



# Partner Support Guide

Get all the tools needed to provide support  
and to escalate when needed

As a Surflyn partner, there are multiple layers to your support flow. Since there can be many different parties involved, it is important that this flow is clearly structured to avoid communication issues. To safeguard your client's happiness and to ensure that issues are handled speedily and are solved in full detail, we'll walk you through the best practices to manage incoming co-browsing tickets. In this guide we'll give you the tools to process your support requests, as well as to hand them off to Surflyn support if necessary.

## Support levels

We differentiate between four different support levels:

**Level One Support** means the ability to take initial calls; log and track customer problems through to resolution; document problem descriptions and customer information in a case tracking tool, and provide periodic status reports to the customer. Provide general pre and post sales product information.

**Level Two Support** means the ability to provide Level One Support plus respond to hardware and software configuration issues; respond to questions on upgrades; collect relevant technical problem identification information including logs, screenshots and recreation procedures; isolation of non SURFLY problems including network issues; and perform base problem determination for basic product feature use and configuration issues.

**Level Three Support** means the ability to provide Level Two Support plus the ability to resolve the majority of mis-configurations; troubleshoot and simulate complex configuration, hardware, and software problems; support problem isolation and determination of SURFLY Product defects; provide lab simulation and interoperability and compatibility testing for new software and hardware releases prior to being deployed at an End User; define and execute problem resolution action plans; and provide the End User with complete steps to reproduce most problems.

**Level Four Support** means the ability to provide Level Three Support plus the ability to provide hot patches and fixes; generate work- arounds that address SURFLY Product non conformance; troubleshoot non conformance that were not diagnosed during Level Three Support; work directly with End Users to resolve critical situations; and build and execute action plans for resolving complex issues.

With regard to supporting your clients, Level One should be handled by you. Escalation takes place at levels Two to Four, if the requirements are met.

Below you'll find which types of issues belong to these levels specifically

# Types of issues

## Client issues

Issues can generally be categorized into different “types”. Most of the times this can be done by analyzing the support request from your client, sometimes you will have to ask them some further questions about their session. This means that most issues exist on your client’s side and are therefore Level One or Two, and can be solved by investigating the following categories:

- Account setup
    - Wrong settings
      - By updating the Surfly options the UI of the co-browsing session can be completely customized. This can be done through the Surfly dashboard or the Surfly API. If your clients report issues with regard to the co-browsing UI, you can look into their settings to check if everything is set up correctly
    - Account not provisioned correctly
      - Have you created a Surfly account for them?
      - Have you set up their account correctly?
      - Are they using the right widget keys?
      - Have they added their agents correctly and did they assign the right roles to them? For more info:  
<https://docs.surfly.com/partner-admin-guide.html>
  - User behaviour
    - Are they performing the right actions to actually be able to start co-browsing?
      - Is it clear to the agent and the customer how they can start a co-browsing session?
      - Do they understand what co-browsing is (vs screen sharing for instance)?
      - Is it clear to the agents which co-browsing features are available to them?
      - Do they understand what it means to be in control of the session? And that the UI might change when you switch control?
  - Browser
    - Is the version outdated? If yes, then upgrade to a newer version.
      - Surfly supports:
        - Chrome
        - Firefox
        - Safari
        - Opera
        - Edge
        - Internet Explorer 11
- Note: Surfly is always tested against the latest versions of these browsers*
- Network
    - Is there a connection established with the Surfly server?

- If a client reports that they can't connect to a Surfly session, or that it is blocked in any way, ask them to try again on a different network and on a different computer. It could be that security measures are in place like firewalls, popup blockers, antivirus software or cookie settings.
  - It is important to note that Surfly needs to be able to reach the server over the network. You can use tools such as [ngrok.io](https://ngrok.io) or [burrow.io](https://burrow.io) to allow Surfly access to your local machine whilst you are developing locally.
- Implementation
  - First of all, what the implementation looks like depends on two different scenarios:
    - How you have build Surfly into your platform (?); If issues occur with the Surfly implementation, this can either be traced back to your code, or how your client has set up your platform.
    - If your clients implement Surfly themselves. In which case there might issues with *their* code
  - Things to look into:
    - Are you or your client using the JS API or the REST API?
    - Are or your client able to make any GET requests
    - Are you or your client able to ping the Surfly server?
    - Is the client's widget key correct?
    - Is the code correct? For more info: [docs.surfly.com](https://docs.surfly.com)
    - Is the Surfly script loaded through a Tag Manager?
      - We advise against loading Surfly through a tag manager, since tag managers come with certain limitations. If website visitors have an ad blocker installed, you run the risk that it will block the tag manager also. This is a side effect of ad blockers, as many of them block the loading of scripts from third parties. This means that these ad blockers would block all Javascript loaded through the tag manager, not just Surfly's. Therefore, it is advisable to add any code snippet to the website directly.

## Co-browsing issues

These are usually Level Three and Four issues. Meaning, that they have something to do with either our network or our software. To ensure a speedy processing, it's important that there is a clear cut handoff from you to Surfly Support. When you run into a co-browsing issue, this is what you should take into account:

- Surfly network issue
  - Check [status.surfly.com](https://status.surfly.com)
  - If you see any errors, please contact us at [support@surfly.com](mailto:support@surfly.com) or call us at +31202611820. You can also contact us through our live chat on our website.
- Surfly bug

- In most cases, if a customer is experiencing an issue, it can be resolved on the client's side. However, on rare occasions you may encounter part of a website that doesn't work within a Surfly session. Since the web is constantly evolving, sometimes there is an edge case that has not yet been accounted for. After confirming that this behaviour does indeed work outside of a session (on the original page), but not within a session, then please investigate the issue further according to below steps.

## Reproducing issues

If the Issue could not be resolved by checking the clients implementation, account settings, network, etc... The next step is to troubleshoot and to understand where the issue occurs, and open a Surfly ticket if it is indeed a bug.

While troubleshooting, the following flow may prove useful to you:

- Always start by checking the original website. Does the issue also occur without a Surfly session? If so, then inform the customer and give them pointers to help them fix the issue.
- Make sure the browser cache is cleared
  - Open the developer tools, go to the "Network" tab and make sure that you've enabled the "Disable cache" option. This is important to ensure that the browser has not cached any old data or versions when you start a co-browsing session.
- Use an incognito browser.
  - If an issue occurs in a normal browser, but is not reproducible in an incognito one, this could mean that browser plugins might be blocking the co-browse session.
- Try to reproduce the issue in different browsers for both the leader and the follower.
  - If the issue occurs in a specific browser, inform your client to use a different one in the meantime.
- Check if the issue occurs inbound (through the Surfly integration) as well as outbound (by starting a co-browse session from the Surfly dashboard, on the url where the issue occurs). If an issue occurs during an inbound session, but not in an outbound session, it has something to do with how Surfly is implemented by the customer.
- Open the developer tools and take a look at the console and network tabs.
  - When errors pop up in the console, check if they are Surfly related, and if they don't pop up on the original website outside a Surfly session.
  - If you see errors in the network tab, please look at the response. Include any info in the issue ticket, also add status codes.
- If the issue appears to be specific to mobile devices:
  - Try to reproduce on both Android and iOS
  - Check both the leader and follower on mobile devices

If you're not able to reproduce the issue within a Surfly session, it is a client's side issue. Please read through the client's support request again or ask them for more info. When you're confident it is a Surfly bug, it's time to create an issue ticket.

## Report a bug

Only report a bug if...

- ... you can describe the concrete steps to reproduce the issue
- ... the issue occurs on multiple devices and/or a known unfiltered internet connection (to rule out local network issues)
- ... the problem happens on a 'fresh' Surfly account with a known integration flow

In the report, please include:

- A detailed description of the issue
- Concrete steps to reproduce
  - Including credentials to a (test) account
- An explanation of the expected behaviour vs what actually happens
- If the issue occurs on the leader's side, the follower's, or both
- Meaningful console/network errors and status codes

When the issue occurs on a specific page of the website, or on a page that we can't get access to (due to security measures for instance), then please create a separate test page for the issue through for example Github Pages or Heroku. On the page include the exact HTML, CSS and Javascript and include the URL in the issue ticket.

When you've completed your bug report, you can submit your support ticket at [support.surfly.com](https://support.surfly.com).

## Surfly support portal

You can submit your support tickets at [support.surfly.com](https://support.surfly.com). To get started, you've received an email with an activation link. Please open the link to confirm your email address and get access to your support account.

To create a ticket, click "Submit a request". You have to add a subject, a description and steps to reproduce. The leader/follower, browser, console errors and attachment fields are optional. You'll receive a confirmation email when the request is send

To check your ticket status, click on your name in the top right corner, and go to "My activities" to check what the status is of your tickets. When you open a ticket, you can add comments and see what the status of the ticket is.

# Get to know Surfly

You'll probably learn the most from trying to integrate Surfly yourself and from co-browsing with colleagues, family and friends to create an understanding of the things your clients might run into. Play around with the settings in the Surfly dashboard to see how the co-browsing experience can be customized, how some settings might not work together that well and also look at the format that is needed for some of them.