

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 also expanded, showing "Team - Cons", "Team - Devs", and "Team - Sales". The "Teams" section is highlighted with a blue background. At the bottom, there are four rows of settings, each with a text field and two buttons ("Set selected category" and "Clear"). The first row is "Tracking Category 1:" with "Regions" in the field. The second row is "Tracking Category 2:" with "<not set>" in the field. The third row is "Tracking Category 3:" with "Teams" in the field. The fourth row is "User Teams:" with "Teams" in the field. 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

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