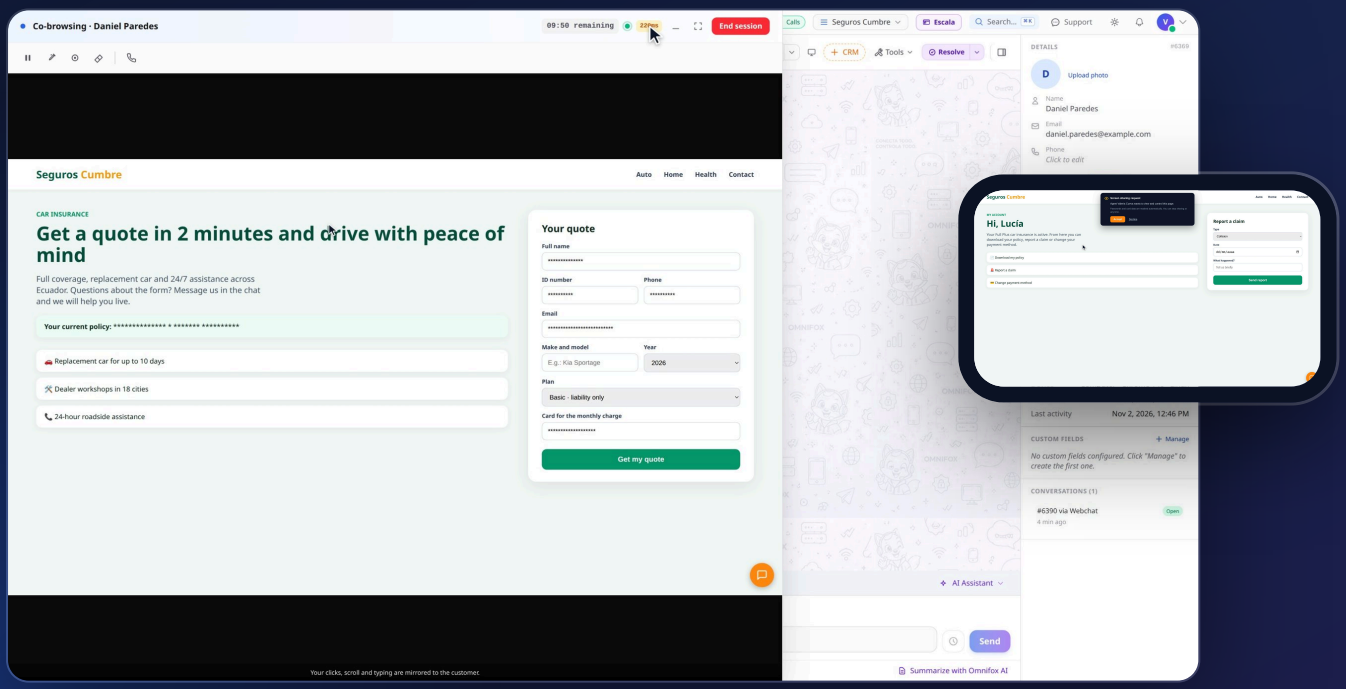
Omnifox

CO-BROWSE · COMPLETE GUIDE

Co-browse

See your customer's screen on your website and help them live, with their permission.



CONTENTS

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How to read this manual

The screenshots are real Omnifox screens, in English, with a sample business: **Seguros Cumbre**, a fictional insurer with a car insurance quote form. The agent is **Valeria Cueva** and the customers are **Lucía Andrade** (in her customer area) and **Daniel Paredes** (getting a quote). The co-browse sessions are real: the customer uses the Omnifox chat installed on the site.

Button and field names are in **bold**. This manual follows the video "Co-browse · Guía completa" on the Omnifox YouTube channel (in Spanish).

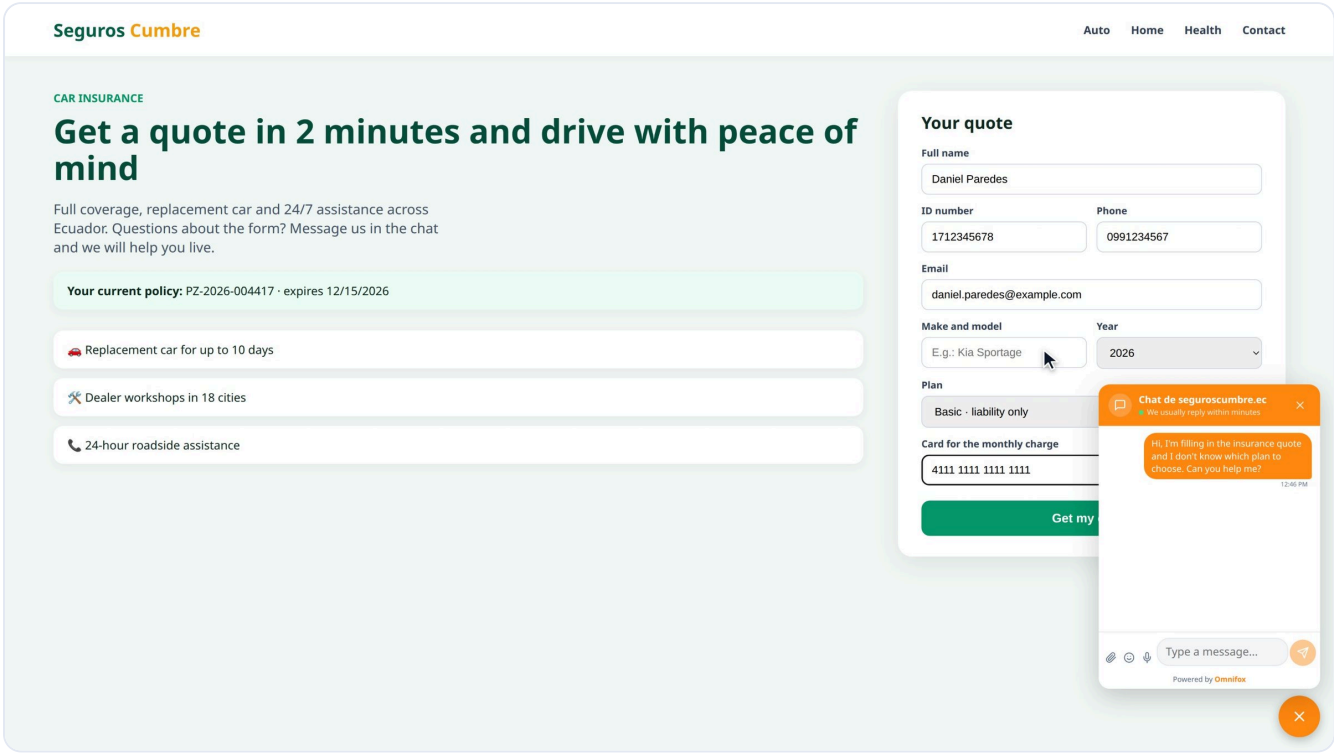
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01

CHAPTER 1

What co-browse is and what it is for

See what your customer sees on your site, and help them right there.



The sample site: the Seguros Cumbre quote form, with the Omnifox chat.

- You see in real time what the customer types, chooses and where they are, from the Omnifox inbox.
- Ideal for forms, payments, sign-ups or settings where the customer gets stuck.
- You guide them: you point, type or click for them.

02

CHAPTER 2

It is not screen sharing

Only your site, nothing else.

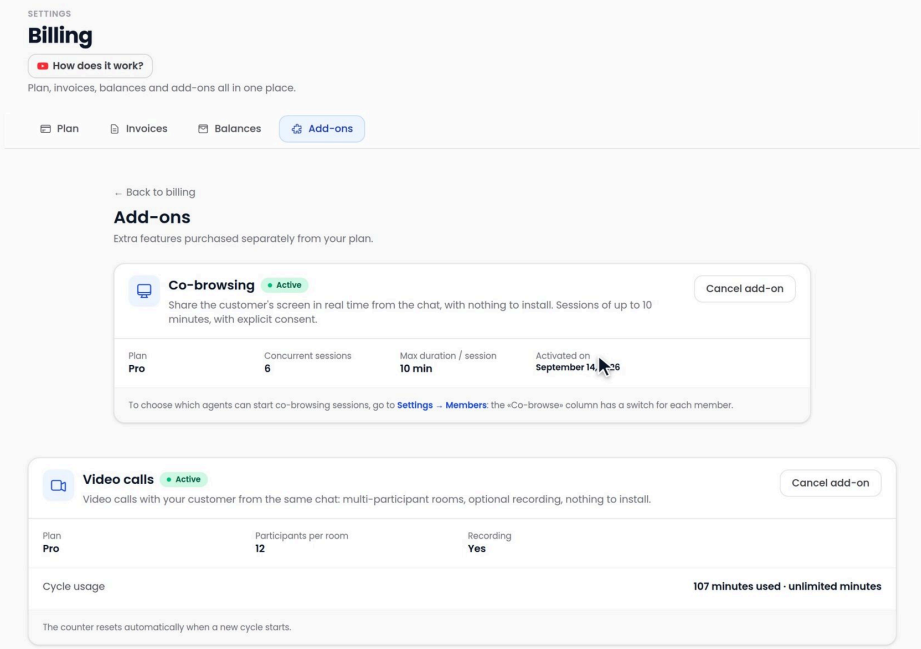
- The customer does **not** share their computer, other tabs or notifications: you only see the page of your site where the Omnifox chat is.
- No video travels: the page structure does, and your browser redraws it. It looks sharp and uses very little bandwidth.
- Sensitive data is hidden **before** it leaves the customer's browser.

03

CHAPTER 3

The add-on and its tiers

A separate add-on, by simultaneous sessions.



Billing → Add-ons: Co-browsing active, tier, simultaneous sessions and maximum length.

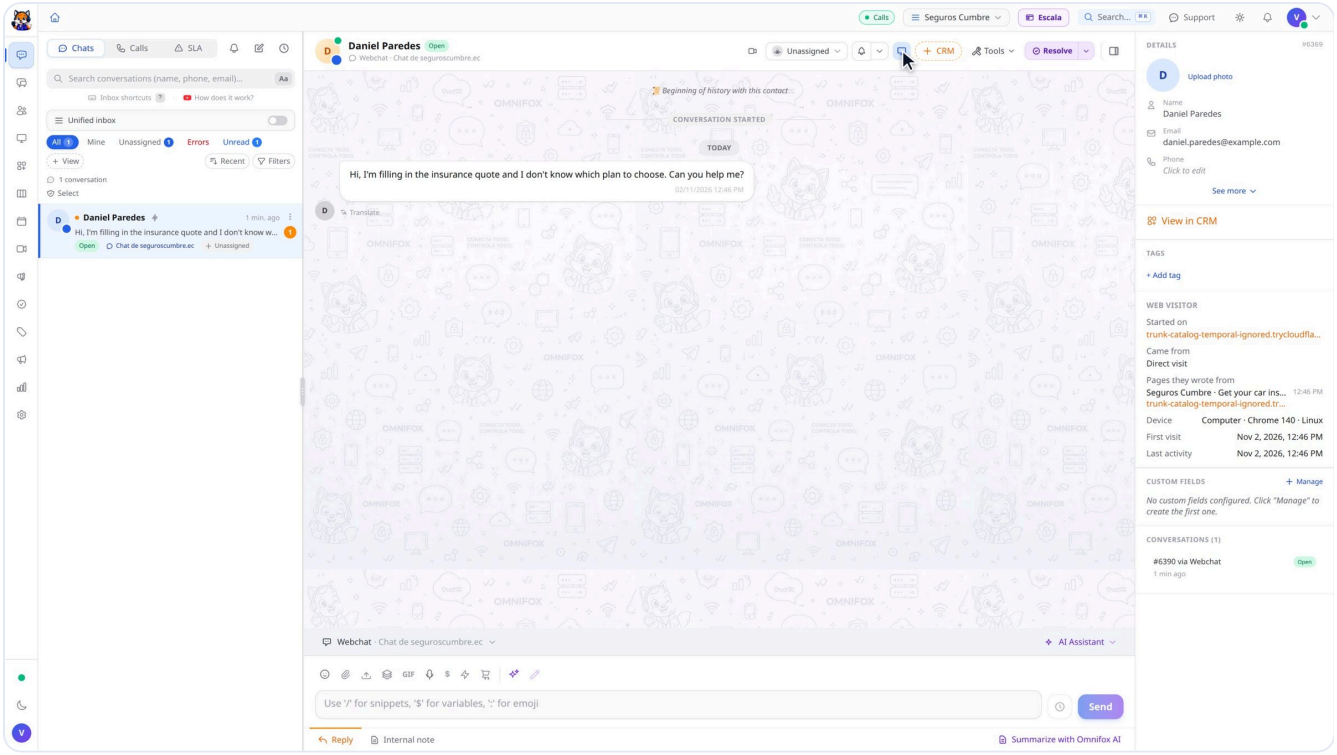
Tier	Simultaneous sessions	Length per session
Standard	3	10 minutes
Pro	6	10 minutes
Business	10	10 minutes
Enterprise	Tailored	Tailored

04

CHAPTER 4

Requirements: your website chat

The same chat widget; nothing else to install.



The co-browse button, in the header of a website chat conversation.

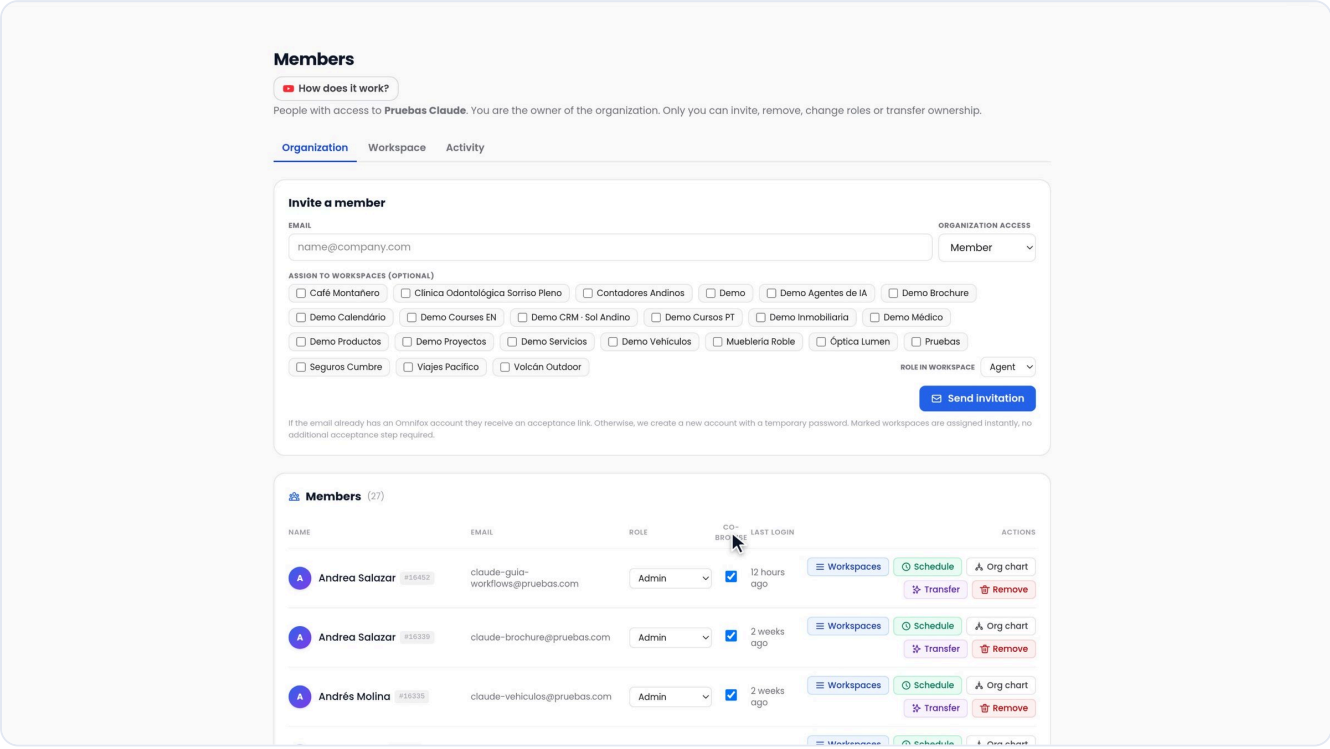
With the add-on active, the chat widget enables co-browse by itself. The co-browse button appears in **website chat** conversations, not in WhatsApp or Instagram ones: there's no page of yours to look at there.

05

CHAPTER 5

Who can start sessions

Only the people you choose.



Settings → Members: the Co-browse column, with one switch per person.

In **Settings → Members** (the account owner's screen), the **Co-browse** column has one switch per person. The owner can always do it. The change is immediate, without logging out.

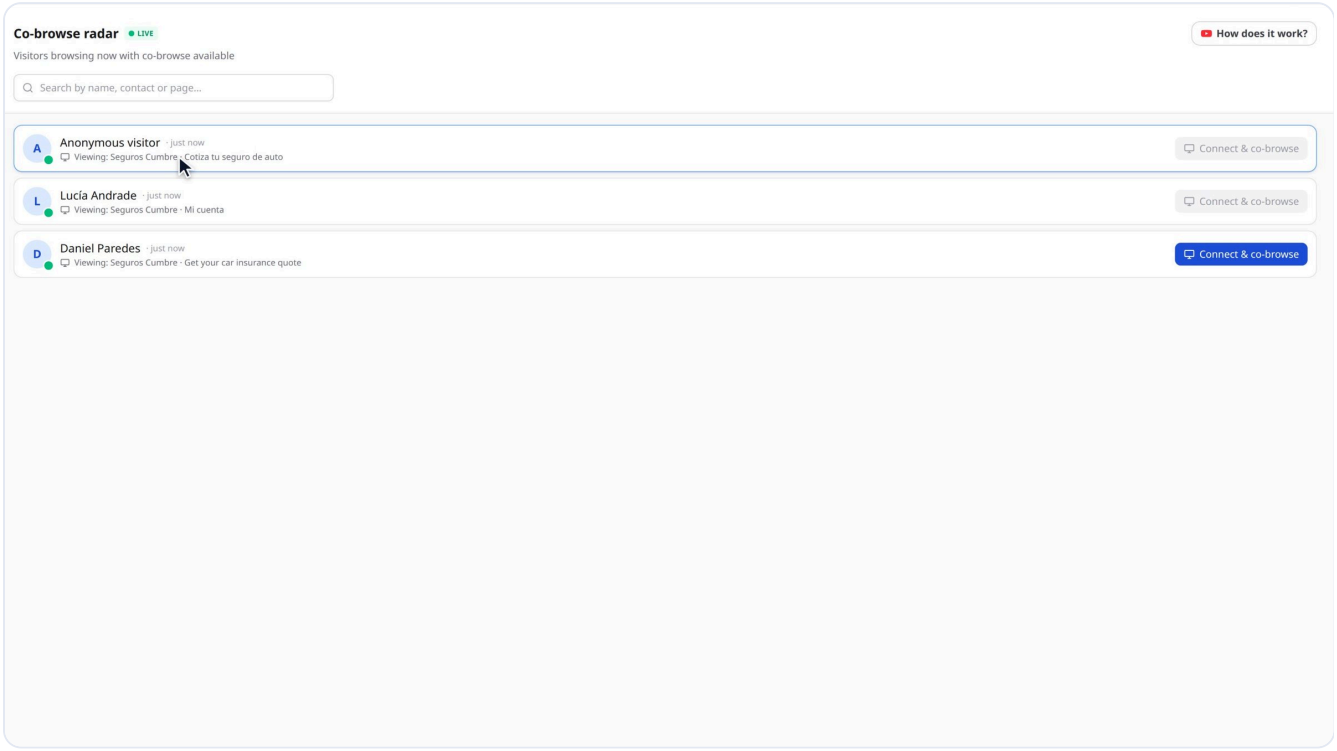
> **TIP**
>
> Anyone without the permission sees the co-browse button disabled, with the notice "Your admin has not given you permission to co-browse".

06

CHAPTER 6

The visitor radar

Who is on your website right now.



The Co-browse radar: visitors browsing now, with the page they are viewing.

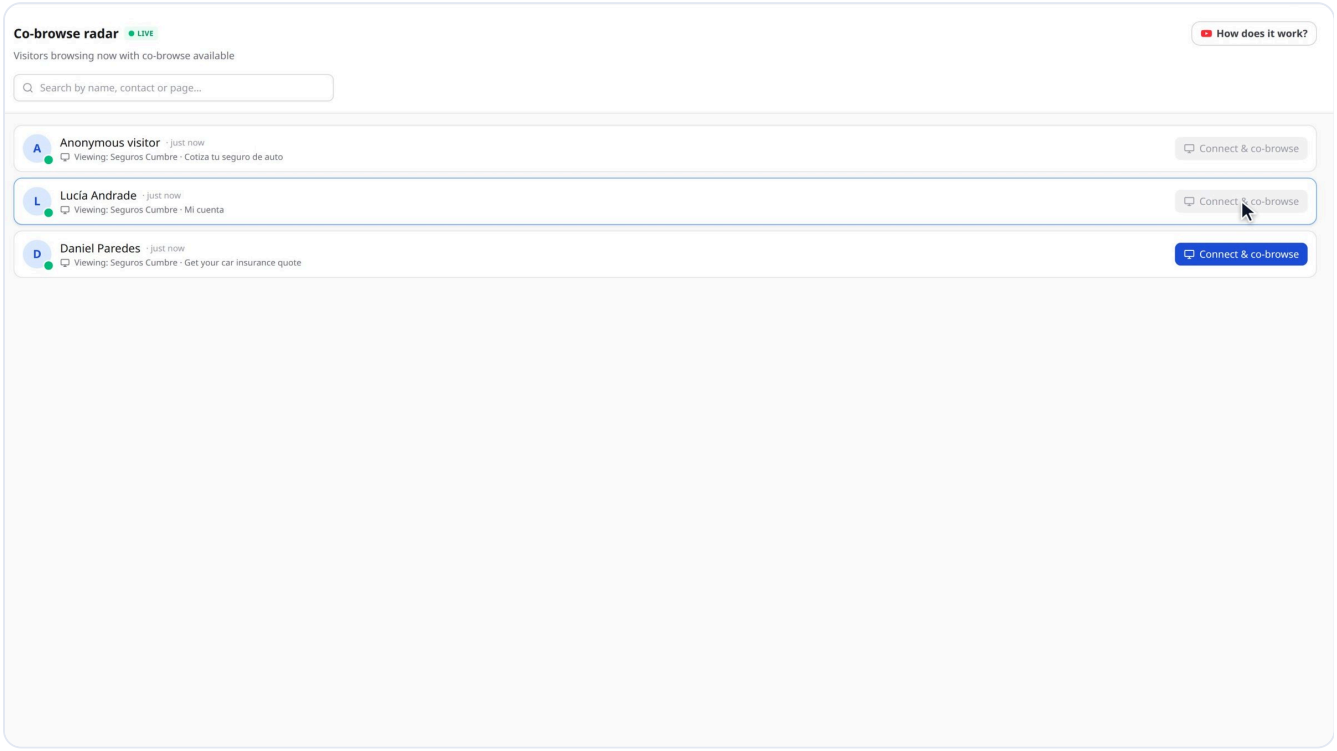
In the menu, **Cobrowse** opens the radar: the live list of people browsing your site with the chat loaded. Each row shows who they are, how long they've been there and which page they're on, and it updates by itself.

07

CHAPTER 7

Identified visitors

The name before the first message.



Lucía Andrade shows up with her name before writing; her Connect button stays grey until she opens the chat.

If your site already knows who signed in, pass the name and email to the widget and the radar will show them by name:

```
<script>window.omnifoxSettings = { visitor: { name: 'Lucía Andrade', email: 'lucia.andrade@example.com'
} };</script>
```

The widget script's `data-visitor` attribute works too. Until the visitor writes, their **Connect** button stays grey: co-browsing is always tied to a conversation. When they write, their conversation is created with that name and email, and the button becomes active.

08

CHAPTER 8

Search the radar

Find who you are looking for.

The radar search box filters by name, email or page. Anonymous visitors show up too, as unnamed visitors, with the page they're viewing.

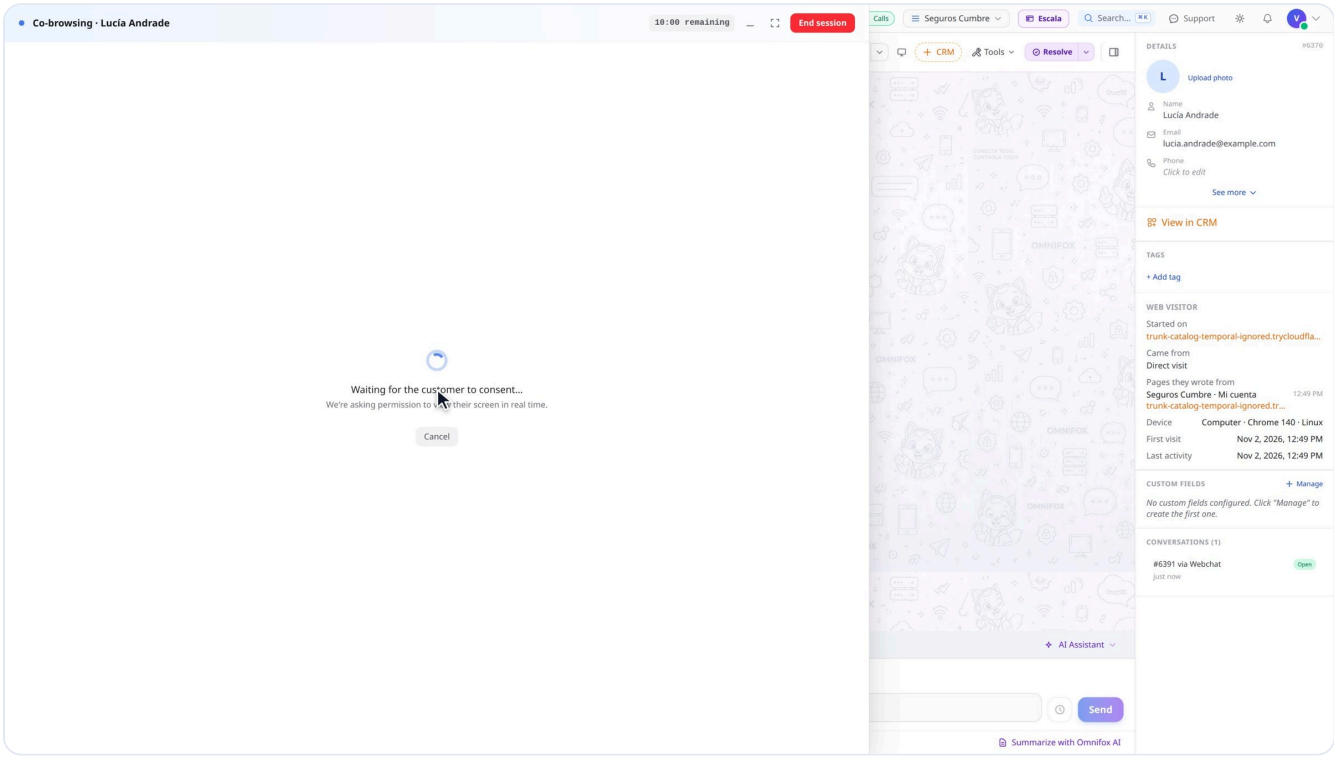
09

CHAPTER 9

Connect from the radar

Offer help without waiting.

1. In the radar, find the visitor's row.
2. Press **Connect & co-browse**.
3. Their conversation opens with the panel "Waiting for the customer to consent...". **Cancel** stops it.



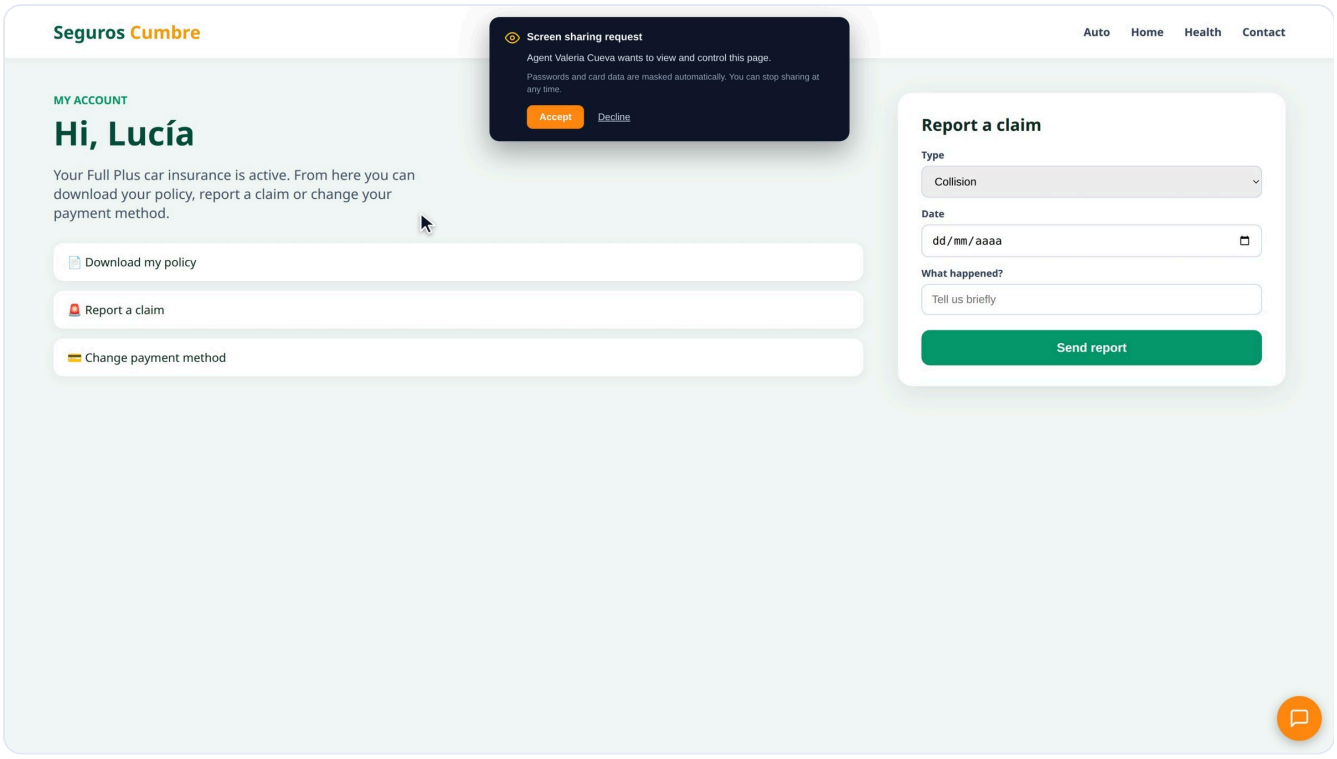
After Connect & co-browse: the panel waits for the customer to consent.

10

CHAPTER 10

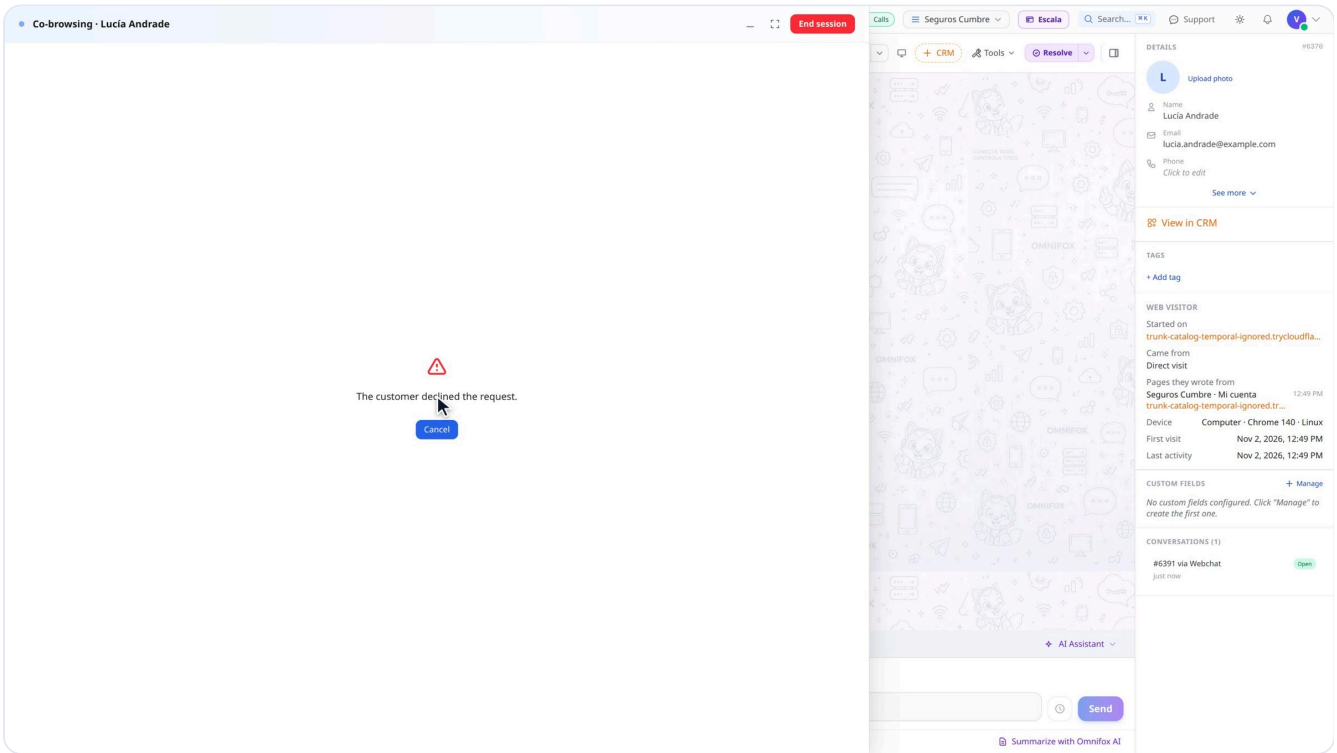
If the customer says no

Nothing is seen without their permission.



What the customer sees: the notice with Accept and Decline.

The customer sees "*Agent … wants to view and control this page*", with the notice that passwords and card data are masked automatically and that they can stop sharing at any time. They can **Accept** or **Decline**.



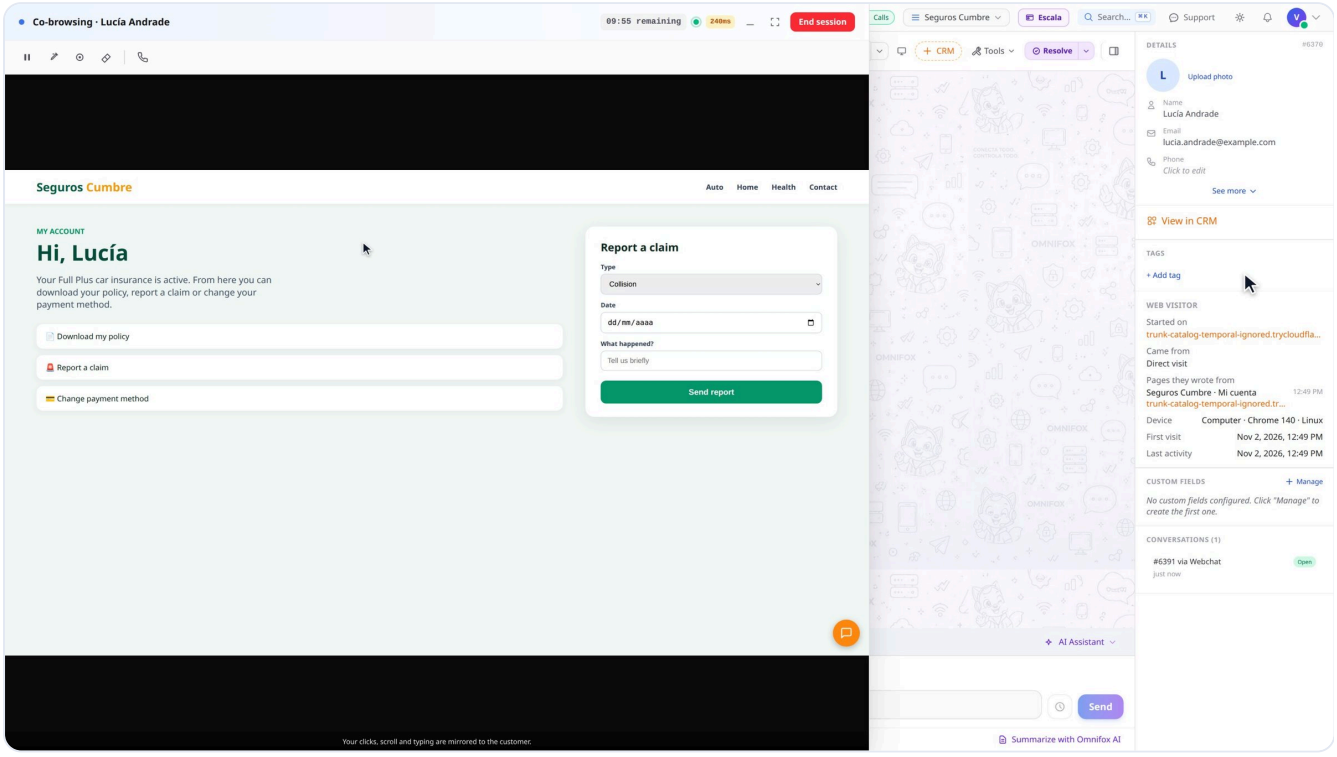
If the customer declines, the agent sees nothing of their screen.

11

CHAPTER 11

Ask again and accept

Permission is asked for every time.



Lucía accepted: her customer area, live in the agent's panel.

You can ask again. When the customer accepts, they see the **Sharing screen** label on their screen, with the time left and the **Stop** button.

12

CHAPTER 12

The agent ends the session

End it as soon as you finish.

End session, in the panel, closes the session for both: the label disappears for the customer and you stop seeing their screen.

13

CHAPTER 13

Start from a conversation

From the conversation header.

1. Open the customer's webchat conversation.

2 Press **Start co-browsing**.

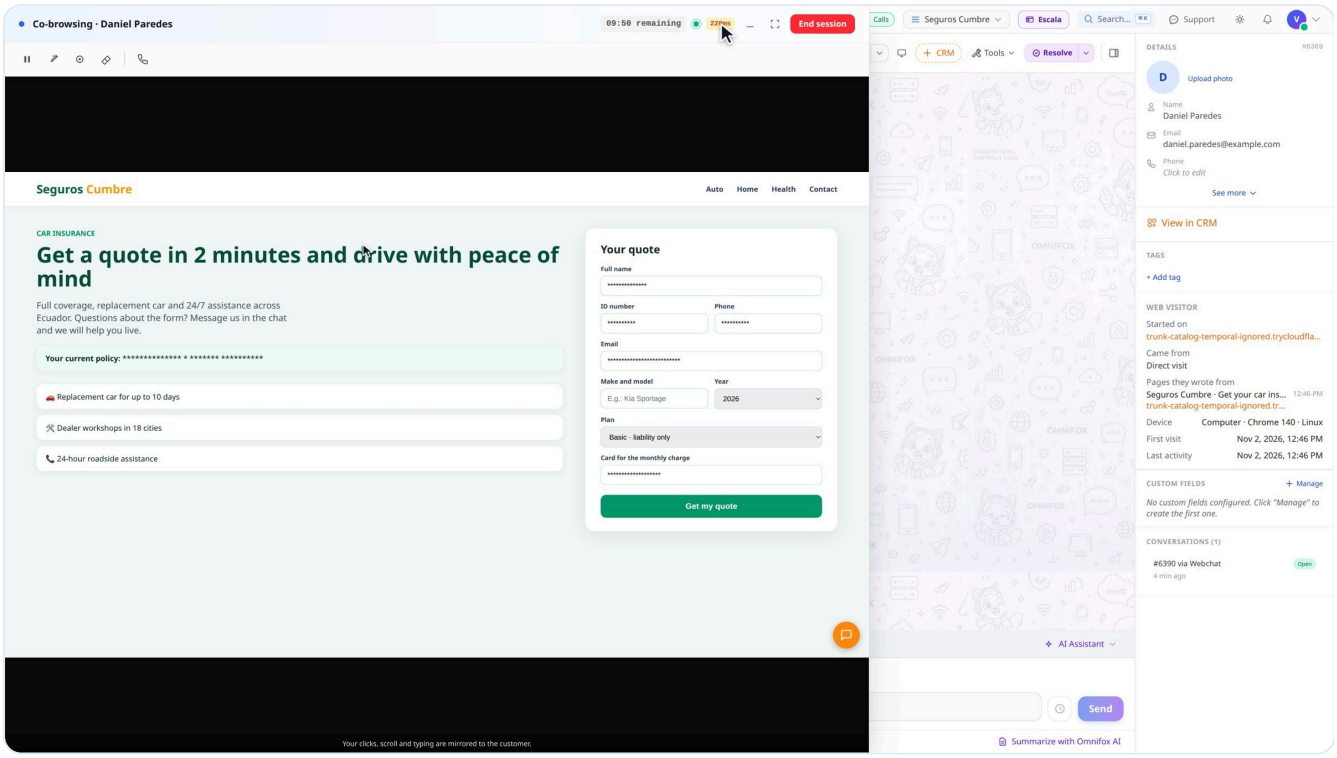
3 The customer accepts and the panel opens with their page live.

14

CHAPTER 14

The live screen

Their page, live, in your inbox.



The live screen, with the time left, the latency and the tools.

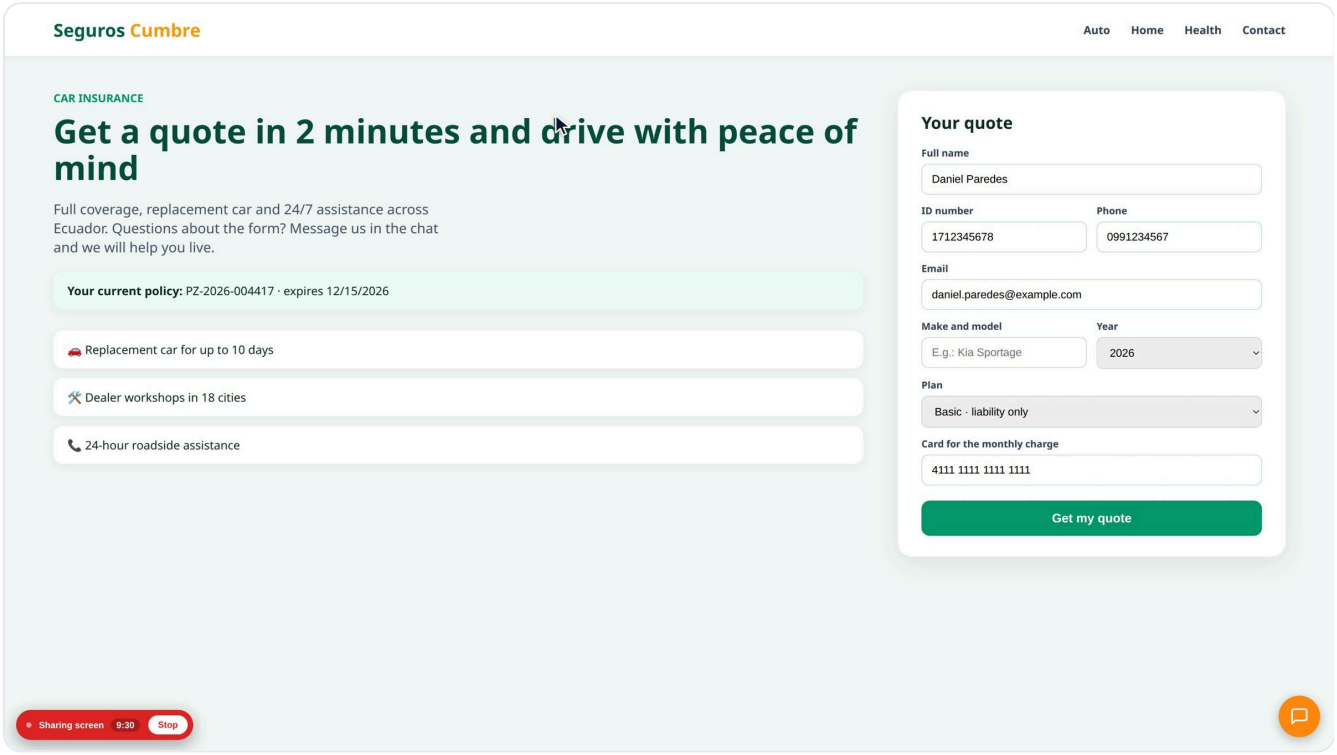
Element	What it does
Time remaining	How much of the session is left.
Connection indicator	Quality and latency in milliseconds.
Pause / Resume	Stops and resumes the stream.
Draw	Freehand strokes over the customer's page.
Highlight	Marks a spot to guide their eyes.
Clear marks	Removes all marks.
Call	Voice call in the browser.
Minimize / Fullscreen	Changes the panel view.
End session	Ends the session.

15

CHAPTER 15

The customer sees your cursor

Nothing hidden.



On the customer's side: the agent's cursor, with her name.

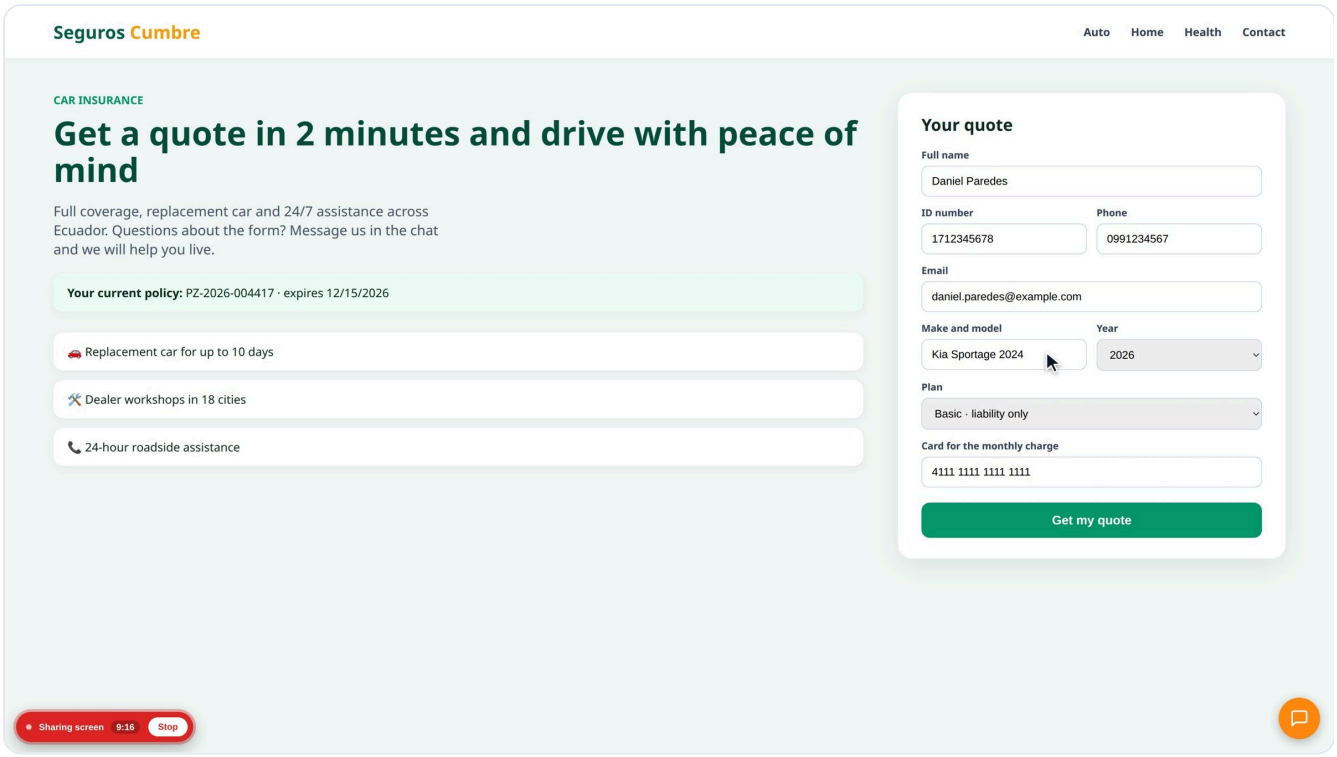
The customer sees a cursor with your name where you move the mouse, and every click leaves a small circle on their screen.

16

CHAPTER 16

Type for the customer

Your keyboard, in their form.



What the agent types appears in the customer's form.

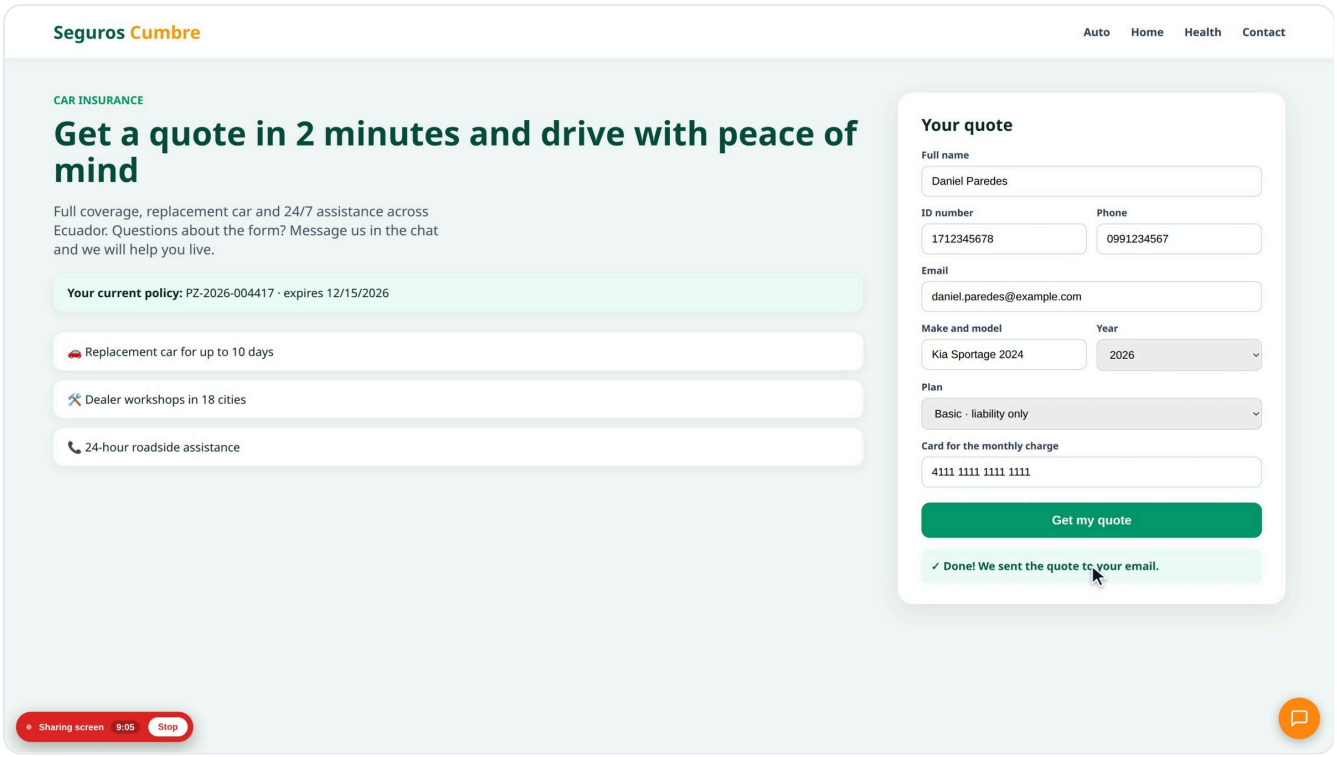
Click a field and type: the text appears in the customer's form as if they were typing it.

17

CHAPTER 17

Click for the customer

Your clicks get through.



The agent pressed the quote button: the customer sees the confirmation.

18

CHAPTER 18

Scroll the page

The mouse wheel moves their page.

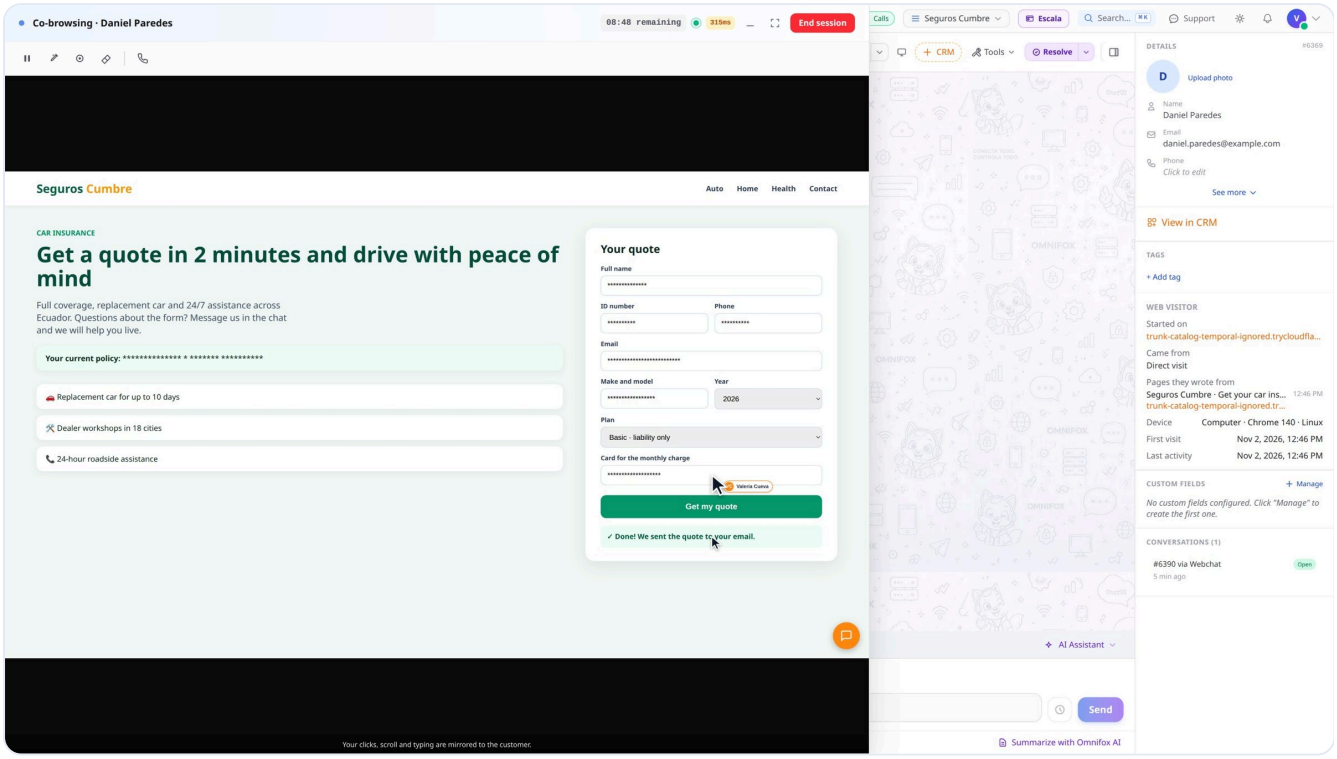
With the wheel over the panel you scroll the customer's page. They keep using their mouse and keyboard normally, and can take back control whenever they want.

19

CHAPTER 19

What the customer types stays hidden

What the customer types never reaches you.



What the customer typed shows up as dots in the agent's mirror.

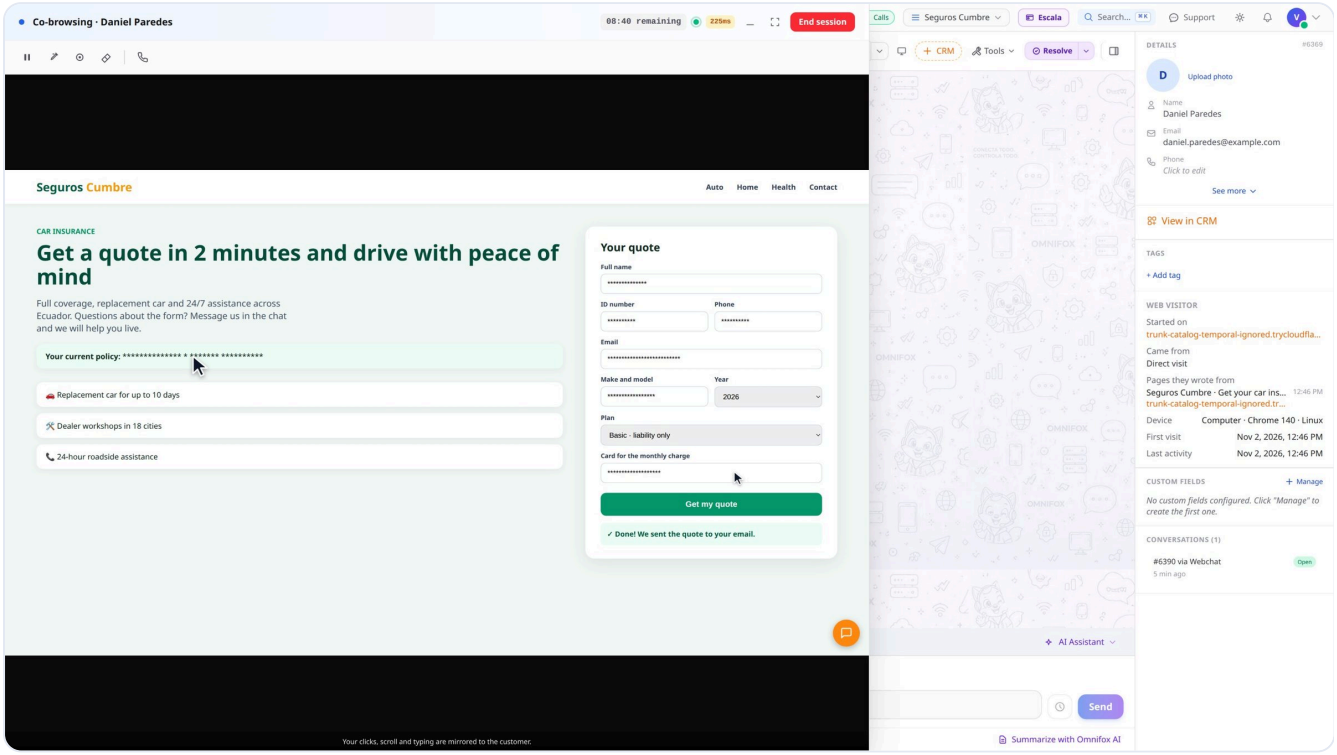
- Everything typed into text fields is replaced with dots **in the customer's browser**, before it's sent.
- It also recognizes sensitive fields by their name (card, ID number, password, account, security code, passport... in Spanish, English and Portuguese).

20

CHAPTER 20

Hide other parts of your page

For data your page displays.



An element with data-rrweb-mask is hidden for the agent.

Add the `data-rrweb-mask` attribute to any element with private data (policy number, balance, address): the customer sees it normally and the agent sees it hidden.

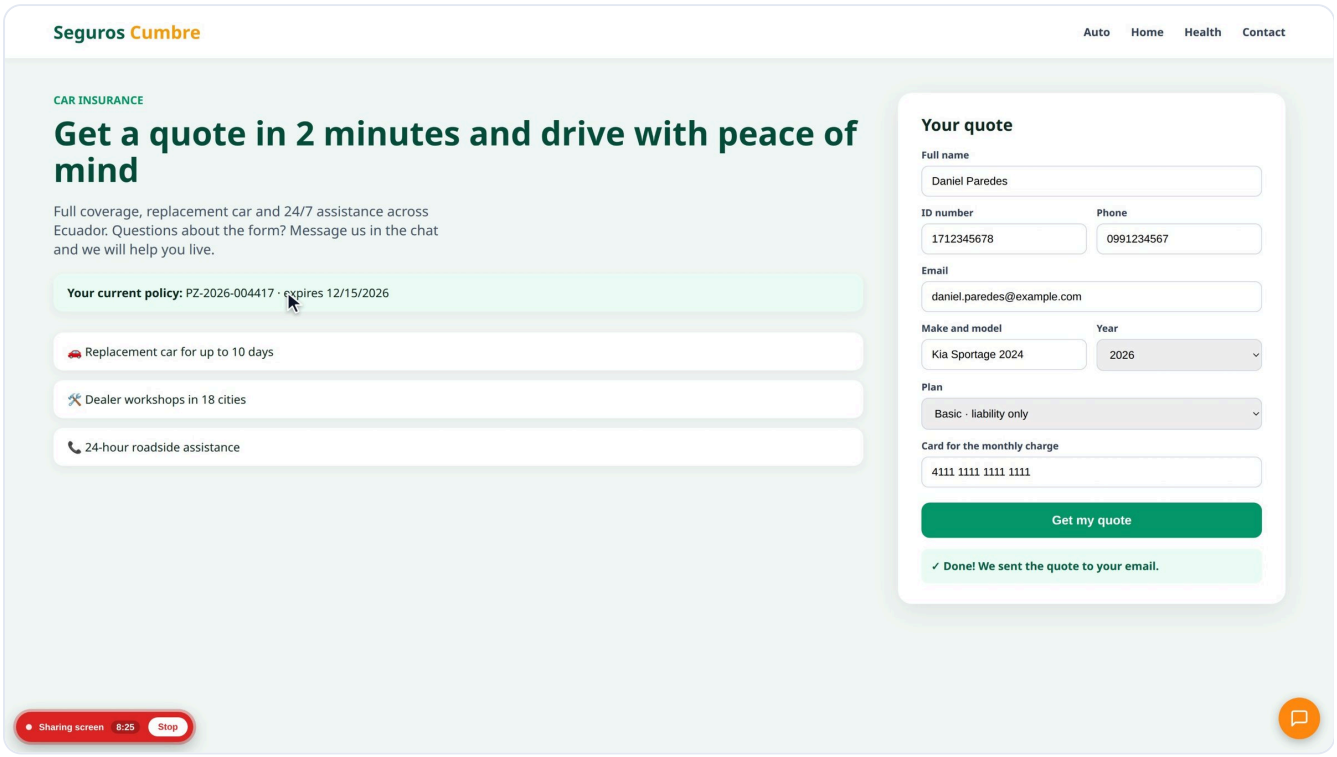
```
<span data-rrweb-mask>PZ-2026-004417 · expires 12/15/2026</span>
```

21

CHAPTER 21

Highlight

Guide without touching anything.



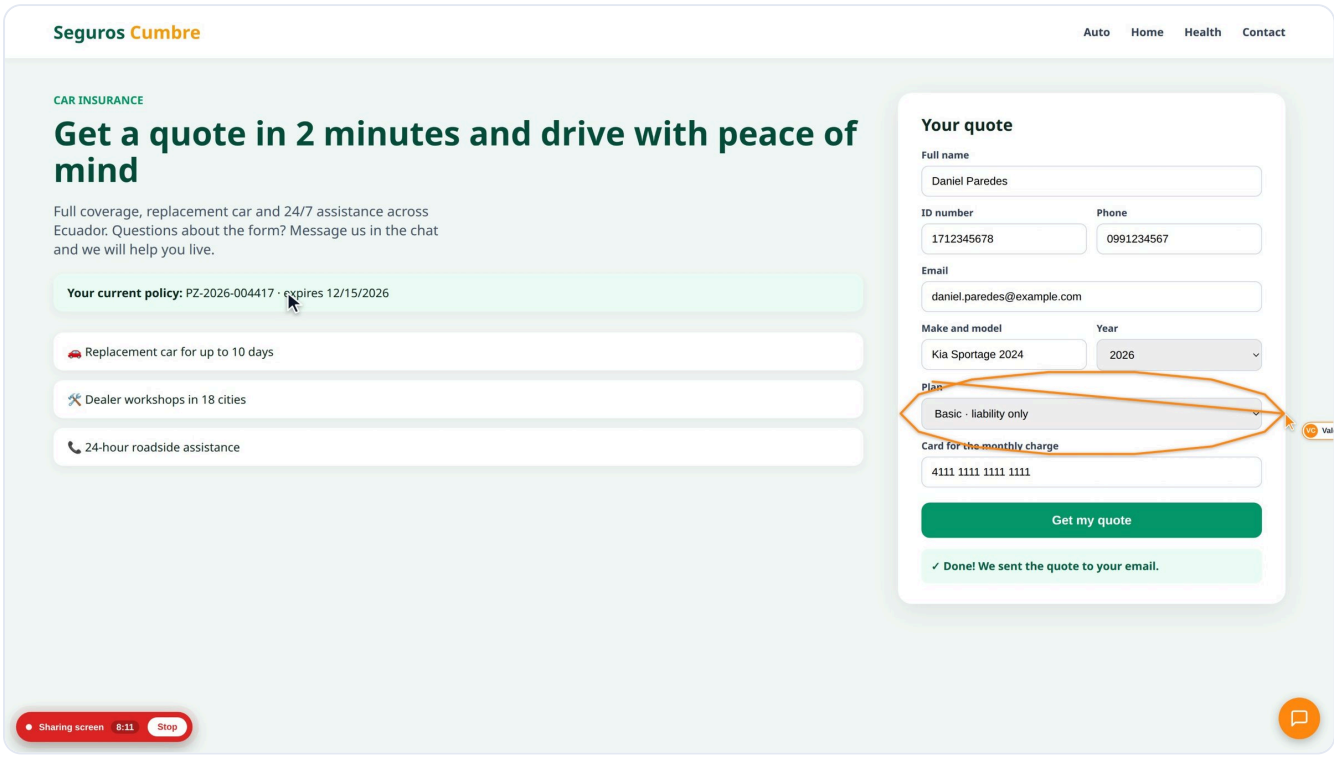
The agent's highlight, seen on the customer's screen.

22

CHAPTER 22

Draw and clear marks

Arrows, circles and underlines.



A mark drawn by the agent, seen on the customer's screen.

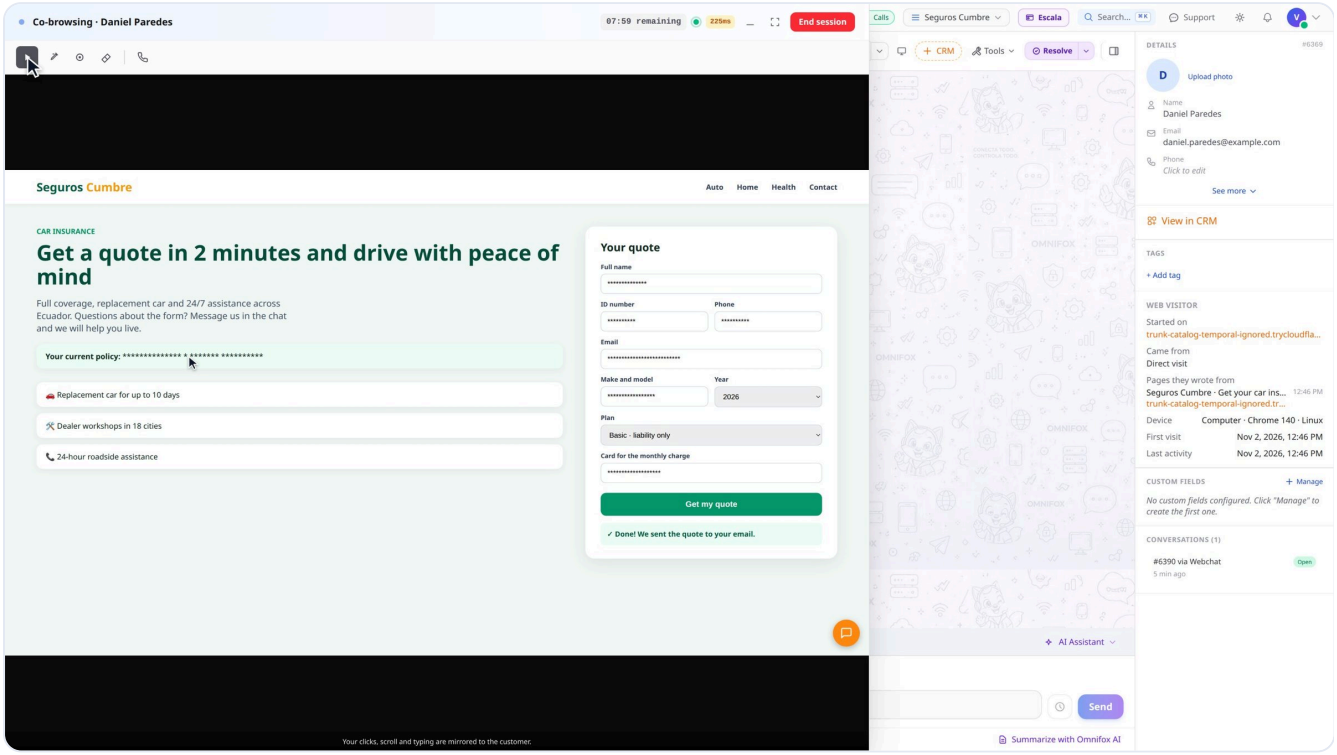
The strokes fade by themselves after a while; **Clear marks** removes them all at once.

23

CHAPTER 23

Pause and resume

A moment alone for the customer.



Session paused.

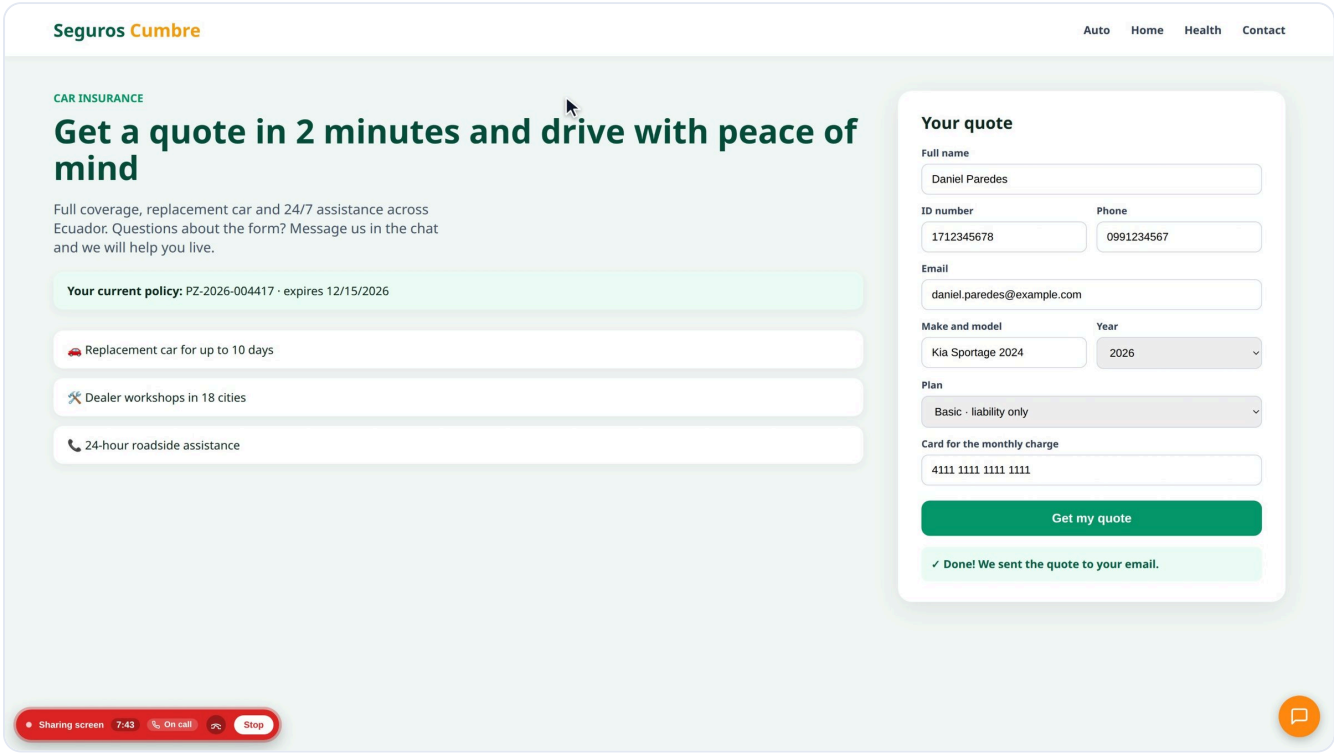
Pause stops the stream; **Resume** shows it live again, without asking for permission again.

24

CHAPTER 24

Voice call

Talk while you browse together.



The voice call, on the customer's side: On call.

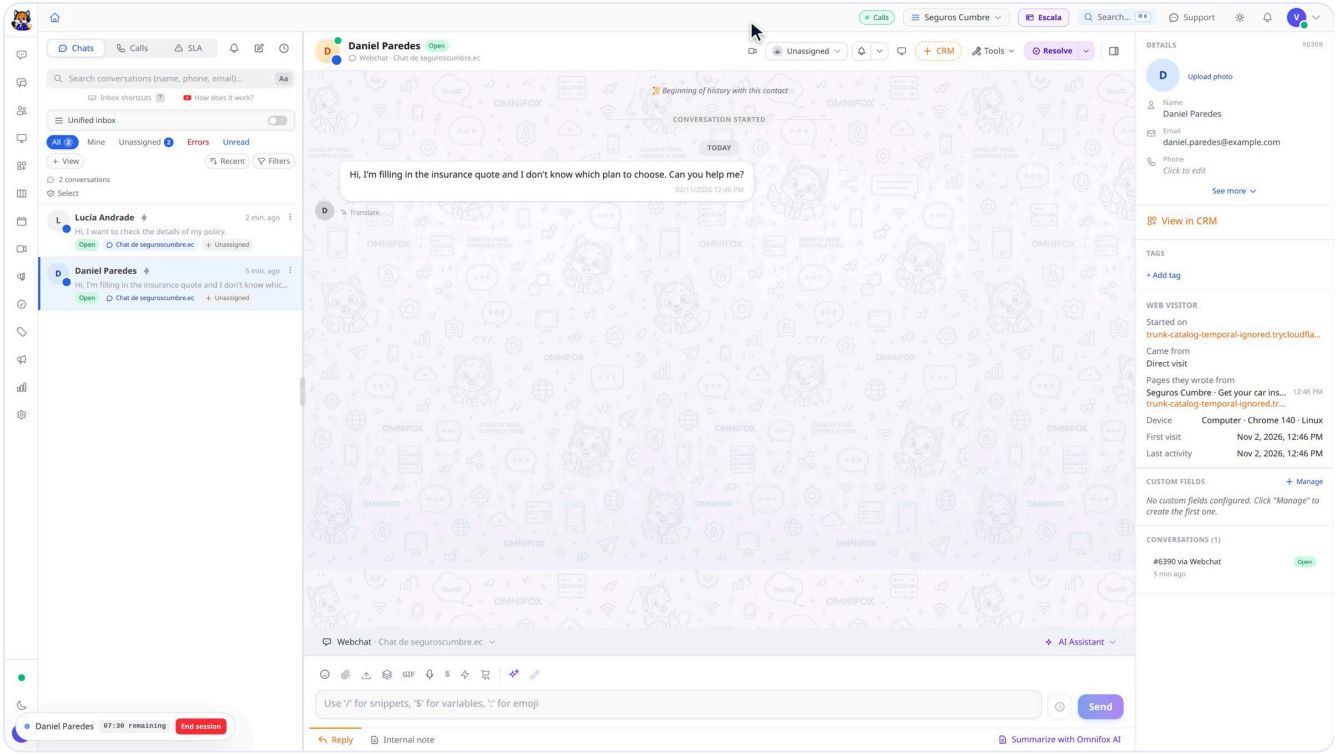
The customer sees "*... wants to talk to you*" with **Accept call** or **Decline**; they need to allow the microphone. **Hang up** ends the call and the session continues.

25

CHAPTER 25

Minimize, full screen and size

Keep handling other chats.



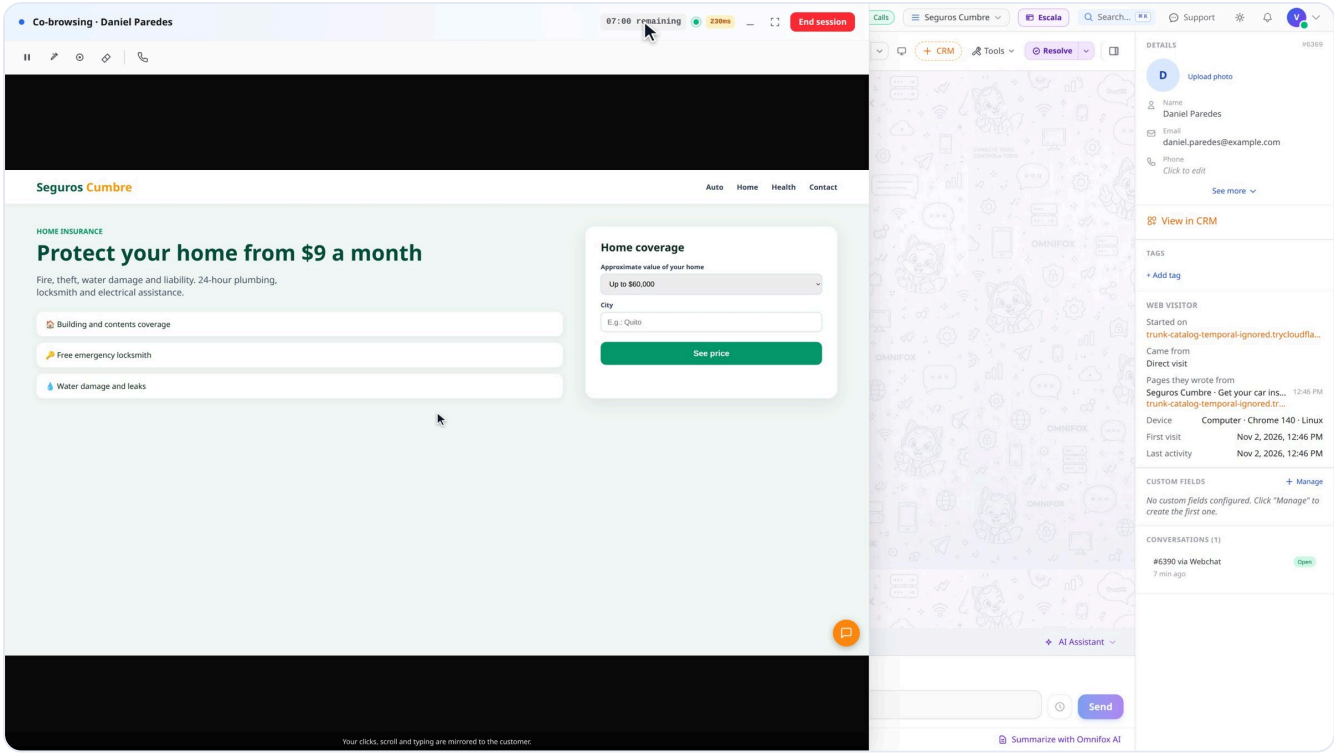
The minimized panel: the session is still active.

Minimized, a pill remains with the customer's name and the time; one click opens it again. There's also full screen, and you can resize it by dragging the edge.

CHAPTER 26

26 The customer changes page

The session follows them around your site.



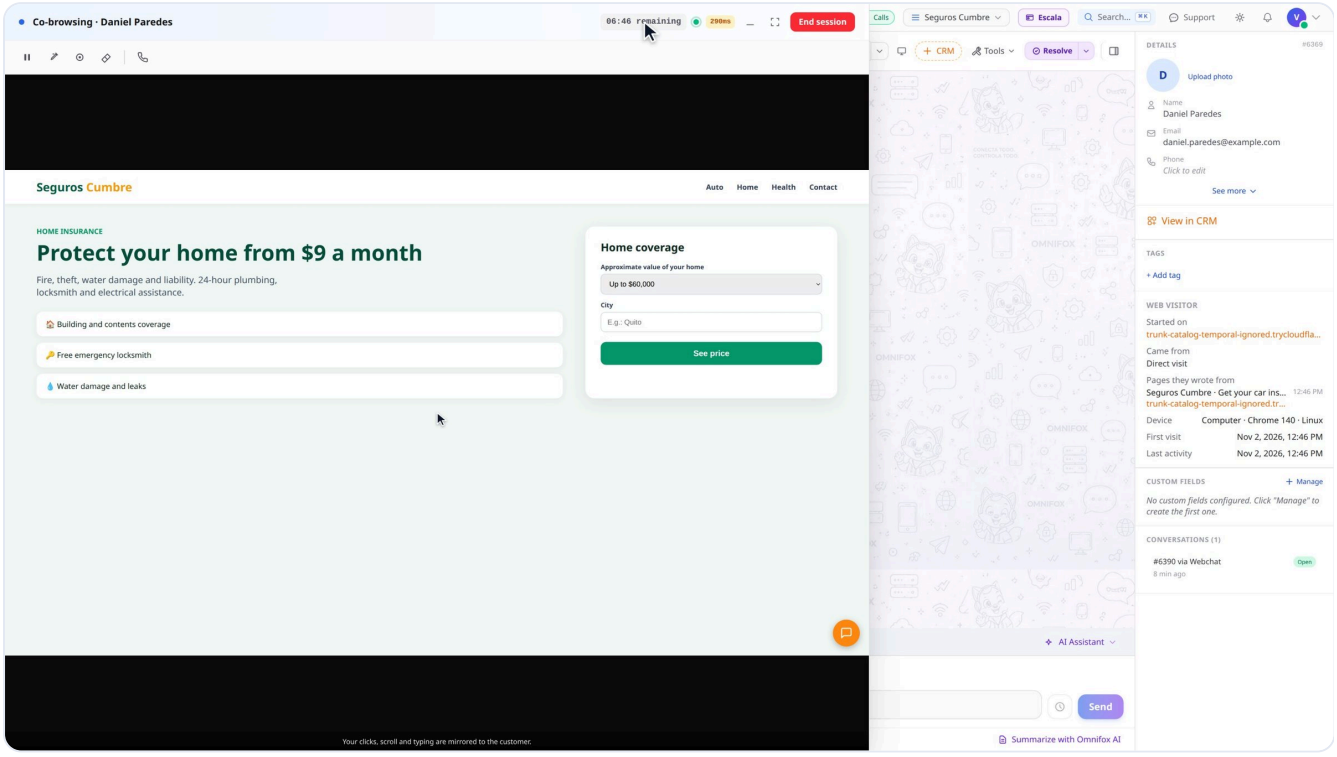
The customer moved to another page of the site and the session continues.

27

CHAPTER 27

If the customer reloads

Reloading does not end the session.



After reloading, the session resumes by itself.

If the customer reloads the page, the session resumes by itself in a few seconds.

28

CHAPTER 28

Time limit

Ten minutes per session.

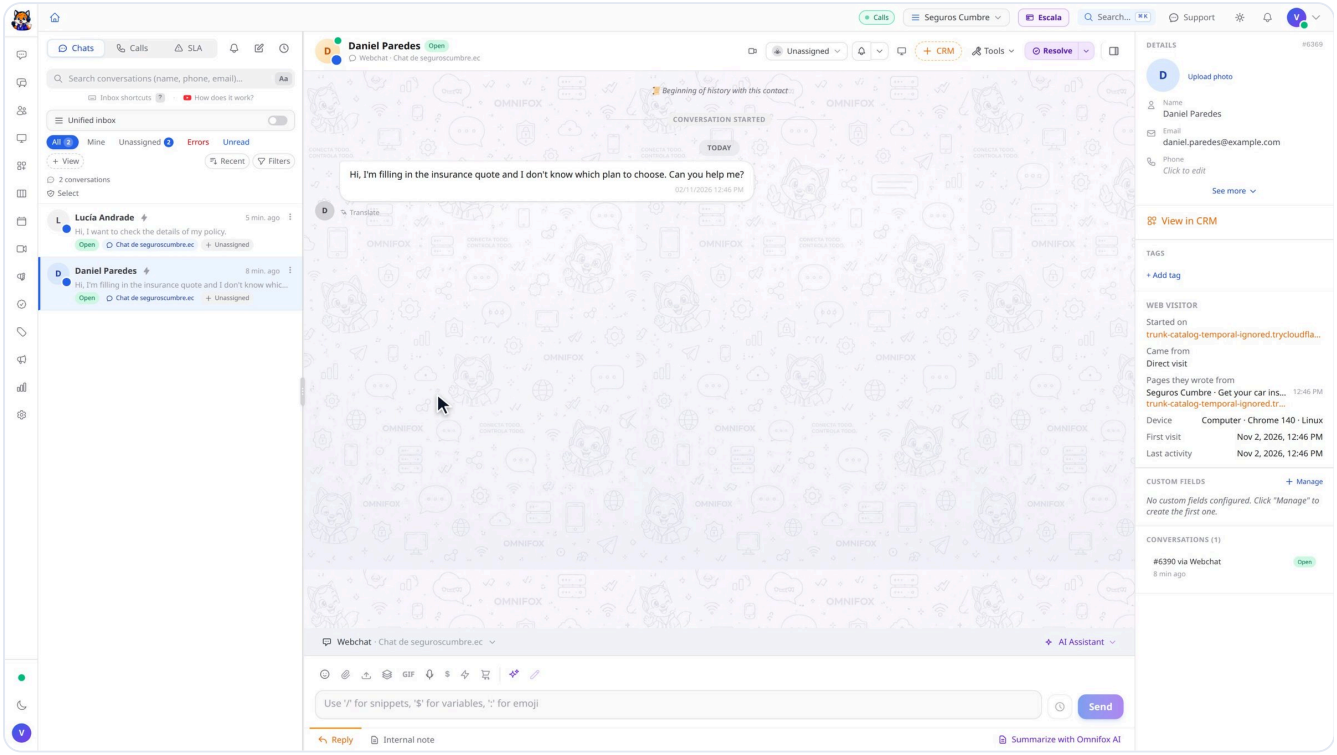
The panel counter always shows it. Near the end, warnings arrive and the session closes by itself. To continue, start a new session with a new permission.

29

CHAPTER 29

The customer ends the session

The customer is in control.



The customer stopped: the agent gets the notice and the panel closes.

The customer presses **Stop** on the **Sharing screen** label and the session ends. The agent gets the notice and the panel closes; the chat conversation stays open.

30

CHAPTER 30

Simultaneous sessions and limits

What counts and what is not visible.

- Simultaneous sessions count for the whole account (6 on Pro).
- Only your site is visible: not other tabs or applications.
- An iframe from another domain (for example, an external payment form) is not visible.

31

CHAPTER 31

Privacy and good practices

Respect for the customer's screen.

- No video is recorded: the page structure is streamed live, with sensitive data already hidden, and nothing is stored when the session ends.
- Explain why you want to see their screen before asking for permission.
- Don't ask for passwords while you watch; hide private data with `data-rrweb-mask`; end the session as soon as you finish.

32

CHAPTER 32

Common problems

What usually happens.

Symptom	Solution
Start co-browsing is disabled	You are missing the permission in Members.
The button does not appear	The conversation is not from your website chat.
Connect is grey in the radar	The visitor has not written in the chat yet.
The customer doesn't see the notice	They must have your site's tab open with the chat loaded.
Nothing shows after accepting	Wait for the first image; with a weak connection the panel warns that it is reconnecting.
The call doesn't connect	The customer must allow the microphone in their browser.