



District definition

ADITO Software GmbH

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Screenshots

The UX design of ADITO is continuously optimised for you. Therefore, there may be deviations in the screenshots.





Agenda

- District definition
 - Create new district
 - Preview
 - Filter view
 - Serial action „Set parent district“
 - Serial action „Set auto assignment“
 - Assign companies
 - Tab „Companies“
 - Tab „Responsibles“
 - Assign „Supervisors“
 - Tab „Supervisors“
 - Status of companies and supervisors
- Dashlets
- Exkursus to the company



District definition

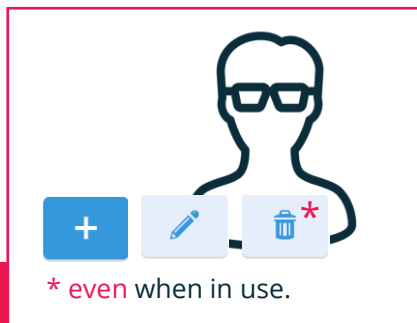
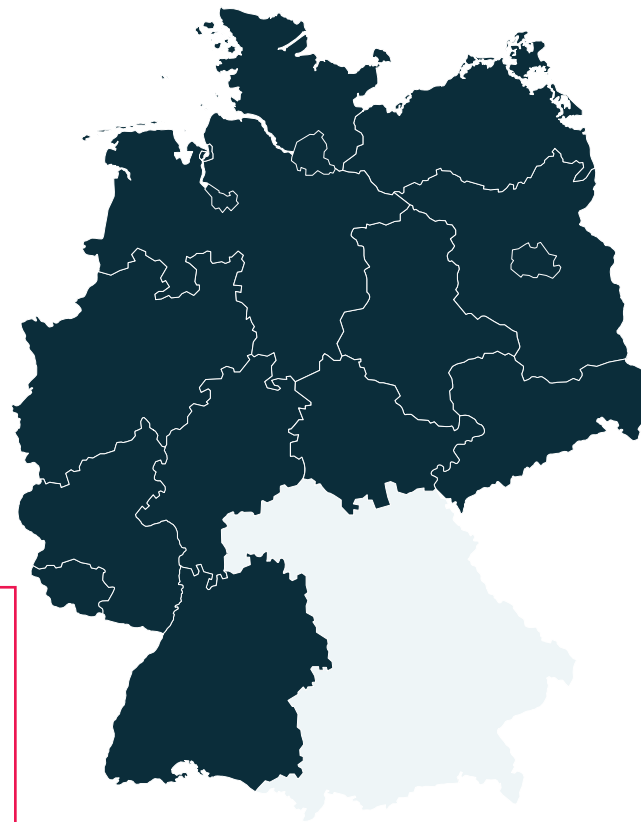
District definition

Districts can

- map **geographical areas** and regional structures (filter by: zip codes, countries, ...) or
- **structures that specify companies in more detail.**

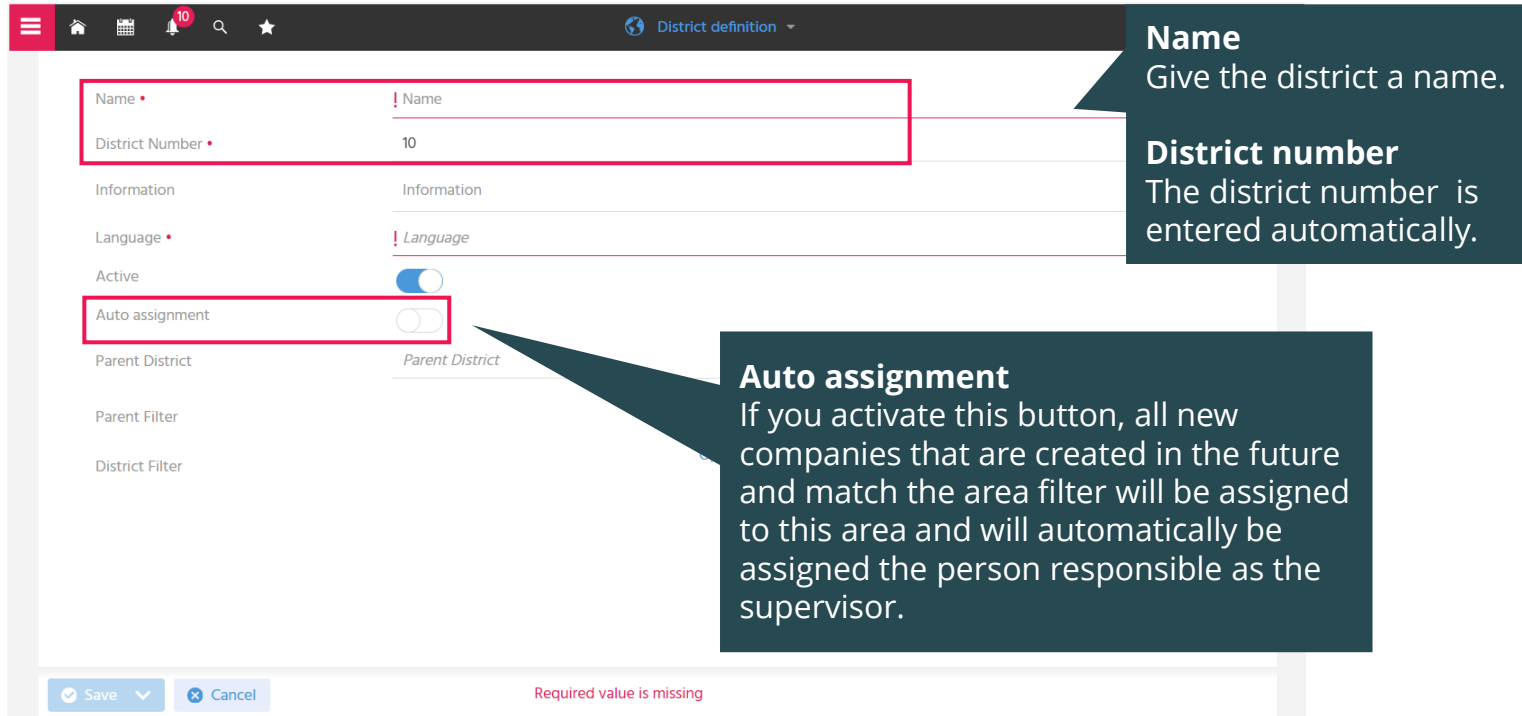
Filter by:

- Industries,
- Types,
- Classifications,
- ...



District definition

Create new district



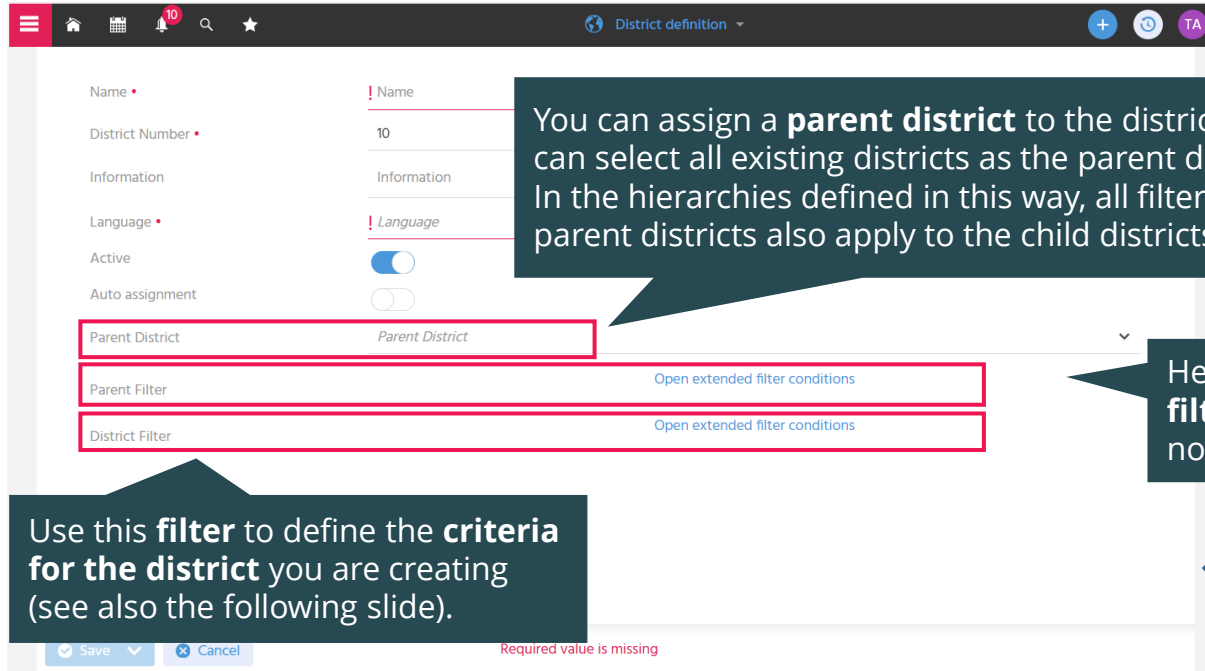
The screenshot shows the 'District definition' form in the ADITO application. The form has a dark header bar with navigation icons and a 'District definition' dropdown. The form fields are as follows:

- Name:** A text input field with a red border and a red exclamation mark icon. A callout box explains: **Name** Give the district a name.
- District Number:** A text input field with the value '10' and a red border. A callout box explains: **District number** The district number is entered automatically.
- Information:** A text input field.
- Language:** A text input field with a red exclamation mark icon and the text 'Language'.
- Active:** A toggle switch that is currently turned on.
- Auto assignment:** A toggle switch that is currently turned off and has a red border. A callout box explains: **Auto assignment** If you activate this button, all new companies that are created in the future and match the area filter will be assigned to this area and will automatically be assigned the person responsible as the supervisor.
- Parent District:** A text input field.
- Parent Filter:** A text input field.
- District Filter:** A text input field.

At the bottom of the form, there are 'Save' and 'Cancel' buttons. A red error message 'Required value is missing' is displayed below the buttons.

District definition

Create new district



The screenshot shows the 'District definition' form in the ADITO system. The form includes fields for Name, District Number (set to 10), Information, Language, Active status (toggle), and Auto assignment (toggle). Below these are three sections: 'Parent District' with a dropdown menu, 'Parent Filter' with a link to 'Open extended filter conditions', and 'District Filter' with a link to 'Open extended filter conditions'. A red error message at the bottom states 'Required value is missing'. The form is framed by a dark header with navigation icons and a sidebar with a menu icon.

! Name

District Number • 10

Information

! Language

Active

Auto assignment

Parent District Parent District

Parent Filter Open extended filter conditions

District Filter Open extended filter conditions

Save Cancel

Required value is missing

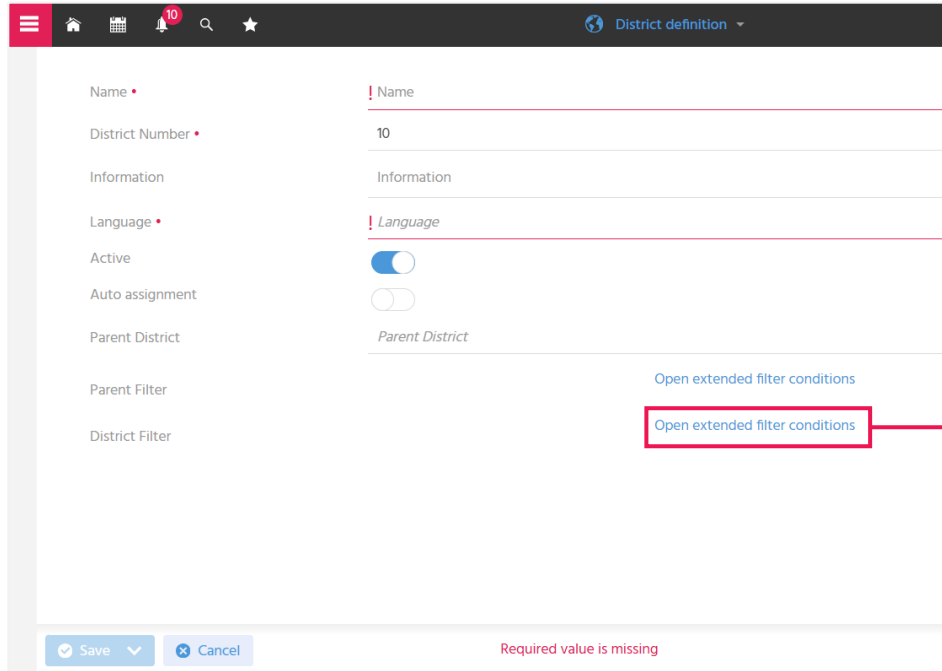
You can assign a **parent district** to the district. You can select all existing districts as the parent district. In the hierarchies defined in this way, all filters of the parent districts also apply to the child districts.

Here you can open and view the **filter of the parent district**, but not change it.

Use this **filter** to define the **criteria for the district** you are creating (see also the following slide).

District definition

Define district filter



! Name

10

Information

! Language

Active

Auto assignment

Parent District

Parent Filter

District Filter

Open extended filter conditions

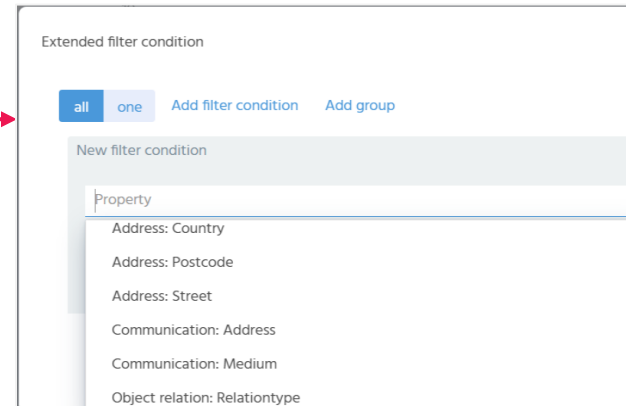
Open extended filter conditions

Save Cancel

Required value is missing

The filter criteria from the context company are available for the district filter.

For example, "Address: Postcode begins with 8" or "Planning: Volume greater than 50,000"



Extended filter condition

all one Add filter condition Add group

New filter condition

Property

- Address: Country
- Address: Postcode
- Address: Street
- Communication: Address
- Communication: Medium
- Object relation: Relationtype

District definition

Define district filter

Extended filter condition

all one Add filter condition Add group

New filter condition

Property

- Contact_Address: ZIP end
- Contact_Address: ZIP start
- Customercode
- Default address groomed
- Default mail groomed
- Default phone groomed

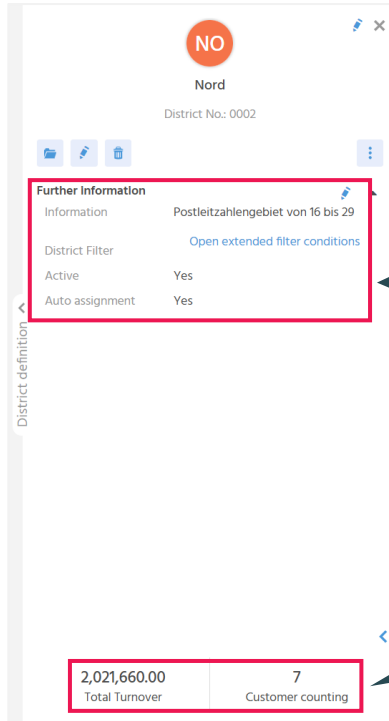
To create a district for a specific zip code range, use the properties "Contact_Address: ZIP start" and "Contact_Address: ZIP end".



Only the "contains" operator has a function for the properties "Contact_Address: ZIP start" and "Contact_Address: ZIP end". You can select and save other operators, but no companies are assigned to the district during company assignment.

District definition

Preview of the district definition



Nord
District No.: 0002

Further Information

Information	Postleitzahlengebiet von 16 bis 29
District Filter	Open extended filter conditions
Active	Yes
Auto assignment	Yes

Footer

2,021,660.00 Total Turnover	7 Customer counting
--------------------------------	------------------------

You can view the filter criteria for this district in the “Further Information” area over the **district filter**, but you cannot change them.

If the **auto-assignment** is set to “Yes”, all companies are automatically assigned to the district from the point at which they match the filter criteria.

In the **footer** you can see the cumulative turnover of all companies belonging to the district and the number of companies that fall into this district.

District definition



Filter view

	Name	District Number	Information	Language	Active	Auto assignment
☐	Deutschland	0001	Deutschland Gesamt	German	Yes	Yes
☐	Nord	0002	Postleitzahlengebiet von 16 bis 29	German	Yes	Yes
☐	Ost	0003	Postleitzahlengebiet 01 bis 15, 39, 98 und 99	German	Yes	Yes
☐	Süd	0004	Postleitzahlengebiet von 70 bis 97	German	Yes	Yes
☐	West	0005	Postleitzahlengebiet von 30 bis 69, ohne 39	German	Yes	Yes
☐	MAB	0006		German	Yes	No
☐	Bau	0007		German	Yes	No
☐	Großbritannien	0008	Großbritannien Gesamt	English	Yes	No
☐	Key Account	0009	Key Account Kunden	German	Yes	Yes

The **hierarchies** that you create by assigning a parent district to a district **are displayed as a tree table in the filter view.**

In the figure, for example, the district “Nord”, “Ost”, “Süd” and “West” are subordinated to the district “Deutschland”.



District definition

Serial action „Set parent district“

2

Execute the “Set parent district” serial action.

3

Choose a parent district.

	Name	District Number	Information	Language	Active	Auto assignment
☐	Deutschland	0001	Deutschland Gesamt	German	Yes	Yes
☐	Nord	0002	Postleitzahlengebiet von 16 bis 29	German	Yes	Yes
☐	Ost	0003	Postleitzahlengebiet 01 bis 15, 39, 98 und 99	German	Yes	Yes
☐	Süd	0004	Postleitzahlengebiet von 70 bis 97	German	Yes	Yes
☐	West	0005	Postleitzahlengebiet von 30 bis 69, ohne 39	German	Yes	Yes
☒	MAB	0006		German	Yes	No
☒	Bau	0007		German	Yes	No
☐	Großbritannien	0008	Großbritannien Gesamt	English	Yes	No
☐	Key Account Kunden	0009		German	Yes	Yes

Parent District

Parent District

Serial action

Save

Cancel

1

Select all districts to which you want to assign the same parent district.

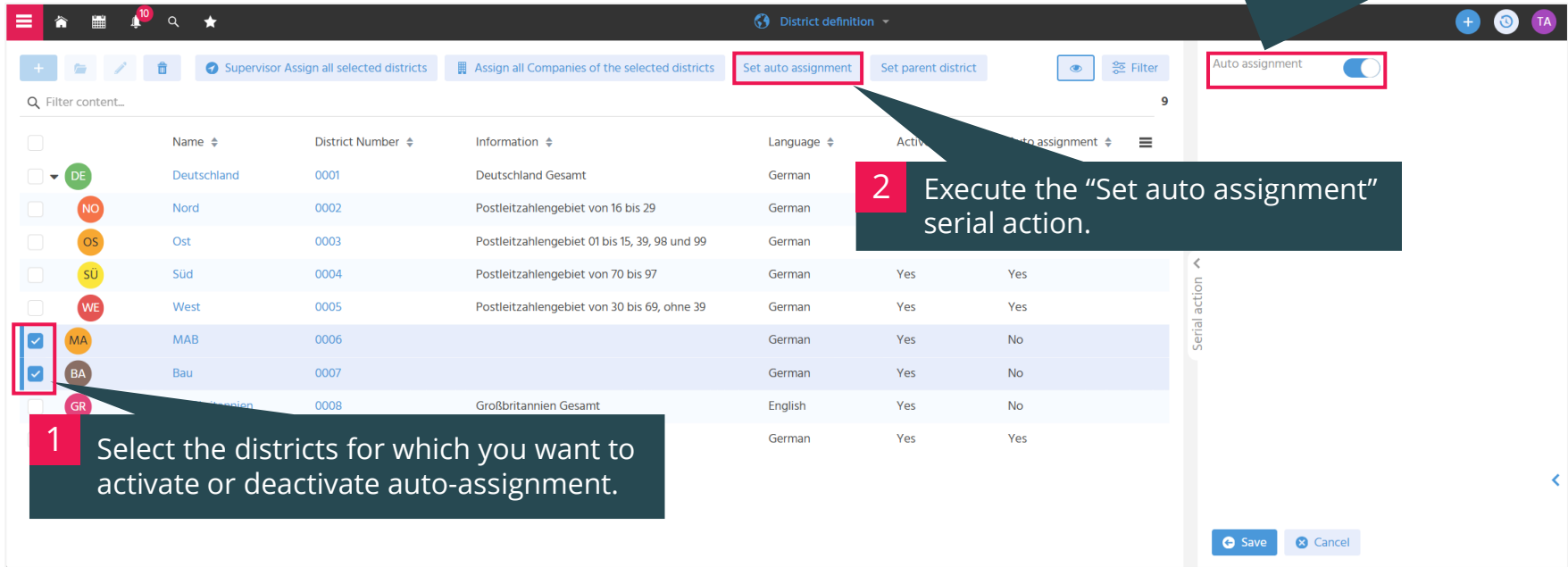
District definition

Serial action „Set auto assignment“

3 Set the button active for auto-assignment = Yes or inactive for auto-assignment = No.

2 Execute the “Set auto assignment” serial action.

1 Select the districts for which you want to activate or deactivate auto-assignment.

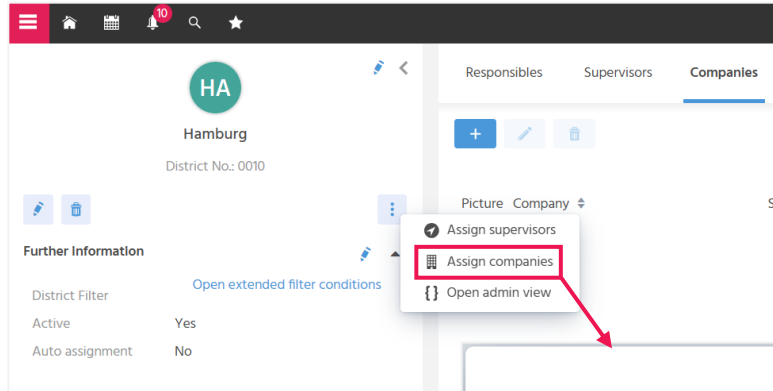


The screenshot shows the ADITO District definition interface. At the top, there are navigation icons and a search bar. Below the navigation bar, there are several buttons: "Supervisor Assign all selected districts", "Assign all Companies of the selected districts", "Set auto assignment" (highlighted with a red box), and "Set parent district". To the right of these buttons is a toggle switch for "Auto assignment" (highlighted with a red box). Below the buttons is a table with columns: Name, District Number, Information, Language, Active, and Auto assignment. The table lists districts: Deutschland (0001), Nord (0002), Ost (0003), Süd (0004), West (0005), MAB (0006), Bau (0007), and Großbritannien Gesamt (0008). The "MAB" and "Bau" rows are selected, indicated by blue checkboxes in the first column (highlighted with a red box). On the right side of the table, there is a vertical panel for "Serial action" with a dropdown menu and a "Save" button.

	Name	District Number	Information	Language	Active	Auto assignment
☐	Deutschland	0001	Deutschland Gesamt	German		
☐	Nord	0002	Postleitzahlengebiet von 16 bis 29	German		
☐	Ost	0003	Postleitzahlengebiet 01 bis 15, 39, 98 und 99	German		
☐	Süd	0004	Postleitzahlengebiet von 70 bis 97	German	Yes	Yes
☐	West	0005	Postleitzahlengebiet von 30 bis 69, ohne 39	German	Yes	Yes
☒	MAB	0006		German	Yes	No
☒	Bau	0007		German	Yes	No
☐	Gröbritannien Gesamt	0008	Gröbritannien Gesamt	English	Yes	No
☐				German	Yes	Yes

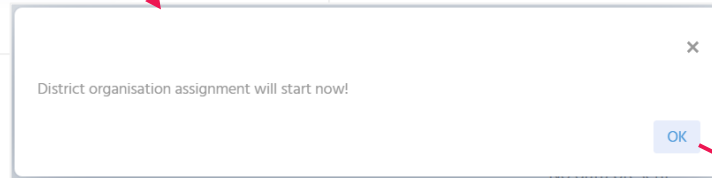
District definition

District – Tab „Companies“



Execute the “Assign companies” action:

- **Initial**, if you have created a new district.
- If you have **changed** the **district filter**.
- When a **company relocates** and therefore belongs to another district.
- If you have **imported** large quantities of **company data records**.



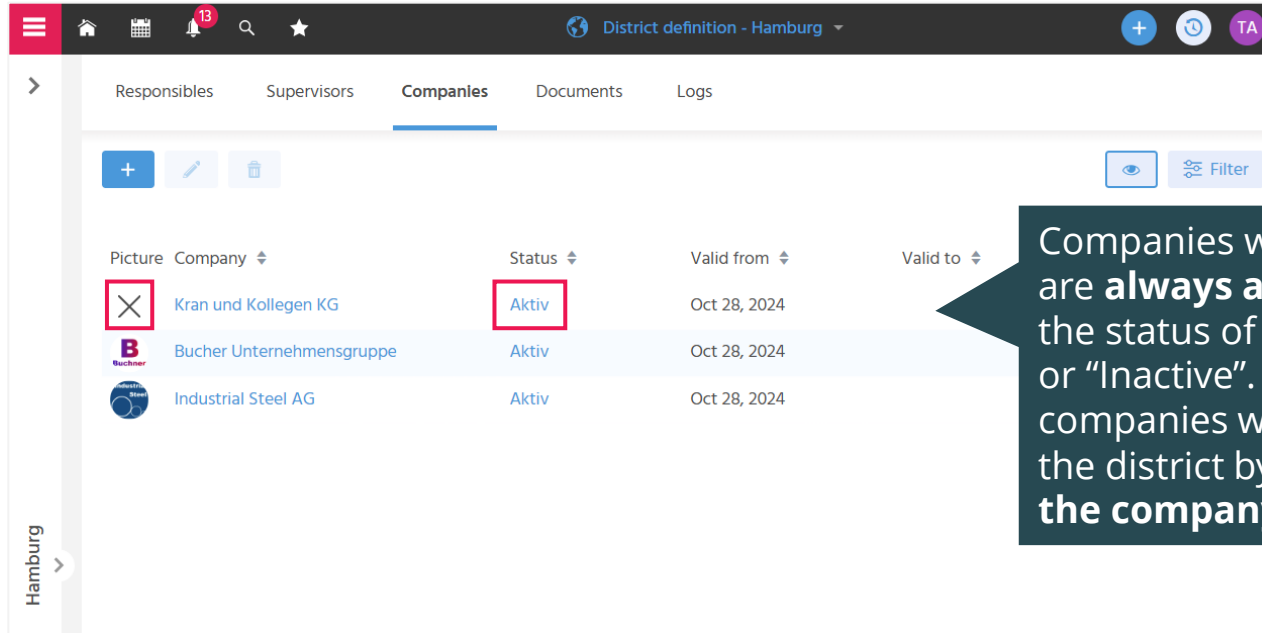
As soon as the assignment is complete, you will receive a notification.



If you have activated auto-assignment in a district, it is not necessary to carry out the “Assign companies” action manually.

District definition – Company assignment

Assignment depending on the status of the company



Picture	Company	Status	Valid from	Valid to
	Kran und Kollegen KG	Aktiv	Oct 28, 2024	
	Buchner Unternehmensgruppe	Aktiv	Oct 28, 2024	
	Industrial Steel AG	Aktiv	Oct 28, 2024	

Companies with matching filter criteria are **always assigned to** a district, even if the status of the company is "In review" or "Inactive". You can recognize companies with the status "Inactive" in the district by the icon . **The status of the company assignment is still active.**

District definition – Company assignment



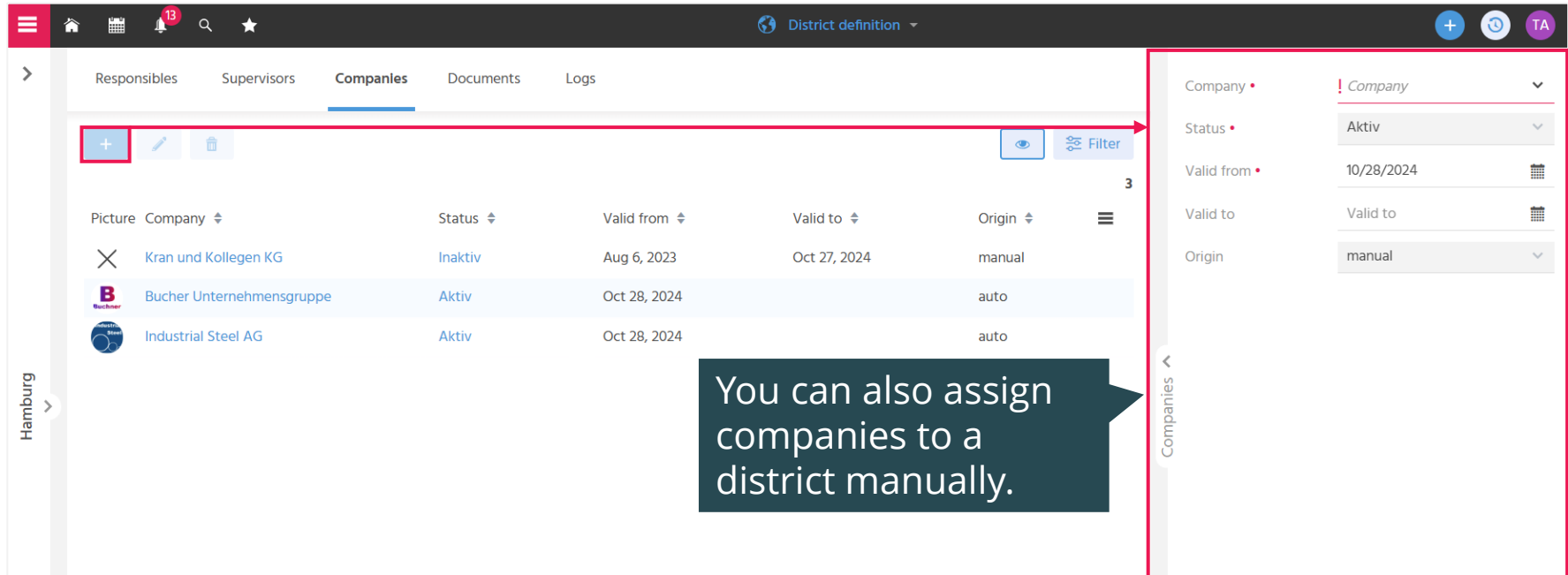
Status of the company assignment

Picture	Company	Status	Valid from	Valid to
	Kran und Kollegen KG	Inaktiv	Aug 6, 2023	Oct 27, 2024
	Bucher Unternehmensgruppe	Aktiv	Oct 28, 2024	
	Industrial Steel AG	Aktiv	Oct 28, 2024	

If you set a "Valid to" date in the district at the company assignment that has been exceeded, the status of the company assignment is set to "Inactive". You can use a filter to hide the inactive data records.

District definition

District – Tab „Companies“



The screenshot displays the ADITO District definition interface, specifically the 'Companies' tab. The interface includes a top navigation bar with a hamburger menu, home, calendar, notifications (13), search, and star icons. The main content area shows a table of companies with columns for Picture, Company, Status, Valid from, Valid to, and Origin. A red box highlights the '+', '-', and trash icons in the top left of the table. A red arrow points from this box to the right-hand sidebar, which is also outlined in red. The sidebar contains a form for editing a company, with fields for Company, Status, Valid from, Valid to, and Origin. A dark blue callout box with white text is overlaid on the table, stating: 'You can also assign companies to a district manually.'

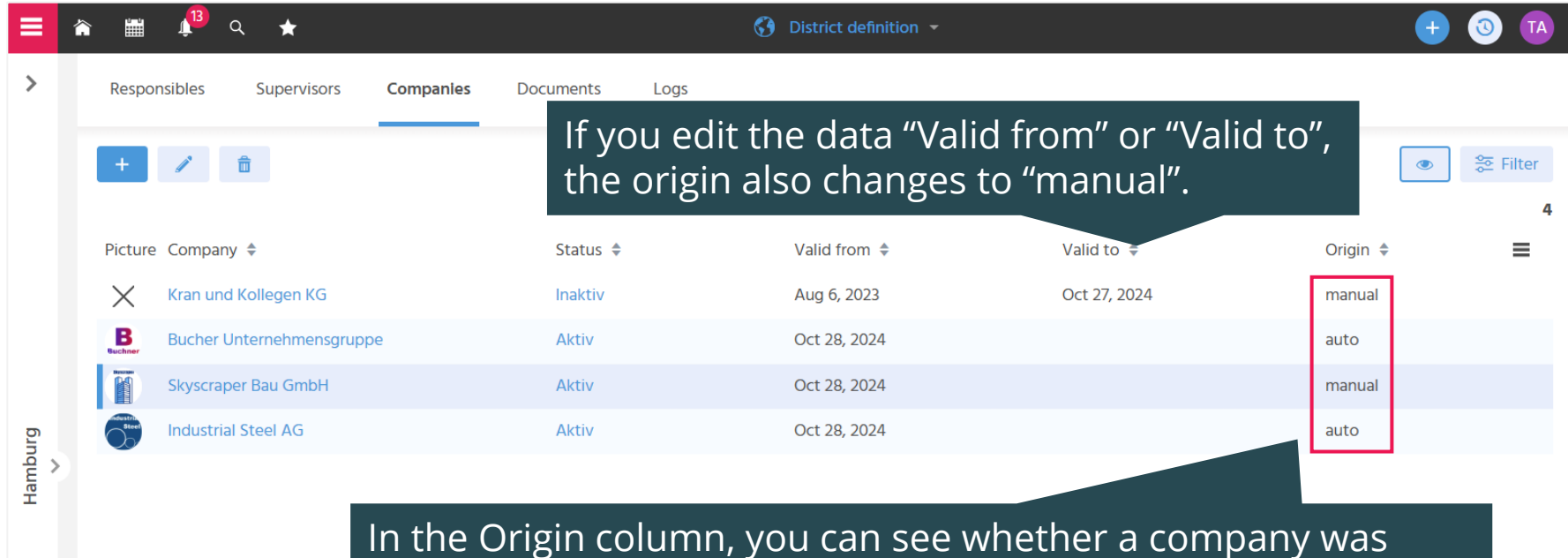
Picture	Company	Status	Valid from	Valid to	Origin
	Kran und Kollegen KG	Inaktiv	Aug 6, 2023	Oct 27, 2024	manual
	Bucher Unternehmensgruppe	Aktiv	Oct 28, 2024		auto
	Industrial Steel AG	Aktiv	Oct 28, 2024		auto

Company • ! Company
Status • Aktiv
Valid from • 10/28/2024
Valid to • Valid to
Origin • manual

You can also assign companies to a district manually.

District definition

District – Tab „Companies“



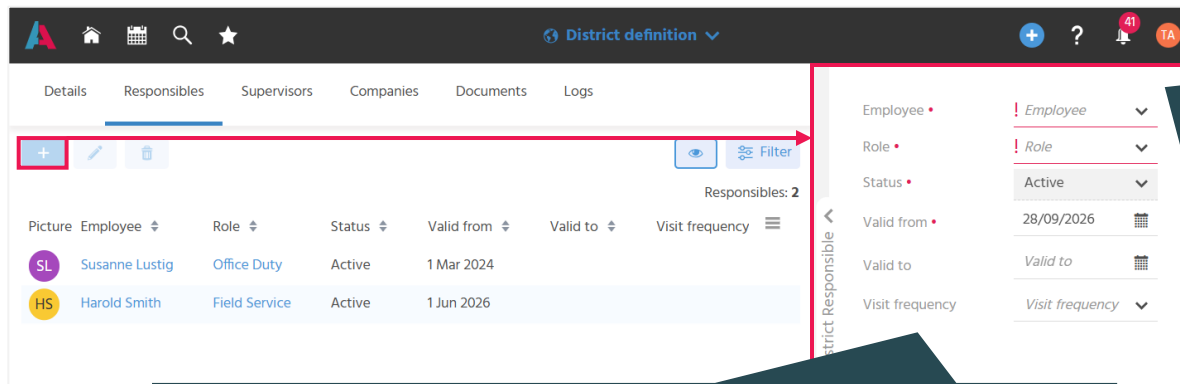
If you edit the data “Valid from” or “Valid to”, the origin also changes to “manual”.

Picture	Company	Status	Valid from	Valid to	Origin
	Kran und Kollegen KG	Inaktiv	Aug 6, 2023	Oct 27, 2024	manual
	Buchner Unternehmensgruppe	Aktiv	Oct 28, 2024		auto
	Skyscraper Bau GmbH	Aktiv	Oct 28, 2024		manual
	Industrial Steel AG	Aktiv	Oct 28, 2024		auto

In the Origin column, you can see whether a company was assigned to the area using the “Assign companies” action or based on the auto-assignment (auto) or whether the company was added using the Create button (manual).

District definition

Add responsible persons to the area



Picture	Employee	Role	Status	Valid from	Valid to	Visit frequency
	Susanne Lustig	Office Duty	Active	1 Mar 2024		
	Harold Smith	Field Service	Active	1 Jun 2026		

Employee • *Employee* ▼

Role • *Role* ▼

Status • *Active* ▼

Valid from • *28/09/2026* 📅

Valid to *Valid to* 📅

Visit frequency *Visit frequency* ▼

Status

The status is automatically preset to "Active".

„Valid from“ and „Valid to“

Indicate here from when or until when the contact is responsible for this district.

Visit frequency

Select here how often the person responsible should visit the companies in this district, e.g. quarterly, semi-annually, etc.

Employee

Here you can select all internal employees entered in the system.

Role

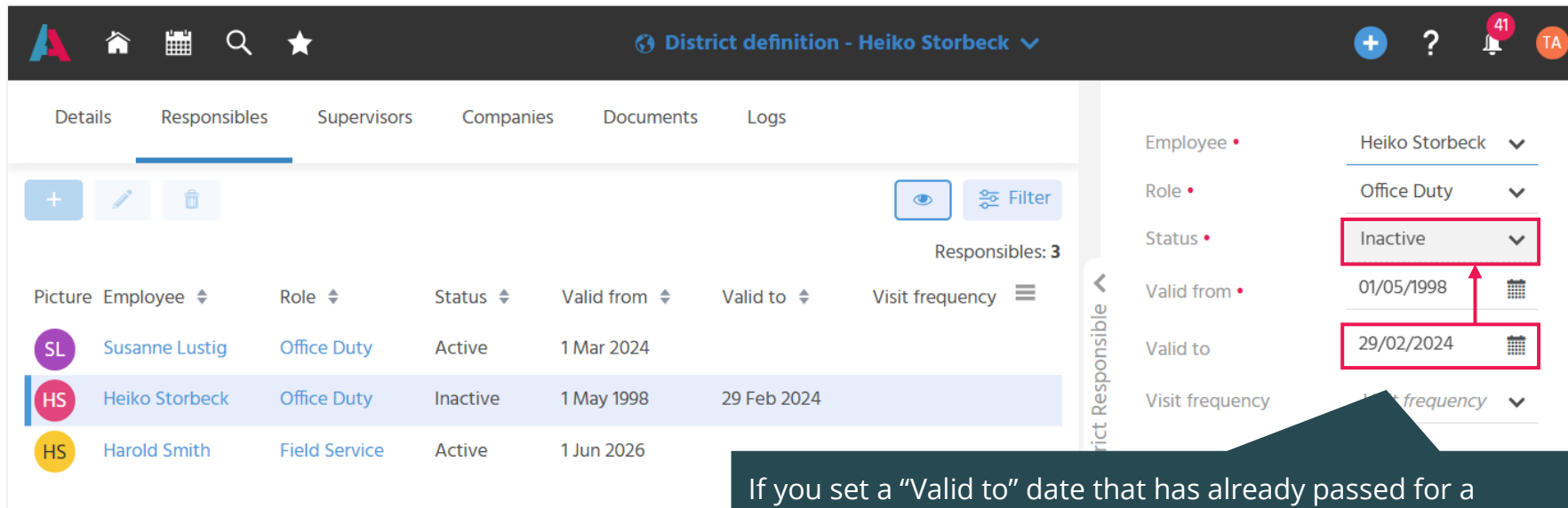
Select the role that the person responsible should have in this district, e.g. area manager.



These roles are independent of the roles used within the permission. The selection can be customized in the keyword ADVISER_ROLE.

District definition

Add responsible persons to the area



The screenshot shows the ADITO interface for defining a district. The top navigation bar includes icons for home, calendar, search, and favorites, along with the title "District definition - Heiko Storbeck". The main content area has tabs for Details, Responsibles, Supervisors, Companies, Documents, and Logs. The "Responsibles" tab is active, showing a list of three responsible persons. The detailed view on the right shows the selected person, Heiko Storbeck, with fields for Employee, Role, Status, Valid from, Valid to, and Visit frequency. The Status field is set to "Inactive", and the Valid to date is 29/02/2024. A red box highlights the Status field, and a red arrow points to the Valid to date field.

Picture	Employee	Role	Status	Valid from	Valid to	Visit frequency
	Susanne Lustig	Office Duty	Active	1 Mar 2024		
	Heiko Storbeck	Office Duty	Inactive	1 May 1998	29 Feb 2024	
	Harold Smith	Field Service	Active	1 Jun 2026		

Responsibles: 3

Employee • Heiko Storbeck

Role • Office Duty

Status • Inactive

Valid from • 01/05/1998

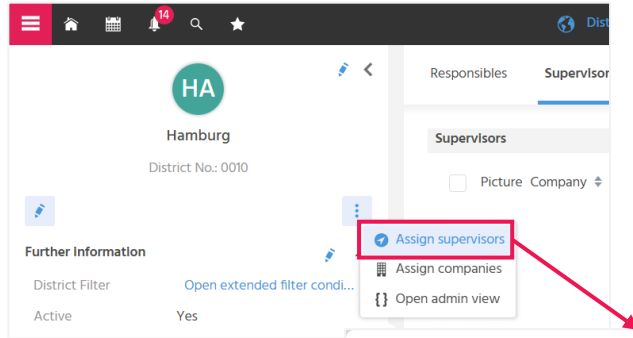
Valid to • 29/02/2024

Visit frequency • Visit frequency

If you set a "Valid to" date that has already passed for a responsible person, e.g. because they leave the company or change district, the status is automatically set to "Inactive".

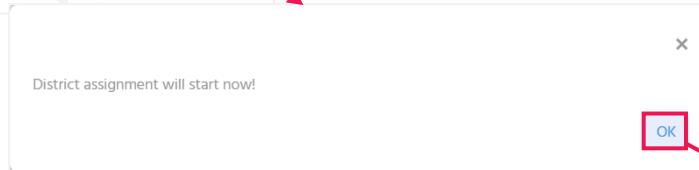
District definition

Assign supervisors



Carry out the “Assign supervisors” action:

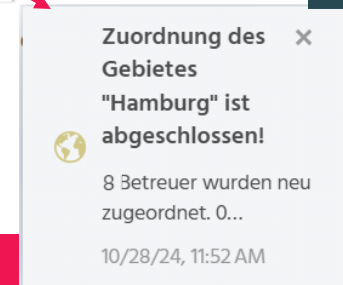
- **Initial**, if you have created a new district.
- If you have **changed** the **district filter**.
- When a **company relocates** and therefore changes to another district.
- If you have **changed** something in the **“Responsibles” tab** (status, validity, etc.).



As soon as the assignment is complete, you will receive a notification.

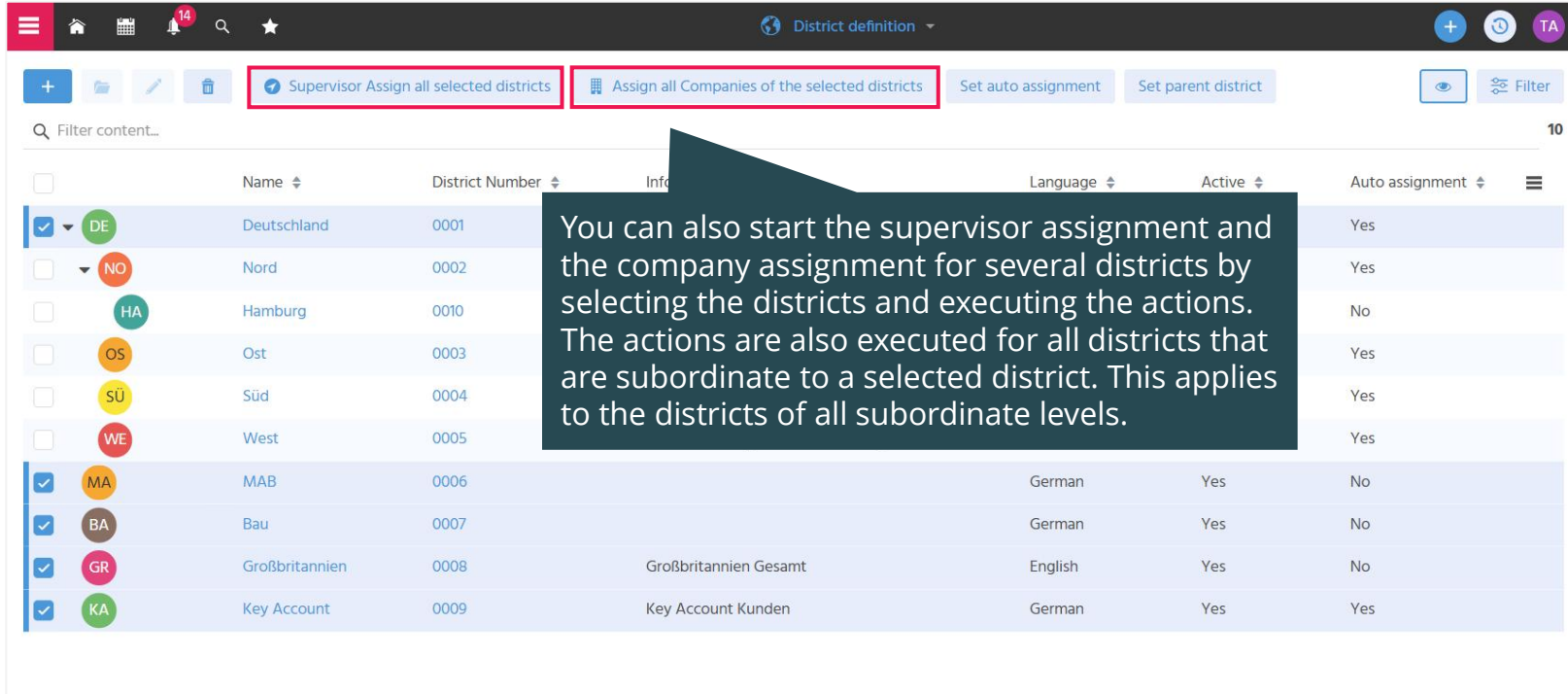


It generally makes sense to carry out the “Assign supervisors” action regularly in order to keep the status of the supervisor data records up to date at all times.



District definition

Assignment by serial action



The screenshot shows the ADITO District definition interface. At the top, there is a navigation bar with a menu icon, home, calendar, notifications (14), search, and star icons. The title bar reads "District definition". On the right of the title bar are icons for adding (+), refreshing, and a user profile (TA).

Below the title bar, there are four action buttons: "Supervisor Assign all selected districts" (highlighted with a red box), "Assign all Companies of the selected districts" (highlighted with a red box), "Set auto assignment", and "Set parent district". To the right of these buttons are icons for viewing (eye) and filtering (funnel).

Below the buttons is a search bar labeled "Filter content..." and a count of "10".

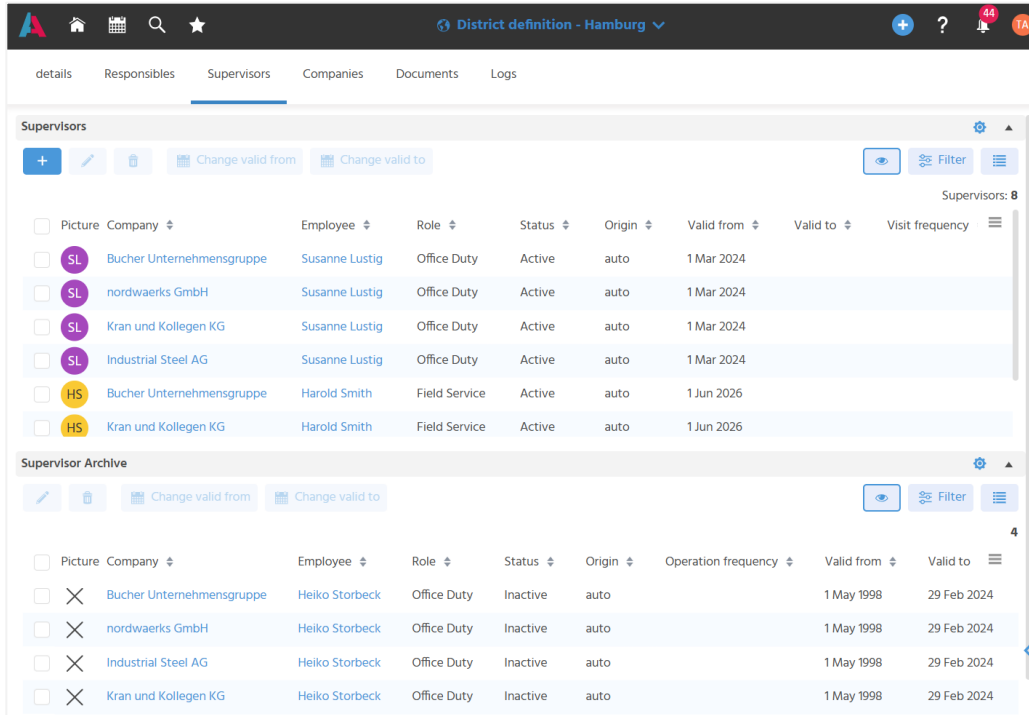
The main content is a table with the following columns: Name, District Number, Info, Language, Active, and Auto assignment. The table lists several districts, some of which are selected (checked).

	Name	District Number	Info	Language	Active	Auto assignment
☒	DE Deutschland	0001				Yes
☐	NO Nord	0002				Yes
☐	HA Hamburg	0010				No
☐	OS Ost	0003				Yes
☐	SÜ Süd	0004				Yes
☐	WE West	0005				Yes
☒	MA MAB	0006		German	Yes	No
☒	BA Bau	0007		German	Yes	No
☒	GR Großbritannien	0008	Großbritannien Gesamt	English	Yes	No
☒	KA Key Account	0009	Key Account Kunden	German	Yes	Yes

A dark blue callout box with white text is overlaid on the table, stating: "You can also start the supervisor assignment and the company assignment for several districts by selecting the districts and executing the actions. The actions are also executed for all districts that are subordinate to a selected district. This applies to the districts of all subordinate levels."

District definition

Tab „Supervisors“



The screenshot shows the ADITO District definition - Hamburg interface. The 'Supervisors' tab is selected, displaying a table of active supervisors. Below it, the 'Supervisor Archive' section shows inactive supervisors.

Picture	Company	Employee	Role	Status	Origin	Valid from	Valid to	Visit frequency
☐	SL Bucher Unternehmensgruppe	Susanne Lustig	Office Duty	Active	auto	1 Mar 2024		
☐	SL nordwaerks GmbH	Susanne Lustig	Office Duty	Active	auto	1 Mar 2024		
☐	SL Kran und Kollegen KG	Susanne Lustig	Office Duty	Active	auto	1 Mar 2024		
☐	SL Industrial Steel AG	Susanne Lustig	Office Duty	Active	auto	1 Mar 2024		
☐	HS Bucher Unternehmensgruppe	Harold Smith	Field Service	Active	auto	1 Jun 2026		
☐	HS Kran und Kollegen KG	Harold Smith	Field Service	Active	auto	1 Jun 2026		

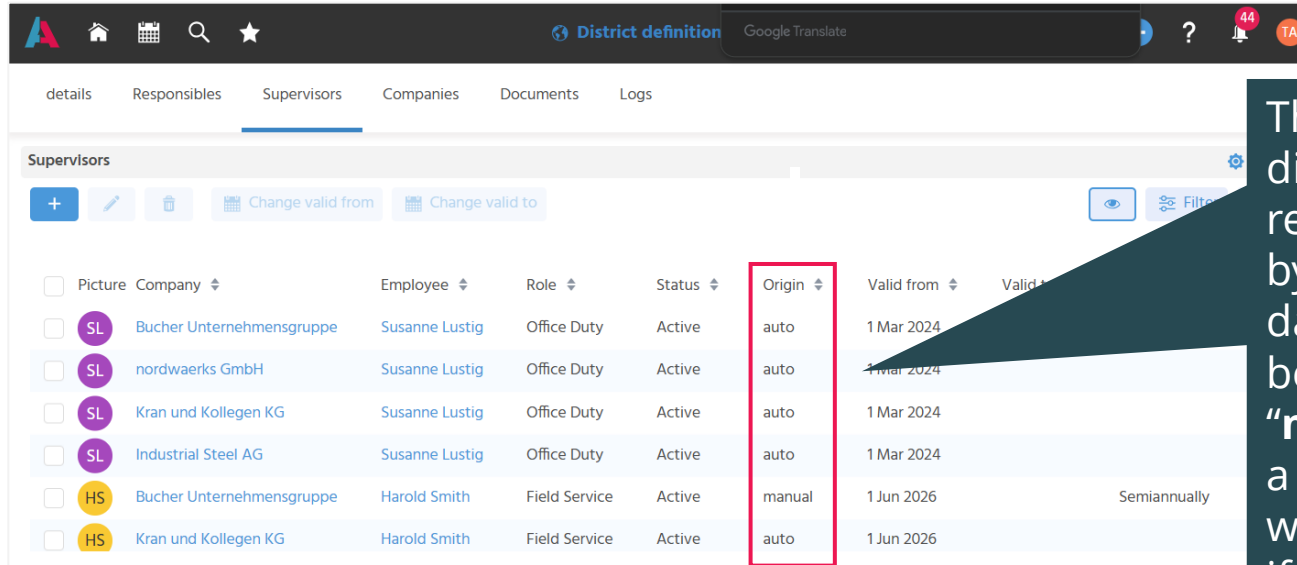
Picture	Company	Employee	Role	Status	Origin	Operation frequency	Valid from	Valid to
☐	X Bucher Unternehmensgruppe	Heiko Storbeck	Office Duty	Inactive	auto		1 May 1998	29 Feb 2024
☐	X nordwaerks GmbH	Heiko Storbeck	Office Duty	Inactive	auto		1 May 1998	29 Feb 2024
☐	X Industrial Steel AG	Heiko Storbeck	Office Duty	Inactive	auto		1 May 1998	29 Feb 2024
☐	X Kran und Kollegen KG	Heiko Storbeck	Office Duty	Inactive	auto		1 May 1998	29 Feb 2024

As soon as the supervisor assignment has been completed, you will find **a supervisor data record for each possible combination of responsible person and company** in the “Supervisor” tab, which the system has created automatically. You can also create a supervisor data record manually.

As soon as a supervisor data record exists for a supervisor, the supervisor can no longer be deleted.

District definition

Tab „Supervisors“



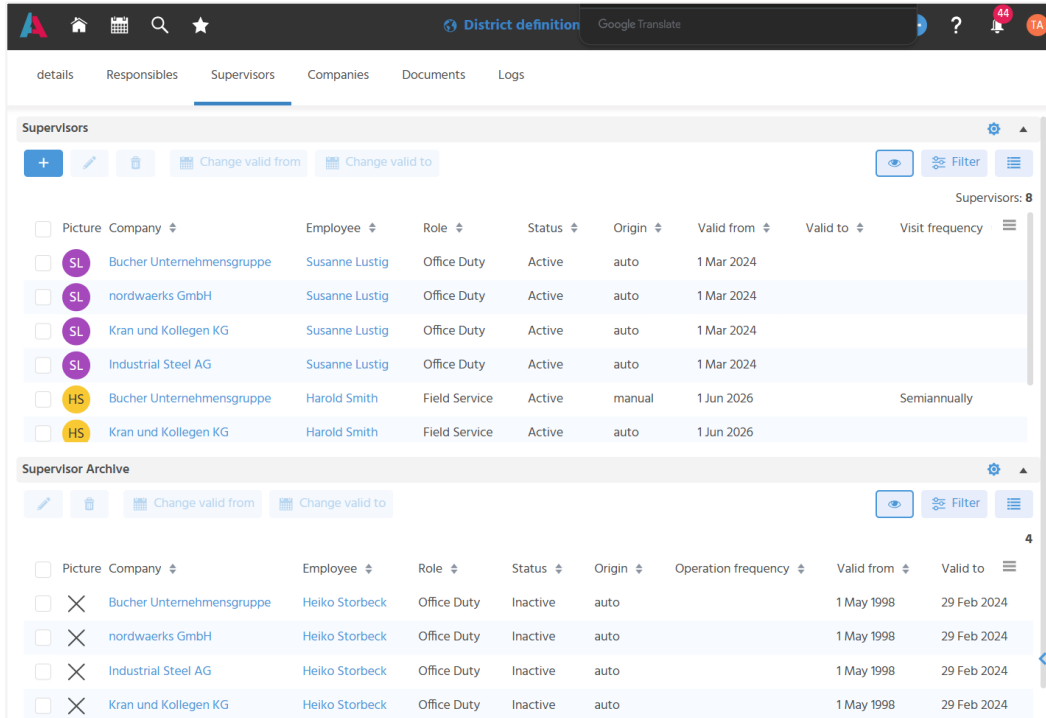
The screenshot shows the ADITO District definition interface. The top navigation bar includes icons for home, calendar, search, and star, along with the text "District definition" and a "Google Translate" button. The main navigation tabs are "details", "Responsibles", "Supervisors" (selected), "Companies", "Documents", and "Logs". The "Supervisors" tab displays a table of supervisor data. The table has columns for "Picture", "Company", "Employee", "Role", "Status", "Origin", "Valid from", and "Valid to". The "Origin" column is highlighted with a red box. The table contains six rows of data, with the first four rows having an "Origin" of "auto" and the last two rows having an "Origin" of "manual".

Picture	Company	Employee	Role	Status	Origin	Valid from	Valid to
	Bucher Unternehmensgruppe	Susanne Lustig	Office Duty	Active	auto	1 Mar 2024	
	nordwaerks GmbH	Susanne Lustig	Office Duty	Active	auto	1 Mar 2024	
	Kran und Kollegen KG	Susanne Lustig	Office Duty	Active	auto	1 Mar 2024	
	Industrial Steel AG	Susanne Lustig	Office Duty	Active	auto	1 Mar 2024	
	Bucher Unternehmensgruppe	Harold Smith	Field Service	Active	manual	1 Jun 2026	Semiannually
	Kran und Kollegen KG	Harold Smith	Field Service	Active	auto	1 Jun 2026	

The origin **“auto”** is displayed if a data record has been created by the system and the data record has not yet been edited. The origin **“manual”** is displayed if a supervisor data record was created manually or if an automatically created data record was subsequently edited.

District definition

Tab „Supervisors“



The screenshot shows the ADITO District definition interface. The top navigation bar includes icons for home, calendar, search, and star, along with the text "District definition" and "Google Translate". Below the navigation bar, there are tabs for "details", "Responsibles", "Supervisors", "Companies", "Documents", and "Logs". The "Supervisors" tab is selected.

The "Supervisors" section displays a table of active supervisors. The table has columns for Picture, Company, Employee, Role, Status, Origin, Valid from, Valid to, and Visit frequency. There are 8 supervisors listed.

Picture	Company	Employee	Role	Status	Origin	Valid from	Valid to	Visit frequency
☐	Bucher Unternehmensgruppe	Susanne Lustig	Office Duty	Active	auto	1 Mar 2024		
☐	nordwaerks GmbH	Susanne Lustig	Office Duty	Active	auto	1 Mar 2024		
☐	Kran und Kollegen KG	Susanne Lustig	Office Duty	Active	auto	1 Mar 2024		
☐	Industrial Steel AG	Susanne Lustig	Office Duty	Active	auto	1 Mar 2024		
☐	Bucher Unternehmensgruppe	Harold Smith	Field Service	Active	manual	1 Jun 2026		Semiannually
☐	Kran und Kollegen KG	Harold Smith	Field Service	Active	auto	1 Jun 2026		

The "Supervisor Archive" section displays a table of inactive supervisors. The table has columns for Picture, Company, Employee, Role, Status, Origin, Operation frequency, Valid from, and Valid to. There are 4 supervisors listed.

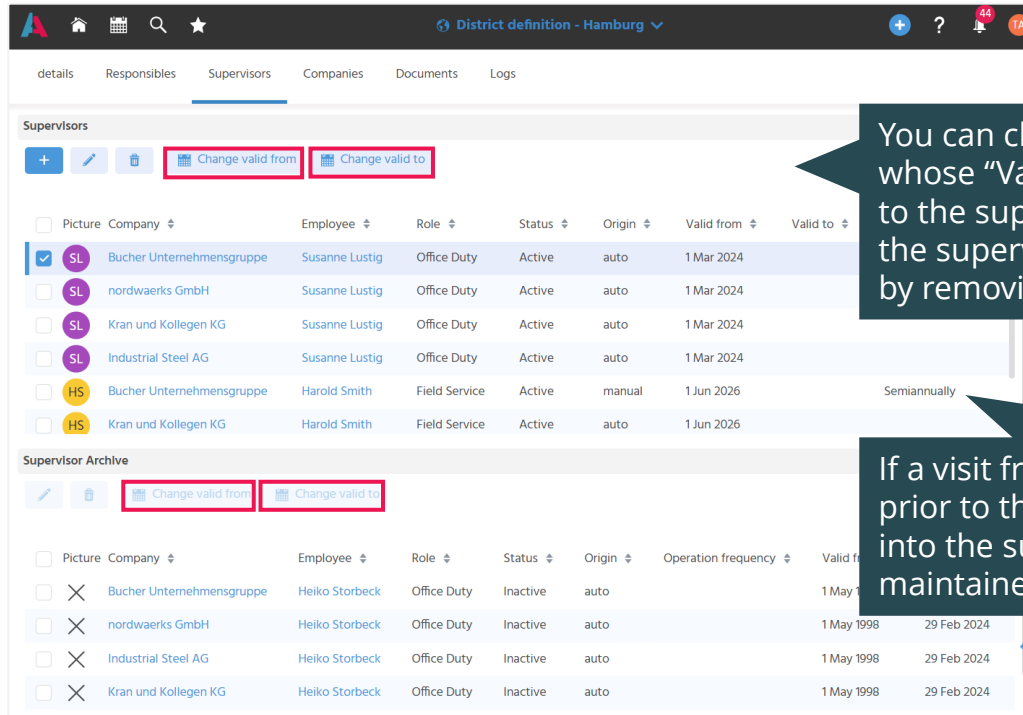
Picture	Company	Employee	Role	Status	Origin	Operation frequency	Valid from	Valid to
☐	Bucher Unternehmensgruppe	Heiko Storbeck	Office Duty	Inactive	auto		1 May 1998	29 Feb 2024
☐	nordwaerks GmbH	Heiko Storbeck	Office Duty	Inactive	auto		1 May 1998	29 Feb 2024
☐	Industrial Steel AG	Heiko Storbeck	Office Duty	Inactive	auto		1 May 1998	29 Feb 2024
☐	Kran und Kollegen KG	Heiko Storbeck	Office Duty	Inactive	auto		1 May 1998	29 Feb 2024

In the “Supervisors” area, you can see the active supervisors for whom no “Valid to” date has been set or one that is in the future.

In the ‘Supervisor Archive’ section, you can see inactive supervisors for whom a ‘Valid to’ date has been set that has already been reached or passed. If the date of the last visit plus the visit frequency results in a date after the ‘Valid to’ date, no new visit suggestion will be created. If a ‘Valid to’ date is set before a future visit suggestion, the visit suggestion must be deleted manually or reassigned.

District definition

Tab „Supervisors“



details Responsibles Supervisors Companies Documents Logs

District definition - Hamburg

Supervisors

+ Change valid from Change valid to

Picture	Company	Employee	Role	Status	Origin	Valid from	Valid to
☒	SL Bucher Unternehmensgruppe	Susanne Lustig	Office Duty	Active	auto	1 Mar 2024	
☐	SL nordwaerks GmbH	Susanne Lustig	Office Duty	Active	auto	1 Mar 2024	
☐	SL Kran und Kollegen KG	Susanne Lustig	Office Duty	Active	auto	1 Mar 2024	
☐	SL Industrial Steel AG	Susanne Lustig	Office Duty	Active	auto	1 Mar 2024	
☐	HS Bucher Unternehmensgruppe	Harold Smith	Field Service	Active	manual	1 Jun 2026	Semiannually
☐	HS Kran und Kollegen KG	Harold Smith	Field Service	Active	auto	1 Jun 2026	

Supervisor Archive

Change valid from Change valid to

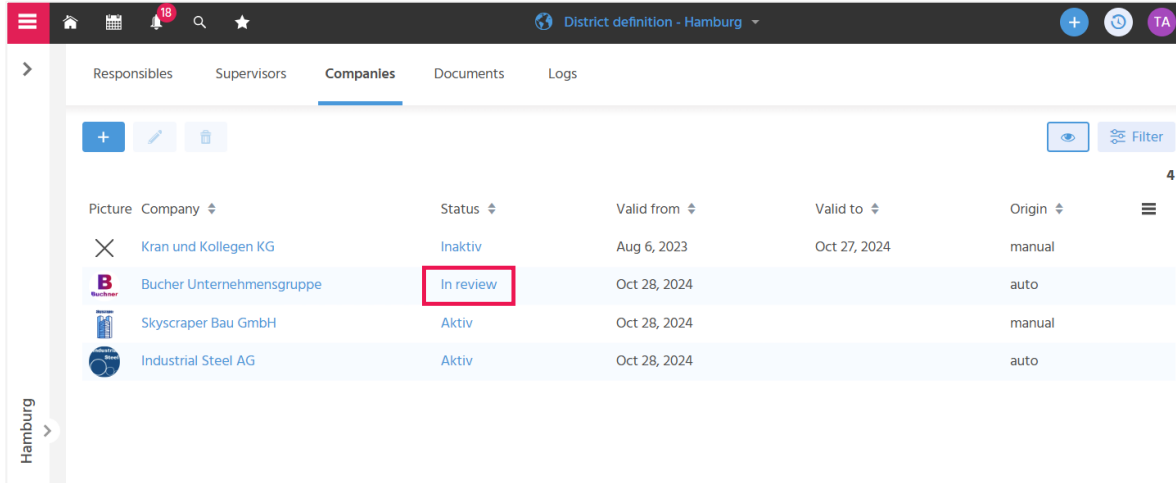
Picture	Company	Employee	Role	Status	Origin	Operation frequency	Valid from	Valid to
☐	X Bucher Unternehmensgruppe	Heiko Storbeck	Office Duty	Inactive	auto		1 May 1998	29 Feb 2024
☐	X nordwaerks GmbH	Heiko Storbeck	Office Duty	Inactive	auto		1 May 1998	29 Feb 2024
☐	X Industrial Steel AG	Heiko Storbeck	Office Duty	Inactive	auto		1 May 1998	29 Feb 2024
☐	X Kran und Kollegen KG	Heiko Storbeck	Office Duty	Inactive	auto		1 May 1998	29 Feb 2024

You can change the validity of the supervisors. Supervisors whose "Valid to" date has expired are automatically moved to the supervisor archive. You can move supervisors from the supervisor archive back to the active supervisor area by removing the "Valid to" date.

If a visit frequency has been set for the person responsible prior to the supervisor being assigned, it is carried over into the supervisor's record. However, it can also be maintained manually in the supervisor's record.

District definition

Change of the area filter => Reassign area



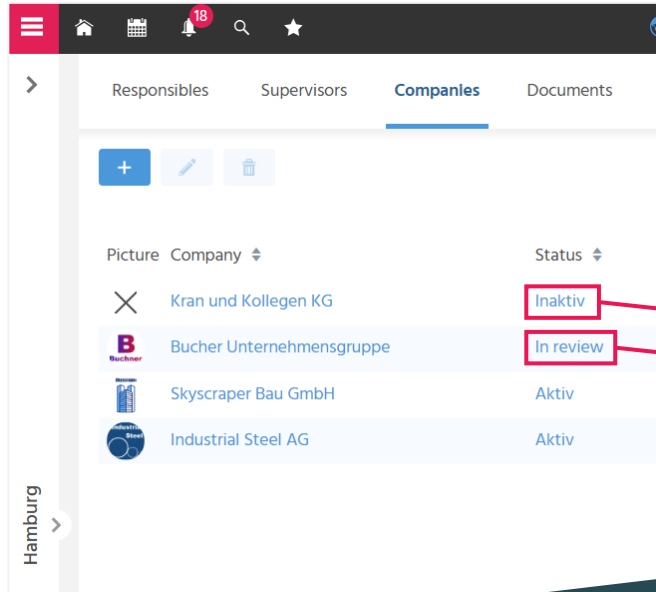
Picture	Company	Status	Valid from	Valid to	Origin
	Kran und Kollegen KG	Inaktiv	Aug 6, 2023	Oct 27, 2024	manual
	Bucher Unternehmensgruppe	In review	Oct 28, 2024		auto
	Skyscraper Bau GmbH	Aktiv	Oct 28, 2024		manual
	Industrial Steel AG	Aktiv	Oct 28, 2024		auto

Companies that fall out of the district due to the change of a district filter or because the company has moved are given the **status “In review”** and can **be deleted manually**.

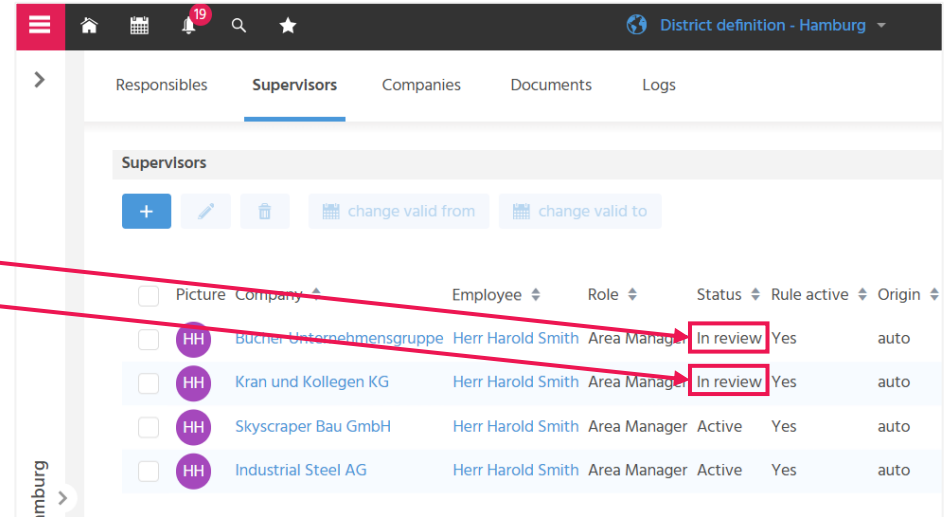
The associated supervisor data records are also set to “in review”.

District definition

Supervisor status depends on the status of the company assignment



Picture	Company	Status
✕	Kran und Kollegen KG	Inaktiv
B Wachner	Bucher Unternehmensgruppe	In review
Skyscraper Bau GmbH	Skyscraper Bau GmbH	Aktiv
Industrial Steel AG	Industrial Steel AG	Aktiv

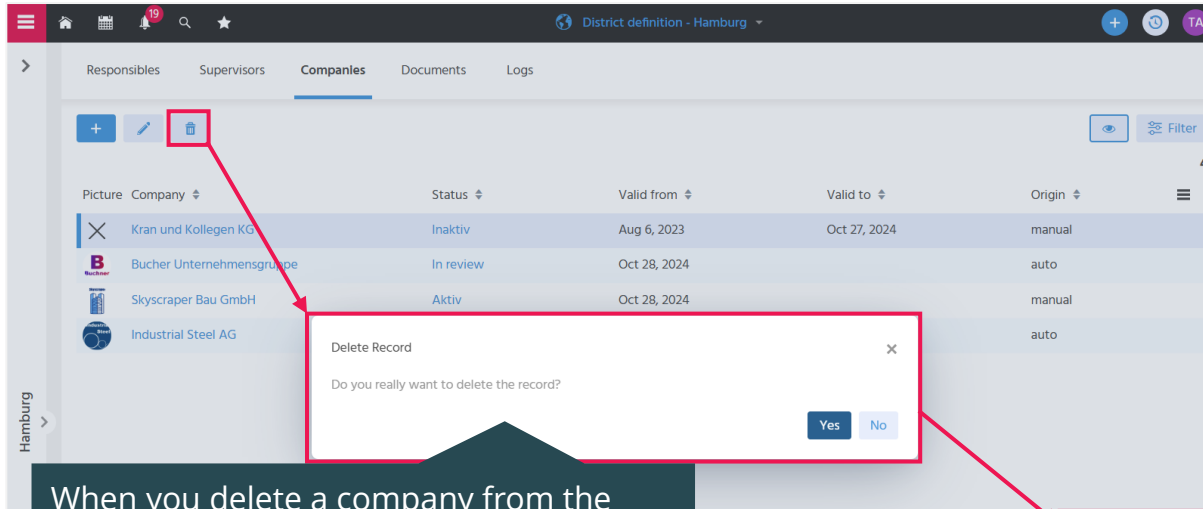


Picture	Company	Employee	Role	Status	Rule active	Origin
HH	Bucher Unternehmensgruppe	Herr Harold Smith	Area Manager	In review	Yes	auto
HH	Kran und Kollegen KG	Herr Harold Smith	Area Manager	In review	Yes	auto
HH	Skyscraper Bau GmbH	Herr Harold Smith	Area Manager	Active	Yes	auto
HH	Industrial Steel AG	Herr Harold Smith	Area Manager	Active	Yes	auto

If a company data record has the status “Inactive” or “In review” and you restart the supervisor assignment, the status of the supervisor data records is set to “In review”.

District definition

Delete company



Picture	Company	Status	Valid from	Valid to	Origin
	Kran und Kollegen KG	Inaktiv	Aug 6, 2023	Oct 27, 2024	manual
	Buchner Unternehmensgruppe	In review	Oct 28, 2024		auto
	Skyscraper Bau GmbH	Aktiv	Oct 28, 2024		manual
	Industrial Steel AG				auto

When you delete a company from the district, the system first asks whether the data record should actually be deleted.

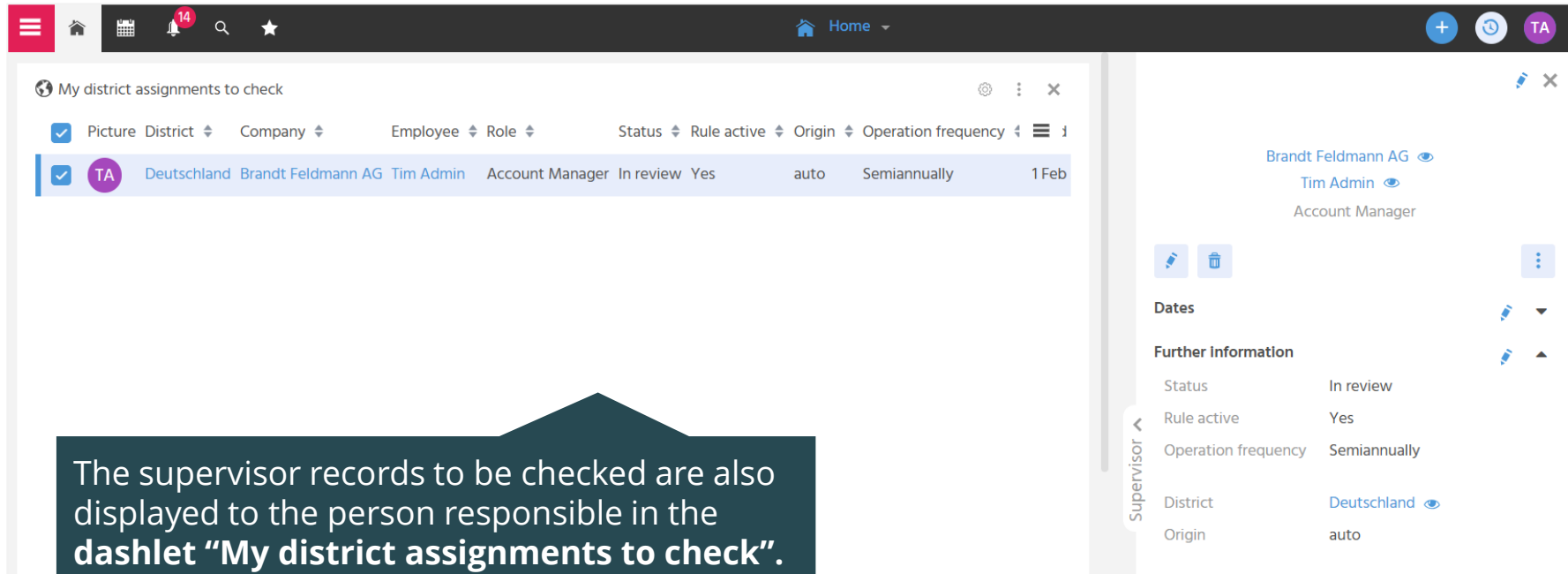
If you affirm the question as to whether the company data record should be deleted, the system will ask you whether all associated supervisor data records should also be deleted.



If you delete companies with the status "active", they will be included in the district again with the next company assignment.

District definition

Dashlet „My district assignment to check“



The screenshot shows the ADITO dashboard interface. At the top is a navigation bar with icons for menu, home, calendar, notifications (14), search, and star. The main content area features a dashlet titled "My district assignments to check". This dashlet contains a table with columns: Picture, District, Company, Employee, Role, Status, Rule active, Origin, Operation frequency, and a date. A single row is visible, representing an assignment for "Deutschland" (Brandt Feldmann AG) to "Tim Admin" (Account Manager), with a status of "In review", rule active "Yes", origin "auto", and operation frequency "Semiannually". To the right of the table is a detailed view for the selected assignment, showing the company name "Brandt Feldmann AG", the employee "Tim Admin" (Account Manager), and a list of details under "Further Information": Status (In review), Rule active (Yes), Operation frequency (Semiannually), District (Deutschland), and Origin (auto). A vertical label "Supervisor" is positioned between the table and the detailed view.

Picture	District	Company	Employee	Role	Status	Rule active	Origin	Operation frequency	
	Deutschland	Brandt Feldmann AG	Tim Admin	Account Manager	In review	Yes	auto	Semiannually	1 Feb

Brandt Feldmann AG
Tim Admin
Account Manager

Dates

Further Information

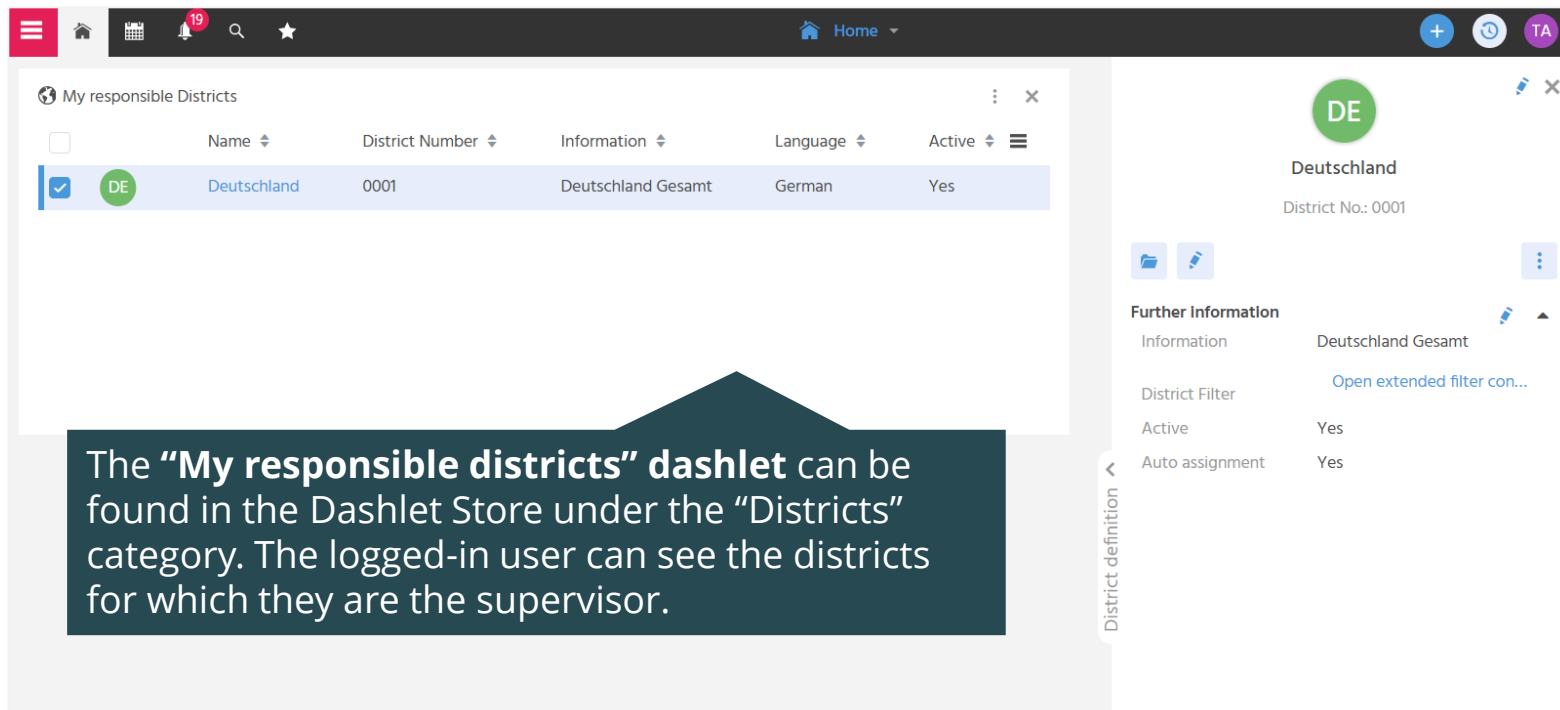
- Status: In review
- Rule active: Yes
- Operation frequency: Semiannually
- District: Deutschland
- Origin: auto

Supervisor

The supervisor records to be checked are also displayed to the person responsible in the dashlet “My district assignments to check”.

District definition

Dashlet „My responsible districts“



The “**My responsible districts**” dashlet can be found in the Dashlet Store under the “Districts” category. The logged-in user can see the districts for which they are the supervisor.

	Name	District Number	Information	Language	Active
☒	DE Deutschland	0001	Deutschland Gesamt	German	Yes

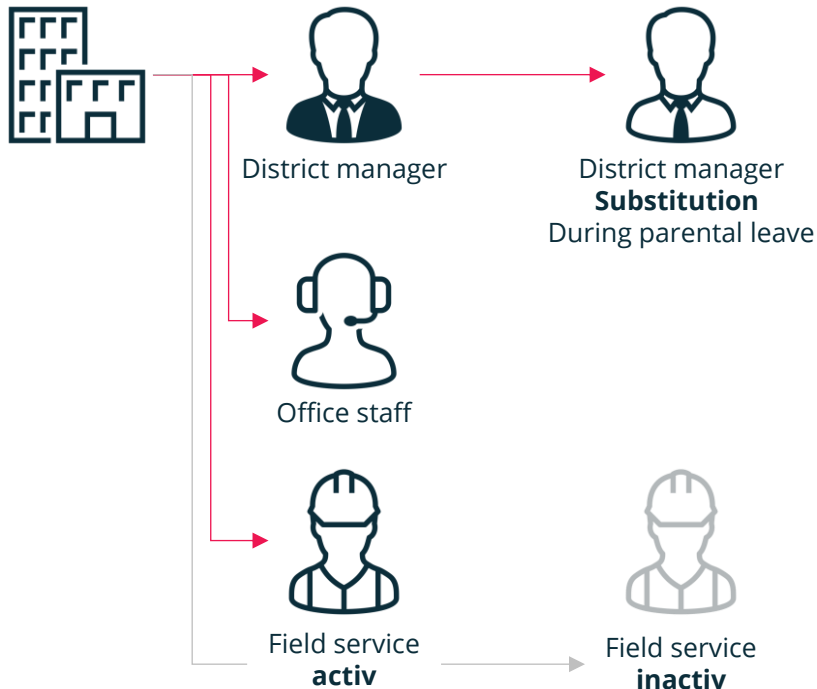
Further Information

- Information: Deutschland Gesamt
- District Filter: [Open extended filter con...](#)
- Active: Yes
- Auto assignment: Yes

District definition

Excursus "Company"

Visible in the company



- Which districts the company is assigned to.
- Who is assigned as a supervisor with which role.
- Who was assigned as a supervisor.
- Whose assignment is to be checked.
- Who was assigned as a non-district-specific supervisor.

Exkursus „Company“ – Tab „Supervision“



Company - Industrial Steel AG									
Details Activities 360 Degree Contacts Appointments/Tasks Attributes Documents Relations Checklist entries Advertising Supervision									
Districts									
Picture	District	Status	Valid from	Valid to	Origin				
DE	Deutschland	Active	21 Dec 2025		auto				
HA	Hamburg	Active	28 Sept 2026		auto				
NO	Nord	Active	21 Dec 2025		auto				
KA	Key Account	Active	24 Dec 2025		auto				
Supervisors									
Picture	District	Employee	Role	Status	Origin	Valid from	Valid to	Visit frequency	
MH	Nord	Melanie Hueber	Field Service	Active	auto	25 Apr 2025		Semiannually	
MH	Nord	Melanie Hueber	Field Service	Active	manual	2 Nov 2024		Semiannually	
BL	Nord	Birgit Leicht	Account Manager	Active	auto	17 Aug 2025		Semiannually	
BL	Nord	Birgit Leicht	Account Manager	Active	manual	2 Nov 2024		Semiannually	
MM	Key Account	Max Mustermann	Area Manager	Active	auto	17 Sept 2026		Yearly	
HS	Deutschland	Heiko Storbeck	Office Duty	Active	auto	11 Sept 2025		Yearly	
Supervisor Archive									
Picture	District	Employee	Role	Status	Origin	Operation frequency	Valid from	Valid to	
×	Hamburg	Heiko Storbeck	Office Duty	Inactive	auto		1 May 1998	29 Feb 2024	

In the “Districts” area, you can see all the districts to which the company is assigned.

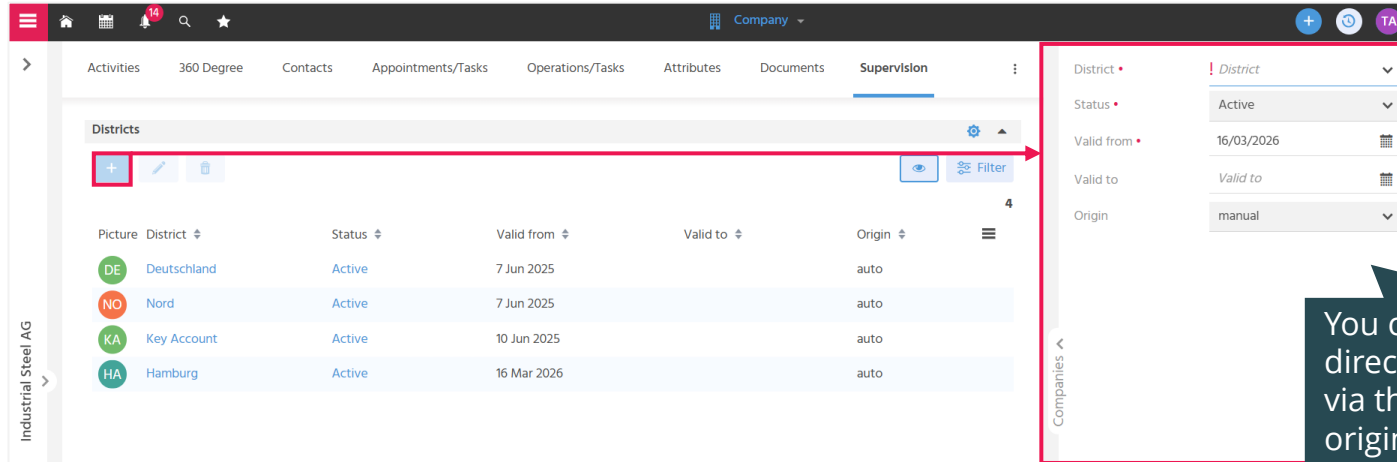
In the “Supervisors” area you can see all active supervisors of the company.

In the “Supervisor archive” area you can see all inactive supervisors of the company.



Exkursus „Company“ – Tab „Supervision“

Add district manually



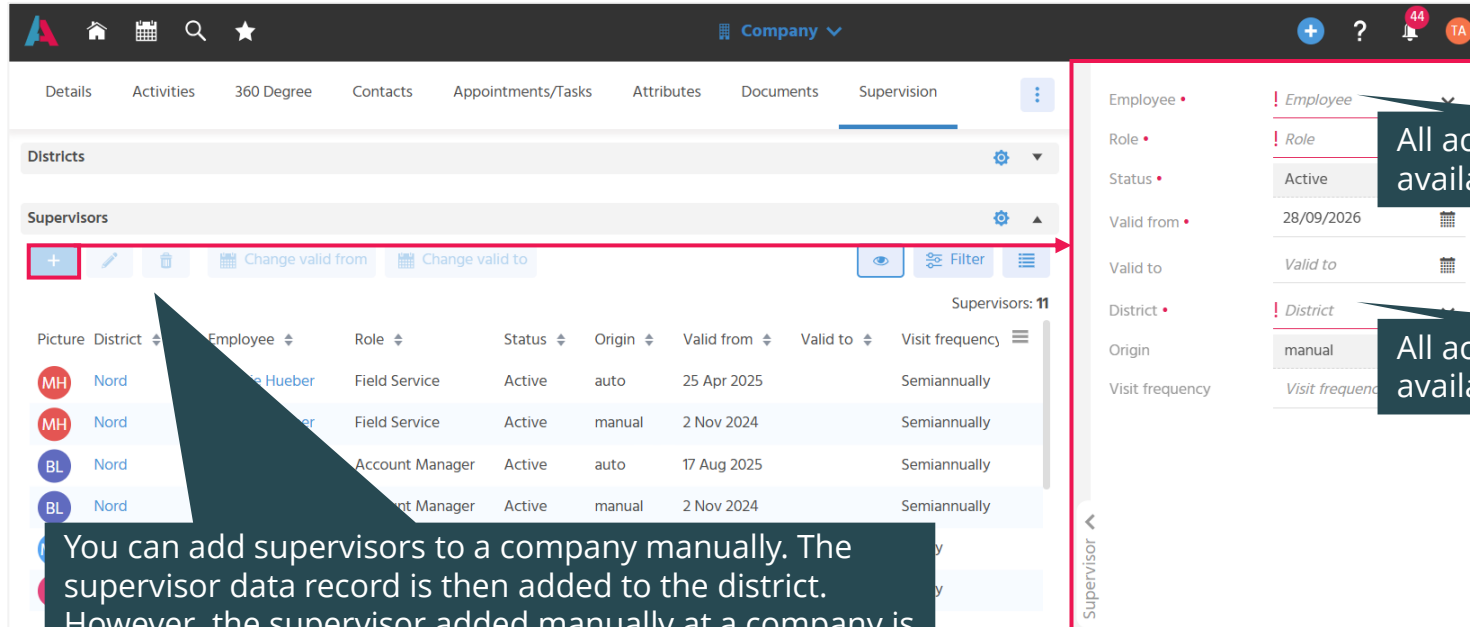
The screenshot shows the ADITO Supervision tab with the 'Districts' section. A red box highlights the '+', '-', and 'Filter' buttons. A red arrow points from the '+' button to the 'District' dropdown in the right-hand form. The form shows 'District' as '! District', 'Status' as 'Active', 'Valid from' as '16/03/2026', 'Valid to' as 'Valid to', and 'Origin' as 'manual'.

Picture	District	Status	Valid from	Valid to	Origin
DE	Deutschland	Active	7 Jun 2025		auto
NO	Nord	Active	7 Jun 2025		auto
KA	Key Account	Active	10 Jun 2025		auto
HA	Hamburg	Active	16 Mar 2026		auto

You can assign the company directly to another district via the “Districts” area. The origin of the company is then displayed as “manual” in the district. The supervisor assignment must be updated in the district using the “Assign supervisors” action.

Exkursus „Company“ – Tab „Supervision“

Add supervisor manually



The screenshot shows the 'Supervision' tab in the ADITO 'Company' view. The main table lists supervisors with columns for Picture, District, Employee, Role, Status, Origin, Valid from, Valid to, and Visit frequency. A red box highlights the '+' button in the 'Supervisors' section. A red arrow points from this button to the 'Add Supervisor' form on the right. The form has fields for Employee, Role, Status, Valid from, Valid to, District, Origin, and Visit frequency. Callouts explain that active employees and districts are available for selection.

Picture	District	Employee	Role	Status	Origin	Valid from	Valid to	Visit frequency
MH	Nord	... Hueber	Field Service	Active	auto	25 Apr 2025		Semiannually
MH	Nord	...	Field Service	Active	manual	2 Nov 2024		Semiannually
BL	Nord	...	Account Manager	Active	auto	17 Aug 2025		Semiannually
BL	Nord	...	Account Manager	Active	manual	2 Nov 2024		Semiannually

Supervisors: 11

Employee • ! Employee
Role • ! Role
Status • Active
Valid from • 28/09/2026
Valid to • Valid to
District • ! District
Origin • manual
Visit frequency • Visit frequency

You can add supervisors to a company manually. The supervisor data record is then added to the district. However, the supervisor added manually at a company is not transferred to the district as a person responsible.

Excursus to the Company

Filter set „Supervisor: ...“

In the Company, Contact, and Opportunity contexts, the filter set “Supervisor: ...” is available to you.

Supervisor: Company

Supervisor: District

Supervisor: Employee

Supervisor: Origin

Supervisor: Role

Supervisor: Status

Supervisor: Valid from

Supervisor: Valid to

For example, if you only want to see companies where you are a supervisor, you must select the filter condition “Supervisor: Contact equal me.”

Condition

Join conditions by:

all one

Status not equal "Inactive" x

Supervisor: Contact equal "me" x

Supervisor: Contact

equal

me

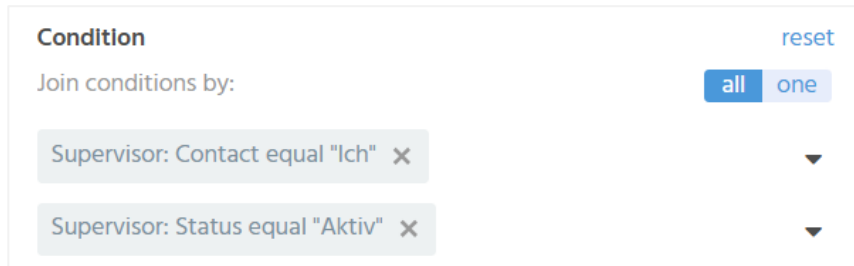
reset

Dashlet „My Organisations“



The screenshot shows a dashlet titled "My Companies" with a table of company data. The table has columns for "Picture", "Name", "Customercode", "Preferred language", and a partially visible "Ac" column. The data rows are as follows:

Picture	Name	Customercode	Preferred language	Ac
	Aquire GmbH	3469	English	Ac
	Bohrmarkt GmbH	9612	German	Ac
	Bornheimer Maschinenfabrik GmbH	4387	German	Ac
	Bucher Unternehmensgruppe	3698	German	Ac
	Emil Brandstätter AG	5609	German	Ac



The screenshot shows the "Condition" configuration panel. It includes a "reset" button, a "Join conditions by:" section with "all" and "one" options, and two conditions:

- Supervisor: Contact equal "Ich" x
- Supervisor: Status equal "Aktiv" x

In the Dashlet Store, you will find a dashlet that shows you all the companies to which you are assigned as a supervisor.

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