

5.8 Surfly Integration Guide

Bright Pattern Documentation

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About

Bright Pattern Contact Center software integrates with Surfly, a co-browsing solution, in order to allow co-browsing between agents in the Agent Desktop application and customers viewing specific web resources. Co-browsing is an ideal solution for helping customers negotiate confusing web pages, fill out complex forms, and so forth.

The *Surfly Integration Guide* describes how to do the following:

- Configuring your Surfly account's settings to optimize Bright Pattern Contact Center integration
- Configuring a co-browsing integration account
- Adding the integration account to a messaging/chat scenario entry
- Training your agents how to operate co-browsing with customers

Audience

The *Surfly Integration Guide* is intended for the IT/technical personnel responsible for the data infrastructure of the contact centers that use Bright Pattern Contact Center solutions for customer interaction processing and the Surfly co-browsing service.

Readers of this guide are expected to have expertise and experience in the administration of these systems as well as a solid understanding of contact center operations and resources that are involved in such operations.

Prerequisites

In order to configure Surfly (Co-browsing) Integration, you must do the following:

1. You will need to obtain a Surfly account and configure it. For more information, please refer to section [Configure Surfly Account Settings](#) in this guide as well as [Surfly's Tutorials](#).
2. Your service provider must enable the Surfly co-browsing feature for your contact center in order for you to complete this tutorial.

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

