UserView Training

Initiating A Session

There are multiple ways of starting a session, so determine how your company has implemented the solution.

Live chat

UserView co-browsing is available for a number of live chat systems and the installation is a simple copy and paste in most cases. Visit the Integrations page to find more complete instructions on how to integrate UserView with the Live Chat tool you are using.

Phone / UserView app

Depending on how UserView has been set up for your team, you may see a list of users on https://app.upscope.io

While on a call with a client, head to the UserView app (https://app.upscope.io) where you can find them using the search bar.

This shows the most recent online users, where you can use the search engine to start a session.

You can typically search by email, name, location, lookup code, or page URL.

Initiating a Session: Troubleshooting

Unable to Connect to user

User not found

The system is unable to find the user, the underlying problem may be:

1. The user hasn't refreshed the page since you installed Upscope, ask them to refresh the page and try again.
2. Upscope is not installed on the page, you'll need to make sure it's installed, head to https://app.upscope.io/install/ for the installation code and instructions.

User not online

1. Make sure they're on a page that Upscope is installed on.
2. If you're attempting a co-browsing session with an email ticket on a chat service, you won't be able to.
3. Check whether their browser is supported, we support IE11 and above and the recent Chrome, Safari, and Firefox.
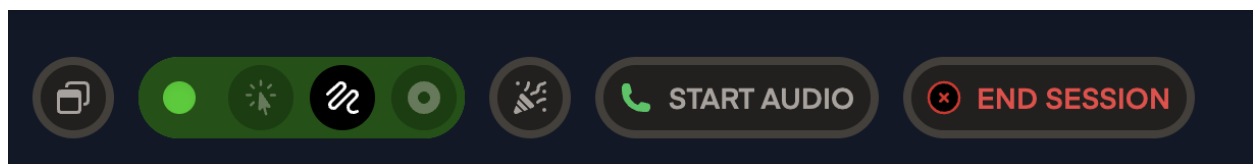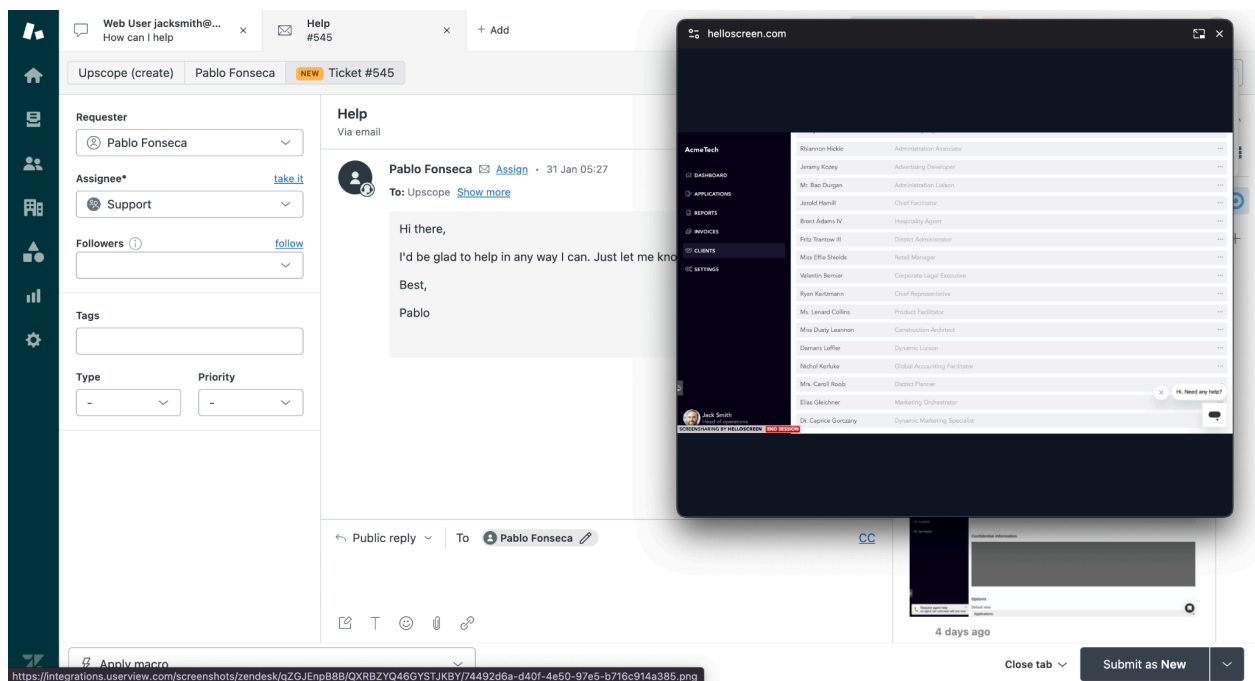
UserView Session Basics
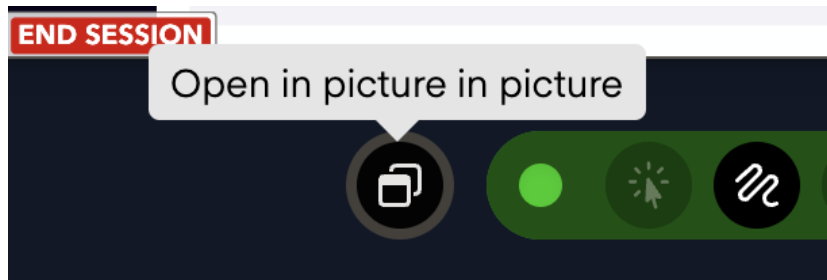
During the session
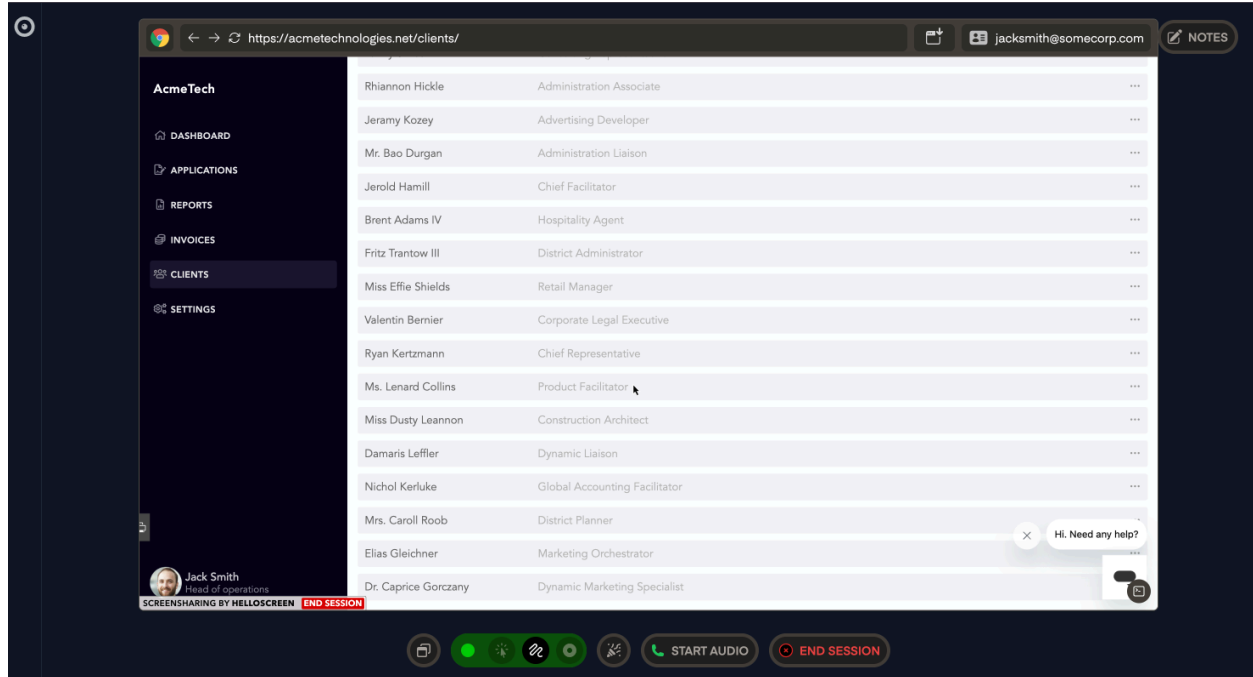
There are a set of features that help you to guide your client through the session, some may not appear depending on what features your team owner has enabled:
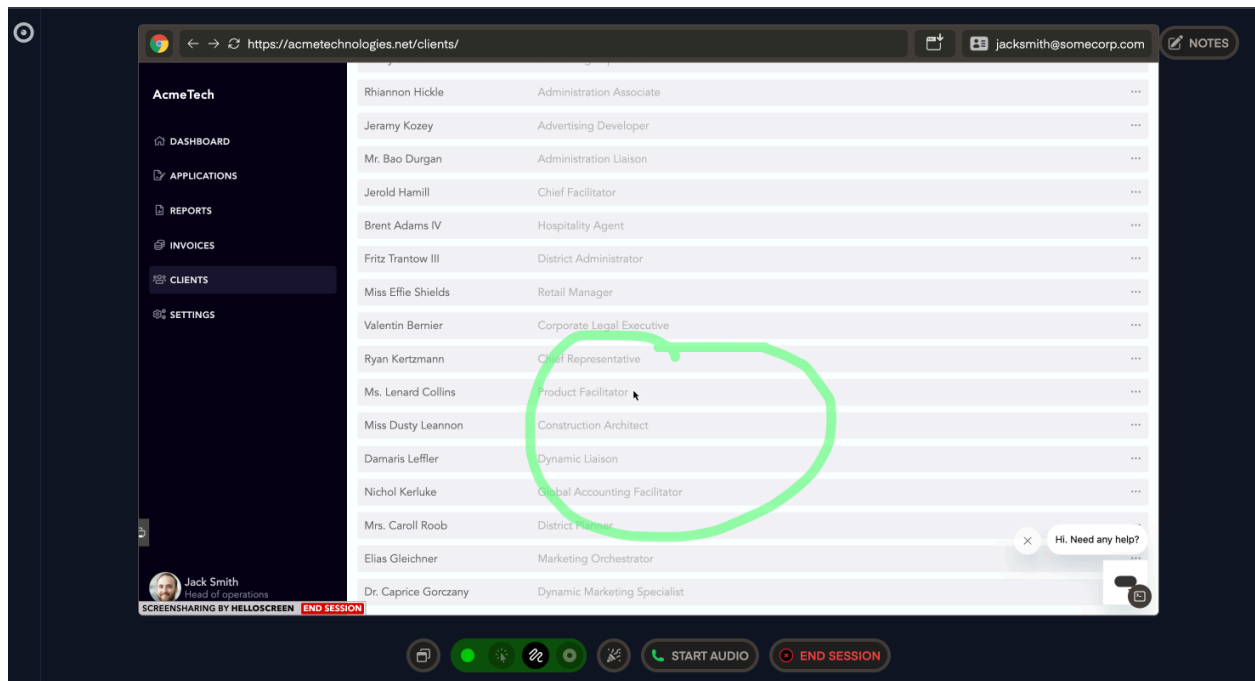
The Toolbar

Picture in Picture

Take UserView with you wherever you go on your browser, helpful for live chat interactions.
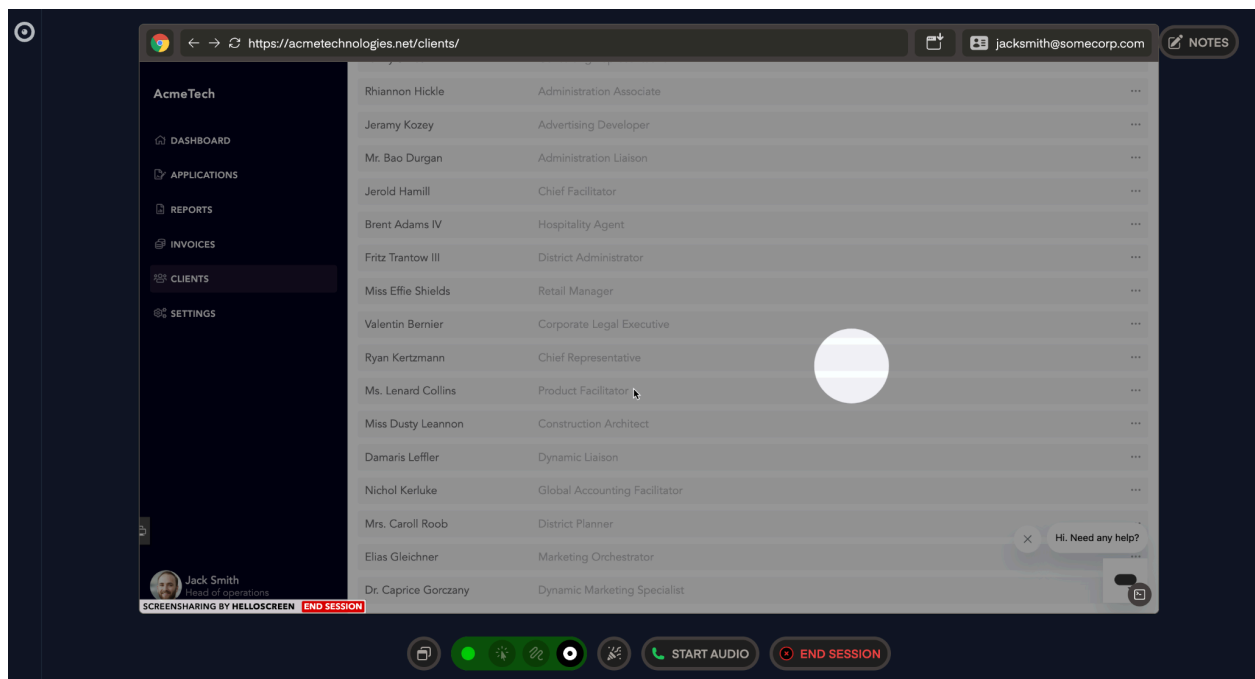
Cursor

Use your cursor as you would on your own device. Navigate, scroll, click, and type to resolve issues faster.

Pen Tool

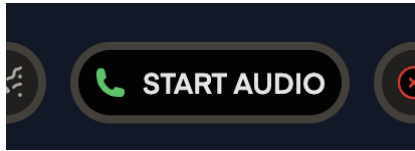Highlight parts of the page by using the pen tool.

Spotlight

Draw focus to any part of the page with the spotlight tool.

Audio Calling

Start an audio call over the browser clicking on the green phone icon at the bottom of the page.

This is a browser-to-browser call, so they'll need a microphone and speaker.

Note that if the audio call request for the client doesn't appear it is most likely due to the client having an ad-blocker on their browser.

Notes
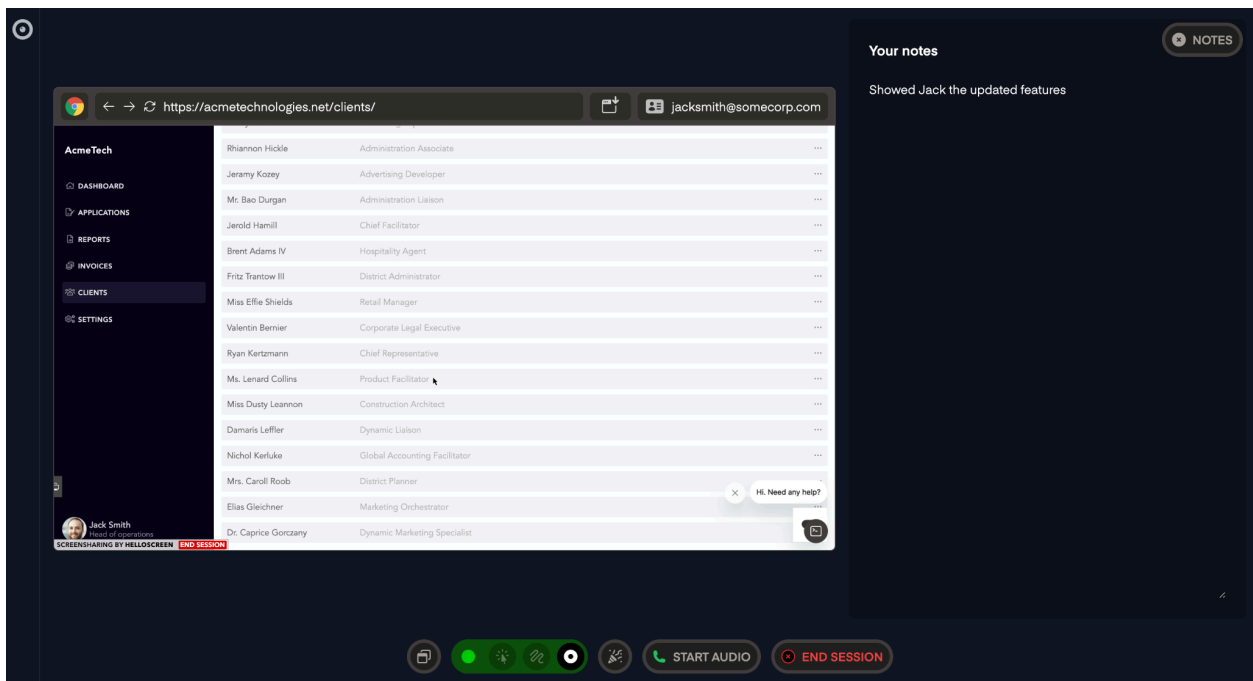
Take notes during the call, if you have an Intercom integration these will be pushed to the ticket.

Bring a teammate into the session

https://helloscreen.com/w/QXRBZYQ46GYSTJKBY

Need to bring in the next tier support or a topic specialist? Send them the page URL and get them to join the session (including audio if on a call), just make sure they also have an Upscope account!
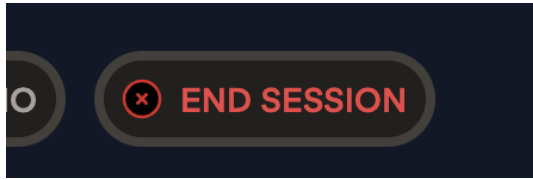
Even if you leave, as long as the other person stays on the session it can be handed off and continue without you.

Confetti
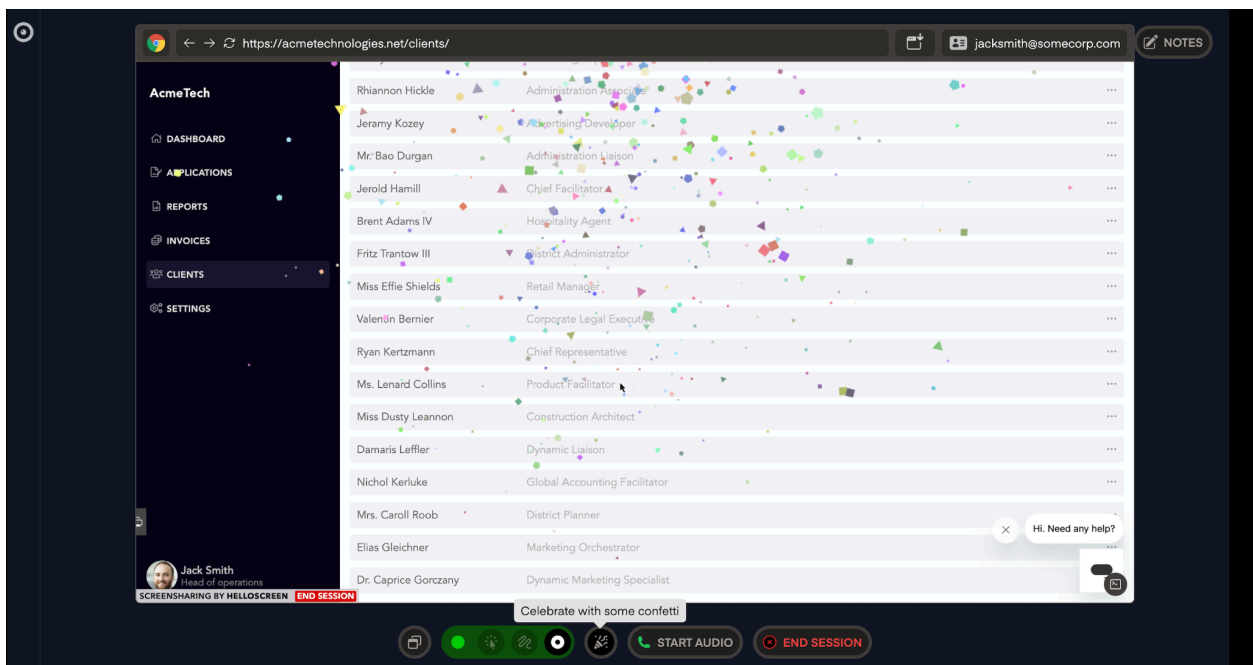
Celebrate with customers with a bit of confetti.

Ending the session

The session ends when:

- You or the client click on 'end session' in the bottom left corner of the screen
- The client closes the tab and any other tabs that have your site up
- 10 minutes of inactivity (unless there is an audio call active)

Post Session

Rating

You'll be asked to rate the session, where you can leave any feedback or report an issue with the session. We appreciate your thoughts and will always be happy to help if there is a problem!

Notes

Some integrations involve any notes that were taken during the call to be pushed into the a ticket associated with the session.

Recordings

Session recordings can be found in the app, if your organization has enabled them, every session is recorded (apart from audio).

If you have settings rights, you can view them along with other details of previous co-browsing sessions here.

Troubleshooting

How to deal with easy troubleshooting issues

Struggling to sign up for an account

If you are struggling to join the team and the team owner is not able to add you onto it via an invite, and you can't use SSO, please contact us.

Can't find user online

UserView not installed on the same page that the user is currently on so they have to install it on that page (most common) . It could also be ad blockers.

Unable to log into account

Login email does not appear in inbox, spam or junk. Check whether you have a password set, reach out to us if you have forgotten your password

Missing feature

If you're unable to find a feature it might be that:
- It is disabled, you'll need to reach out to the owner of your team
- It isn't part of your plan

Please reach out to a member of the team if you're not sure.

Audio problems

We have a new audio provider. Some of the issues could be to do with headphones or headsets not being switched on. Switch your output device if you can't hear them, and switch input if they can't hear you.

Sometimes the device or microphone is not authorized. They will usually be prompted to allow the device and will need to authorize in 5 seconds. If not, they might need to call back again. Look for a small icon on the right hand side of the address bar.

Part of the page isn't showing

Sometimes UserView doesn't pick up some parts of the page. Please contact a member of the team either through our live chat or email us at team@upscope.io, we should be able to get the area working with a few adjustments