



USER GUIDE

How to use **CX Connect** in HubSpot





^^ ^^ ^^ ^^
^^ ^^ ^^ ^^
^^ ^^ ^^ ^^
^^ ^^ ^^ ^^
^^ ^^ ^^ ^^

WHAT'S INSIDE:

03

SET UP AN ACCOUNT ON
THE CX CONNECT WEB
APP

08

SETUP CX CONNECT

13

HOW TO USE

23

TROUBLESHOOTING





Set up an Account on the CX Connect Web App





Set up an Account on the CX Connect Web App

01

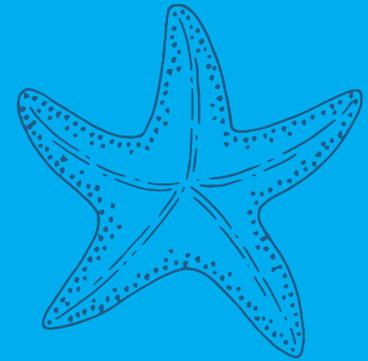
Go to <https://awsconnect.manobyte.com/login>

02

Register an account or log in if you already have one.

03

After the verification email, go to the setup page.
a. Enter your company information



General

Business Name
test

Website Link
https://test.com

Description
ete

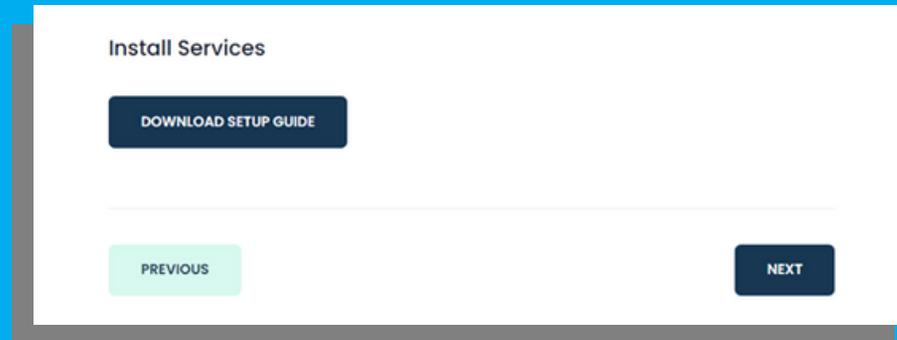
NEXT



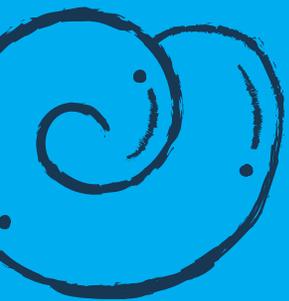
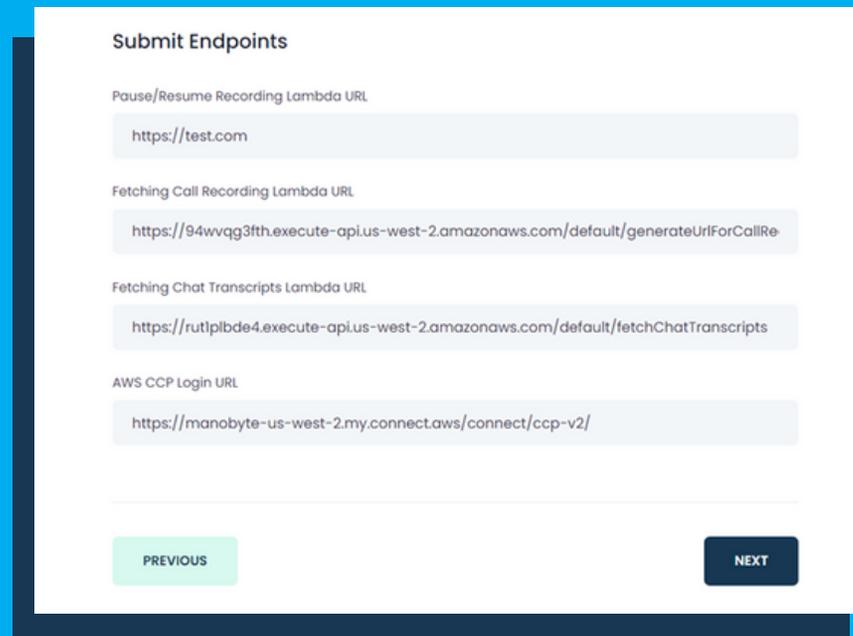


Set up an Account on the CX Connect Web App Cont.

b. Download the setup guide and set up everything on AWS based on the guide.



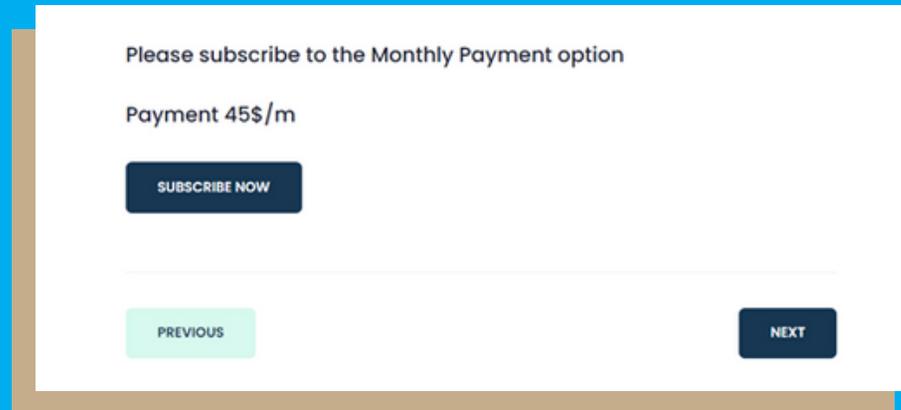
c. Enter all endpoints that you get from the previous step.



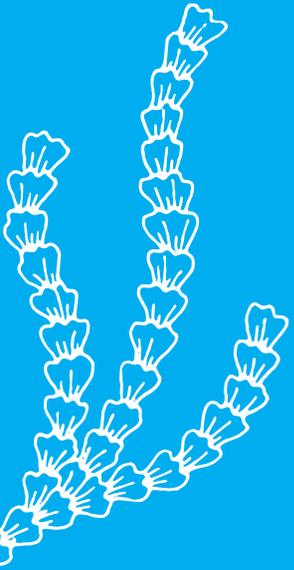
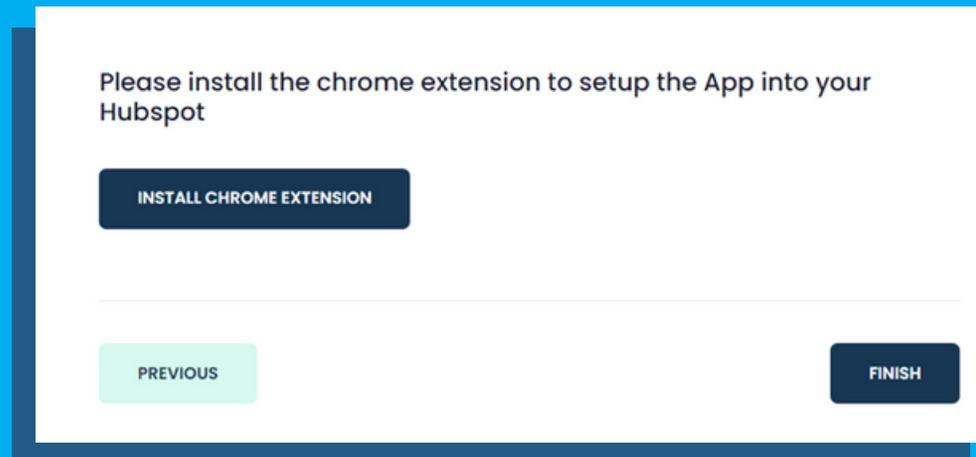


Set up an Account on the CX Connect Web App (cont.)

d. Subscribe to the monthly payment. It's \$9/month per user. If you have more sub-users, the payment will be increased automatically.



e. Install the Chrome extension



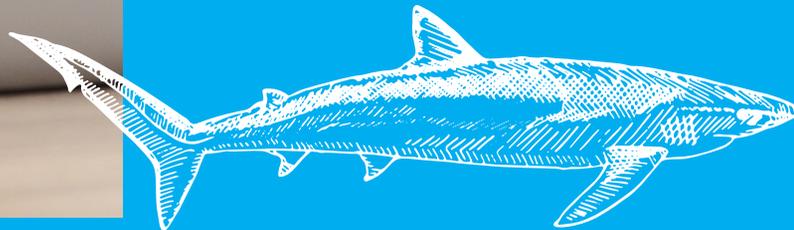


Set up an Account on the CX Connect Web App (cont.)

04

Manage sub-user.

- a. You can manage sub-users here.
<https://awsconnect.manobyte.com/client/sub-users>
- b. If you want to import the users from HubSpot, please go to <https://awsconnect.manobyte.com/hubspot/admins> and click the “Add admins to Sub users” button. Note: This button only works once you set up an extension into your HubSpot account.





Setup CX Connect



Setup CX Connect

Amazon Connect only supports US-East-1 and US-West-2. No other US regions are supported.

01

Login to your HubSpot account on Google Chrome.

02

Install the CX Connect Chrome extension.

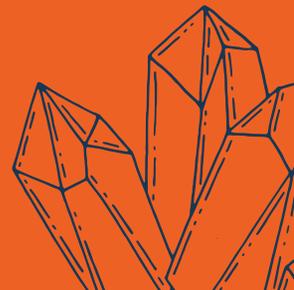
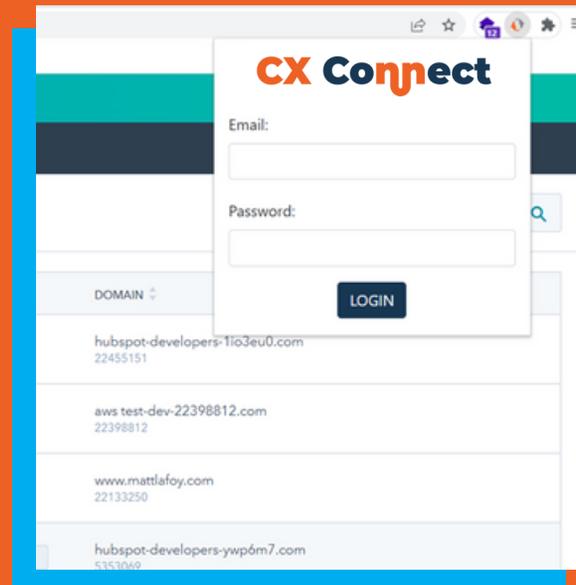
a. Go to:

<https://chrome.google.com/webstore/detail/hubconnect/fnbkcchjfeoncmjplienjopldklgkhcd>

b. Click the “Add to Chrome” button

03

Once installed, login to the Chrome extension with your account.



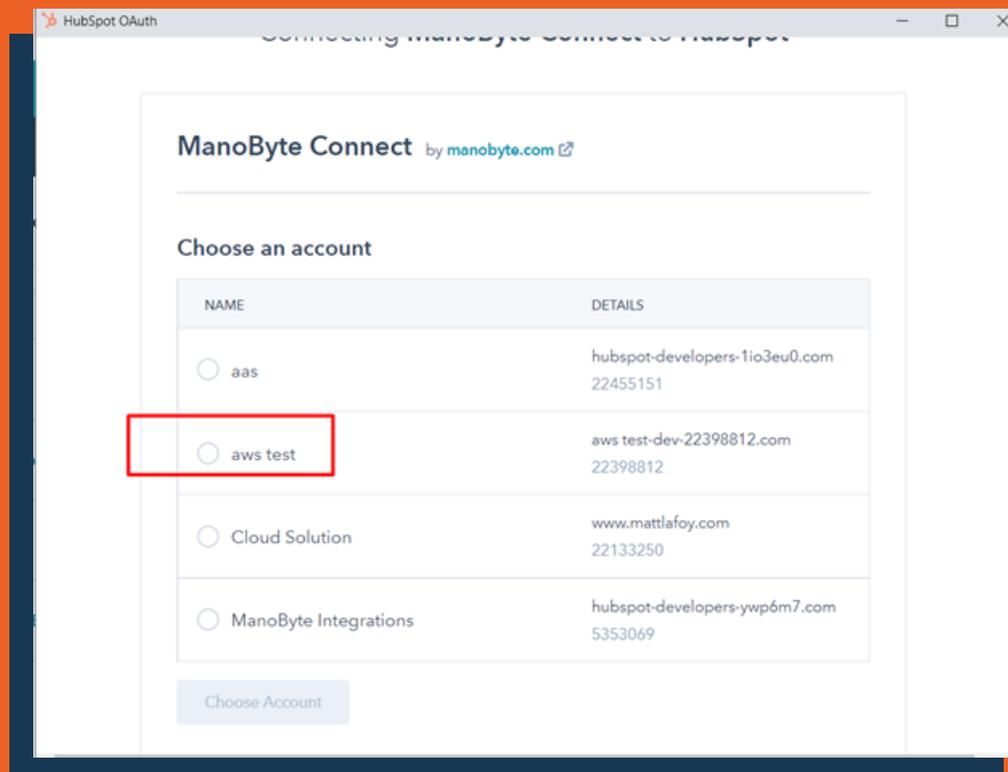
Setup CX Connect (cont.)

04

Click “Install Amazon CCP into your Hubspot” to set up CX Connect in your account.

05

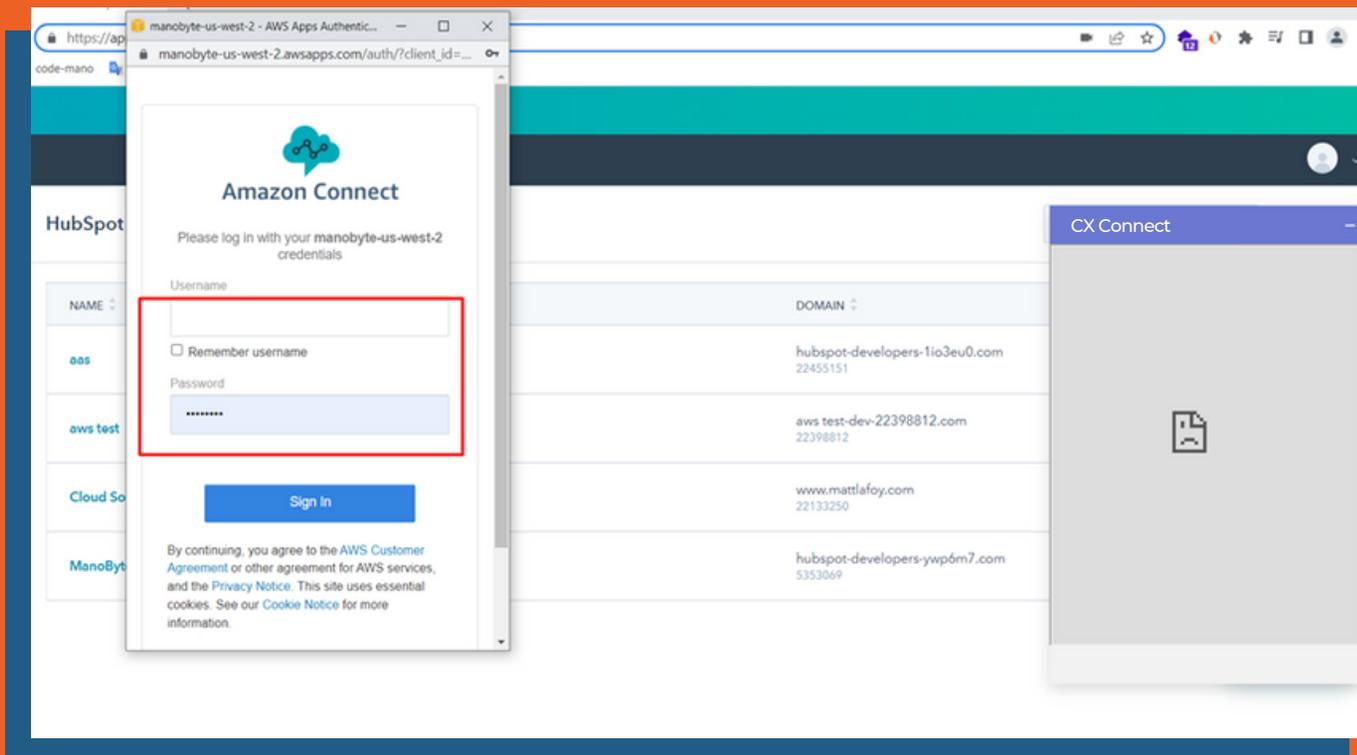
Select the account to install CX Connect.



Setup CX Connect (cont.)

06

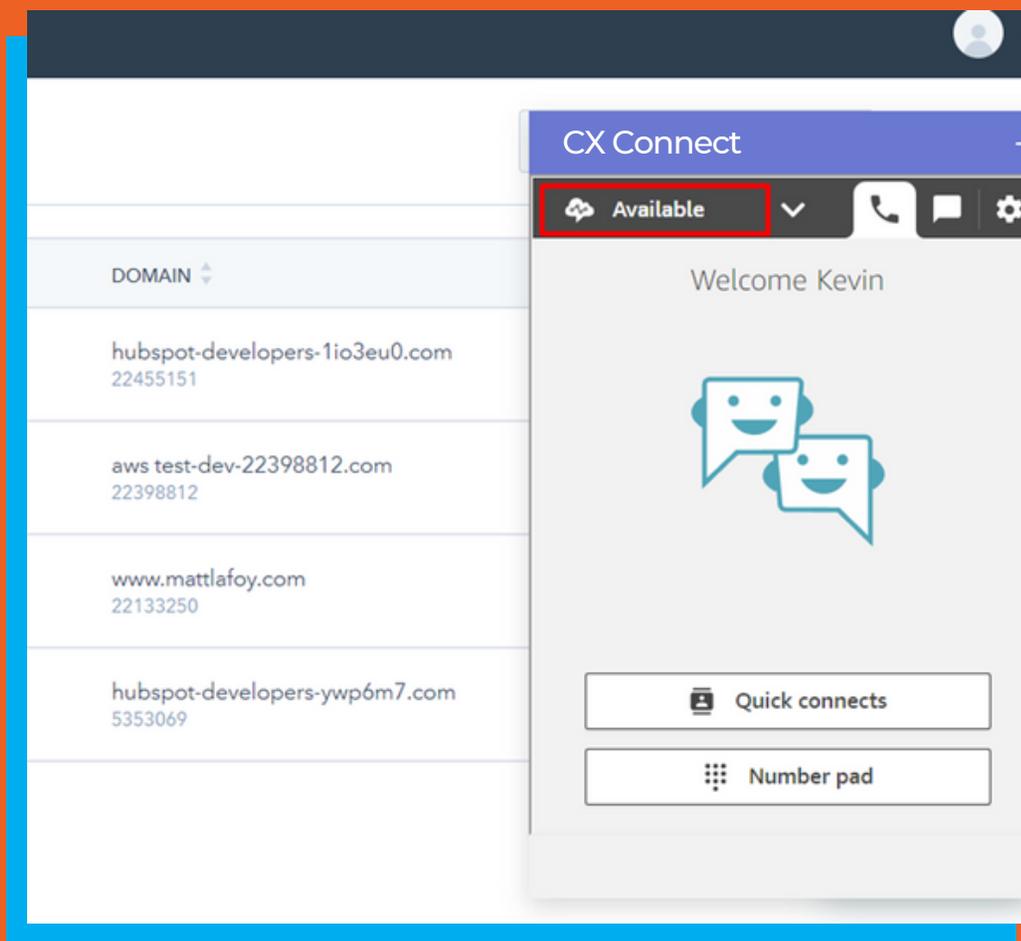
After setup, login (as an agent, not an admin) into Amazon Connect.

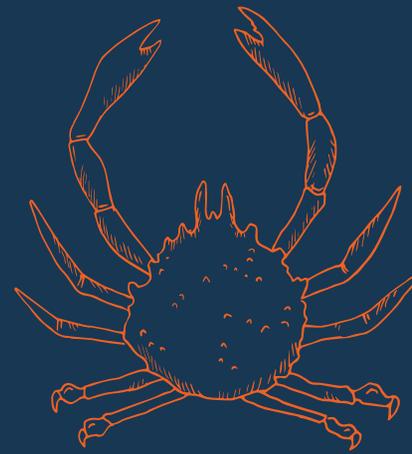


Setup CX Connect (cont.)

07

Make sure to set your status as "Available"





How to Use

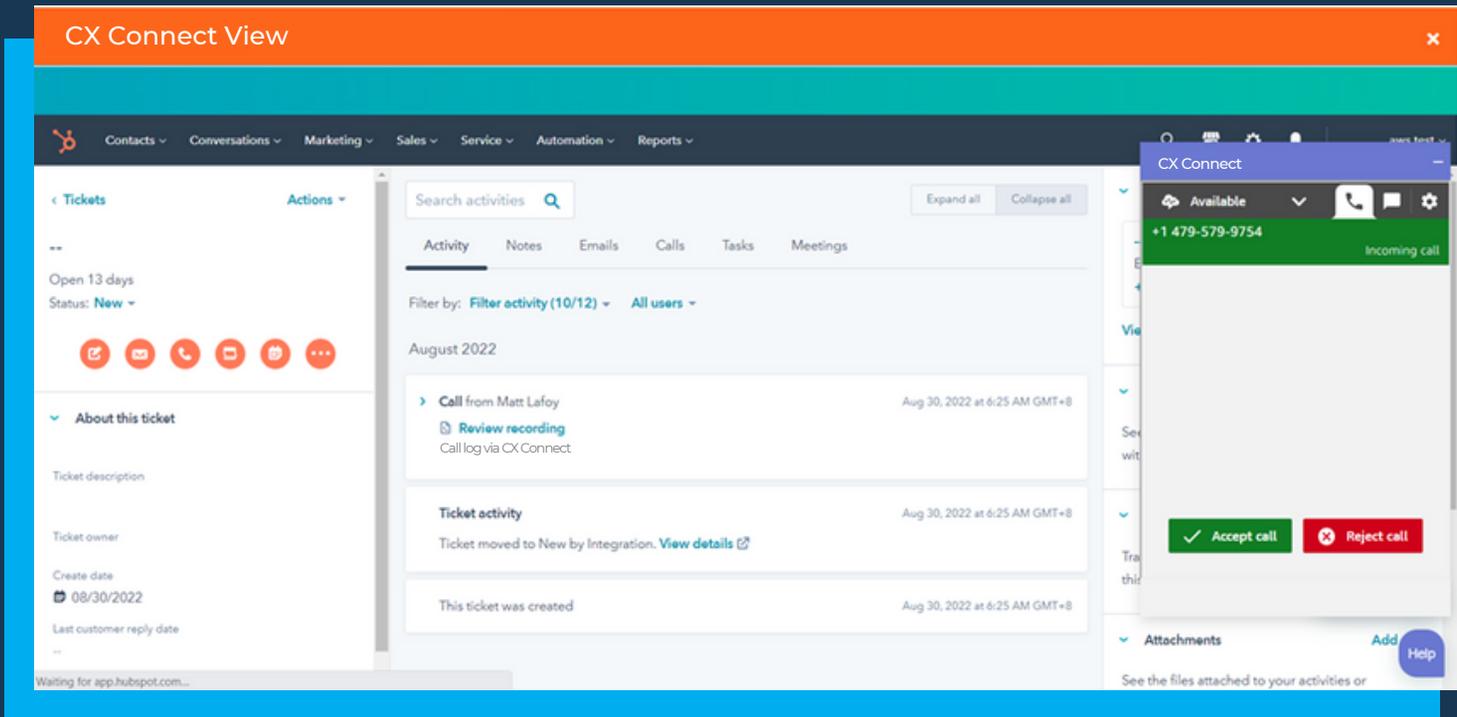


How to Use

01

Receive incoming calls:

- a. Always open the HubSpot page on your browser.
- b. You will see the incoming call notification on CX Connect and can accept or reject the call



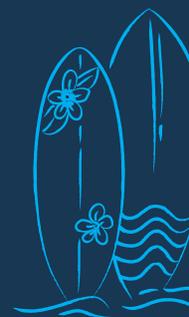
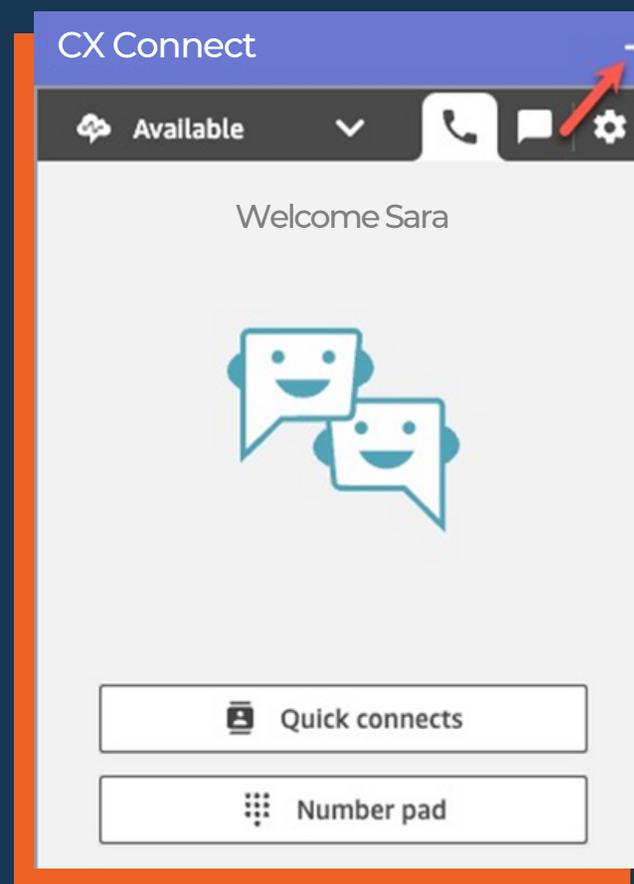
How to Use (cont.)

c. It automatically opens a service ticket for the customer.

- If there is no existing contact in HubSpot with the phone number of the incoming call, CX Connect creates a new service ticket AND a new contact with the incoming phone number. The service ticket is associated with the newly created contact.
- If there is an existing contact but no open ticket, CX Connect creates a new service ticket and associates it with the existing contact.
- If there is an existing contact and existing open ticket, CX Connect opens that service ticket.

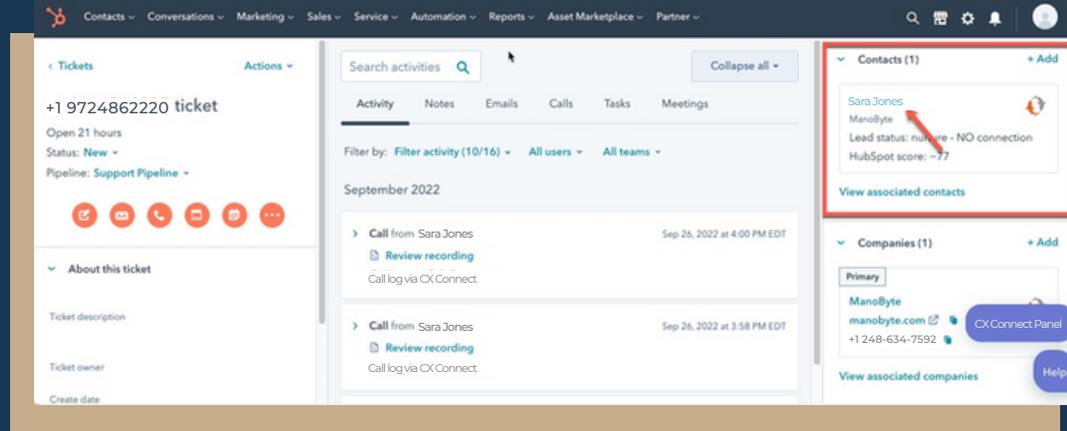
NOTE: The agent can easily switch between the contact record (which has all the information about the customer) and the service ticket (which the agent can add notes about the specific service ticket) by doing the following:

i. Collapse the CX Connect panel by clicking on the - in the top right corner.

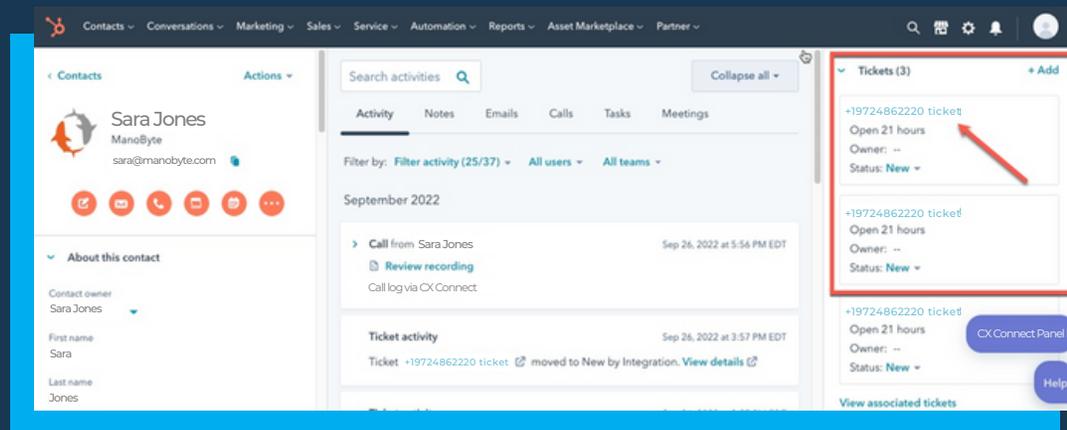


How to Use (cont.)

ii. In the top right corner of the service ticket record, click on the associated contact's name. This will switch you to the contact record.



iii. From the contact record, you can switch back to the service ticket by scrolling down in the right panel of the contact record to the Tickets section. Click on the service ticket name.





How to Use (cont.)

d. All call recordings will be stored in the Calls tab in the service ticket and can also be accessed from the contact record.



Call from Matt Lafoy Actions Aug 20, 2022 at 4:12 AM GMT+8

[Review recording](#)

Call log via CX Connect

Outcome Direction ⓘ

[Select an outcome](#) [Select call direction](#)

▶ 0:00 0:00 [🗑️](#) [🔗](#)

[Add comment](#) 1 association





How to Use (cont.)

02

Receive incoming chats:

- a. You need to integrate the Amazon Connect chat into your website to receive chats. Here is the guide: <https://docs.aws.amazon.com/connect/latest/adminguide/add-chat-to-website.html>
- b. It is required that chat users enter an email address before the Agent and CX Connect can identify that user in HubSpot, since it is based on their email address.
- c. When an incoming chat is received, you will see the incoming chat notification on CX Connect and can accept or reject the chat.



The screenshot displays the CX Connect interface. At the top, there is a notification: "You have 42 days left in your Developer Test Account trial." Below this is a navigation bar with tabs for Contacts, Conversations, Marketing, Sales, Service, Automation, and Reports. The main area is divided into a left sidebar for ticket details and a central activity feed. The activity feed shows a note from Matt Lafoy dated Sep 7, 2022, at 4:04 AM GMT+8, stating "# Customer is joined at 2022-09-06 20:02:45". Below this, there is a section for August 2022, showing a ticket activity on Aug 16, 2022, at 1:00 PM GMT+8: "Ticket moved to New by Integration. View details". At the bottom of the activity feed, it says "This ticket was created" on Aug 16, 2022, at 1:00 PM GMT+8. On the right side, a CX Connect chat window is open, showing a customer profile and two buttons: "Accept chat" (green) and "Reject chat" (red). There is also an "Attachments" section at the bottom right with an "Add" button and a "Help" button.



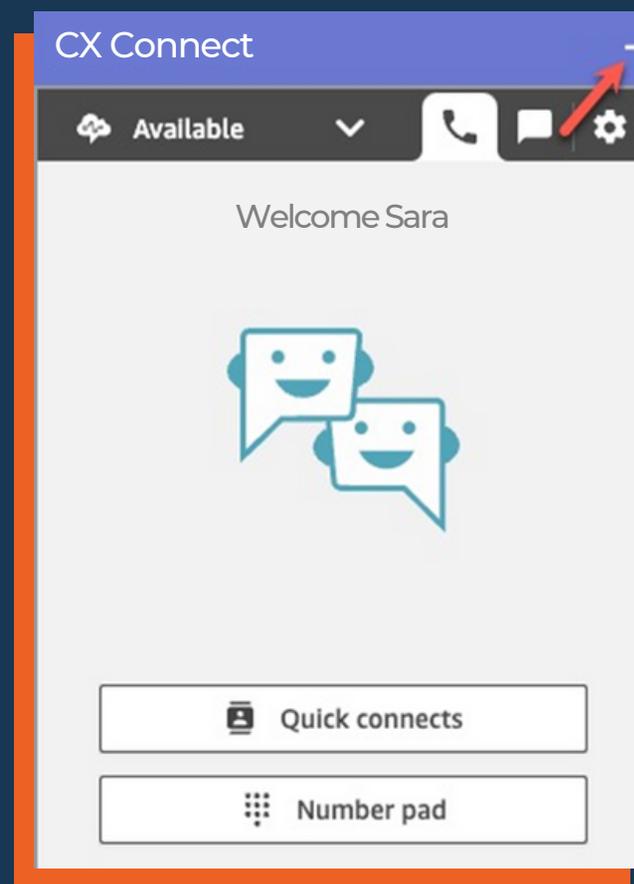
How to Use (cont.)

d. It automatically opens a service ticket for the customer.

- If there is no existing contact in HubSpot with the email address of the incoming chat, CX Connect creates a new service ticket AND a new contact with the email address. The service ticket is associated with the newly created contact.
- If there is an existing contact but no open ticket, CX Connect creates a new service ticket and associates it with the existing contact.
- If there is an existing contact and existing open ticket, CX Connect opens that service ticket.

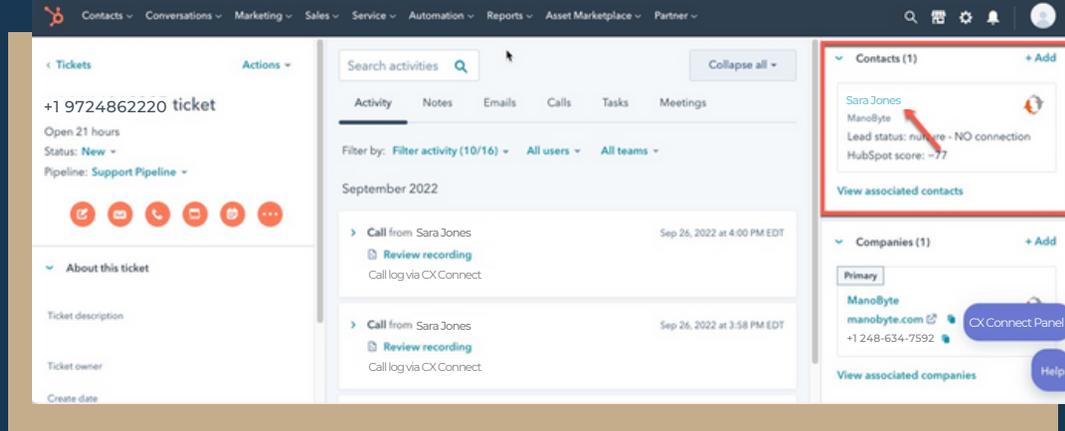
NOTE: The agent can easily switch between the contact record (which has all the information about the customer) and the service ticket (which the agent can add notes about the specific service ticket) by doing the following:

i. Collapse the CX Connect panel by clicking on the - in the top right corner.

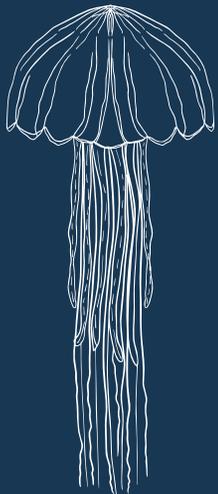
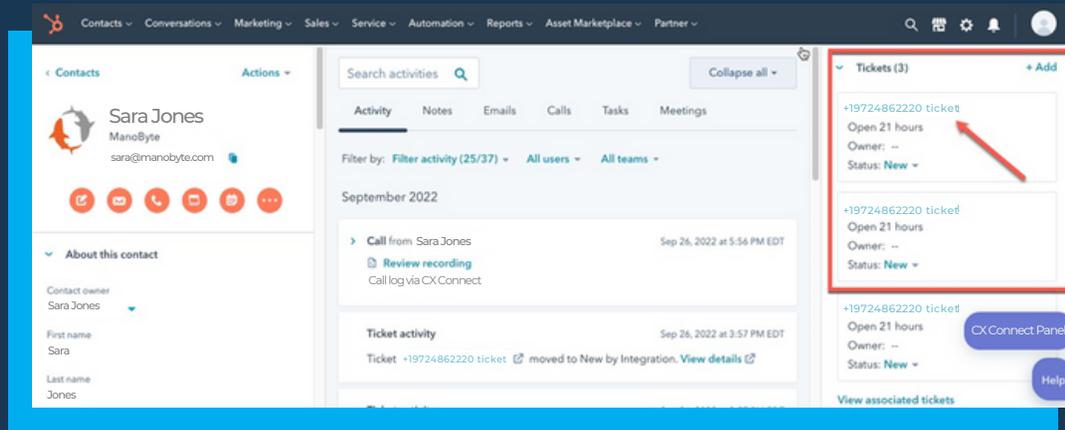


How to Use (cont.)

ii. In the top right corner of the service ticket record, click on the associated contact's name. This will switch you to the contact record.



iii. From the contact record, you can switch back to the service ticket by scrolling down in the right panel of the contact record to the Tickets section. Click on the service ticket name.





How to Use (cont.)

e. All chat scripts will be stored in the Notes tab in the service ticket and can also be accessed from the contact record.



▼ **Note** by Matt Lafoy Actions ▼ Sep 7, 2022 at 4:04 AM GMT+8

Customer is joined at 2022-09-06 20:02:45
BOT: Welcome to contact us. Please input your email to continue.
Customer: mattlafoy@gmail.com
SYSTEM_MESSAGE: Thank you for your information. We will pass your information on to the agent.
Please wait here.
Kevin is joined at 2022-09-06 20:03:09
Kevin: Hello.
Customer: Welcome.
Customer: Mee test. blablabla
Kevin: gloogloobloo
Customer: bababa
Kevin: **asdfasdf**
Customer: Hey. File copy is not working
Kevin: Send me the link
Kevin is left at 2022-09-06 20:04:44
Chat ended at 2022-09-06 20:04:44

🗨️ Add comment 1 association ▼

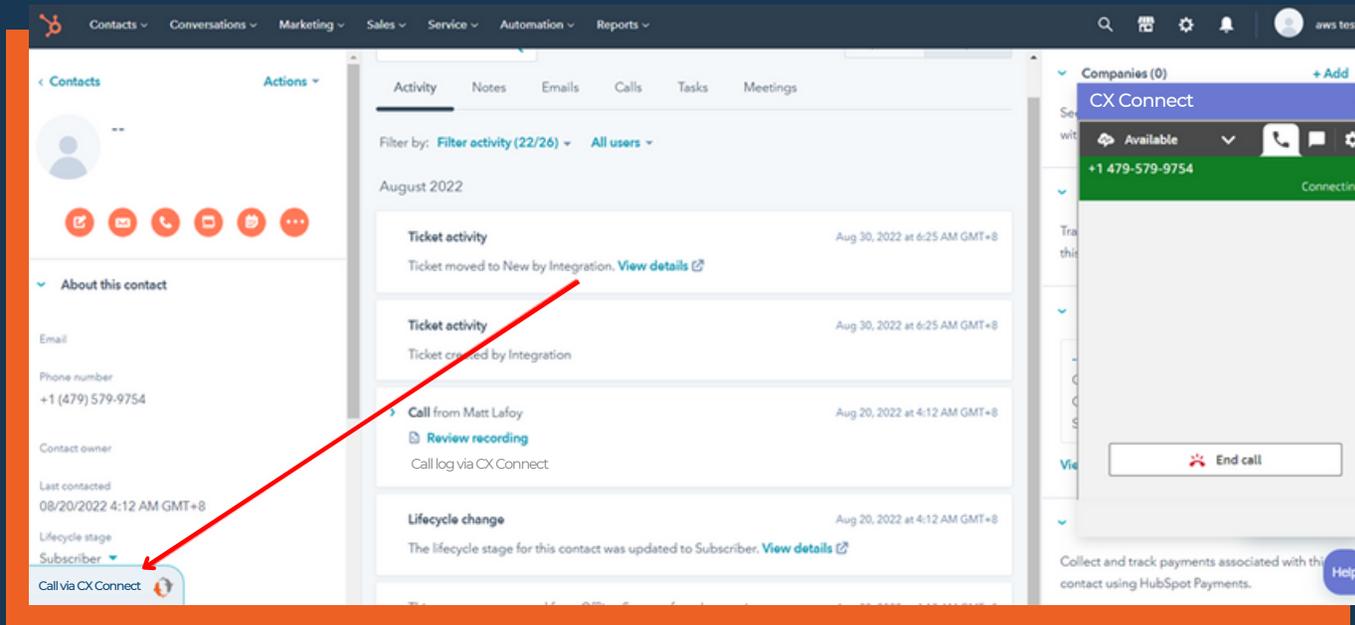


How to Use (cont.)

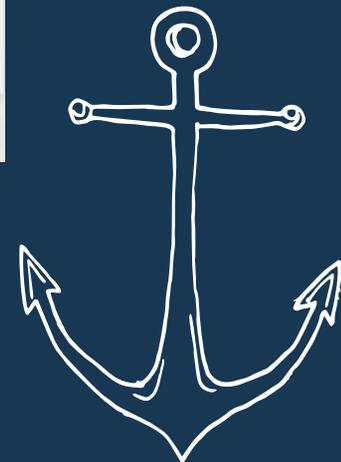
03

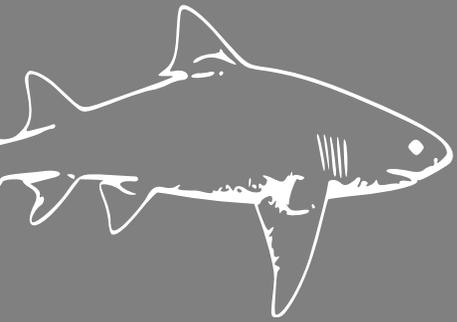
Making Outbound Calls:

- a. Open the Contact record of the person you would like to call.
- b. Click the “Call via CX Connect” button at the bottom of the screen.

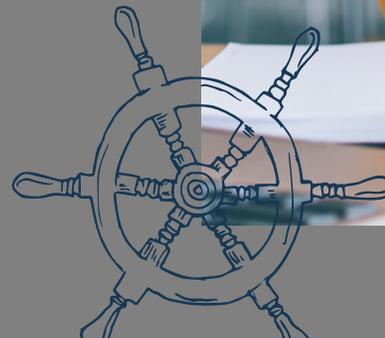


- c. CX Connect will make the outbound call.





Troubleshooting



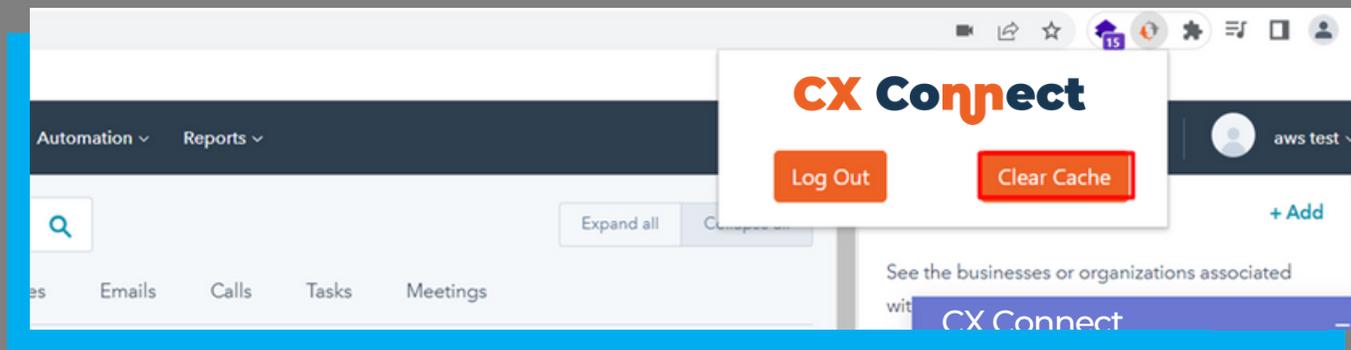


Troubleshooting



Sometimes Amazon Connect doesn't load correctly in the HubSpot widget. The reason is because of the browser cache. Here is how to resolve it: In the Routing menu of the sidebar, click Contact Flows

- Open the Chrome extension in the extension bar and click "clear cache".



- This will remove the cache and reload the browser. Once completed, you need to log back into Amazon Connect.

