eServices Manager Administrator's Guide

Plan and build a Category Tree

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- Administrator

Plan and build a category tree to provide the hierarchy for your standard responses.

Related documentation:

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A Category Tree consists of one or more *root categories*, each of which can have subcategories under it. Standard Responses are nodes under categories or subcategories in the Category Tree.

Step 1: Planning

We'll start by planning your Category Tree. To make your Standard Responses useful, you need root categories and subcategories that make sense in your business.

For example, you might create root categories for business units such as Sales, Service, and Billing. Then create useful subcategories. You might want to separate out customer type, such as Platinum, Gold, and Silver customers; or maybe it would work better for you to separate types of products, such as Pet Food, Pet Toys, and Cleaning Supplies; or you might want to respond differently to customers in different locations.

- Make sure that all the Standard Responses you need will fit within the categories you create.

> ### Tip
> Plan your category structure ahead of time. You can edit it, but a little thought now will save time a frustration later.

How category structures work

In general terms, a *category* is a unit of knowledge. Categories are organized in a tree structure; "Example Category Tree" shows an example.
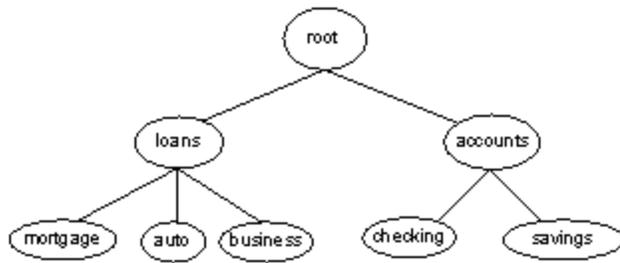
Example Category Tree

Genesys eServices uses category trees to organize and provide access to the library of standard responses. Each standard response must be associated with one category. One category can have zero or many standard responses associated with it.

Categories with no associated standard responses may be of use in grouping other categories together.

Note these definitions:

- A *terminal* category is one that has no subcategories: a leaf on the category tree.

- A *nonterminal* category is one that has subcategories.

- *Child* is another term for subcategory. For example, in "Example Category Tree", **savings** is a child of **accounts**, and accounts has the two children **checking** and **savings**.

A category tree is specific to a tenant and a language. Each tenant/language pair can have multiple category trees.

You can design different sets of screening rules (for example) for different languages within a single tenant. But the screening rules operate the same way regardless of which language they are grouped under.

Category membership is inherited. That is, if Category 1 includes Categories 10 and 11, and Category 10 includes Categories 100 and 101, then Category 1 also includes Categories 100 and 101.

Step 2: Build your Category Tree

You've done your planning. Now let's make it happen. For our example, we are going to create two new root categories, Cats and Dogs, with subcategories, and sub-subcategories:
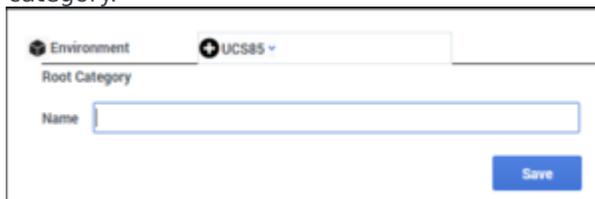
First, we'll create our two root categories:

1. Make sure you have selected the right Tenant and Contact Server.

2. Select the language. Note that in this release, the language choice does not affect how messages are handled.

3. Select **New > Root Category**.
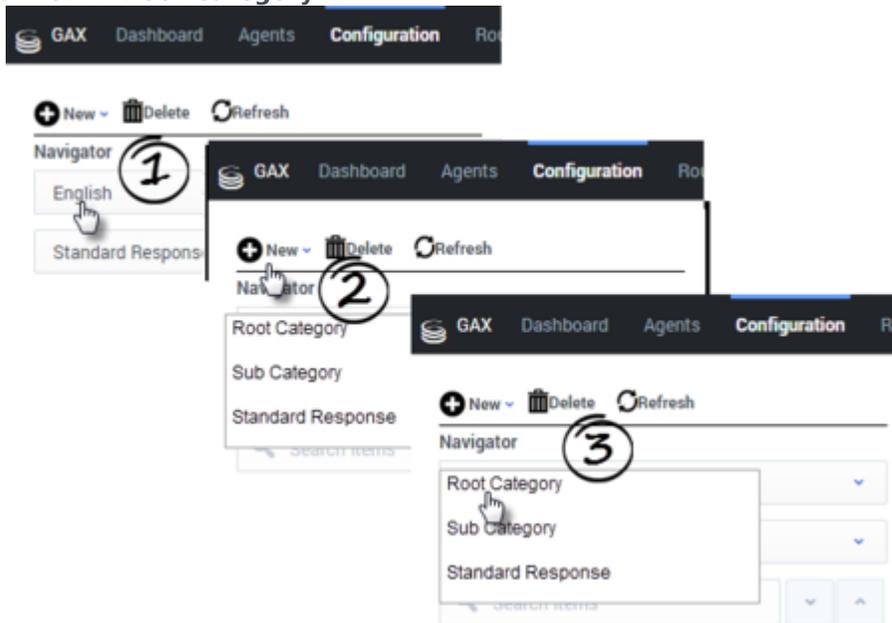
4. Then enter the root category name, Cat, and click **Save.** Repeat the same process to create the Dog root category.


5. Now create the subcategories. For each subcategory, highlight the correct root category and then follow the same process as above, but select **New > Sub Category** instead of **New > Root Category**.

> ### Tip
> You can cut, copy, paste, and delete categories as well as other eServices Manager objects.

More about categories

- To change a category name, select it, edit the name in the text box, and click **Save**.
- To delete a category, check its checkbox and then click **Delete**.
  - Be careful to select only the category check boxes you want to delete!
  - Deleting an upper-level category also deletes all the categories under it.
- There is a special type of category called Service Category that the system may create for you.
- To open the root category and show the categories beneath it, click a caret mark (>).
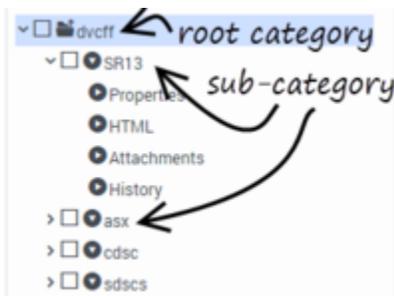
Characters Allowed in Names

eServices Manager Objects

Names of categories, like those of all eServices Manager objects, can consist only of the alphanumeric characters supported in UTF-8, plus the characters shown in the following table:

Additional Characters Allowed in Object Names

Name	Character	Name	Character
Hyphen	-	Exclamation point	!
Number sign, pound	#	Dollar sign	$
Caret	^	Asterisk	*
Underscore	_	Curly brackets	{ }
Angle brackets		Period, full stop	.

Names can be no more than 64 characters long.

Language Names

Names of the Business Attribute called **Language** can consist only of Latin characters and numbers (A–Z, a–z, 0–9), plus the characters in "Additional Characters Allowed in Object Names."

Custom Variables

Names of custom variables can consist only of Latin characters and numbers (A–Z, a–z, 0–9).
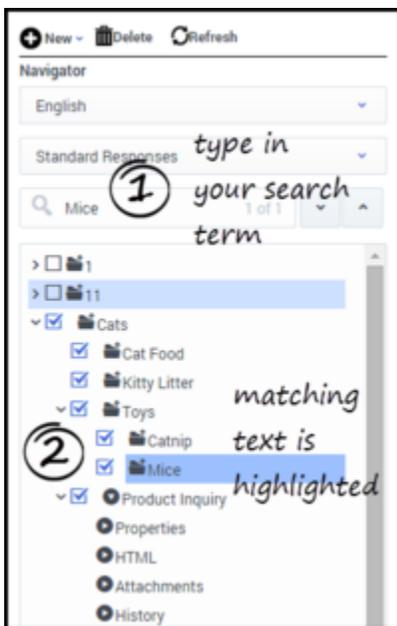
Text Direction

The default direction for text is left to right. To change the direction, right-click the text field and select `writing direction`.

Search the Category Tree

To locate a category, Standard Response, Field Code, or Screening Rule:

- Select the type of object you want to search for and then enter your search term.

Next steps

- Creating Standard Responses
- Personalizing Standard Responses with Field Codes