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Genesys Engage cloud Supervisor's Guide

Co-browse sessions (v8)

Co-browse sessions (v8)

Important

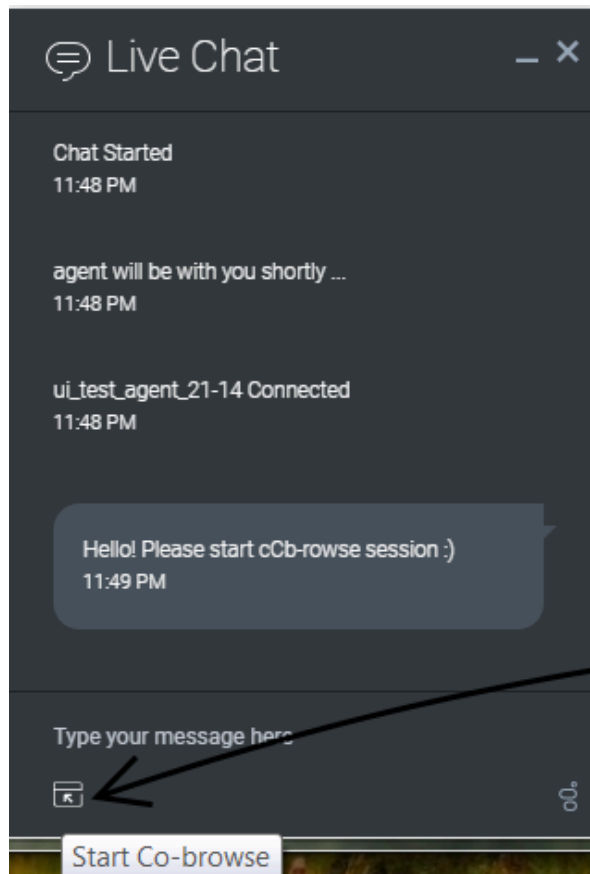
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A Genesys Co-browse session lets you and a customer navigate the same web page at the same time. Unlike conventional screen-sharing applications where one party sees an image of the other party's browser, in a Genesys Co-browse session both you and the customer share the same instance of the web page.

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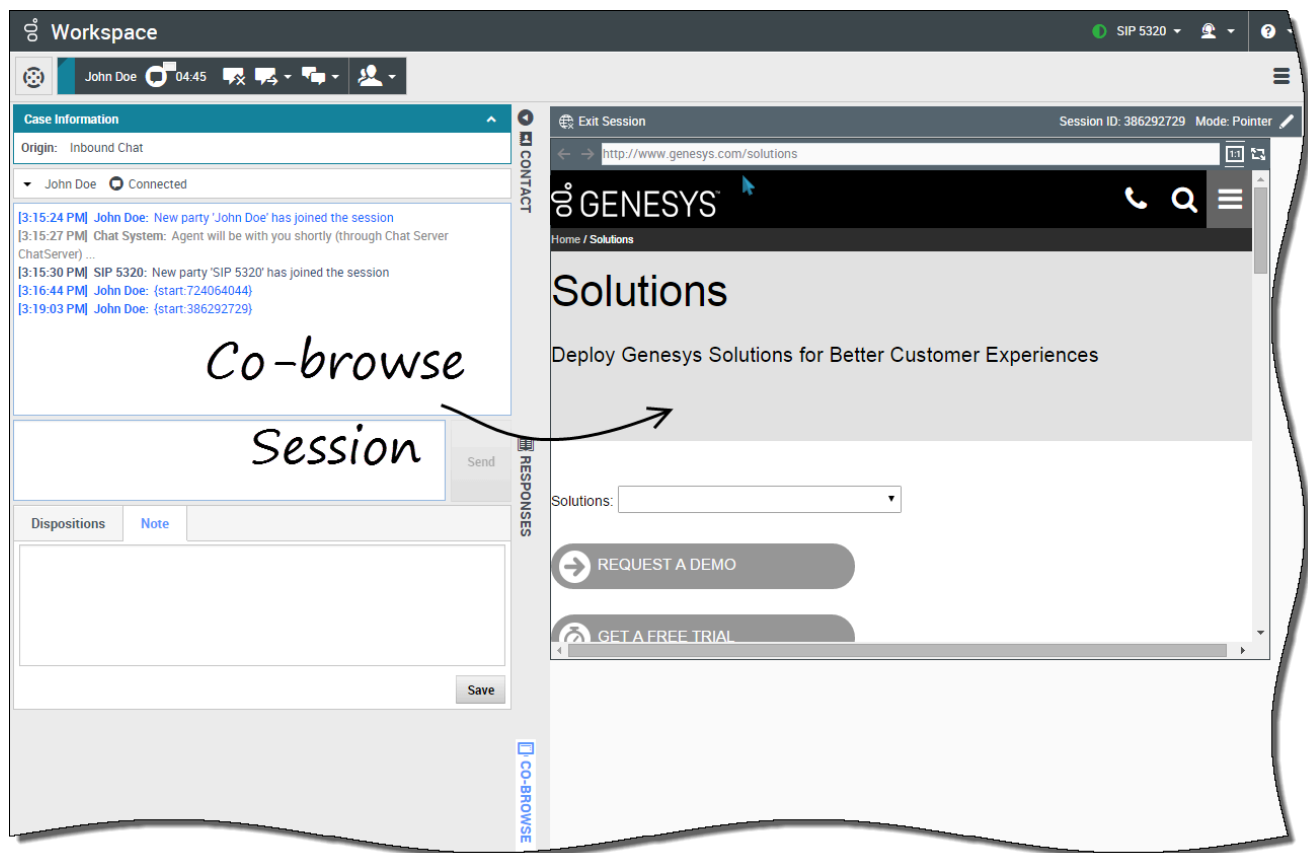
Start a Co-browse session



What your
customer
sees

The customer *must* initiate a Co-browsing session. You cannot start a Co-browse session. Websites set up for Genesys Co-browse include a widget with a **Start Co-browse** button that the customer must click to start a Co-browsing session.

One of the widgets that your customer sees might look something like this. Clicking the **Start Co-browse** button will present the customer with a session ID.



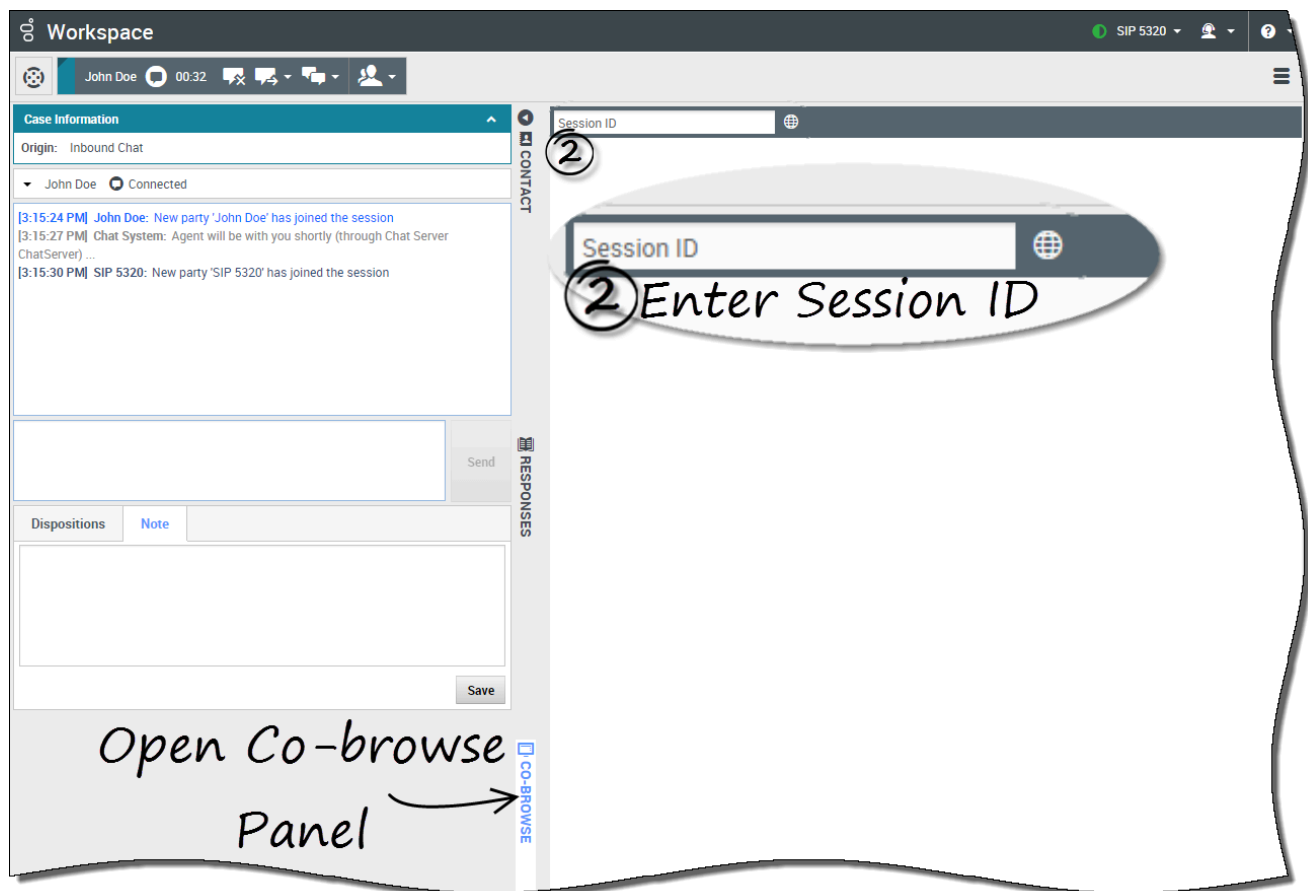
If you are engaged in a chat with the customer, the Co-browse session will automatically start in your desktop. Once the Co-browsing session starts, you see a special message in chat—**{start:123123123}** for example, where **123123123** is the session ID.

You can only have one Co-browse session open at a time (regardless of how many chat sessions you might be handling).

Important

For security considerations, you will see placeholder graphics for certain website elements.

Start a Co-browse session using a session ID



If you are on a call or a chat and your Co-browse session does not automatically start, you can use a session ID to start a Co-browsing session.

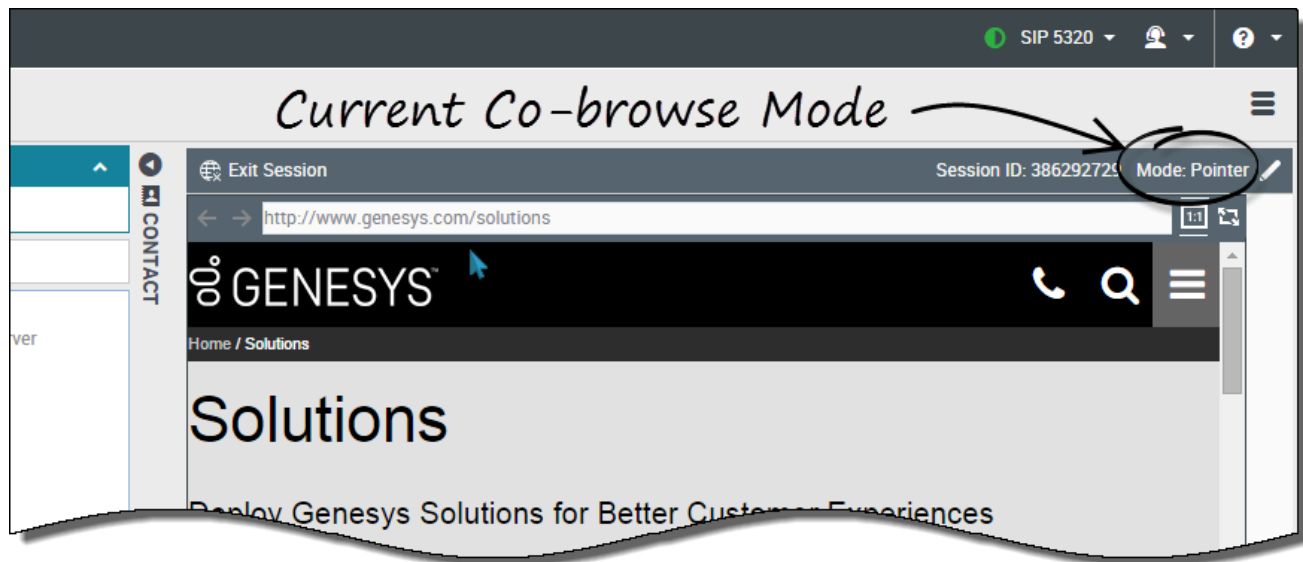
Get the session ID from the customer and enter it in the **Session ID** field, then click the globe icon.

You should now see the customer's browser. You do not need to navigate to the same page as the customer. Co-browse uses the session ID to make sure that you and the customer are viewing the same page. As soon as the session starts, the customer receives a notification on their screen that they have started a Co-browsing session.

Important

Genesys Co-browse does not support conference or transfer for **chat** and **voice**.

Use Pointer Mode



When you first join a Co-browse session, you are in *Pointer Mode*. You can see what the customer sees but you cannot perform any actions in their browser. You cannot navigate, input information, or submit forms.

You and the customer can see each other's mouse movements at all times and your mouse clicks create a red circle effect around your mouse pointer. Use the red circle effect to direct the customer to specific sections on the web page.

At any time, you can send a request to the customer to enable *Write Mode*.

Switch to Write Mode



In Write Mode, both you and the customer can perform conventional user actions. Both of you can enter text and click buttons.

To switch to Write Mode, click the pencil icon at the top right corner of the Co-browse area. The customer is asked to approve the switch to Write Mode. Write Mode is enabled only if the customer approves. You receive a notification about the customer's response.

If the customer approves the switch to Write Mode, the pencil icon turns into a pointer icon.

Tip: If Write Mode is disabled by administrators, you will not see the pencil icon.

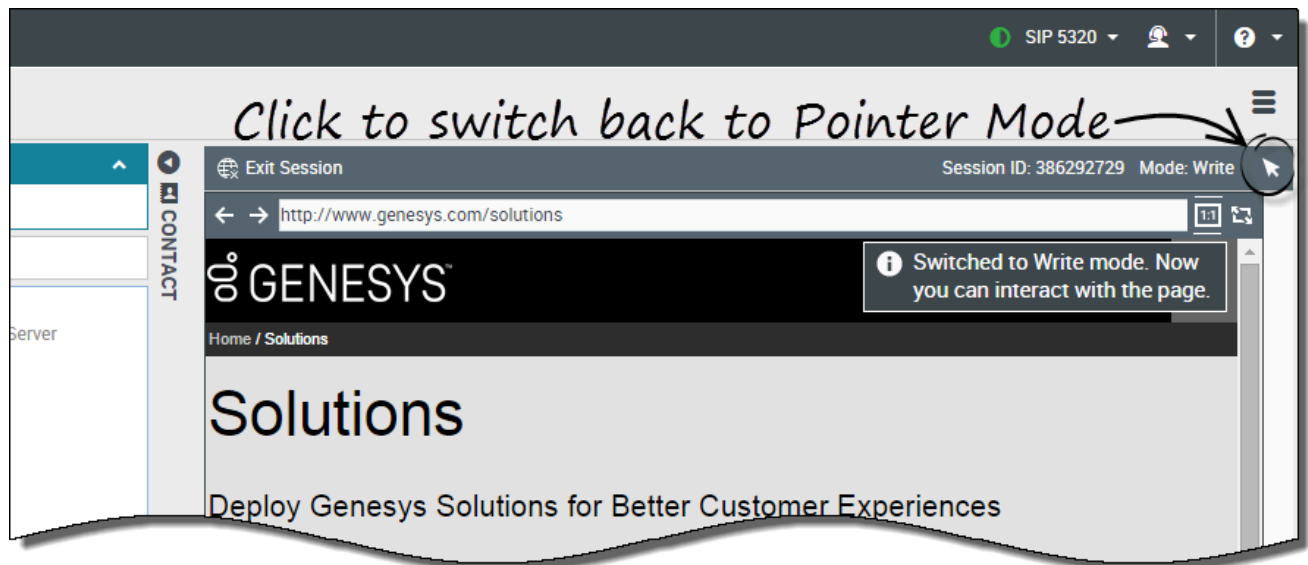
In Write Mode, you can navigate by clicking links in the web page or by using the following navigation options in Agent Desktop:

- Click the back and forward arrows.
- Type a URL into the URL bar and press **Enter**.
- Click **Refresh** to reload the page.

Administrators can limit **which interactive elements are enabled for you** in Write Mode.

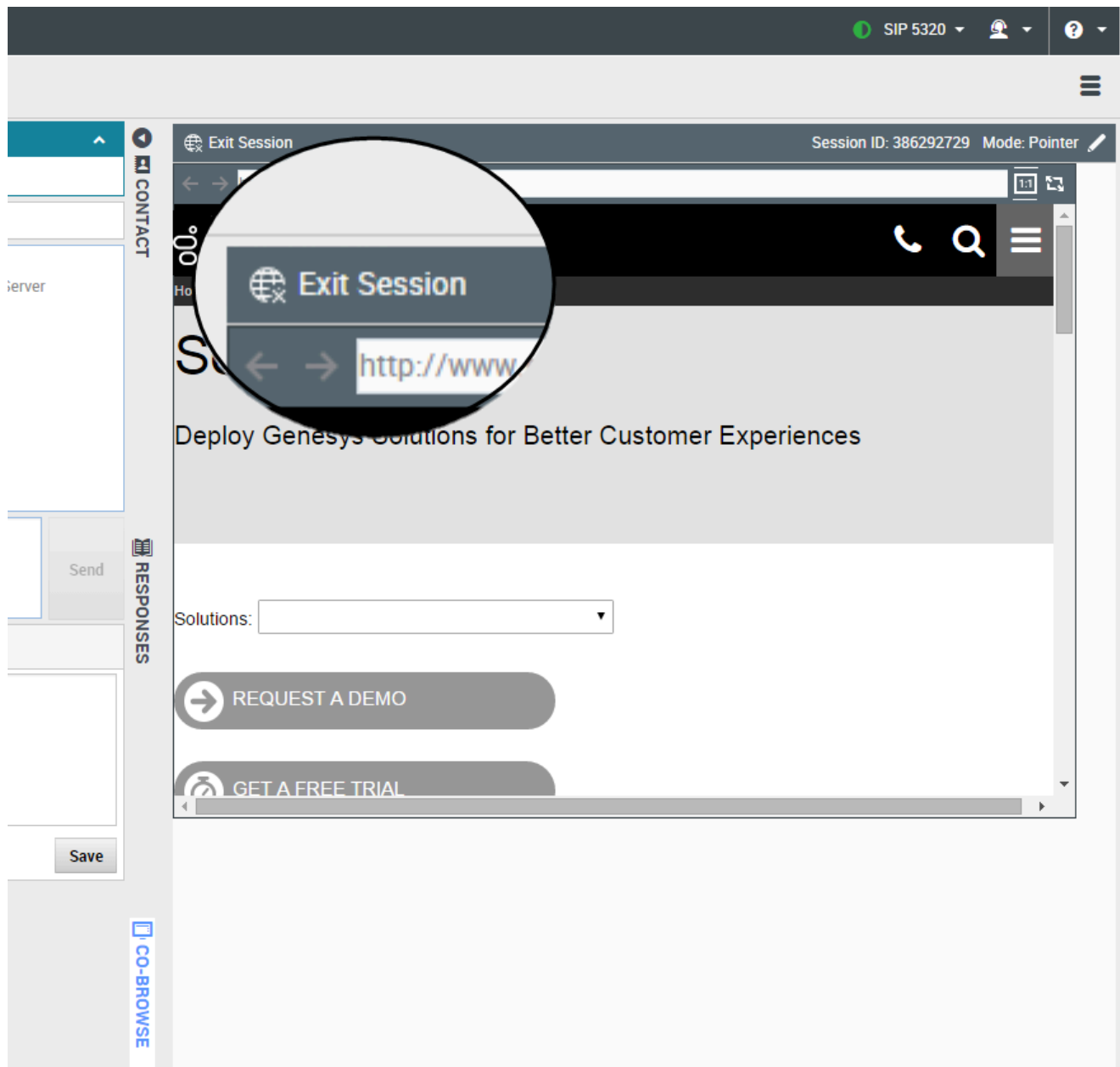
You can only co-browse while the customer is on your company's site. If the customer goes to another site, the co-browse session stops until they come back to your site.

Switch back to Pointer Mode



To switch back to Pointer Mode, click the pointer icon at the top right corner of the Co-browse area. The customer can also switch back to Pointer Mode at any time.

Stop a Co-browse session



Once a Co-browse session starts, both you and the customer have the ability to end the session with the **Exit Session** button. Ending your ongoing chat or call with the customer also immediately ends the Co-browsing session.

If the customer exits the session, you are notified and your browser no longer displays a view of the customer's browser. Likewise, if you exit the session, the customer receives a notification. Exiting the Co-browse session does not end your related chat or call with the customer.

Manage your virtual browser

The screenshot displays a virtual browser window within a software interface. The browser's address bar shows the URL `http://genesys-live.com/checkout.html`. The page content includes the Genesys logo, navigation links for 'Customer Experience', 'Solutions', 'Platform', and 'Se', and a main heading 'Solutions' with a sub-heading 'Deploy Genesys Solutions for Better Customer Experiences'. The text describes the challenges of multi-vendor solutions and the benefits of an integrated customer experience platform. Handwritten annotations include 'Zoom in/Zoom out' with an arrow pointing to the browser's zoom controls in the top right corner, and 'Extra Scroll Bars' with an arrow pointing to the vertical scrollbar on the right side of the page content.

Zoom in/Zoom out

Exit Session Session ID: 448-328-885 Mode: Printer

`http://genesys-live.com/checkout.html`

+1.888.436.3797 ? Support Login Select Region

GENESYS™ Customer Experience Solutions Platform Se

Home / Solutions

Solutions

Deploy Genesys Solutions for Better Customer Experiences

As customer interactions have expanded across multiple touchpoints, many companies have been forced to manage front and back office efficiency with a mix of disconnected multi-vendor solutions. As a result, customers have broken experiences that needlessly test their patience and loyalty, while organizations don't realize operational efficiencies or financial returns.

What's required is an integrated all-in-one customer experience platform that preserves customer context across all touchpoints and communication channels available from the cloud or in your data center. It takes these capabilities to measurably optimize front and back office workforces, increase efficiencies, improve end-to-end customer experiences along the customer journey, and reduce your total cost of ownership.

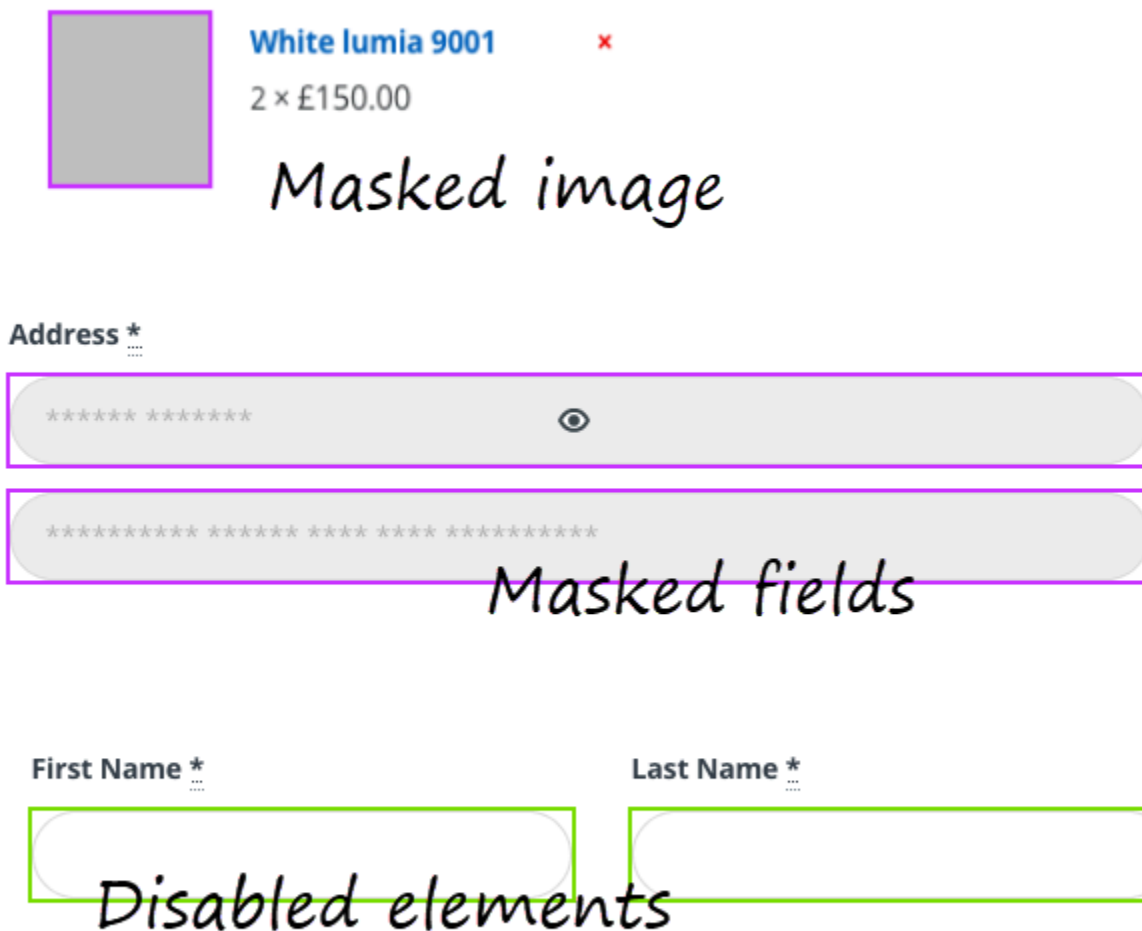
Genesys can help you successfully implement best-in-class solutions to improve customer loyalty, increase sales and collections, and align your customer care with strategic business goals—all while delivering operational efficiencies and lower costs across your organization.

Extra Scroll Bars

The size of your virtual browser (a window on your computer that displays the customer's browser)

window) matches the actual size at the customer's end. Scroll bars appear to help you navigate the customer's browser if their window is bigger than your Agent Desktop Co-browse area. Or, you can use the zoom-to-fit button to scale the display to fit in your window.

Visibility of sensitive data



Administrators can limit which fields are readable to you; asterisks (****) display anywhere that characters are masked. For example, administrators might choose to mask only the customer's password and social security number—or an entire page—from all agents. Images can also be masked from you and will display as a grayed out area. Both masked fields and images are surrounded with a purple border.

At the same time, control for some elements, like buttons or links, can be disabled. These disabled elements are surrounded with a green border. By default, all **Submit** buttons are deactivated for agents. If you click on a **Submit** button, nothing happens. The customer always has permission to submit any web forms, just as they would while browsing normally.