SMART User Manual

Create a Category

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Create a Category

You can create categories that define the type of business issue you want to analyze.

Procedure

1. Analyze your Business Needs
   Gather information about the business issue that you want the category to represent.

2. Create an Empty Category
   Set the category properties and define its attributes (such as name, description, sharing properties, and so on), according to the related business issue.

3. Configure Category Conditions
   Define the conditions that must be met for an interaction to be connected to the category.

4. Save and Activate the Category
   Once you have configured the category to represent your business issue, save the category.

Related Topics

Introducing the Category Interface
Save and Apply Changes