eServices Manager Plug-in for GAX

Plan and Build a Category Tree

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Contents

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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.

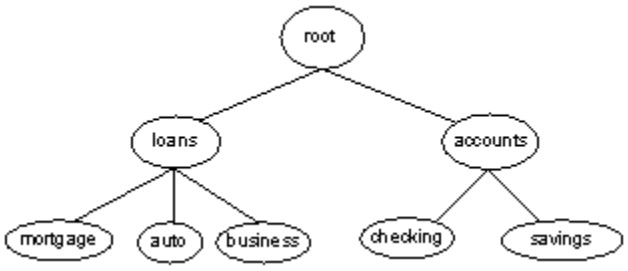
- Make sure that all the Standard Responses you need will fit within the categories you create.

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

To read more about how category structures work, see

[+] 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**.

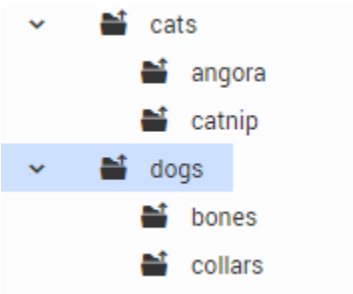
A category tree is specific to a tenant, a Contact Server, and a language. Each tenant/Contact Server/language triplet can have multiple category trees.

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.

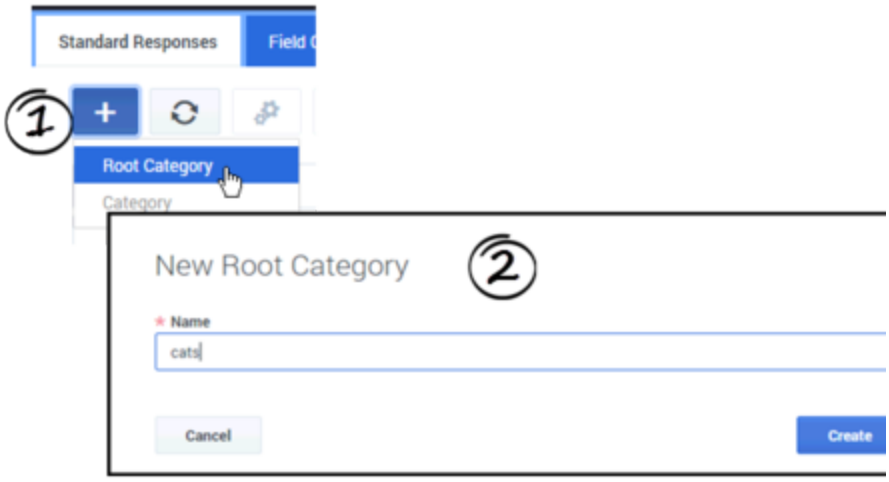
Category membership is inherited. That is, if Category 1 includes Categories 10 and 11, and Category 10 includes Categories 100 and 101, then Category 1 also includes Categories 100 and 101.

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:



First we'll create our two root categories. Make sure you have selected the right Tenant, Contact Server, and Language, then:

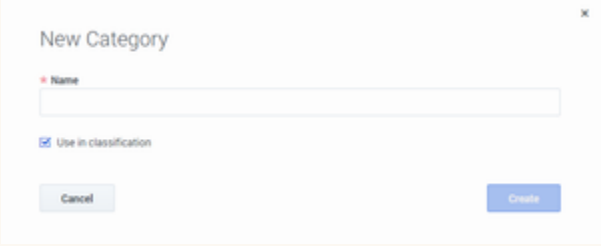


New Root Category

1. Click the New (plus sign) icon and select **Root Category**.
2. Enter the root category name, Cat, and click **Create.**
3. Repeat the same process to create the Dog root category.
4. Now create the subcategories. For each subcategory, select the correct root category and then follow the same process as above, but select **New > Category** instead of **New > Root Category**.

Important

The **New Category** and **Edit Category** dialog boxes (unlike the **New Root Category** dialog) include a **Use in classification** checkbox, which enables you to choose whether Genesys Content Analyzer uses the category in classification. The box is selected by default, but you may wish to have some categories that are used only for organizing other categories or standard responses, not for classification.



Tip

You can cut, copy, paste, and delete categories as well as other Knowledge

> Management objects.

More About Categories

- To change a category name, select it and click the Edit (gears) icon.
- To open the root category and show the categories beneath it, click a caret mark (>).
- To locate a category, use the search box located just above the list of category trees.
- To delete a category, select it and click the Delete (trashcan) icon.Deleting an upper-level category also deletes all the categories under it.

> **Tip**
> You cannot delete any root category that has at least one training data object or model assigned to it.

Characters Allowed in Names

The names of most eServices Manager and Content Analyzer objects can consist only of the alphanumeric characters supported in UTF-8, plus the characters shown in "Additional Characters Allowed in Object Names". This covers categories, standard responses, and screening rules (for eServices Manager), and training data objects and models (for Content Analyzer). Requirements for the names of other objects are listed below the "Additional Characters" table.

Additional Characters Allowed in Object Names

Name	Character	Name	Character	Name	Character
Hyphen	-	Exclamation point	!	Backslash	\
Number sign, pound	#	Dollar sign	$	Parentheses	( )
Caret	^	Asterisk	*	Question mark	?
Underscore	_	Curly brackets	{ }	Space	
Angle brackets	< >	Period, full stop	.	At sign	@

Other Objects

- Field Code names have the same requirements as most other objects (alphanumeric characters supported in UTF-8, plus the characters in "Additional Characters Allowed in Object Names"), except

that you must not use the sequences <$ and $>.

- Custom Variable names can consist only of Latin characters and numbers (A–Z, a–z, 0–9) plus underscore (_).
- The names of test messages for Screening Rules can use any character in UTF-8.
- The **Display Name** of the Business Attribute called **Language** can consist only of Latin characters and numbers (A–Z, a–z, 0–9).

Name Length

- Categories, Field Codes, Custom Variables, Training Data Objects—64 characters
- Standard Responses, Screening Rules—128 characters
- Test messages for Screening Rules—254 characters
- Models—21 characters

Text Direction

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

Next Steps

- Creating Standard Responses
- Standard Responses for SMS Gateways
- Personalizing Standard Responses with Field Codes