

# 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

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**

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