IntPowers

USER GUIDE · COBROWSING SOLUTION

# CoBrowsing

Browse your own website together with your customer, on the same page, right from the browser

Service: **[CLIENT]**



Interactive Powers · Version 2026.1 · October 2026

WHAT IT IS

# CoBrowsing at a glance

The agent and the customer browse together through the pages of your website that have CoBrowsing: the same page, in both browsers, while they talk over their usual channel.

### The same page, at once

Shared scrolling, clicking and typing, with both cursors in view

### Short link or PIN

The customer joins with a link or by typing six characters

### Follow each other

Your screen goes with the customer when they change page

### Hidden fields

Sensitive data never shows on the agent's screen

### Alongside voice, video or chat

The conversation stays on its own channel, in parallel

### No downloads, no account

The customer uses their desktop browser and installs nothing

# From a question to a shared page

Every session follows the same path. The agent always creates it, from the page of your website where CoBrowsing lives.

01

### The customer asks for help

They call, write in the chat or are on a video call while browsing your website.

02

### You create the session

On that same page, you press “New session” on the agent button.

03

### You share access

You paste the link in the chat or read out the PIN over the phone.

04

### You browse together

You both see the same page: you point, click and fill in fields.

05

### You stop the session

When the task is done, either of you presses “Stop”.

**The conversation stays separate.** The CoBrowsing widget only co-browses: it has no video or chat. Voice, video or chat continue on their own channel.

**Where it works** Only on the public pages of your website that carry the CoBrowsing script. It never shows the desktop or other tabs.

BEFORE YOU START

# What you need at your workstation

CoBrowsing is not installed: it is part of your website. All you need is an up-to-date browser and the right page open.

### To assist with CoBrowsing

- A computer with an up-to-date browser: Chrome, Firefox, Safari, Edge, Opera or Brave.
- Your agent access, as set up by the service administrator.
- The page of your website with CoBrowsing open, the same one the customer reaches.
- An open channel with the customer: a phone call, a video call or a chat.

**Page with CoBrowsing: [YOUR WEBSITE URL]**

TECHNICAL REQUIREMENTS

Browsers

**Chrome · Firefox · Safari · Edge · Opera · Brave**

Systems

**Windows · macOS · Linux, on desktop**

Connection

**WebSockets: page data, not video**

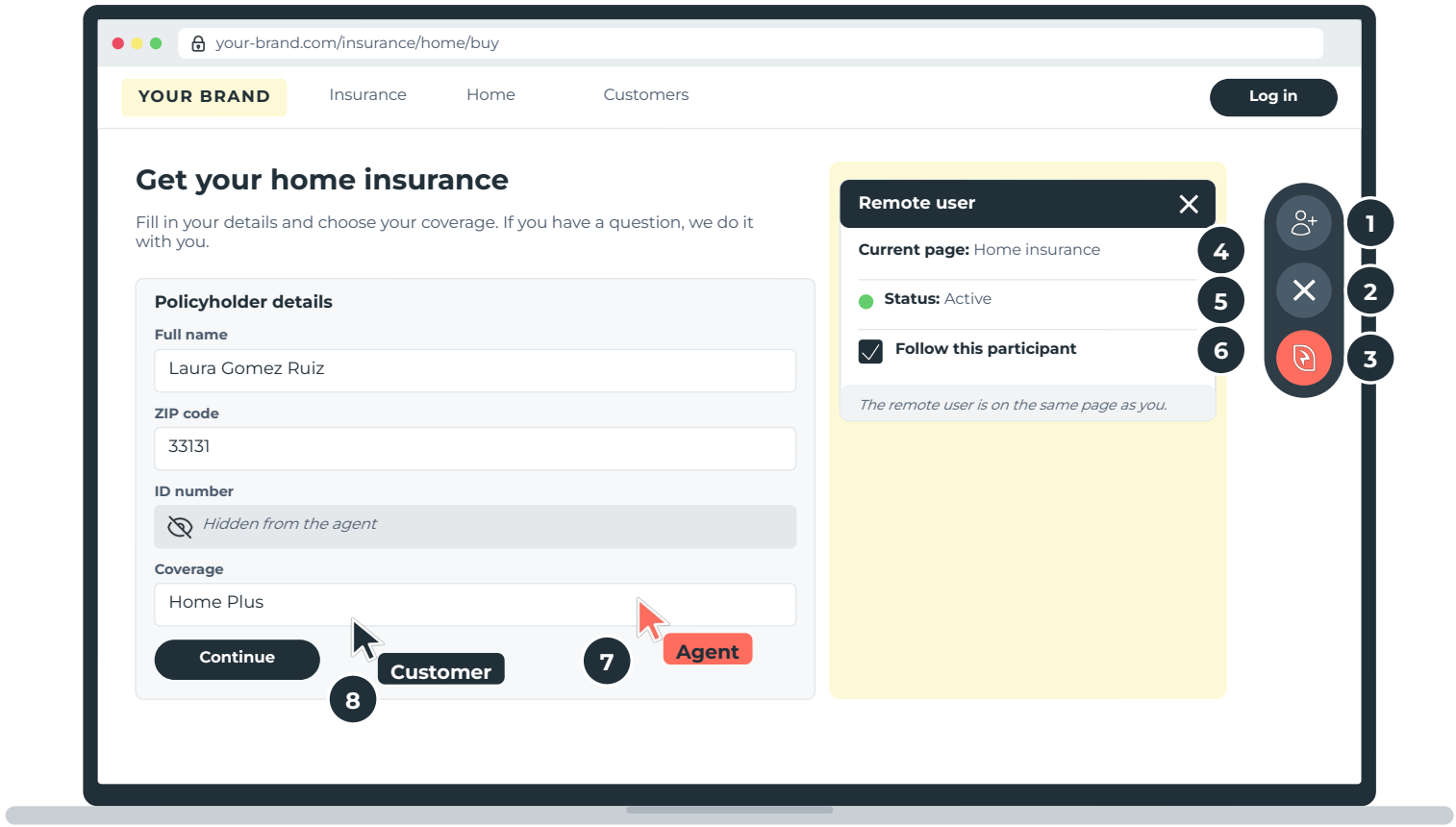
Bandwidth

**Under 500 kbps once the page has loaded**

**This is not screen sharing.** If you need to see the customer's desktop, an application or their camera, the tool is Remote Viewer, not CoBrowsing.

# Your widget, on the same website

You see the website just as the customer does. Bottom right, the agent's floating button; next to it, the panel with the connected user.




Mockup with synthetic data. The button's position and look adapt to each website.

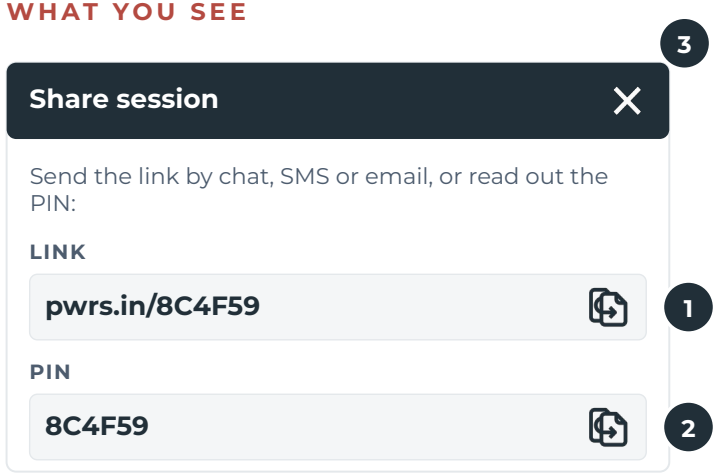
1. **New session** creates the session and opens "Share session"
2. **Stop** ends CoBrowsing for both of you
3. **Remote user** opens the participant panel
4. **Current page** where the customer is right now
5. **Status** whether the session is active
6. **Follow** your screen goes with the customer
7. **Your cursor** in coral, labeled "Agent"
8. **Customer's cursor** in navy blue

STEP 1 · SHARE

# Create the session and give access

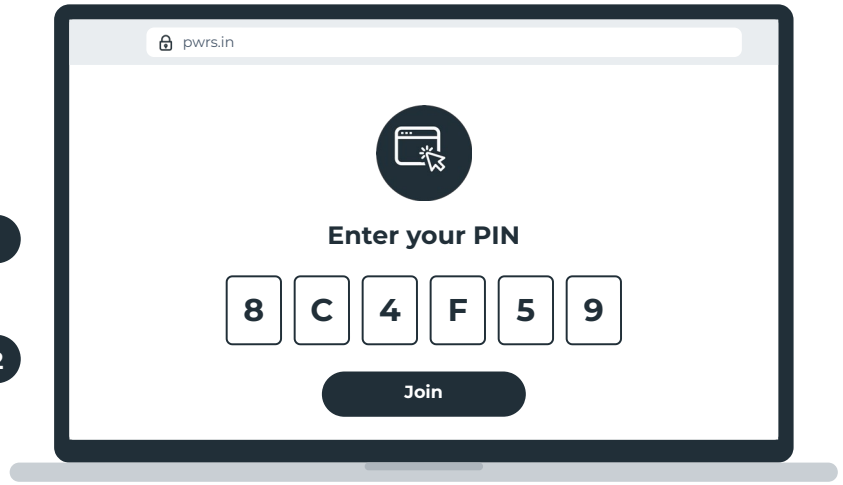
Pressing “New session” opens “Share session” with a short link and a PIN. They are interchangeable: use whichever fits the channel best.

## WHAT YOU SEE




1. **Short link** press copy and paste it
2. **PIN** six characters to read out
3. **Close** the session stays open

## WHAT THE CUSTOMER SEES WITH THE PIN



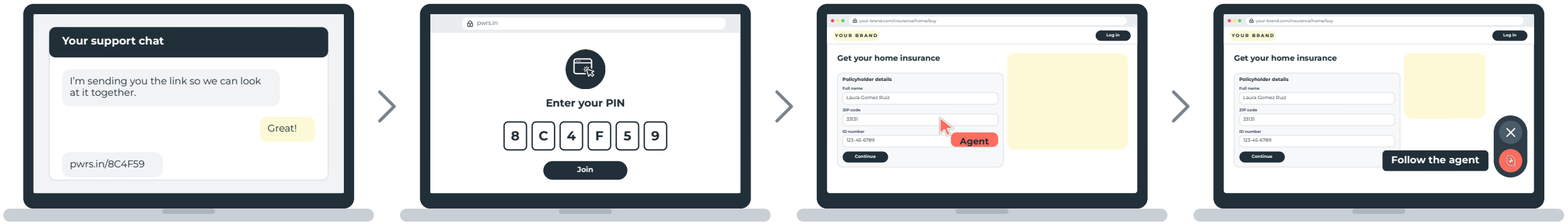

### By channel

- **Over the phone:** read out the PIN slowly, in two groups of three. Nothing needs to be sent.
- **In a chat:** paste the link into the conversation that is already open.
- **By email or SMS:** paste the link into your usual message.

**Your own domain.** The link and the PIN page can be served on your brand’s domain, if configured that way.

# From the link to the shared page, with nothing to install

This is how the customer goes through the session from their desktop browser. No account, no download.




### 1 Gets access

The link in the chat or the email, or the PIN over the phone.

### 2 Opens or types

Opens the link, or goes to the PIN page and types the six characters.

### 3 Joins the page

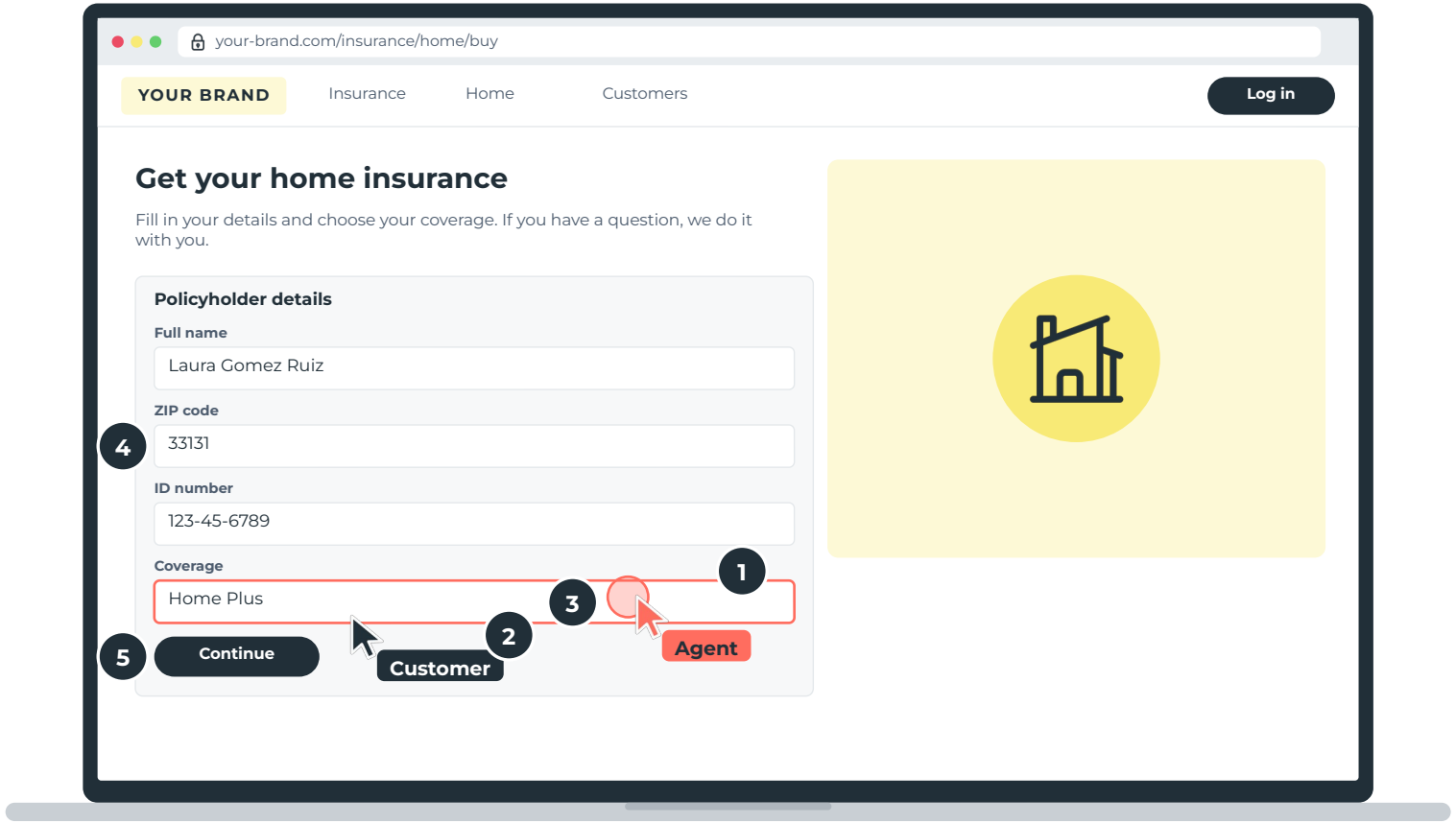
Is on the same page as you and sees your cursor labeled "Agent".

### 4 Browses with you

Their widget lets them follow you or stop the session at any time.

# Point, click and type on the same page

Whatever one of you does, the other sees instantly. Stop describing the screen and guide the customer on it.



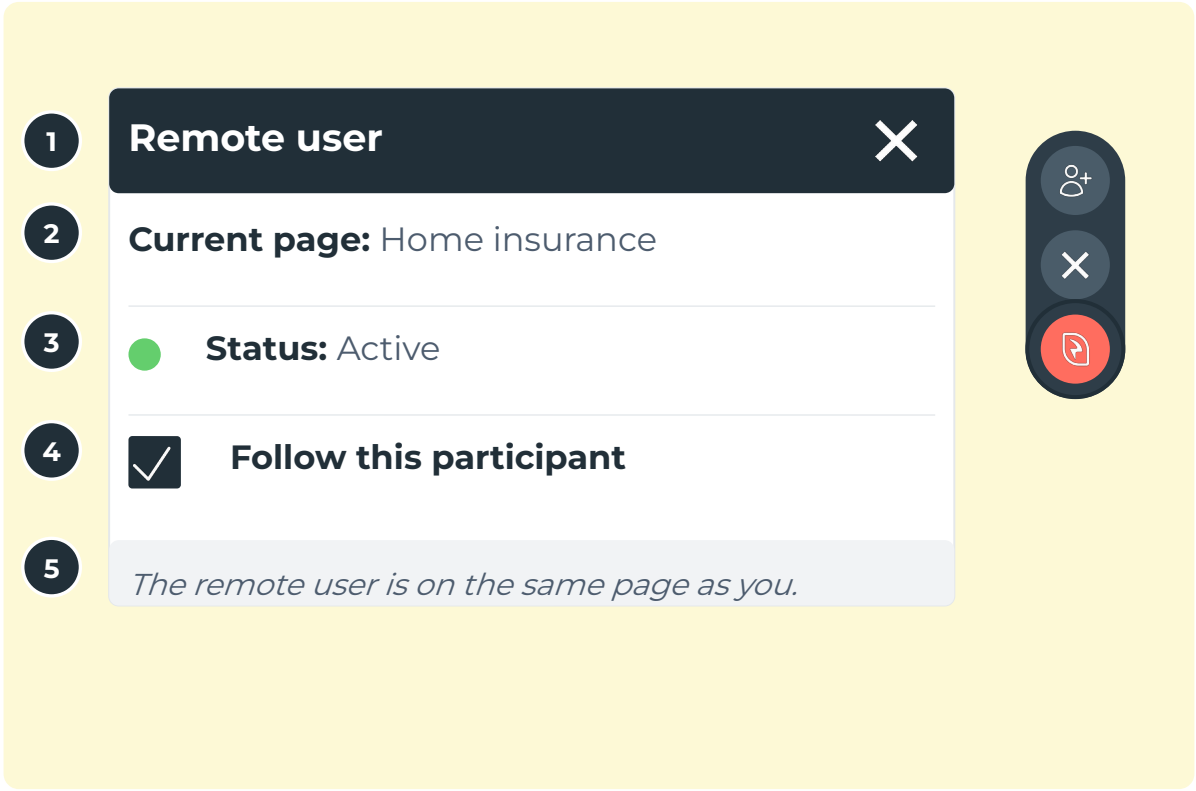

1. **Your cursor** the customer sees where you point
2. **Their cursor** you see where they are
3. **Highlighted click** your click is marked on their screen
4. **Type together** you both fill in the same form
5. **Buttons and links** one click navigates for both

## How to use it

- Point before you click: “See the Continue button? Go ahead and press it.”
- If the customer asks, you can drive the page yourself.
- Several participants can join the same session.

# Don’t lose the customer when they change page

The “Remote user” panel tells you where the customer is. With “Follow”, your screen goes with them from page to page.




1. **Remote user** the connected participant
2. **Current page** the page they are on
3. **Status** active while the session lasts
4. **Follow this participant** check the box
5. **Notice** confirms you are on the same page

### When to use it

- **At the start,** to land on the customer’s exact page.
- **When the customer browses** on their own and you want to go with them.
- **The other way round:** the customer can follow you from their widget, “Follow the agent”.

PRIVATE DATA

# If you see a hidden field, it’s on purpose

Your website marks sensitive fields with CSS classes. The customer sees and types them; on your screen they appear masked.

### WHAT THE CUSTOMER SEES

**Policyholder details**

**Full name**
Laura Gomez Ruiz

**ZIP code**
33131

**ID number**
**123-45-6789**

**Coverage**
Home Plus

**Continue**

### WHAT YOU SEE

**Policyholder details**

**Full name**
Laura Gomez Ruiz

**ZIP code**
33131

**ID number**
*Hidden from the agent*

**Coverage**
Home Plus

**Continue**

## What to do

- **Don’t ask for the data.** Tell the customer which field they should fill in.
- **Check the rest** of the form with them before moving on.
- **If a sensitive field is visible,** tell the administrator: it still needs to be marked on the website.

**No data stored.** CoBrowsing does not store any user data from the session, and communications travel encrypted.

WITH VOICE, VIDEO OR CHAT

# The conversation stays on its channel

CoBrowsing joins the channel you are already on with the customer. That channel stays open: you talk over it while you browse.

## With a phone call

1. Keep the call open.
2. Create the session and read out the PIN.
3. Guide the customer by voice while you point.

*Works with any phone system, no integration needed.*

## With a video call

1. The video call continues in its own Video RTC widget.
2. Send the link in the call chat or read out the PIN.
3. You browse without hanging up.

*The Video RTC button is for screen sharing; it does not launch CoBrowsing.*

## With a chat

1. Create the session.
2. Paste the link into the open conversation.
3. Keep writing in your chat.

*The CoBrowsing widget has no chat of its own.*

An external button or link can only take the customer to the page where CoBrowsing lives. The session is always created there.

# Stop the session, and what to do if something fails

The session ends when either of you presses “Stop”. If something doesn’t respond, these checks almost always solve it.

## To finish

1. Confirm with the customer that they have completed what they needed.
2. Press “Stop” on your agent button.
3. Let them know you no longer see their page. They stay on your website as usual.



## If something isn’t working

### The customer can’t see the session

Check they are on a page with CoBrowsing: an external link only takes them there.

### The PIN doesn’t work

It must be the PIN of the current session. If you stopped it, create a new one and share the new PIN.

### You don’t see the same thing

Use “Follow” to go to their page. If it persists, ask the customer to reload the page.

### Corporate network

CoBrowsing uses WebSockets: if a proxy or firewall blocks them, check the Network Connectivity Requirements.

# Five steps to enable CoBrowsing on your website

The website owner sets this up once, with the Interactive Powers team, before the first session.

01

## Choose the pages

The public pages where your customers usually need help: forms, purchases, guides.

02

## Load the script

On your web server, on those pages, with your site's own keys.

03

## Mark sensitive fields

CSS classes on the fields the agent must not see, with the label you prefer.

04

## Customize

Logo, language, widget position and your own domain for the link and the PIN.

05

## Test a session

Two browsers: one as agent, one as customer, with a hidden field.

### WHAT RUNS UNDERNEATH

Platform
**Video RTC**

Deployment
**Cloud or on-premises**

Encryption
**SSL/TLS**

Your website
**No logic changes**

# Before and during the session

Simple habits that make the session faster and build the customer's trust.

### Explain what you'll see

Only the page of your website, not their computer or their other tabs.

### Read out the PIN in two parts

Three characters, pause, three characters. Ask them to repeat it.

### Point, don't rush

Move the cursor to the spot and let the customer do the click.

### Ask before you drive

Take control of the page only when the customer asks you to.

### Respect what's hidden

The customer fills in masked fields. Never ask them for the data.

### Stop when you're done

Press "Stop" and check the customer is fine on your website.

MORE DOCUMENTATION

# Next steps

### CoBrowsing Brochure 2026

What it is, how it works, security and deployment, in long and short editions.

### Network Connectivity Requirements

Browsers, bandwidth and ports for the workstation and the network.

### Support

Email: support@ivrpowers.com
Help Center: support.ivrpowers.com
Phone ES: +34 911 599 846
Phone US: +1 786 329 7177