Expert Chat 2.0 – Screen Sharing

4 Steps for Screen Sharing

Check EUDP Flag	➡	Get Customer Consent	➡	Instruct Customer to download Bold360 Applet	➡	Start Remote Access

Purpose

The possibility to analyze the root-cause or get additional details about an issue via screen sharing speeds up the resolution and helps our organization to delight customers always.
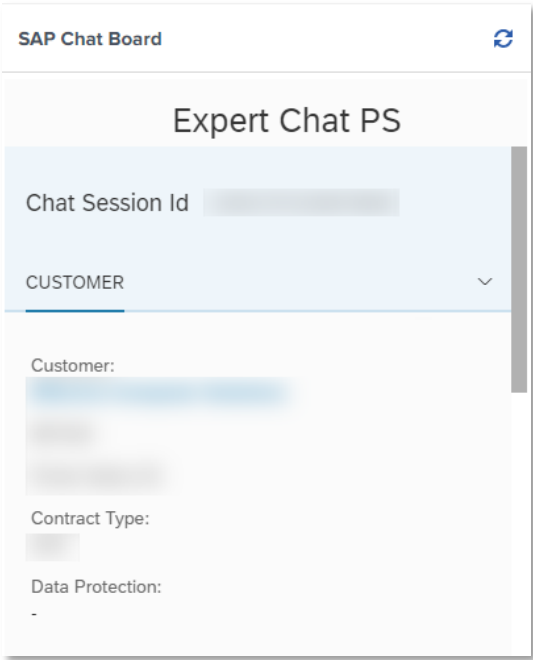
Notes ⚠

Screen share session is '**View Only**'. Only the customers **main screen** can be shared.
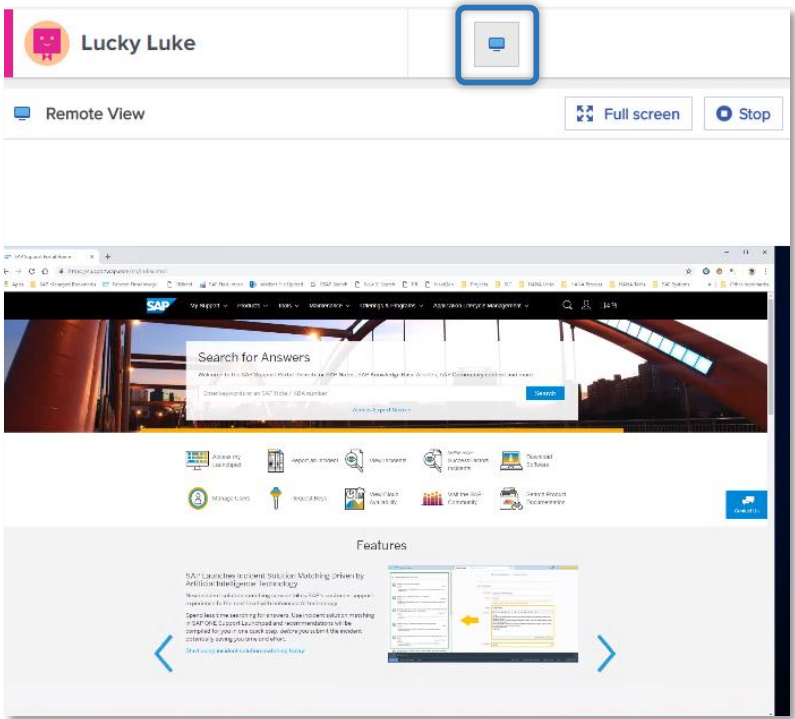
Expert Chat 2.0 – Screen Sharing

Screen Sharing (cont.)

To perform a Screen Sharing, please follow the steps described here.

Step 1

Check if you are compliant with **EUDP** flag before getting customer consent for screen sharing. See **Customer Information** for more details.
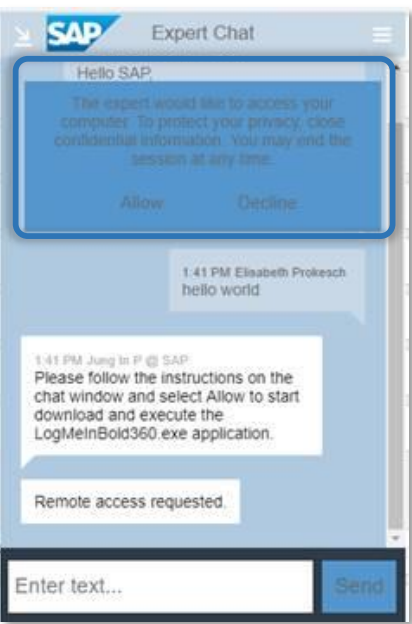
Step 2

Instruct customer for screen share session, you can use the canned messages **/ps-screenshare1, 2, 3**

Click on 'Start Remote Access' button.

Customer to accept request and download executable (5MB).
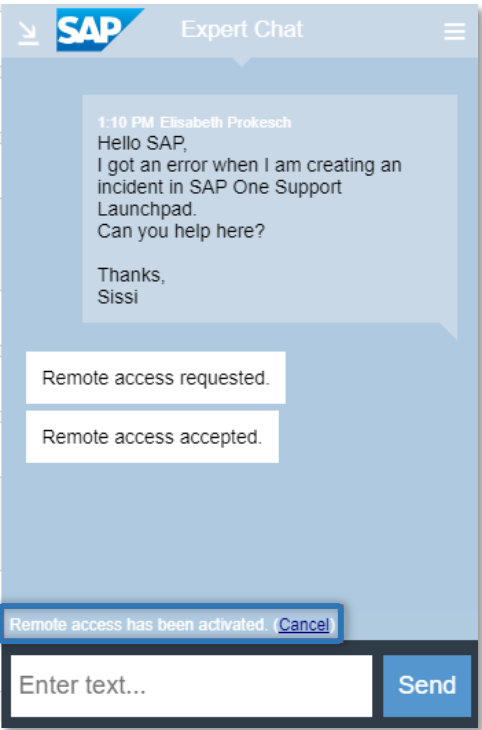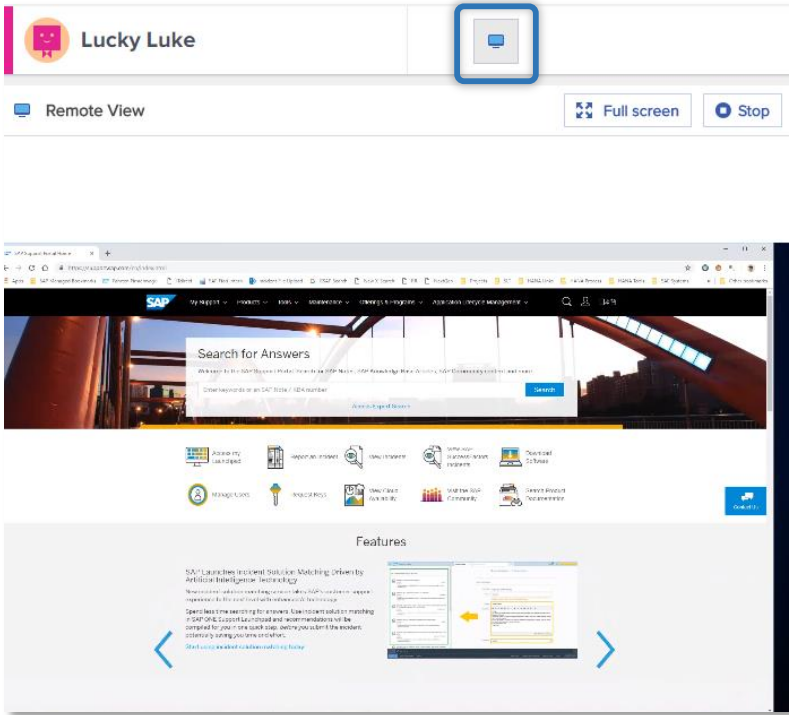
Customer to start executable.

Customer screen will appear in Agent Workspace.

Expert Chat 2.0 – Screen Sharing

Screen Sharing (cont.)

To perform a Screen Sharing, please follow the steps described here.
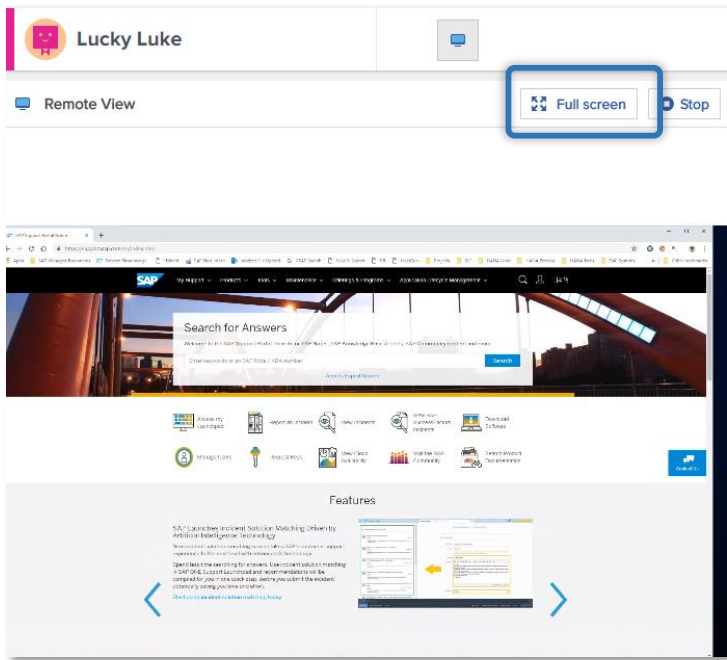

Step 3

To close screen sharing session, it can be done by the engineer or by the customer

It will be automatically closed when ending the chat conversation

Expert Chat 2.0 – Screen Sharing

Screen Sharing (cont.)

To perform a Screen Sharing, please follow the steps described here.

Full Screen

During a screen share session you may enter full screen mode by using the full screen button

Using the full screen option, you can move the chat window and chat with the customer.

Exit full screen mode by pressing 'Esc' on your keyboard.

Notes ⚠️

Best practice is to **call customer** before going into full screen mode to facilitate the communication

Change Log
Secondary title if needed

Change Log

Version	Changed by	Date	Description of changes	Status
1.0.0	Reilly, Ruth; Rodden, Stephen; Nagy, Janos; Sipocz, Eszter; Iturbe, Lucia; Maier, Bernd; Park, Jung In Kumar, Santhosh; Tang, Claire; Murray, Chris H	February 21, 2019	▪ New document for Bold360	Released
1.1.0	Melinda Ludanyi	May 7, 2019	▪ WIPS 4.0 Initial Document	Draft
1.1.1	Lisandro Magnus	November 22, 2019	▪ Document Template Update	Released