

## Service Categories

Service categories are used to capture consistent information, to allow for reporting and benchmarking, and for determining service level assignments.

Creating and defining categories helps build valuable knowledge about the customer and also collects data that can be analyzed to understand business requirements and market demands.

Service categories are stored in catalogs to accomplish the following:

- Establish a multilevel category hierarchy.
- Link catalogs to different entities such as cases, and interactions such as email, chat, and phone calls.
- Manage the catalog status.

## Create Service Catalogs

You, as an administrator, can create catalogs to organize service categories and sub categories.

### Context

Create and organize service categories to sort cases and other entities into different service catalogs.

### Procedure

1. Go to your user profile and select **Settings Service Catalog Catalog Definition**.
2. Select the Create icon (🛠️) to create a new catalog, or select a catalog name to edit an existing catalog.
3. If you're creating a new catalog, enter a **Name**, **ID**, and **Description**, then save your changes.
4. Select or edit the entities with which to use this catalog. For example: case, email, chat, or phone call.
5. Add or edit a service category in the catalog. Select the **Add Parent Category** icon (🛠️) to add a new category.
6. Enter or edit the **Name**, **ID**, and **Description**, for the category, then save your changes.

Once you enter an ID for the category, it can't be changed. However, you can edit the name and description.

7. To add subcategories to your top-level category, select the **Add Subcategory** icon (🛠️) in the **Action** column. Enter a **Name**, **ID**, and **Description**, for the subcategory, then save your changes.

### Note

You can have up to three levels of subcategories under your top-level category, providing a total of four hierarchy levels for your category catalogs.

Add additional categories and subcategories to build your catalog.

### Tip

You can export a spreadsheet template, create your catalog hierarchy structure, and then import your catalog structure. For more details on importing data, see the related information section.

8. Activate your new catalog. Select the **Activate** button in the catalog header.

### Restriction

Once you activate a catalog, you can deactivate it, but you cannot activate it again.

You can also activate and deactivate categories in the catalog with the **Activate** and **Deactivate** icons (🔘 and 🔘) in the **Action** column.

### Results

Once you create and activate your service catalog, users in the system can assign categories to the entities you specified for the catalog.