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Genesys Cloud CX Use Cases

Genesys Co-browse (CE27) for Genesys Cloud

Extend web messaging, voice or chat interactions with Co-browse

What's the challenge?

Your customer is frustrated because they're having trouble on your website. Your agent is frustrated because he can't see where the customer is struggling. The customer has to describe what's on the screen; the agent has to articulate where to click. It's cumbersome — and results in long handle times.

What's the solution?

Improve first contact resolution by letting agents "show and tell" with your customers through a co-browsing session, using real-time annotations, comments, or even the ability to take control of the customer's screen. There's zero footprint for customer ease and content masking for peace of mind.

Other offerings:

Genesys Engage on-premises

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Use Case Overview

Story and Business Context

A customer and a contact center agent are having a conversation over the phone or through a web messaging or web chat session. During the conversation, the ability to see and control the customer's browser through co-browsing functionality enables the agent to convey information more effectively and get the customer's issue resolved more quickly.

Use Case Benefits*

The following benefits are based on benchmark information captured from Genesys customers and may vary based on industry, lines of business or Genesys product line:

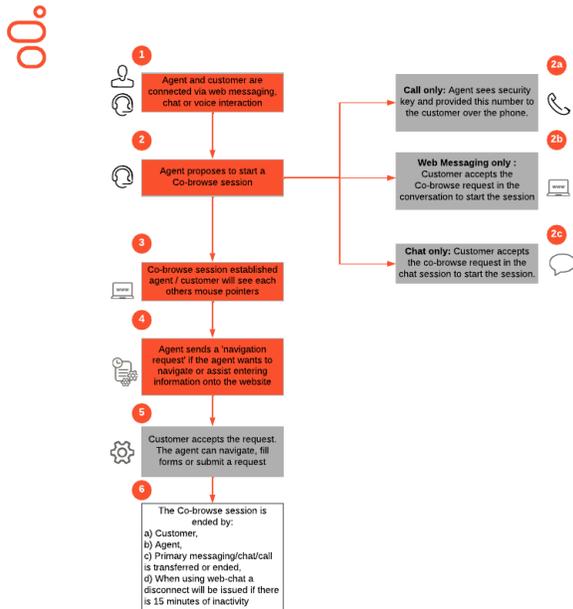
Use Case Benefits	Explanation
Improved Customer Experience	Mitigate customer frustration by providing a better method to serve and assist customers thereby reducing customer effort
Improved First Contact Resolution	Optimize the customer service experience by initiating a co-browse session with the customer to resolve their request the first time
Increased Revenue	Reduce shopping cart abandonment and increase online conversion rates.
Reduced Handle Time	Leverage annotations, comments and browser control to aid quick resolution.

Summary

During a call or a web messaging or a chat session between a customer and an agent, the customer can initiate a co-browse session with the agent, so both the agent and the customer share the same instance of the browser. This session enables the agent to provide direct support to a customer trying to complete a request on the company's website.

Use Case Definition

Business Flow



Business Flow Description

1. The customer and agent are connected via a web messaging session, a chat session or a voice call.
2. The agent may propose to the customer to start a Co-browse session to support him/her on the website. For security reasons, the customer and agent have to initiate the Co-browse session.
 - **Call only:** A security ID is displayed to the agent if he/she clicks the 'screen sharing link' in the Genesys Cloud CX UI. This security key is then given over the phone by the agent to the customer and entered by the customer. The customer enters the security key into the website to start the co-browse session.
 - **Web messaging only:** The customer clicks the "Accept" option when asked the question if they want to share their screen.
 - **Chat only:** The customer clicks the 'start sharing' option when asked the question if they want to share their screen.
3. When the session is established, the Genesys Cloud CX UI displays a view of the website in the browser window the customer is using. Agents start Co-browse sessions in read-only mode. In read-only mode, the customer and the agent can see each other's mouse pointer but the agent cannot enter any information into the web page, click buttons, or navigate the customer's browser. The agent does have the ability to highlight sections of the page (by clicking) or to add annotations to the page to guide the customer.
4. If the agent needs to enter information into the web page or to navigate the browser, he/she can send the customer a 'request navigation'.

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5. Once the customer accepts this request, the agent can navigate, fill forms, and click hyperlinks on the web page. Sensitive Data can be masked before presenting to the agent, and agent controls (the ability to fill certain fields or submit forms) can be blocked through instrumentation. The customer can revoke the Write Mode at any time, returning the agent to read-only mode.
 6. The Co-browse session ends when any of the following events occurs:
 - The customer chooses to end the Co-browse session
 - The agent chooses to end the Co-browse session
 - The primary web messaging, chat or voice interaction is transferred or ended by either the customer or the agent
 - For a web messaging session, after 2 minutes of inactivity the Co-browse session will be disconnected.
 - For a WebChat session after 15 minutes of inactivity the session will be disconnected. There is no timeout when using voice.

The primary voice, web messaging or chat interaction can continue even when Co-browse has ended.

Business and Distribution Logic

Business Logic

User Interface & Reporting

Reporting

Real-time Reporting

No real-time co-browse data is available currently, this data will be added in a future release.

Historical Reporting

- Interactions Detail View: Co-Browse sessions are shown in the Interactions Timeline information.
- Interaction History for External Contacts: Co-browse sessions are shown in the interaction history screen for related conversations.
- Additional co-browse metrics are available via the Genesys Cloud CX API's, not all of this data is currently exposed in the various performance views.

Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

All of the following required:	At least one of the following required:	Optional	Exceptions
None	Digital <ul style="list-style-type: none">• Genesys Chat Routing (CE18)• Genesys Messaging (CE34) Inbound <ul style="list-style-type: none">• Genesys Personalized Routing with Callback (CE43)	None	None

General Assumptions

Co-browse with Web Messaging and Voice:

- Customer has Genesys Cloud CX 2 licensing for their organization, or users who are using the Digital Add-on.
- Customer has prepared their website to work with co-browse (<https://help.mypurecloud.com/articles/>)

set-co-browse-for-web-chat/)

- Customer has added masking to private data on their website to control what can and cannot be seen by the agent.

Co-browse with Chat:

- Customer has Genesys Cloud CX 3 licensing for their organization.
- Customer has prepared their website to work with co-browse (<https://help.mypurecloud.com/articles/set-co-browse/>)
- Customer has added tags to private data on their website to control what can and cannot be seen by the agent.

NOTE: Legacy Co-browse (used for Chat and previously Voice) is due to be deprecated on January 27, 2025. All customers should be directed towards the new Co-browse for Messenger, supporting Web Messaging and Voice use cases. For more information, see: <https://help.mypurecloud.com/articles/deprecation-legacy-co-browse-and-screen-share/>

Customer Responsibilities

- Customer is responsible for integration of the solution into the company website.
- Customer is responsible for tagging information and fields on their website that need to be hidden from the agent during a co-browse session, or agent controls that need to be blocked (such as Submit form).

Document Version

- Version **V 1.1.3** last updated **May 14, 2026**