

This is the first part of a guide to the Category Inheritance Manager, which is used to set facet inheritance rules in the Bloomreach Dashboard. This page explains where to find the feature, what each of the inheritance settings are, and how they behave. The feature went under many changes during development, so I had to work closely with the Product Manager to keep updated on the latest changes.

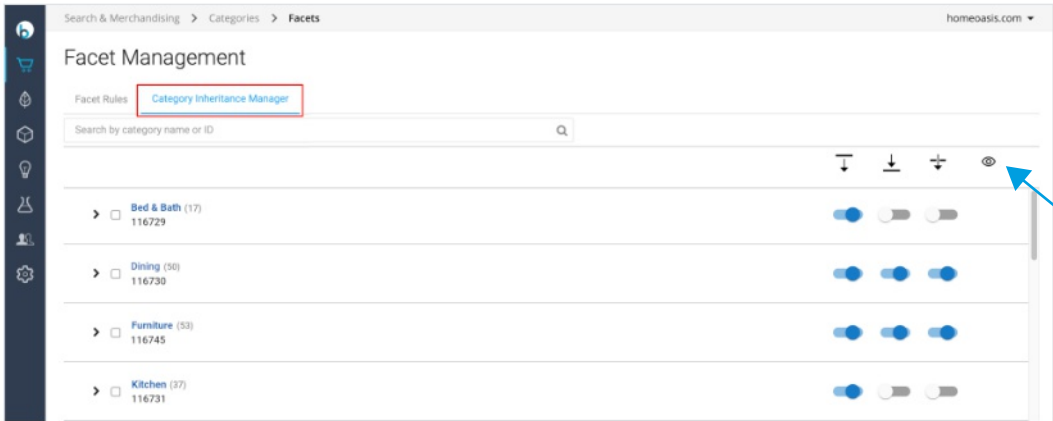
Live at <https://documentation.bloomreach.com/discovery/docs/category-facet-inheritance>

Category Facet Inheritance

Category Facet Inheritance allows facet rules that are set on parent categories to cascade down to child categories in a hierarchical tree structure. You can also control inheritance settings at each category node of a category tree. This allows you to merchandise all your category pages efficiently at scale.

Facet Inheritance Scope

Facet Inheritance settings can be viewed and edited in the Dashboard under **Search & Merchandising** → **Categories** → **Facets** under the **Category Inheritance Manager** tab.



The introduction explains what the feature does and why users should care about this feature

Bold text and color in the screenshot highlight where feature is located

The "eyeball" column here was added later in development, so I eventually had to recapture all screenshots.

Facet Inheritance settings can also be viewed, but not edited, in the Facet Rule Editor under **Search & Merchandising** → **Categories** → **Facets** → **Facet Rules**.

Inheritance Settings

Facet Inheritance has three types of settings, which are described in the table below. You can control each setting individually for each category.

Facet Inheritance setting	Description	Default value
Pass Down	Allows this category's facet rules to be passed down to be inherited by any of its child categories.	Off
Receive From	Allows this category to inherit facet rules from parent and ancestor categories with Pass Down = On.	On
Pass Through	Allows the inheritance chain to continue through this category tree.	On

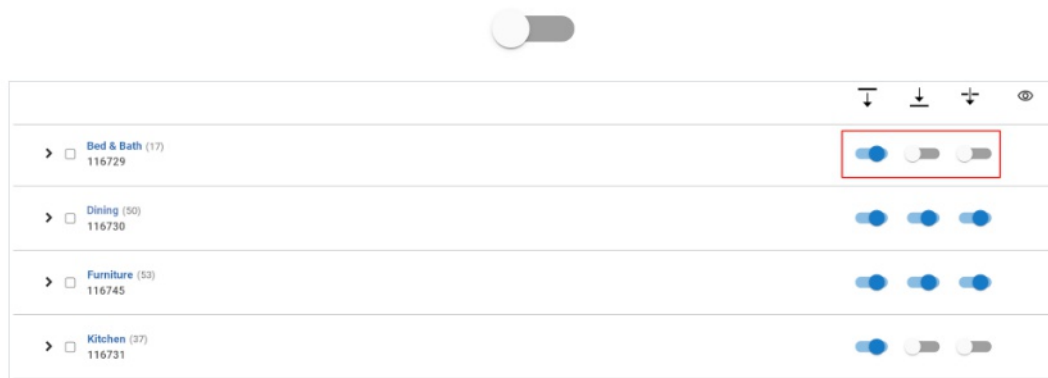
I used a table here instead of a bulleted list to better highlight the default values.

In the Dashboard, you can control each of the Facet Inheritance settings for each category, as shown below.

This Facet Inheritance setting is **On** (blue switch to the right).



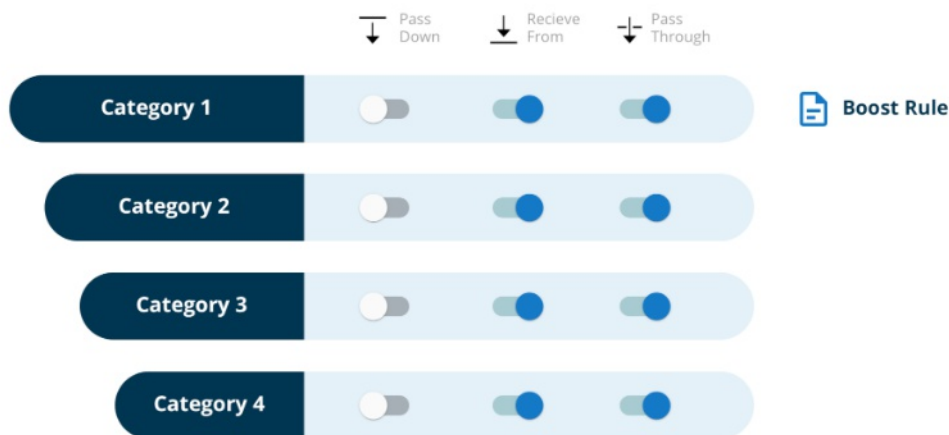
This Facet Inheritance setting is **Off** (white switch to the left).



More details about the Dashboard interface are available in the [Dashboard Controls](#) page.

Example 1: Pass Down

Suppose you have a category branch that uses the default Facet Inheritance settings:

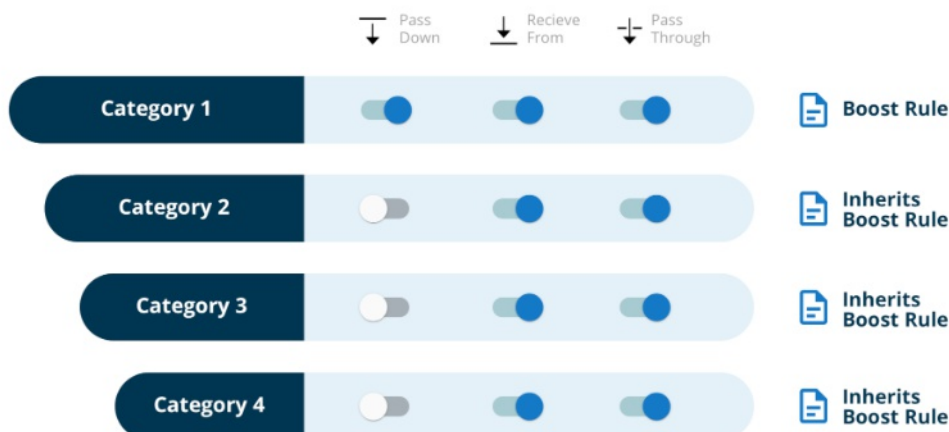


The graphics here visualize the inheritance relationships.

I provided mockups and descriptions to the Design team, who produced the final graphics for me.

With the default settings, no facet rules are passed down. Category 1 has the price facet boosted, but does not pass down this rule to its child categories. You can use the **Pass Down** setting (default: No) to allow a parent category's facet rules be passed down the category branch.

Let see what happens if you set Pass Down = On for Category 1:



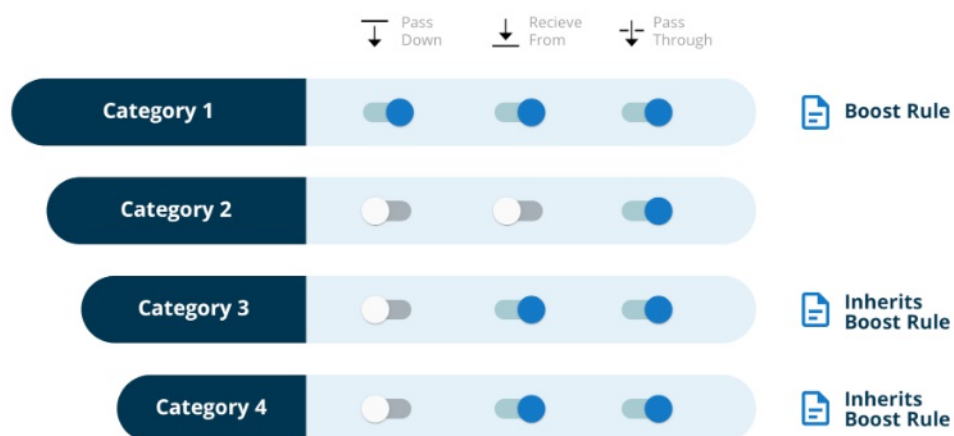
The second graphic here demonstrates the effect of the inheritance setting as the text on the right explains that the rules are now being passed down.

By default, categories can receive facet rules from parent categories and all ancestors. Therefore, Category 1's price facet boost is passed down to Category 2, 3, and 4.

Example 2: Receive From

What if you wanted to turn off inheritance for certain categories? You can use the **Receive From** setting (default: On) to control whether the category inherits facet rules from parent categories and ancestors that have Pass Down = On.

For example, suppose Category 1 has Pass Down = On, and Category 2 has **Receive From** = Off:

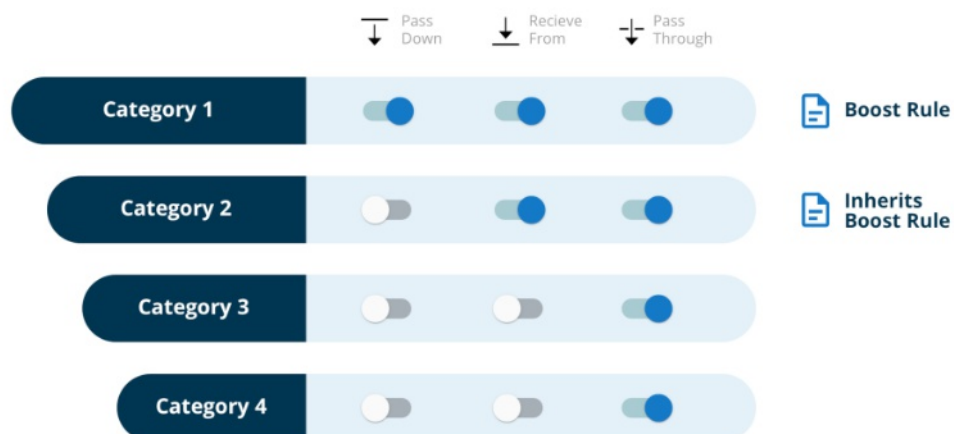


The previous graphic represents "before" changing the Receive From setting, so this graphic represents "after".

Category 2 cannot receive any facet rules, so it does not inherit the price facet boost from Category 1. Category 3 and Category 4 can receive facet rules, so they inherit the price facet boost from Category 1.

Example 3: Pass Through

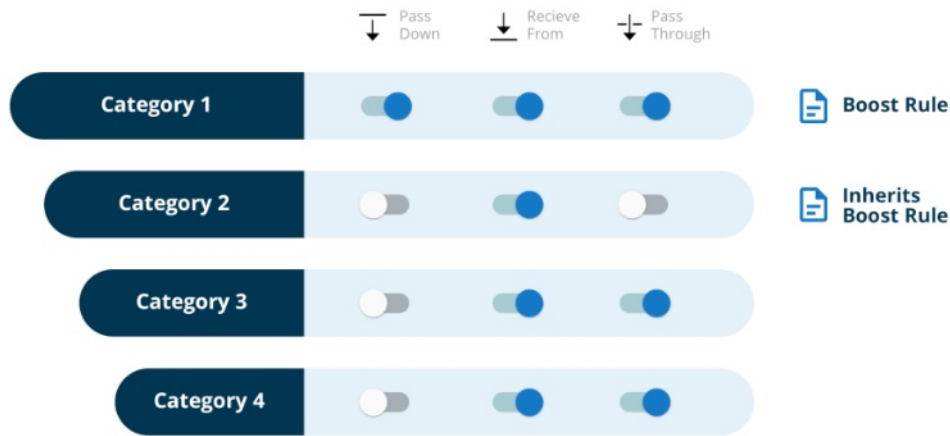
What if you want facet rules to be passed down to a specific level only? Suppose you want Category 2 to inherit from Category 1, but you do not want Category 3 or 4 to inherit from Category 1. You could set Receive From = Off for Category 3 and 4:



Rather than simply demonstrate the Pass Through setting, I also tried to explain how Pass Through achieves different results from the previous two settings.

With these settings, Category 3 and 4 will not inherit from Category 1, but they also would not inherit from Category 2. The Receive From setting can achieve the results you wanted here, but it does not allow you to inherit from other levels as well.

Instead, you can use the **Pass Through** setting (default: On) to control whether inheritance chains can continue through a node. Let see what happens if you set **Pass Through** = Off for Category 2:



Category 2 inherits the price facet boost from Category 1 while Category 3 and 4 do not, even though they have Receive From = On. If you created a facet rule at Category 2 and set it to Pass Down = On, then Category 3 and 4 would be able to inherit the rule from Category 2.

Use Cases

For more advanced examples, continue reading in the [Use Cases section](#).

FAQ

How does Facet Inheritance interact with targeting?

A category with Pass Down = On will only pass the default rule, and not the targeting rule.

How does Facet Inheritance interact with scheduling?

Inheritance respects scheduling. A category with Pass Down = On will pass down scheduled rules and follow scheduling guidelines. When a parent category has a new schedule rule come into effect, the child categories can also inherit it.

How does Facet Inheritance behave when categories change in the feed?

Feed change	Facet Inheritance behavior
New category, no parents	Starts with default Facet Inheritance settings
New category, has parents	Inherits parent's Facet Inheritance settings, reevaluate Facet Inheritance based on the new path
Category moved within current category tree	Keeps existing configurations, inherited configurations for this node are erased, inherits new parent settings Former and current child categories will be updated, reevaluate Facet Inheritance based on the new path
Deleted category	Reevaluate Facet Inheritance for child categories based on the new path



Introducing unclean category data can cause issues in updating the category tree with new categories. However, the existing category inheritance settings will still apply to the non-updated category trees.

This page is an introduction to the feature. Therefore, I felt that Use Cases belonged on a separate page and linked to it here.

The FAQ explains some interactions with other Dashboard features and feed data.

The Product Manager provided the questions and answers to include, and I copyedited them.