

# Tracking Categories

**Tracking Categories** are used as **controlling variables** through-out the whole system, where your organization may gather some financial data, such as projects, time sheet, expenses, invoices (received/issued), orders (issued/received), estimates, etc.

There are max. **three** Tracking Categories available (Tracking Category 1, 2, 3). Tracking Categories must be set-up in general in order to start working. Once you assign one of the (root) records in Tracking Categories overview to Tracking Category 1, 2 or 3, they become available in the whole Atollon.

On the level of Folders (Clients, Prospects, Partners, ...) or Projects you may define whether or not the Tracking Category 1, 2 or 3 will be shown/hidden, optional, silent or required. Silent is work-in-progress, it should allow setting Tracking Categories automatically based on user settings in system registry.

## Use Cases

Tracking Category 1 is typically used for assigning financial data, folders or project to organization's **Business Units, Teams** eg.:

Tracking Category 1 = Organization Structure

Organization Structure may contain several levels, starting by Region > Business Unit A, B, C, ...

Tracking Category 2 is typically used to set **Cost Centre**. It is also used in connection with Work Price List. It is possible to set different prices of work/labour per Tracking Category 2 (Cost Centre, Work Regime, etc.)

Tracking Category 3 is not used heavily and it is additional controlling variable, if required.

## Set the Tracking Category

Create new root record, called for example "Team" and save it. Click on the newly created record (Team) and press button: "Set selected category" next to the Tracking Category 1, 2 or 3. From now, the Team option will be available throughout the whole Atollon. Repeat steps for Tracking Category 2, 3 (if needed).

# Tracking Categories Settings Example

The screenshot shows a macOS-style dialog box titled "Tracking Categories". Inside, the title "Tracking Category Settings" is at the top. Below it are three buttons: "Add root category", "Add category" (highlighted with a blue border), and "Delete category". A tree view follows, with "Regions" expanded to show "China", "EMEA", and "US". Below "Regions", "Teams" is expanded and highlighted with a blue background, showing "Team - Cons", "Team - Devs", and "Team - Sales". At the bottom, there are four rows of settings, each with a text field and two buttons ("Set selected category" and "Clear"). The settings are: "Tracking Category 1:" (value: "Regions"), "Tracking Category 2:" (value: "<not set>"), "Tracking Category 3:" (value: "Teams"), and "User Teams:" (value: "Teams"). At the very bottom are "Cancel" and "Save" buttons.

Tracking Categories

Tracking Category Settings

Add root category Add category Delete category

▼ Regions

- China
- EMEA
- US

▼ Teams

- Team - Cons
- Team - Devs
- Team - Sales

Tracking Category 1: Regions Set selected category Clear

Tracking Category 2: <not set> Set selected category Clear

Tracking Category 3: Teams Set selected category Clear

User Teams: Teams Set selected category Clear

Cancel Save

Revision #1

Created 21 March 2020 06:18:12 by Jan Safka

Updated 21 March 2020 06:25:10 by Jan Safka