GLOBAL. For more information, see Option 2 (not recommended): Allow IP address ranges.

**September 11, 2020**

### Option 1 (recommended): Replace Amazon EC2 and CloudFront IP range requirements with a domain allow list (p. 1387)
Updated Option 1, second row of table, with a line break between {myInstanceName}.awsapps.com/connect/api and *.cloudfront.net. For more information, see Option 1 (recommended): Replace Amazon EC2 and CloudFront IP range requirements with a domain allow list.

**September 11, 2020**

### Amazon Connect resource-level policy examples (p. 1387)
Changed title of “Amazon Connect resource-based policy examples” topic to "Amazon Connect resource-level policy examples." For more information, see Amazon Connect resource-level policy examples.

**September 8, 2020**

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# Earlier updates

<table>
<thead>
<tr>
<th>Change</th>
<th>Description</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Updated the Consult and Contact consulted metrics to indicate they were deprecated May 2019.</td>
<td>For more information, see Consult (p. 1000) and Contacts consulted (p. 1025).</td>
<td>August 27, 2020</td>
</tr>
<tr>
<td>Added topic on setting up agent-to-agent transfers.</td>
<td>For more information, see Set up agent-to-agent transfers (p. 477).</td>
<td>August 19, 2020</td>
</tr>
<tr>
<td>Change</td>
<td>Description</td>
<td>Date</td>
</tr>
<tr>
<td>----------------------------------------------------------------------</td>
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<td>-----------------</td>
</tr>
<tr>
<td>Added section on requirements for custom termination points.</td>
<td>For more information, see Request numbers, international numbers, or termination points (p. 162).</td>
<td>August 18, 2020</td>
</tr>
<tr>
<td>Removed the &quot;Known differences&quot; section from I use the Amazon Connect Streams API (p. 291).</td>
<td>For more information, see I use the Amazon Connect Streams API (p. 291).</td>
<td>August 3, 2020</td>
</tr>
<tr>
<td>Changed the name of the Metrics chapter to Monitor metrics &amp; run reports.</td>
<td>For more information, see Monitor metrics and run reports (p. 979).</td>
<td>July 16, 2020</td>
</tr>
<tr>
<td>Clarified that the following metrics are no longer supported in queue grouping: Agent on contact time, Agent idle time, Occupancy. Previously we stated that these metrics had been deprecated.</td>
<td>For more information, see June 2020: Changes for omnichannel support (p. 989).</td>
<td>July 8, 2020</td>
</tr>
<tr>
<td>Updated the Set disconnect flow (p. 406) block, which now supports voice conversations.</td>
<td>For more information, see Set disconnect flow (p. 406).</td>
<td>June 29, 2020</td>
</tr>
<tr>
<td>Added upcoming metric changes: new real-time and historical metrics for inbound and outbound contact time</td>
<td>For more information, see What’s new in metrics (p. 979).</td>
<td>June 26, 2020</td>
</tr>
<tr>
<td>Added how to upgrade CCP</td>
<td>For more information, see Upgrade to the latest CCP (p. 279).</td>
<td>June 16, 2020</td>
</tr>
<tr>
<td>Added video on using CCP</td>
<td>For more information, see Training video: How to use the CCP (p. 1249).</td>
<td>June 16, 2020</td>
</tr>
<tr>
<td>Deprecated metrics: Agent on contact time, Agent idle time, Occupancy.</td>
<td>For more information, see June 2020: Changes for omnichannel support (p. 989).</td>
<td>June 12, 2020</td>
</tr>
<tr>
<td>Added topic on quick connects work</td>
<td>For more information, see How quick connects work (p. 475).</td>
<td>May 21, 2020</td>
</tr>
<tr>
<td>Added how to get administrative support, and added a topic on inherited permissions</td>
<td>For more information, see Get administrative support for Amazon Connect (p. 1386) and About inherited permissions (p. 781).</td>
<td>April 16, 2020</td>
</tr>
<tr>
<td>Added how to customize your CCP to log out agents automatically when they close the CCP window</td>
<td>For more information, see CCPv1: Log out agents automatically when they close their CCP (p. 237).</td>
<td>April 16, 2020</td>
</tr>
<tr>
<td>Change</td>
<td>Description</td>
<td>Date</td>
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<tr>
<td>----------------------------------------------------------------------</td>
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</tr>
<tr>
<td>Updated the <strong>Get customer input</strong> block to support timeout values for voice input</td>
<td>For more information, see [Get customer input](p. 372).</td>
<td>April 8, 2020</td>
</tr>
<tr>
<td>Added terminating keypress</td>
<td>For more information, see [Store customer input](p. 432).</td>
<td>March 31, 2020</td>
</tr>
<tr>
<td>Added NLB endpoints and required domain for softphones</td>
<td>For more information, see [Set up your network](p. 552).</td>
<td>March 23, 2020</td>
</tr>
<tr>
<td>Announced upcoming changes for metrics</td>
<td>For more information, see [June 2020: Changes for omnichannel support](p. 989).</td>
<td>March 23, 2020</td>
</tr>
<tr>
<td>Added topic on region requirements for phone numbers</td>
<td>For more information, see [Region requirements for ordering and porting phone numbers](p. 165).</td>
<td>March 11, 2020</td>
</tr>
<tr>
<td>Added tutorials</td>
<td>For more information, see [Tutorials: An introduction to Amazon Connect](p. 31).</td>
<td>March 6, 2020</td>
</tr>
<tr>
<td>Added topic on emergency admin access</td>
<td>For more information, see [Emergency admin login](p. 138).</td>
<td>March 3, 2020</td>
</tr>
<tr>
<td>Added topics on saving, sharing, and publishing reports</td>
<td>For more information, see [Save custom reports](p. 1088), [Share custom reports](p. 1090), [View a shared report](p. 1092), and [Publish reports](p. 1093).</td>
<td>January 22, 2020</td>
</tr>
<tr>
<td>Updated flow block definitions</td>
<td>For more information, see .</td>
<td>January 17, 2020</td>
</tr>
<tr>
<td>Added a section about queued callbacks in metrics reporting.</td>
<td>For more information, see [About queued callbacks in metrics](p. 1082).</td>
<td>January 17, 2020</td>
</tr>
<tr>
<td>Updated networking guidance for the updated CCP (ccp-v2)</td>
<td>For more information, see [Set up your network](p. 552).</td>
<td>January 15, 2020</td>
</tr>
<tr>
<td>Add a topic on logging Amazon Connect API calls with AWS CloudTrail</td>
<td>For more information, see [Logging Amazon Connect API calls with AWS CloudTrail](p. 1109).</td>
<td>December 13, 2019</td>
</tr>
<tr>
<td>Added a section on analyzing conversations</td>
<td>For more information, see [Analyze conversations using Contact Lens for Amazon Connect](p. 807).</td>
<td>December 02, 2019</td>
</tr>
<tr>
<td>Added information about live media streaming</td>
<td>For more information, see [Capture customer audio: live media streaming](p. 765).</td>
<td>November 21, 2019</td>
</tr>
<tr>
<td>Change</td>
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<tr>
<td>Added information about chat</td>
<td>For more information, see Chat (p. 13). Also added these topics: Best practices for Amazon Connect (p. 29), About agent status (p. 1078), About contact states (p. 1080), and Additional resources for Amazon Connect (p. 1341).</td>
<td>November 21, 2019</td>
</tr>
<tr>
<td>Added topic on using IAM</td>
<td>For more information, see Identity and access management for Amazon Connect (p. 1185).</td>
<td>November 14, 2019</td>
</tr>
<tr>
<td>Added dimensions</td>
<td>Added dimensions to the Amazon Connect metrics sent to CloudWatch. See Monitoring your instance using CloudWatch (p. 1095).</td>
<td>October 22, 2019</td>
</tr>
<tr>
<td>Added a networking topic</td>
<td>Consolidated networking content into Set up your network (p. 552). Updated the guidance.</td>
<td>September 30, 2019</td>
</tr>
<tr>
<td>Updated metrics topics</td>
<td>Improved the descriptions of the real-time metrics definitions. Added categories to the historical metrics definitions.</td>
<td>August 30, 2019</td>
</tr>
<tr>
<td>Updated historical metrics report section</td>
<td>Added categories to the historical metrics definitions.</td>
<td>August 27, 2019</td>
</tr>
<tr>
<td>Re-organized the content</td>
<td>Re-organized the content so it's task-based.</td>
<td>July 19, 2019</td>
</tr>
<tr>
<td>Added information about the updated Transfer to phone number block</td>
<td>You can use the updated Transfer to phone number block to transfer callers to a phone number external to your Amazon Connect instance, and then optionally resume the flow after the call with the external party ends. For more information, see Resume a flow after transfer (p. 479).</td>
<td>February 18, 2019</td>
</tr>
<tr>
<td>Adding information about live media streaming for customer audio streams</td>
<td>You can capture customer audio during interactions with your contact center and send it to a Kinesis video stream. For more information, see Capture customer audio: live media streaming (p. 765).</td>
<td>December 21, 2018</td>
</tr>
<tr>
<td>Change</td>
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</tr>
<tr>
<td>Added content about agent queues</td>
<td>You can use agent queues to route calls directly to a specific agent. For more information, see Transfer contacts to a specific agent (p. 481).</td>
<td>December 21, 2018</td>
</tr>
<tr>
<td>Added information about using Amazon Connect in the Asia Pacific (Tokyo) Region.</td>
<td>For more information, Claim phone numbers for Amazon Connect in the Asia Pacific (Tokyo) Region (p. 161).</td>
<td>December 10, 2018</td>
</tr>
<tr>
<td>Added information about how to determine agent ACW time from agent event streams</td>
<td>For more information, see Determine how long an agent spends doing ACW (p. 1048).</td>
<td>October 30, 2018</td>
</tr>
<tr>
<td>Added troubleshooting and best practices</td>
<td>Troubleshooting Issues with the Contact Control Panel (CCP) (p. 1313) covers best practices for agent connectivity using the CCP and troubleshooting connectivity and call quality issues in Amazon Connect.</td>
<td>October 18, 2018</td>
</tr>
<tr>
<td>Added information about service-linked roles in Amazon Connect</td>
<td>For more information, see Use service-linked roles for Amazon Connect (p. 1228).</td>
<td>October 17, 2018</td>
</tr>
<tr>
<td>Added information about queue to queue transfers</td>
<td>You can use the new options of the Transfer to queue block to enable transferring calls that are already in a queue to another queue. For more information, see Manage contacts in a queue (p. 480).</td>
<td>July 31, 2018</td>
</tr>
<tr>
<td>Added information about the Call phone number block</td>
<td>Updated the content about flows to include the new Call phone number block, including how to use the block in a flow. For more information, see Caller ID number: Set in the queue or Call phone number block (p. 209).</td>
<td>July 2, 2018</td>
</tr>
<tr>
<td>Added information about contact attributes and the Get queue metrics block</td>
<td>For more information, see Use Amazon Connect contact attributes (p. 519).</td>
<td>June 18, 2018</td>
</tr>
<tr>
<td>Added information about new metrics sent to Amazon CloudWatch Logs.</td>
<td>Monitoring your instance using CloudWatch (p. 1095) includes additional metrics.</td>
<td>April 19, 2018</td>
</tr>
<tr>
<td>Change</td>
<td>Description</td>
<td>Date</td>
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</tr>
<tr>
<td>Added information about using SAML for identity management</td>
<td>You can configure your instance to use SAML for identity management. You can also use SAML to enable single sign-on. For more information, see Configure SAML with IAM for Amazon Connect (p. 116).</td>
<td>March 30, 2018</td>
</tr>
<tr>
<td>Added information about agent call transfers</td>
<td>You can enable call transfers from an agent to another agent, to a queue, or to an external number.</td>
<td>December 10, 2017</td>
</tr>
<tr>
<td>Added information about manager listen-in</td>
<td>You can configure and enable a manager to listen in on agent calls. For more information, see Monitor live conversations (p. 798).</td>
<td>December 10, 2017</td>
</tr>
<tr>
<td>Added information about flow logs</td>
<td>For more information, see Enable flow logs (p. 514).</td>
<td>November 16, 2017</td>
</tr>
<tr>
<td>Added information about flow import/export</td>
<td>For more information, see Import/export flows (p. 491).</td>
<td>November 16, 2017</td>
</tr>
<tr>
<td>Added information about agent event streams</td>
<td>For more information, see Amazon Connect agent event streams (p. 1045).</td>
<td>November 16, 2017</td>
</tr>
<tr>
<td>Added information about porting your current phone number to Amazon Connect</td>
<td>For more information, see Port your current phone number (p. 149).</td>
<td>November 10, 2017</td>
</tr>
<tr>
<td>Added information about Login/Logout reports</td>
<td>For more information, see Login/Logout reports (p. 1041).</td>
<td>November 1, 2017</td>
</tr>
<tr>
<td>Initial release</td>
<td>Initial release of the Amazon Connect Administrator Guide.</td>
<td>March 28, 2017</td>
</tr>
</tbody>
</table>
Amazon Connect Glossary

**Channel**

How a customer contacts your business: voice (a phone call), chat (a web site or app), and task.

**Contact attribute**

A piece of data about a contact. You can use this data to personalize the customer experience, make routing decisions about contacts as they progress through your contact center or retrieve real-time metrics about the queues and agents in your contact center to dynamically route contacts based on queue and agent availability.

**Flow**

Flows define the experience your customers have when they interact with your contact center. These are similar in concept to Interactive Voice Response (IVR). Flows are comprised of blocks, with each block defining a step or interaction in your contact center. For example, there are blocks to play a prompt, get input from a customer, branch based on customer input, or invoke an Lambda function or Amazon Lex bot.

**Instance**

A virtual contact center. It is 100% cloud-based and can scale to support any sized business. An Amazon Connect instance is not aligned to an EC2 instance or any other hardware concept.

**Letter of Authorization**

Letter of Authorization (LOA) is a legal document in which you assert to the carrier for Amazon Connect that you have the authority to port phone numbers from your current carrier to the carrier for Amazon Connect. Traditionally, this is a paper document requiring an actual signature.

**Losing carrier**

Also the customer’s current carrier. This is the carrier that currently owns the telephone number. The losing carrier will review all information presented on the Letter of Authorization (LOA) and will validate if it matches the information that they have on file for the customer.

**Mutually agreed date and time**

After the LOA has been approved by the losing carrier, the losing and winning carriers agree upon a date and time to perform the porting activity.
Omnichannel

A unified contact experience across multiple communication channels, such as voice and chat. Admins can build experiences once, and enable them for voice and chat. Managers monitor and adjust queues from one dashboard. Agents handle all customers using one interface.

Phone number portability

Number portability allows telephone customers to transfer their numbers to other carriers. Carriers and countries may have unique processes and procedures required.

Queue

A waiting area that holds contacts to be answered by agents.

Winning carrier

Also the carrier for Amazon Connect. This is the carrier that the phone number is being ported to, and will own the phone number after the porting is completed.