Oracle B2C Service

Using Standalone Cobrowse

20B
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Preface

This preface introduces information sources that can help you use the application and this guide.

Using Oracle Applications

To find guides for Oracle Applications, go to the Oracle Help Center Documentation.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit Oracle's Accessibility Program at https://www.oracle.com/corporate/accessibility/.

Videos included in this guide are provided as a media alternative for text-based topics also available in this guide.

Contacting Oracle

Access to Oracle Support

Customers can access electronic support through Oracle Support. For information, visit https://cx.rightnow.com/app/landing/get_started_support or visit https://www.oracle.com/corporate/accessibility/learning-support.html if you are hearing impaired.

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- For guides: Oracle Service Cloud - Documentation Feedback.
- For tutorials: Oracle Service Cloud - Tutorial Feedback.
1 Standalone Cobrowse User Guide

Overview of Cobrowse User Guide

The purpose of this guide is to outline the process and best practices around the use of cobrowse during customer interactions.

While the process of cobrowsing with customers is similar for all companies, it is highly encouraged that each company thoroughly document its unique use cases and develop agent scripting to support the cobrowse strategy.

Log In to the Agent Console

Follow this procedure to log in to the Agent Console.

1. Do one of the following:
   - Click the Agent Widget icon on your system tray if it has been installed. The widget may be installed through Install Agent Widget.
   - Access the Agent Console URL at Oracle Digital Engagement Channels Administrative Console Login.
2. Enter your login.
   This is your email, or, if your company uses single sign-on (SSO), this is your alphanumeric SSO login.
3. Enter your password.
   - Note: If you forgot your password, you can click the Forgot Password link, or you can request a password reset by visiting LiveLOOK Forgot Password. An email will be sent to you.
4. Click Continue.
   The Agent Console opens.

Launch a Cobrowse Session

When a customer calls for assistance, you may determine that the customer’s issue would be solved more quickly or efficiently if you could see the customer’s screen.

With your Agent Console open, you can invite the customer to start a cobrowse session using company-approved scripting (for example, “Let’s start a cobrowse session so I can walk you through this more quickly.”).

1. Enter your name on the Agent Console.
   Your name displays automatically after the first time you enter it on the Agent Console.
2. Ask the customer to click the Cobrowse button on your company website.
Note: How this button displays can be customized and branded by your company. It can be displayed as a hovering button (best practice), a link, or an icon. It can be displayed on every page of the site (best practice) or displayed on a contact page. The button may be labeled Cobrowse, Live Help, or whatever the company has chosen.

3. Ask the customer to read the 6-digit Session ID code displayed in the cobrowse window.
   The cobrowse window minimizes automatically after a few seconds, but the 6-digit code remains visible to the customer.
4. Enter the 6-digit Session ID code onto the **Agent Console**.
5. Click **Connect** to start the cobrowse session.
   The customer can see that the session is connected by the green dot that appears on the **Cobrowse** button.

How You Cobrowse with a Customer

While cobrowsing with a customer, you use the controls and information on the **Agent Console**.

Your viewing and cobrowsing options are limited depending on how your company has set up the Cobrowse deployment. Privacy settings can differ when you cobrowse in Instant Cobrowse mode or Advanced Cobrowse mode. Your company’s Cobrowse administrator configures the privacy settings.

In Instant Cobrowse Mode, only company web pages may be viewable. Options available are View Only and View + Pointer. Depending on how your company is set up, the Full Control option may also be available in Instant Cobrowse mode.

In Advanced Cobrowse mode, privacy settings may be configured to limit cobrowsing to specific web pages, the browser only, or specific applications. All other applications and the customer’s desktop can be masked. Additionally, specific fields on the page you are cobrowsing can be masked for the customer’s privacy, such as social security or credit card numbers. Options available are View Only, View + Pointer, and View + True Pointer. Depending on how your company is set up, the Full Control option may also be available.

<table>
<thead>
<tr>
<th>Button/Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Session ID Code</strong></td>
<td>The Session ID code displays so that additional agents or subject matter experts can be asked to join the active session if needed.</td>
</tr>
<tr>
<td><strong>Status</strong></td>
<td>The status of the session connection displays, alerting the agent to any connectivity issues that may cause the session to proceed slowly or cause disruption.</td>
</tr>
<tr>
<td><strong>URL</strong></td>
<td>The URL of the customer’s current web page displays. Click the drop-down menu to select a URL in the customer’s history for the active window. The drop-down menu is available only in Full Control state.</td>
</tr>
<tr>
<td><strong>Mode</strong></td>
<td>Click to select a cobrowse state, which specifies how much control you have over the customer’s active window. Not all states may be available. Your company administrator defines the states available to you when cobrowsing in Instant or Advanced Cobrowse modes.</td>
</tr>
<tr>
<td>Button/Field</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------</td>
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</tr>
<tr>
<td>View Only</td>
<td>Select to view the active window. This option is selected by default in Advanced Cobrowse mode.</td>
</tr>
<tr>
<td>View + Pointer</td>
<td>Select to view the customer’s active window and use a labeled mouse as a pointing device on the customer’s screen. With this option selected, mouse-click functionality does not work on the customer’s active window. This option is selected by default in Instant Cobrowse mode.</td>
</tr>
<tr>
<td>View + True Pointer</td>
<td>Select to view the customer’s active window and control the movement of the customer’s mouse or other pointing device. With this option selected, mouse-click functionality does not work on the customer’s desktop.</td>
</tr>
<tr>
<td>Full Control</td>
<td>Select to view the customer’s active window, control all mouse or other pointing device functions (pointer and mouse clicks), navigate to other company web pages, and use your keyboard to enter information on the customer’s active window (for instance, to help the customer fill out a form). In Advanced Cobrowse mode, you can access the customer’s desktop and cobrowse third party sites. The customer receives a consent message to allow or deny full control.</td>
</tr>
<tr>
<td>Advanced Mode</td>
<td>Click to escalate to the Advanced Cobrowse mode.</td>
</tr>
<tr>
<td>Client Info</td>
<td>Displays the customer’s environment information for operating system, browser version, client version, and escalation mode. This information may be helpful if there is a technical problem.</td>
</tr>
<tr>
<td>Disconnect</td>
<td>Click to end the cobrowse session.</td>
</tr>
<tr>
<td>True View</td>
<td>True View is enabled by default and lets you view the customer’s desktop exactly as it is seen by the customer when in Instant Cobrowse mode. Click to turn True View off in situations where the customer’s settings prevent you from navigating efficiently.</td>
</tr>
<tr>
<td>Zoom In</td>
<td>Click to zoom in on the customer’s desktop. This button is available only in Advanced Cobrowse mode.</td>
</tr>
<tr>
<td>Zoom Out</td>
<td>Click to zoom out on the customer’s desktop. This button is available only in Advanced Cobrowse mode.</td>
</tr>
</tbody>
</table>

**Escalate to Advanced Mode**

In certain cases, you will need to escalate to Advanced Cobrowse mode in order to assist a customer.
Reasons to escalate to Advanced Cobrowse mode include the following.

- You need to see content that resides outside of the corporate website pages visible in Instant Cobrowse mode (for example, a desktop application, a document, or a third-party resource website).
- On-page elements are not displaying properly in Instant Cobrowse mode (for example, with Flash, dynamic content, or Silverlight).

1. Click **Advanced Mode**.
   An invitation is sent to the customer to activate Advanced Cobrowse mode.
2. Follow the instructions that appear on the **Agent Console** to help you guide the customer through any next steps that might be necessary to activate Advanced Cobrowse mode.
   Advanced Cobrowse mode uses one of three technologies to run, depending on the customer’s environment, including Java which may require the customer to activate it within the browser.

**End a Cobrowse Session**

Both the agent and customer can end a Cobrowse session at any time.

1. Click **Disconnect** at the top of the Agent Console. Customers can click **Disconnect** on the cobrowse button displayed on their screen.

Oracle Standalone Cobrowse includes an option to display a survey to both customers and agents after the cobrowse session. If your company has included this option, a survey URL appears in the **Session Ended** window enabling the participants to complete the survey.

**Access Your User Reports**

With your Agent Console open, you can access your reports.

1. Click **My Reports**.
   A list of reports available to you appears. These reports include summary information on the number of sessions run and the number of total minutes, as well as details for individual sessions.
2. Click the arrows on any field headings to sort the reports by that field.
3. Click **Export** to export the data in a **.csv** format.

**Using Cobrowse on Mobile Devices**

**Special Considerations for Using Cobrowse on Mobile Devices**

Take note of these differences for some features of Cobrowse when you use mobile devices.

- ACB mode is not supported on mobile devices.
- Full Control is not supported in the mobile SDK.
• In Stealth mode, the launch point displays after holding two or three fingers on the screen for 2 to 3 seconds, and then releasing. The number of fingers you should hold down depends on the make and model of your device, and individual settings.

Note: The Cobrowse Admin Console is best accessed on a computer rather than a mobile device.

Cobrowse Accessibility

Cobrowse is natively accessible, and does not require any specialized configuration or setup to enable accessibility.

Support

Support is available.

If you need support, visit our support site.