



5.3 Configuration

Bright Pattern Documentation

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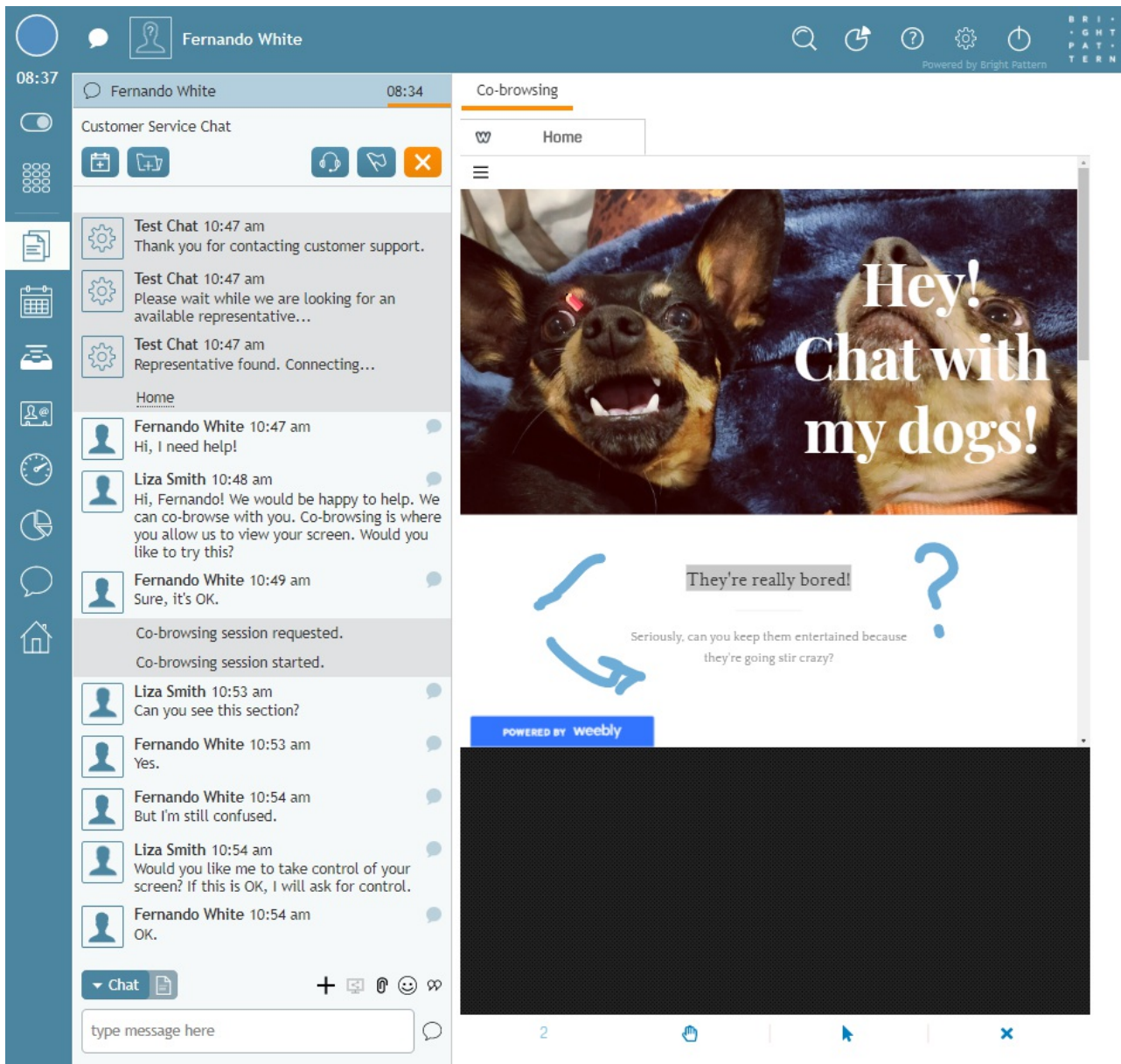
Configuration Overview

Co-browsing is the feature in the Agent Desktop application that allows an agent and a customer to navigate the same web resource at the same time during a chat session; the option is available for chat services with a specifically configured messaging/chat scenario entry. Co-browsing is an ideal solution for helping customers negotiate confusing web pages, fill out complex forms, and so forth.

For example, you have a chat service enabled for your website but you find customers getting stuck in certain areas and requiring assistance. If you add the co-browsing feature to the chat service, your agents will be able to see and interpret how your customers view your website, which can help you improve any difficult areas.

This tutorial describes the steps involved with configuring an end-to-end co-browsing chat service with the third-party service Surfly, including the following:

- [Configure Surfly Account Settings](#)
- [Configure a Co-browsing Integration Account](#)
- [Configure a Messaging/Chat Scenario Entry](#)
- [Instructing Agents About Co-browsing Procedures](#)



An agent co-browsing with a customer

Configure the Surfly Account Settings

Your Surfly account settings allow you to define what your agents can see and do while co-browsing with customers. This includes restricting the areas of a customer's screen that an agent can see, masking text, allowing drawing tools, and so forth. For more information, please refer to [Surfly's Tutorials](#).

PROFILE	BILLING	PLAN	INTEGRATION	OPTIONS	SSO
INTERFACE OPTIONS	SECURITY OPTIONS	INTEGRATION OPTIONS	SESSION APPEARANCE	SESSION FUNCTIONALITY	COMPANY SETTINGS
Reset all					
agent_can_request_control: The agent can request control, after which it can be granted by the controller				<input checked="" type="checkbox"/>	
agent_can_take_control: The agent can take control without the requirement that the controller needs to grant it				<input type="checkbox"/>	
agent_can_end_session: Show End Session button on follower's end				<input checked="" type="checkbox"/>	

Surfly settings

Settings

For integration with Bright Pattern Contact Center software, it is necessary to configure the following settings:

- Settings > Integration
 - language: The desired language
 - position: **bottomleft**
 - hidden: **enabled**
 - confirm_session_start: disabled
 - end_of_session_popup_url: none
- Settings > Options
 - Interface Options
 - language: The desired language
 - chat_box_color: The desired color
 - start_docked: disabled
 - splash: disabled
 - newurl: disabled
 - sharing_button: disabled
 - allow_control_switching: **enabled**
 - docked_only: **enabled**
 - filesharing: disabled
 - videochat: disabled
 - videochat_autostart: disabled
 - Security Options
 - agent_can_request_control: **enabled**
 - agent_can_take_control: disabled
 - agent_can_end_session: **enabled**
 - domain_list: (**IMPORTANT**) Add the domains where you will accept co-browsing requests from
 - blacklist (enterprise only): This setting is optional.
 - whitelist (enterprise only): This setting is optional.
 - private_session: disabled
 - require_password: disabled
 - Integration Options

- language: The desired language
- position: bottomleft
- hidden: **enabled**
- confirm_session_start: disabled
- end_of_session_popup_url: none
- start_muted: **enabled**
- enable_sounds: **enabled**
- stealth_mode: disabled
- autohide_button: disabled
- block_until_agent_joins: disabled
- hide_until_agent_joins: disabled
- chat_integration: Disabled
- shake_to_start: disabled
- auto_restore: **enabled**
- follower_redirect_url: none
- leader_redirect_url: none
- disable_end_redirect: disabled
- Session Appearance
 - show_loading_screen: **enabled**
 - show_cursors: **enabled**
 - ui_off: disabled
 - set_to_smallest: disabled
 - max_height: 0
 - max_width: 0
 - min_height: 0
 - min_width: 0
 - drawing_enabled: **enabled**
 - drawing_color: default
 - drawing_mode: temporary
 - drawing_width: 15
 - drawing_timeout: 15
- Session Functionality
 - store_chat_logs: **enabled**
 - allow_original_file_download: disabled
 - format_session_id: **enabled**
 - url_mangling: disabled
 - share_downloads: disabled
 - only_embedded_sessions: disabled
 - verbose_console: **enabled**
 - white_label (enterprise only): disabled
 - cookie_transfer_enabled (enterprise only): **enabled**
 - cookie_transfer_proxying: disabled
 - cookie_transfer_urls: none
 - cookie_transfer_scopes: none
 - native_selects: disabled
 - allow_pause: **enabled**
 - hide_selector: input, textarea, div[editable]
 - store_session_logs: **enabled**
 - s3_log_bucket: none
 - screenshots_enabled: **enabled**
 - soft_session_end: disabled
 - soft_end_filter: none

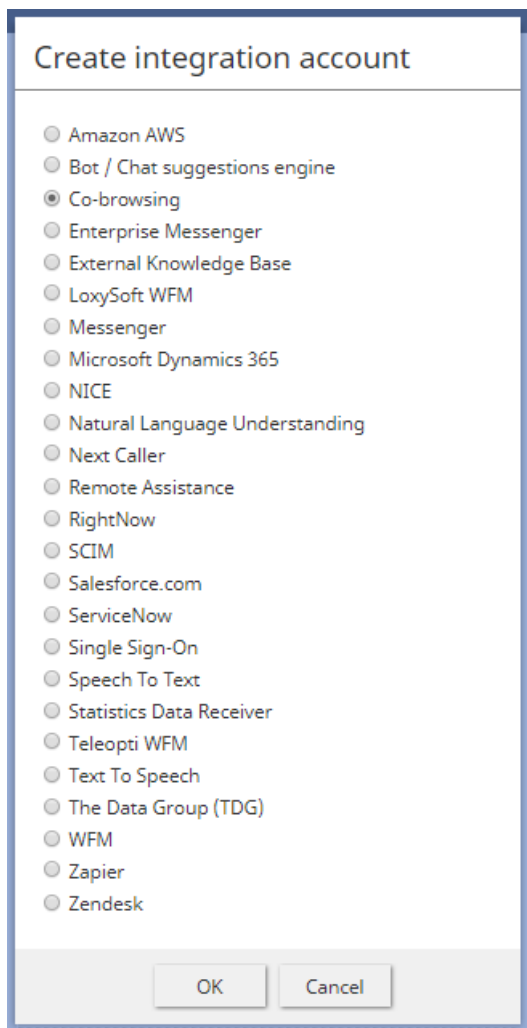
- enable_webp: **enabled**
- enable_native_dialogs: **enabled**
- region: default

Configure a Co-browsing Integration Account

In the Bright Pattern Contact Center Administrator application, you will create a co-browsing integration account. As a reminder, your service provider must enable this feature for your contact center. To configure this integration account, take the following steps.

Procedure

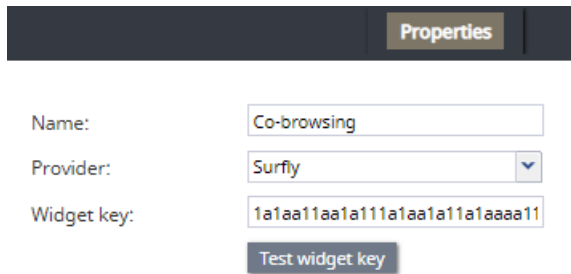
1. In section Contact Center Configuration > Integration Accounts, click the **Add account** button.
2. From the Create integration account menu, select **Co-browsing**, and then click **OK**.



Select the Co-browsing option

3. In the Properties tab, configure the following:

- The [account name](#) (any)
 - The [account provider](#) (i.e., Surfly is the default option)
 - The [Surfly widget key](#) (e.g., 218he91ndionvri4f9iquwndiuqwnd); the Surfly widget key is located in your Surfly account, section *Settings > Integration*.
4. If you wish, you may [test your widget key](#); if the key works, a validation message will pop. When you are finished, click **Apply**.



Properties

Name:

Provider:

Widget key:

Integration account settings

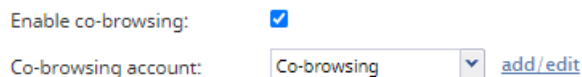
Configure a Messaging/Chat Scenario Entry

After you are finished creating a [Co-browsing](#) integration account, you will add it to an existing [messaging/chat scenario entry](#). If you have not yet created a chat entry, please see *Administration Tutorials*, section [How to Configure Web Chat](#).

1. Edit scenario entry's Properties

If you have an existing chat scenario entry, you will need to take the following steps to complete co-browsing configuration.

1. In the Properties tab, enable the setting [Enable co-browsing](#).
2. For the [Co-browsing account](#) setting, select the name of your Surfly [integration account](#).



Enable co-browsing:

Co-browsing account: [add/edit](#)

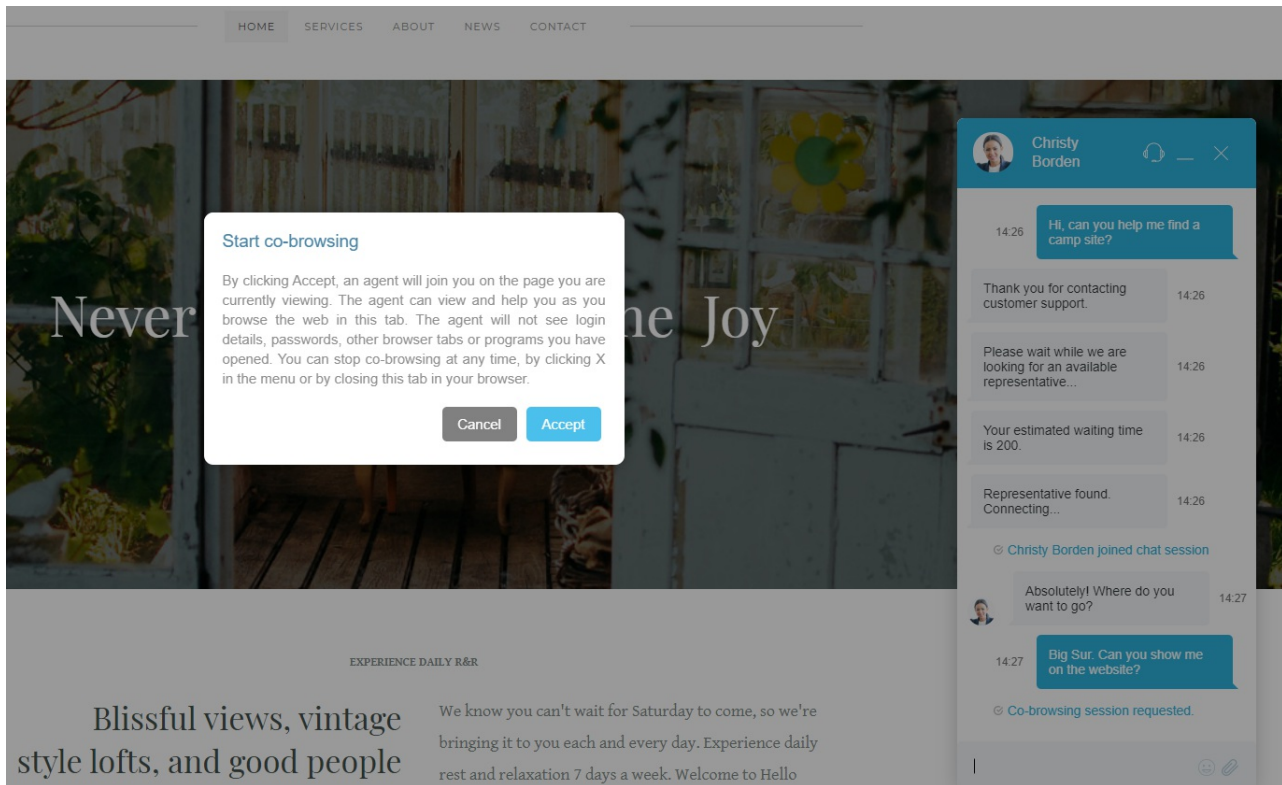
Enable co-browsing settings

3. When you are finished, click **Apply**.

Note: If you previously configured co-browsing, note that you will need to enable new settings.

2. (Optional) Edit co-browsing dialog text

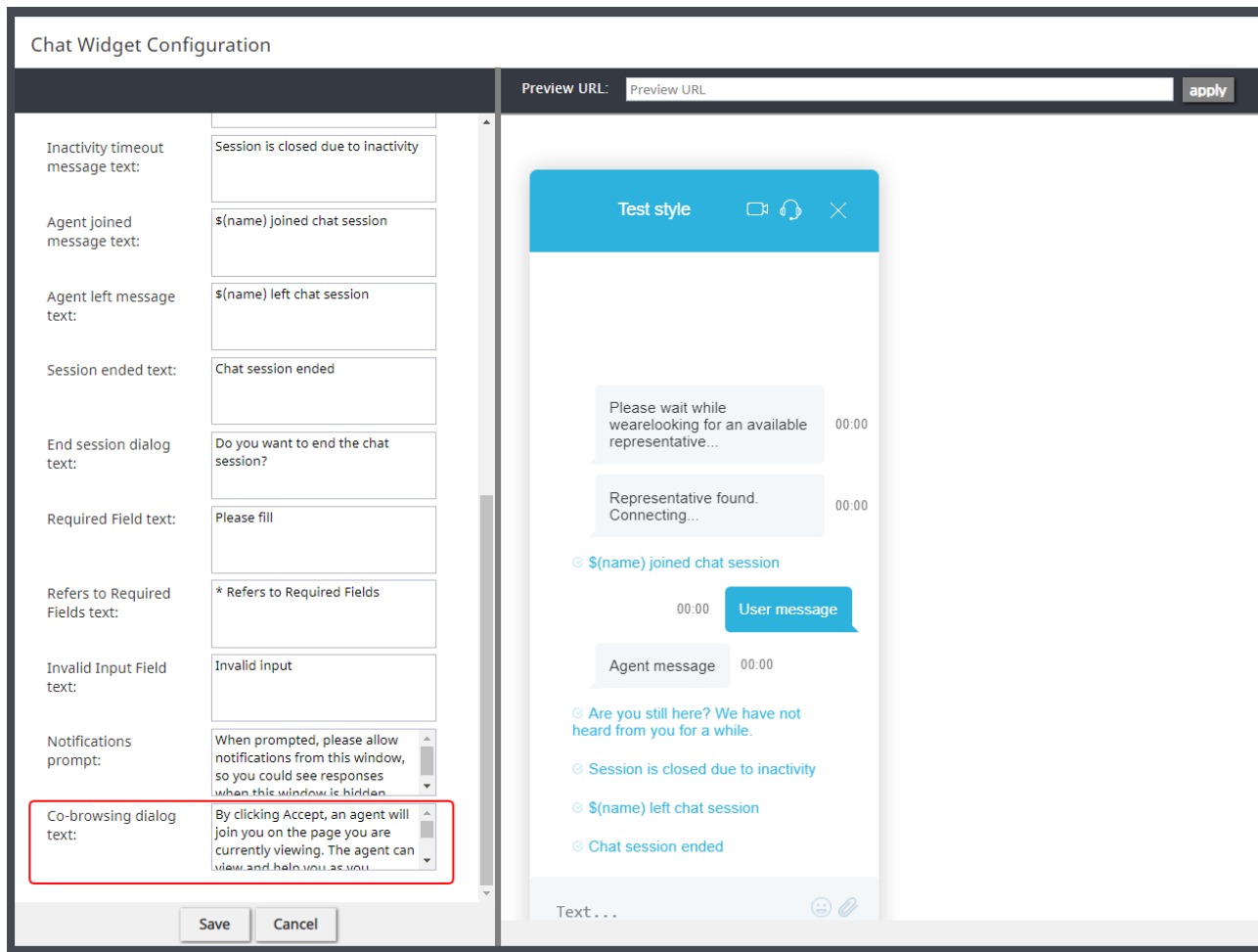
When the agent requests a co-browsing session, the customer will be prompted to accept and start the session. The message shown in this prompt is called the co-browsing dialog text, and you have the option to edit this text in chat widget configuration.



Co-browsing dialog text displayed to customer

1. In the Contact Center Administrator application, go to *Scenario Entries > Messaging/Chat > Chat Widget tab > Chat Styling* and click **edit**.
2. In the Chat Widget Configuration window that opens, make sure that **Enable co-browsing** is selected. Then find [Co-browsing dialog text](#) and enter the desired message in the text entry field.

Note that the following default co-browsing dialog text will be shown to customers if no changes are made to this property: "By clicking Accept, an agent will join you on the page you are currently viewing. The agent can view and help you as you browse the web in this tab. The agent will not see login details, passwords, other browser tabs or programs you have opened. You can stop co-browsing at any time, by clicking X in the menu or by closing this tab in your browser."



Co-browsing dialog text in Chat Widget Configuration editor

3. Click **Save**.

Instructing Agents About Co-browsing Procedures

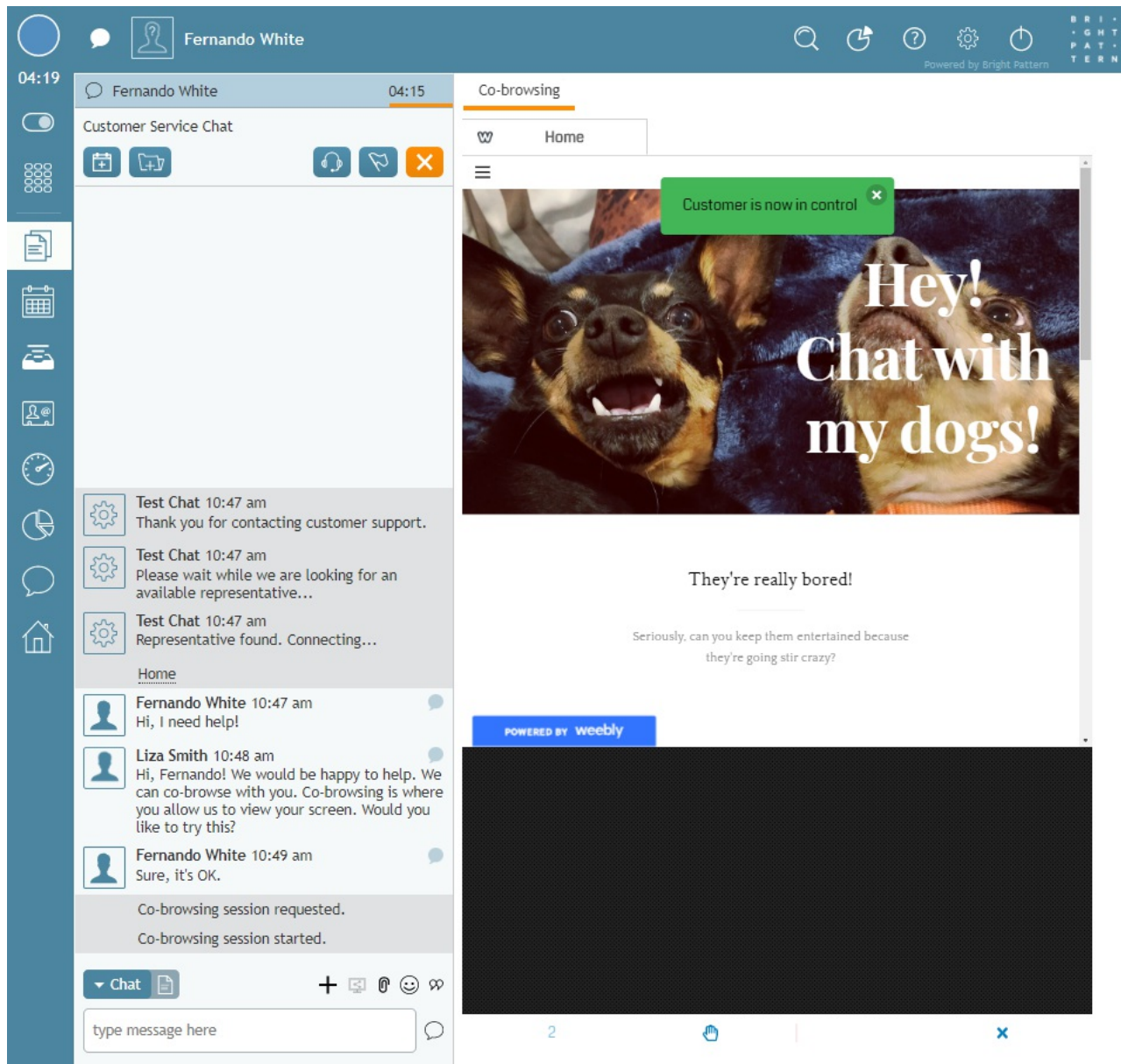
Once co-browsing is configured in your contact center, you will need to instruct your agents on how to initiate and operate co-browsing sessions. Your procedures will likely incorporate your contact center's best practices and other important points.

An example process that uses the Bright Pattern recommended settings might look like the following:

- When the agent determines the customer is having difficulty with a particular web page or form, they may offer to initiate a co-browsing session.
- If the customer agrees, the agent may click the co-browsing icon; the customer will be presented with a dialog prompting them to accept the co-browsing session.

- Once the co-browsing session is initiated, have the agent explain to the customer that they have control of the session but that the agent can take over if allowed.
- If the customer agrees to give the agent control, the agent should explain how the customer can do this.
- Have the agent instruct the customer how to use any enabled Surflyn features or tools.
- When the customer's problem is resolved, have the agent explain that ending the co-browsing session does not end the chat session.

For more information, agents may be directed to the Bright Pattern Contact Center *Agent Guide*, section [How to Co-browse with Surflyn Integration](#).



An agent co-browsing with a customer in the Agent Desktop application