

Panel Manager

Topic	Detail
Navigation	Admin → Contact Center → Panel Manager
Purpose	Create custom UI panels embedded in the agent desktop for CRM systems, internal tools, dashboards, or web apps
Security Requirement	All embedded panel URLs must use HTTPS

Overview

Panel Manager allows administrators to embed external tools directly into the Genesys Cloud agent workspace, eliminating the need for agents to switch between multiple applications during interactions.

Two Types of Panels in the Agent Desktop

Type	Description
Interaction Panels	System panels automatically created when a customer interaction occurs (voice, chat, email, etc.) — manage the conversation itself
Custom Panels (Panel Manager)	Administrator-created panels embedding external tools, CRMs, dashboards, or internal applications — provide supporting context

Custom Panel Configuration Fields

Field	Description
Panel Name	Name displayed to agents in the desktop
URL	Web application URL loaded in the panel — must be HTTPS
Icon	Visual identifier shown in the agent interface

Field	Description
Default State	Whether the panel loads automatically when an interaction begins
Role Assignment	Controls which users can see and access the panel
Width / Layout	Determines panel size and position in the desktop

How to Create a Panel

1. Navigate to `Admin → Contact Center → Panel Manager`
2. Click **Create Panel**
3. Configure Name, URL (HTTPS), Icon, and Visibility settings
4. Save the configuration
5. Assign to the appropriate roles or agent groups

Best Practices

Practice	Reason
Use HTTPS only	Security requirement — HTTP URLs will not load
Keep UI lightweight	Heavy applications slow the agent desktop and increase handle time
Limit total panels	Too many panels reduce usability and create cognitive overload
Align panels with workflows	Panels should directly support what agents do during calls
Use role-based access	Only expose panels to the teams that need them

Default Contextual Panel

Set the starting contextual panel for each new interaction, per interaction type.

Voice

Profile

Chat

Profile

Email

Profile

Callback

Profile

SMS

Profile

Web Messaging

Profile

Voice

Profile

-- No Panel Selection --

Agent Assist

Agent Assist CCAI

Callback

Canned Responses

Customer Journey

Notes

Profile

Wrap-up

Voice Interaction Panels

The following panels are available within the **Voice Interaction workspace**. Availability depends on enabled features, integrations, and licenses in the environment.

Panel	Description
Agent Assist	Real-time transcription, AI suggestions, knowledge article recommendations, intent detection
Agent Assist (CCAI)	Google Contact Center AI — speech-to-text, smart reply suggestions, knowledge recommendations
Callback	Displays callback interactions assigned to agent with dial controls and outcome tracking
Canned Responses	Insert predefined messages from response libraries during voice interactions
Customer Journey	Interaction timeline showing previous customer touches across all channels
Notes	Record interaction notes for documentation and follow-up
Profile	Customer identity, contact attributes, and synchronized CRM data
Wrap-Up	Classify interaction outcome with wrap-up codes and manage ACW

Interaction Panels by Channel

System-created panels that appear when an interaction is active:

Channel	Panel Features
Voice	Call controls (hold, mute, transfer, conference), dial pad, notes, wrap-up codes
Chat	Real-time messaging, canned responses, file sharing, typing indicators
Message (WhatsApp/SMS)	Asynchronous conversations, persistent thread history, attachments
Email	Email composition, templates, attachments, threaded conversation history
Callback	Scheduled callback details, dial controls, wrap-up codes

Channel	Panel Features
Social Messaging	Social platform messages, thread tracking, media attachments

Interview Cheat Sheet

Question	Answer
What is Panel Manager used for?	Embedding external tools (CRM, dashboards, internal apps) into the agent desktop
What URL protocol is required?	HTTPS — HTTP will not load
What is the difference between Interaction Panels and Custom Panels?	Interaction panels manage conversations; custom panels provide supporting tools
What is the Agent Assist panel?	AI-driven panel with real-time transcription, suggestions, and knowledge recommendations
What does the Customer Journey panel show?	Previous customer interactions across all channels

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