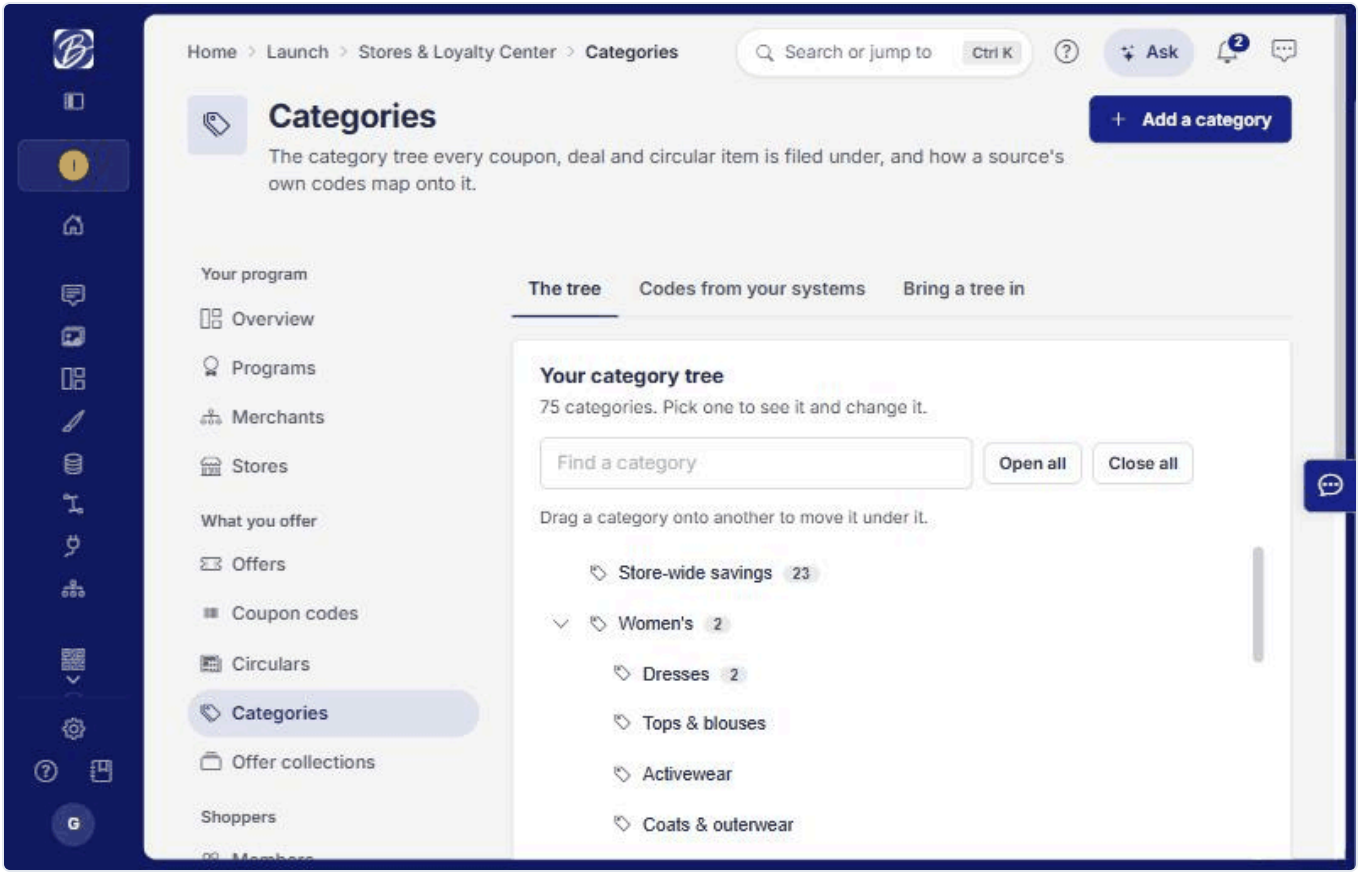
Categories

What this page is for

Categories is where you build the category tree your whole program is filed under, the way a shop arranges its departments: Home & Kitchen, then Cookware, then Pots & Pans. Every coupon, deal, reward, circular and circular item can be filed under these categories, and shoppers browse and search by them on the thread, on the web overlay and with the AI Concierge. The same tree can drive your offers' rules, so "15% off everything in Home & Kitchen" means exactly what shoppers see in Home & Kitchen.

If your register or a feed already sorts things with its own codes, you can map those codes to your categories here, so items that are synced in file themselves. And if you already have your categories in a spreadsheet, you can bring the whole tree in at once.

What you see



- *The page's parts*, across the top. **The tree** shows your categories. **Codes from your systems** shows the codes your other systems use and where each one lands. **Bring a tree in** lets you paste a table or choose a CSV file. Each part has its own address, so you can bookmark it or share it, and you only see the parts that are yours to use.

- **Your category tree.** Each category with its icon, its name and how many things are filed directly under it. A small label marks a category another system brought in, with a lock when that system owns it. **Hidden** marks a category shoppers do not see. Use **Find a category** to search the tree, and **Open all** or **Close all** to show or fold every branch.
- *The category you picked.* Its name, where it sits in the tree, its slug, and how much is filed under it. Under that are its details - **Name**, **Slug**, **Sits under**, **Shoppers see it**, **Order**, **What it means**, **Description**, **Icon** and **Picture** - and **What is filed here**, a page at a time, each thing by its name. A merchant's and a store's name opens its page.
- *The buttons for the category you picked.* **Add under this**, **Move to...** and **Retire**. You only see them when you can change the tree.

What you can do

Add a category

1. Select **Add a category** at the top of the page to add one at the top of the tree, or pick a category and select **Add under this**.
2. Type the **Name** shoppers read. Converse fills in the **Slug** from the name; type your own slug if you want a different one.
3. Choose whether **Shoppers see it**, and give it an **Order** if it should come before its neighbours.
4. Write **What it means** in one sentence, such as "Cookware you cook in on the stove". The AI reads it to file things here and to find them.
5. Select **Make the category**. It opens in the tree, ready to change.

Change a category

1. Pick the category in the tree.
2. Change its fields, and select **Save**. If something needs a fix, a note appears beside the field and nothing is saved until you correct it.

Move a category

You can move a category in either of two ways. It moves with everything beneath it.

1. Drag the category onto another one to move it under that category, or onto **Drop here to move it to the top** to put it at the top of the tree.
2. Or pick the category, select **Move to...**, choose where it goes, and select **Move it**.
3. A note says where it now sits. Select **Undo** in that note if you moved the wrong one.

You can also move through the tree with your keyboard: the arrow keys move up and down, open a branch and close it again.

Give a category its icon and picture

1. Pick the category in the tree.
2. Under **Icon**, select **Choose an icon** and pick one from the list. Select **Use the plain tag** to go back to the plain tag.
3. Under **Picture**, select **Choose a file** to pick a picture from your library, upload a new one or take a free stock photo. You can also paste a picture's https address instead. The picture shows beside the field at once; select **Remove** to take it off.
4. Select **Save**.

See what is filed under a category

1. Pick the category in the tree.
2. Read **What is filed here**. Each thing is listed by its name, with what kind of thing it is and whether this is its main category. Use **Show** to see only offers, circulars, circular items, merchants or stores, and **Next** and **Previous** to page through.

File something under a category

Every offer, circular, circular item, merchant and store can be filed under several categories, with one of them as its main category.

1. Pick the category in the tree, and select **File something here** beside **What is filed here**.
2. Choose what kind of thing it is - **Offer**, **Circular**, **Circular item**, **Merchant** or **Store** - and type part of its name. Select **Search**.
3. Select **Choose** beside the one you want. Its categories open, with this category already added.
4. If it should be filed somewhere else too, pick another category in **Add a category...**. Choose which one is its main category; the first one you add is the main one until you pick another.
5. Select **Save the filing**, then **Done**.

Change where something is filed

1. In **What is filed here**, select **Change filing** beside the thing.
2. Add a category with **Add a category...**, take one out with the cross beside it, or choose a different main category.
3. Select **Save the filing**. **Reset** puts back what was there before you started, and **Done** closes it.

Retire a category

1. Pick the category and select **Retire**.
2. Before anything happens, Converse tells you how much is filed under it, whether any categories still sit under it, and whether any codes map to it. Things filed under it stay filed, and reports keep its name.
3. If categories still sit under it, move or retire them first. If codes map to it, delete those maps on **Codes from your systems** first.
4. Select **Retire** to confirm. Shoppers no longer see the category.

Map your systems' codes to categories

1. Open **Codes from your systems**.
2. Under **Map a code**, type the **Source** - the name of the system the code comes from, such as gregmart-pos - and **Their code**, exactly as that system sends it.
3. Choose the category it **Lands in**, and select **Save the map**.
4. To change a map, select **Edit** beside it. To remove one, select **Delete** and confirm with **Delete**.

See where your codes land

1. On **Codes from your systems**, find **See where codes land**.
2. Type the **Source** and the **Codes**, one a line.
3. Select **Look them up**. Converse lists where each code lands and which codes land nowhere yet. Select **Map it** beside a code to map it on the spot.

Bring a whole tree in

1. Open **Bring a tree in**.
2. Paste a table copied from a spreadsheet, or select **Choose a CSV file**. The first line holds the column names. Only a name column is needed; you can also give a slug, the parent, a code, a description, an order, a status, an icon, a picture and what it means. A parent can be named by its slug or by another row's name.
3. If the rows come from another system, open **These rows come from another system** and type its **Source**, so a later sync updates these categories instead of adding copies.
4. Select **Check it**. Nothing is written yet: Converse shows what it would make, change and leave alone, and why it would refuse any row.
5. Select **Bring it in**. Each row is decided on its own, so a refused row never stops the rest.

How it fits

Categories are how shoppers find what you offer. A member who opens your conversation and taps into Home & Kitchen sees the coupons, deals and circular items filed there, and the web overlay shows the same tree as its filters. Collections can show on a category's page, and a smart collection can pick everything in a category for you. Because the tree also drives your offers' rules, one tree serves browsing and discounts alike.

Good to know

- The category tree belongs to the whole workspace. Only people who run the Stores & Loyalty Center for the whole workspace can change it. Someone who works for one merchant sees the same tree they file their offers under, and someone who only redeems at the stores can read it.
- **Codes from your systems** is shown only to people who work on the whole workspace.

- Filing belongs to the whole workspace too: only people who run the Stores & Loyalty Center for the whole workspace see where a thing is filed and change it. Someone who works for one merchant still sees what is filed under each category from their own merchants.
- A category brought in from another system and owned by it keeps its name, place and status read-only here. You can still give it its own **Icon** and **Picture**.
- The tree shows its first six levels indented; deeper categories line up at the sixth.
- A thing that is no longer in your lists - retired, or one you cannot see - is said so by name, such as "An offer that is not in your lists".

Related pages

- Stores & Loyalty Center: the overview, your programs and how the Stores & Loyalty Center fits together.
- Offer collections: feature offers and circular items, picked by hand or kept current by rules.
- Integrations: switch on the Loyalty skill under Skills.