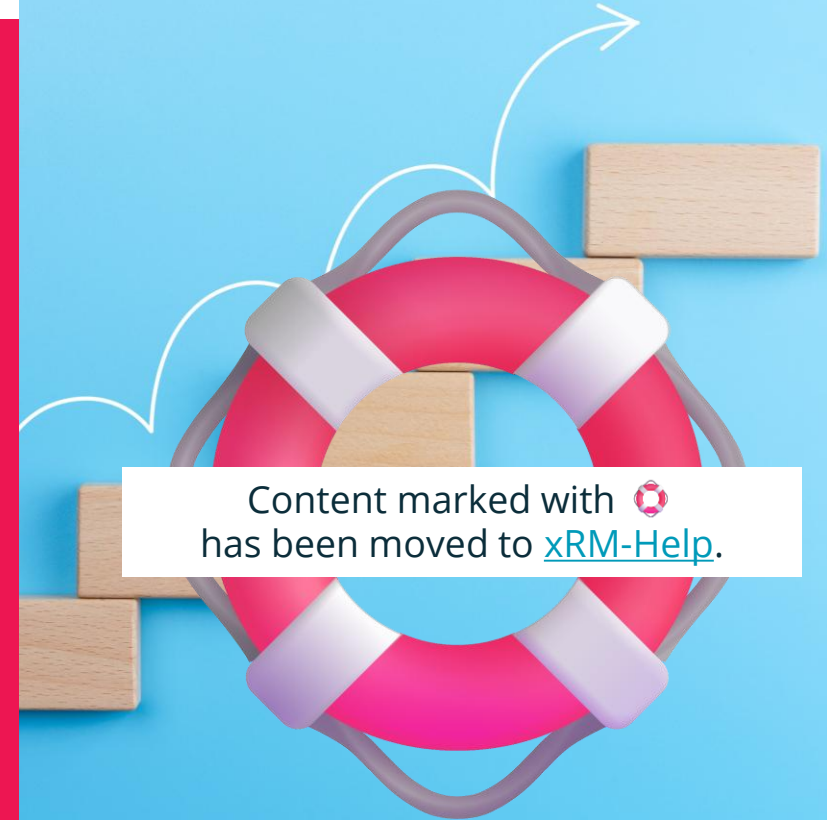


# UX & Basics

ADITO Software GmbH

From version 2026.10.0 | October 2026



Content marked with   
has been moved to [xRM-Help](#).



## Screenshots

The UX design of ADITO is continuously optimized for you. There may therefore be deviations in the screenshots.



# Agenda

-  Log-in
-  Structure/terms of the Web Client
- Dashboards & Dashlets
  - [Set up My Dashboard \(Home\)](#)
  - [Dashlets from the DashletStore](#)
  - [Creating individual Dashlets](#)
  - [Configuring Dashlets](#)
  - [Share Dashlets](#)
  - [Publish Dashlets](#)
  - [Delete Dashlets](#)
-  Searching for datasets: Index search
-  Filter & grouping datasets
-  Navigating within the Context
  -  FilterView
  -  Preview
  -  MainView
  -  EditView
-  Quickentry
-  Working in the web browser
  -  Working with ADITO links
  -  Copy button for links
  -  Working in several browser tabs
  -  Navigate back using the history button
  -  Contrast
  -  Zoom
- Planning of appointments
  - [Open calendar](#)
  -  Control calendar display
  - [Calendar of colleagues](#)
  - [Create appointments](#)
  - [Appointment Preview](#)
- Mark or categorize datasets as "important"
  - [Overview](#)
  - [Assigning tags](#)
  - [Favorites](#)
  - [#tags](#)
- Documents in the Preview
-  User-specific settings
  -  User menu
  -  Saving individual display settings

# Dashboards & Dashlets



Home

My Dashboard (Home) can always be accessed by pressing the Home button.

7  
New tasks

2  
Imminent appointments for today

My Tasks

| Status      | Subject                                      |                 |
|-------------|----------------------------------------------|-----------------|
| waiting     | Fr. Vogel kont...                            |                 |
| new         | Freier Außend...                             |                 |
| new         | Event im Hause                               | Frau Birgit Lei |
| new         | Controlling Termin Vorbereiten               | Herr Tim Adm    |
| in progress | Skyscraper VP für nächste Schritte           | Frau Birgit Lei |
| in progress | Vorbereitung Präsentation                    | Frau Susanne    |
| new         | Anrufen: Abfrage aktueller Projektstatus     | Frau Lisa Som   |
| new         | Produkt Präsentation vorbereiten und mit Li: | Herr Tim Adm    |
| new         | Lead nachfassen                              | Herr Peter Pfi  |
| new         | Präsentation vor Ort vorbereiten             | Frau Birgit Lei |

Newsfeed (Preview)

Marketingmitarbeiter Marketing  
Woran erkennen wir dich? An  
und immer einen lockeren  
ie kommst du ab jetzt jeden  
Morgen zu ADITO? Mit Bus und Bahn oder (bei gutem...  
Linda Reiter

Contact person EN

| Picture | Salutation | Title | Firstname | Lastname  | Company          | E-Mail                | Phone | Address                                                 |
|---------|------------|-------|-----------|-----------|------------------|-----------------------|-------|---------------------------------------------------------|
| CB      | Mr.        |       | Carl      | Bush      | Lockman LLC      | bush@lockman.com      |       | 21 London Road - GB SO15 2AD Southampton                |
| CD      | Mr.        |       | Cameron   | Doyle     | Glob Group       | doyle@globgroup.com   |       | 32-40 Blackfriars Road - GB SE1 8NW London              |
| MF      | Mrs.       |       |           | Freeman   | Glob Group       | freeman@globgroup.com |       | 32-40 Blackfriars Road - GB SE1 8NW London              |
| JF      | Mrs.       |       |           | Armstrong |                  | jenniferfrost@fsa.org |       | 69 New Street - GB B2 4DU Birmingham                    |
| CM      | Mr.        | PhD   |           |           |                  | marsh@globgroup.com   |       | 32-40 Blackfriars Road - GB SE1 8NW London              |
| MR      | Mrs.       |       |           |           |                  | read@lockman.com      |       | 21 London Road - GB SO15 2AD Southampton                |
| JS      | Mr.        |       |           |           |                  |                       |       | -                                                       |
| SW      | Mr.        |       | Steven    | Wallinger | Parker & Jenkins |                       |       | 26-40 Kensington High Street - GB W8 4PE Royal Borou... |

Dashlets are the individually customizable components of a Dashboard.

Appointments/Tasks

10  
Overdue tasks

7  
New tasks

2  
Imminent appointments for today

My Tasks

|                          | Status      | Subject                                     | Requestor           |
|--------------------------|-------------|---------------------------------------------|---------------------|
| <input type="checkbox"/> | waiting     | Fr. Vogel kontaktieren                      | Herr Tim Admin      |
| <input type="checkbox"/> | new         | Freier Außendienst im Gebiet alle 4 Wochen  | Herr Tim Admin      |
| <input type="checkbox"/> | new         | Event im Hause                              | Frau Birgit Leicht  |
| <input type="checkbox"/> | new         | Controlling Termin Vorbereiten              | Herr Tim Admin      |
| <input type="checkbox"/> | in progress | Skyscraper VP für nächste Schritte          | Frau Birgit Leicht  |
| <input type="checkbox"/> | in progress | Vorbereitung Präsentation                   | Frau Susanne Lustig |
| <input type="checkbox"/> | new         | Anrufen: Abfrage aktueller Projektstatus    | Frau Lisa Sommer    |
| <input type="checkbox"/> | new         | Produkt Präsentation vorbereiten und mit Li | Herr Tim Admin      |
| <input type="checkbox"/> | new         | Lead nachfassen                             | Herr Peter Pfiffig  |
| <input type="checkbox"/> | new         | Präsentation vor Ort vorbereiten            | Frau Birgit Leicht  |

Newsfeed (Preview)

May 6, 2024, 1:32 PM

Neuer Kollege im Marketing

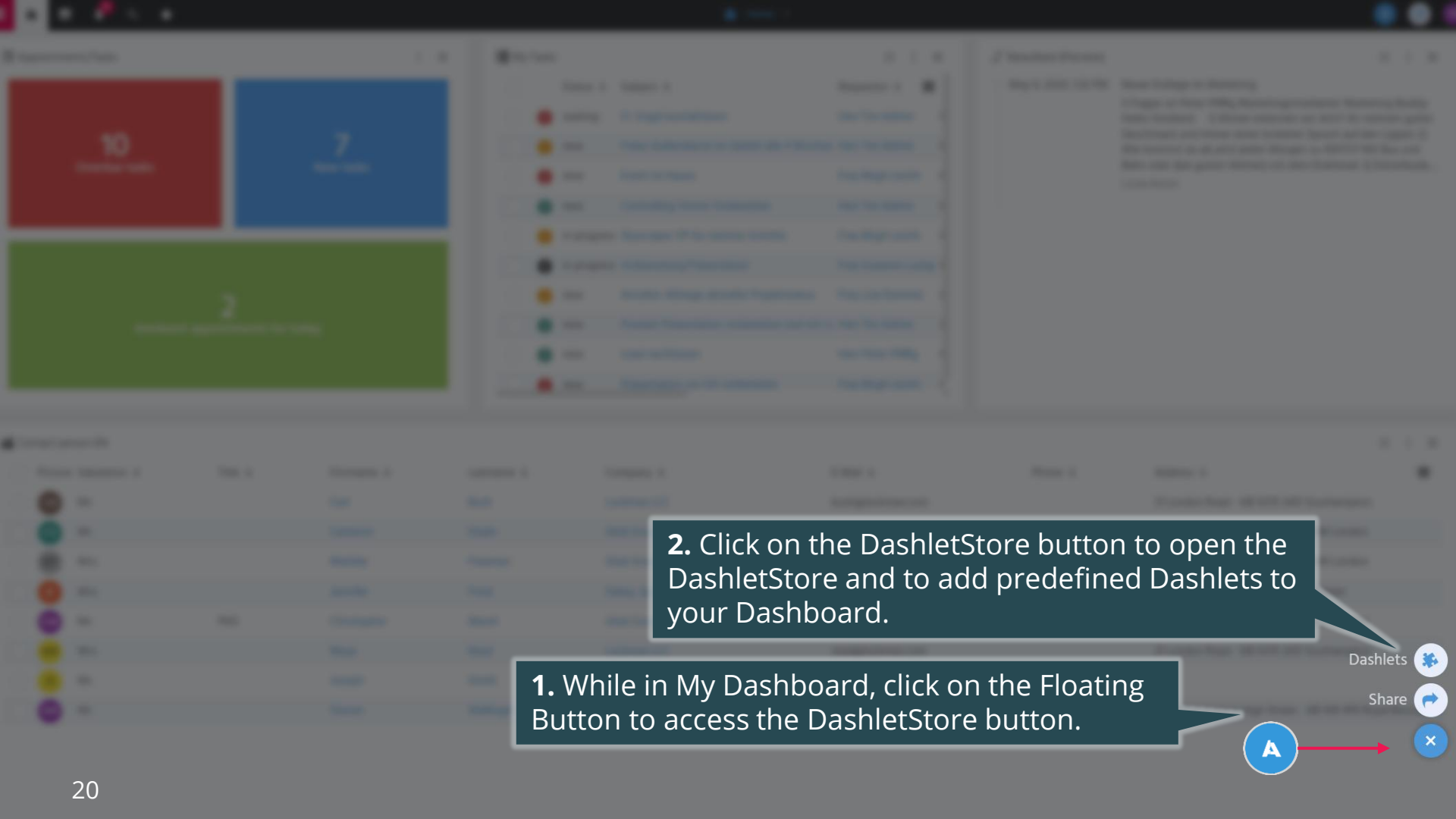
5 Fragen an Peter Pfiffig Marketingmitarbeiter Marketing Buddy: Heiko Storbeck 1) Woran erkennen wir dich? An meinem guten Geschmack und immer einen lockeren Spruch auf den Lippen 2) Wie kommst du ab jetzt jeden Morgen zu ADITO? Mit Bus und Bahn oder (bei gutem Wetter) mit dem Drahtesel. 3) Dönerbude,... Linda Reiter

Contact person EN

|                          | Picture | Salutation | Title | Firstname   | Lastname  | Company          | E-Mail              | Phone | Address                                                    |
|--------------------------|---------|------------|-------|-------------|-----------|------------------|---------------------|-------|------------------------------------------------------------|
| <input type="checkbox"/> | CB      | Mr.        |       | Carl        | Bush      |                  |                     |       | 21 London Road - GB SO15 2AD Southampton                   |
| <input type="checkbox"/> | CD      | Mr.        |       | Cameron     | Doyle     |                  |                     |       | Blackfriars Road - GB SE1 8NW London                       |
| <input type="checkbox"/> | MF      | Mrs.       |       | Matilda     | Freeman   |                  |                     |       | Blackfriars Road - GB SE1 8NW London                       |
| <input type="checkbox"/> | JF      | Mrs.       |       | Jennifer    | Frost     |                  |                     |       | W Street - GB B2 4DU Birmingham                            |
| <input type="checkbox"/> | CM      | Mr.        | PhD   | Christopher | Marsh     | Glob Group       | marsh@globgroup.com |       | 32-40 Blackfriars Road - GB SE1 8NW London                 |
| <input type="checkbox"/> | MR      | Mrs.       |       | Maya        | Read      | Lockman LLC      | read@lockman.com    |       | 21 London Road - GB SO15 2AD Southampton                   |
| <input type="checkbox"/> | JS      | Mr.        |       | Joseph      | Smith     | Nedick's         |                     |       | -                                                          |
| <input type="checkbox"/> | SW      | Mr.        |       | Steven      | Wallinger | Parker & Jenkins |                     |       | 26-40 Kensington High Street - GB W8 4PE Royal Borough ... |

The **position** and **size** of a Dashlet can be adjusted. The **blue dashed frame** shows the next free position or the next possible size.





2. Click on the DashletStore button to open the DashletStore and to add predefined Dashlets to your Dashboard.

1. While in My Dashboard, click on the Floating Button to access the DashletStore button.

Appointments/Tasks

10  
Overdue tasks

Imminent appointments

Contact person EN

Picture

Salutation

Mr.

Mr.

Mrs.

Mrs.

Mr.

Dashlets

All (83)

Admin (1)

Calendar (1)

Charts (7)

Contact Management (7)

Contact synchronisation (5)

Covid Information (2)

Districts (2)

Email (2)

Favorites (1)

Knowledge (3)

Marketing (10)

Notifications (1)

offline.SlaveAdministrationMyLastSync...

Project (3)

Reset Dashboard

f

ADITO Facebook Feed

Show all Facebook posts of ADITO

Add

Activities

Show all activities

Add

All Unlinked Mails

All mails that could not automatically linked are displayed here

Add

All synchronized datasets

Show all synchronized datasets

Add

Appointment CheckUp

Appointment checkup for the selected day

Add

Bulk Mail Opening Hours

Bulkmail Device Types

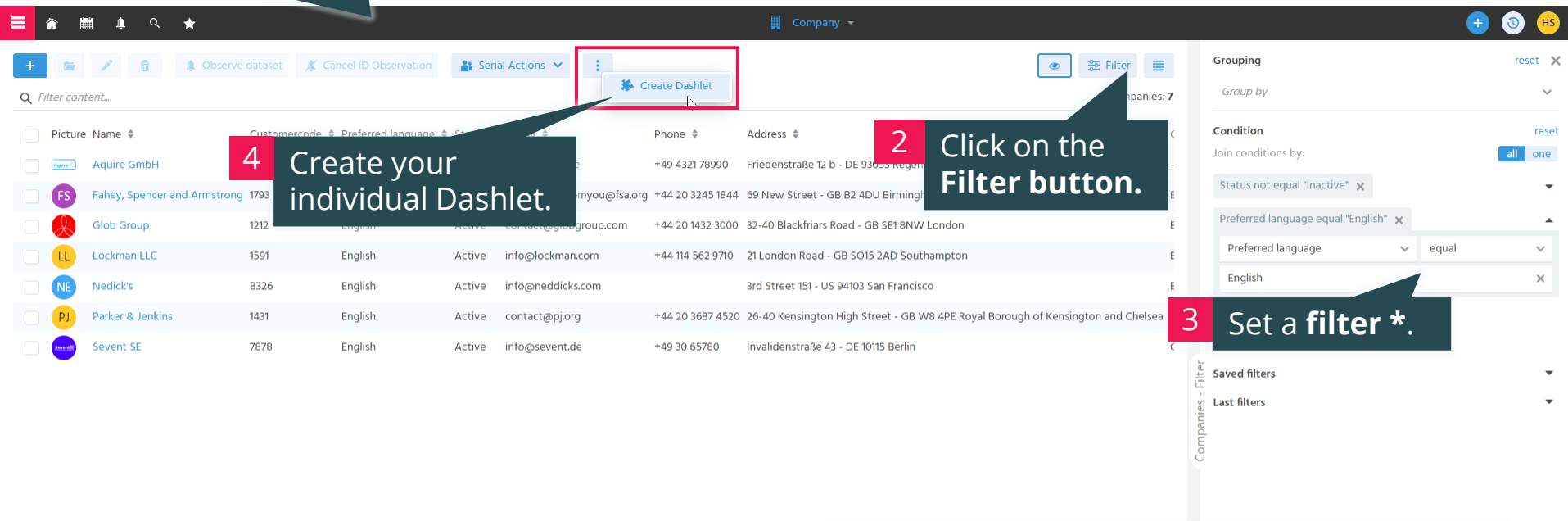
Dashlets are displayed depending on the user role.

Dashlets that **can only be used once by a user** and that are already placed on the Dashboard will no longer be displayed in the DashletStore.

21

# Create individual Dashlets

1 Open the FilterView of the required Context.



The screenshot shows the ADITO interface with a table of companies. A red box highlights the 'Create Dashlet' button in the top toolbar. Another red box highlights the 'Filter' button in the top toolbar. A third red box highlights the 'Filter' button in the right sidebar. A fourth red box highlights the 'Create Dashlet' button in the top toolbar. A fifth red box highlights the 'Filter' button in the right sidebar.

4 Create your individual Dashlet.

2 Click on the Filter button.

3 Set a filter \*.

| Picture                                                                         | Name                         | Customercode | Preferred language | Status | Phone            | Address                                                                          |
|---------------------------------------------------------------------------------|------------------------------|--------------|--------------------|--------|------------------|----------------------------------------------------------------------------------|
|  | Aquire GmbH                  | 1793         | English            | Active | +49 4321 78990   | Friedenstraße 12 b - DE 93055 Regensburg                                         |
|  | Fahey, Spencer and Armstrong | 1793         | English            | Active | +44 20 3245 1844 | 69 New Street - GB B2 4DU Birmingham                                             |
|  | Glob Group                   | 1212         | English            | Active | +44 20 1432 3000 | 32-40 Blackfriars Road - GB SE1 8NW London                                       |
|  | Lockman LLC                  | 1591         | English            | Active | +44 114 562 9710 | 21 London Road - GB SO15 2AD Southampton                                         |
|  | Nedick's                     | 8326         | English            | Active |                  | 3rd Street 151 - US 94103 San Francisco                                          |
|  | Parker & Jenkins             | 1431         | English            | Active | +44 20 3687 4520 | 26-40 Kensington High Street - GB W8 4PE Royal Borough of Kensington and Chelsea |
|  | Sevent SE                    | 7878         | English            | Active | +49 30 65780     | Invalidenstraße 43 - DE 10115 Berlin                                             |

Companies: 7

Grouping

Group by

Condition

Join conditions by:

Status not equal "Inactive" x

Preferred language equal "English" x

Preferred language equal

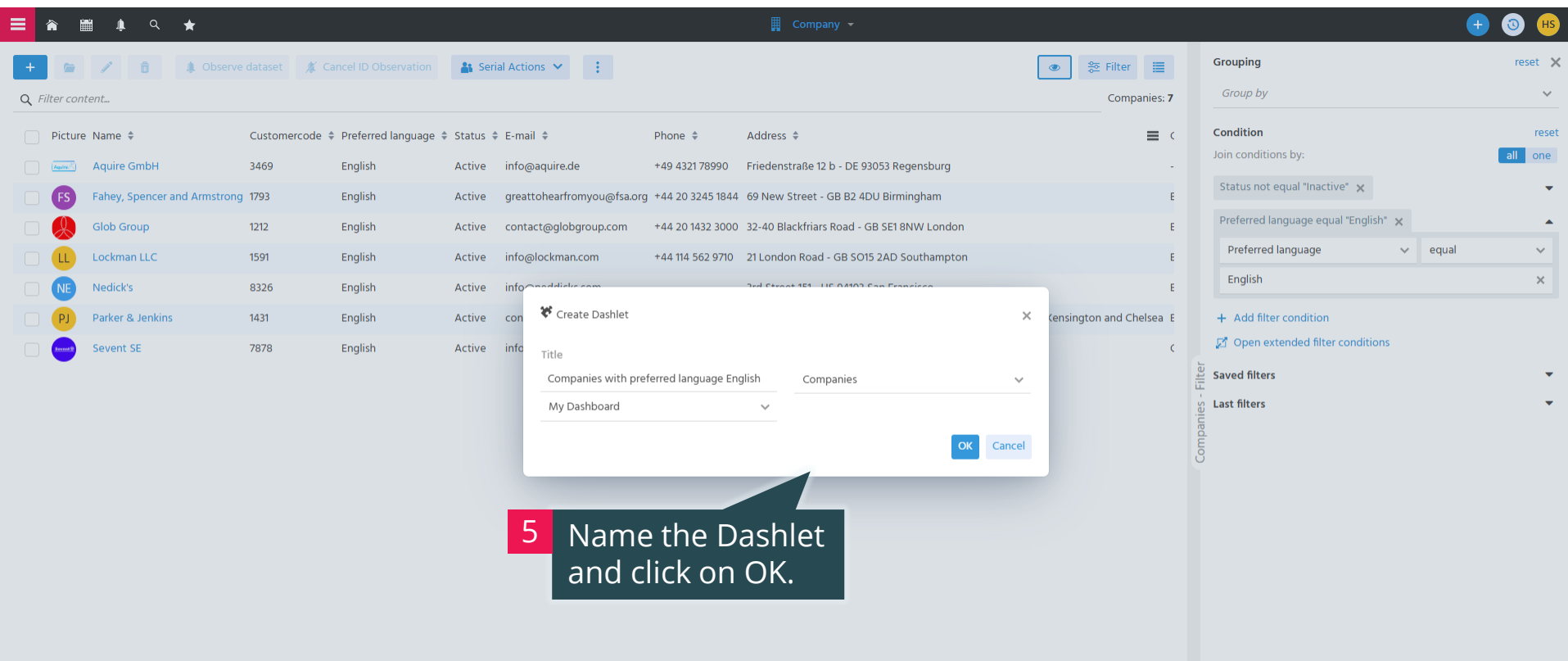
English x

Saved filters

Last filters

\* The latest used filter will be transferred into the Dashlet.

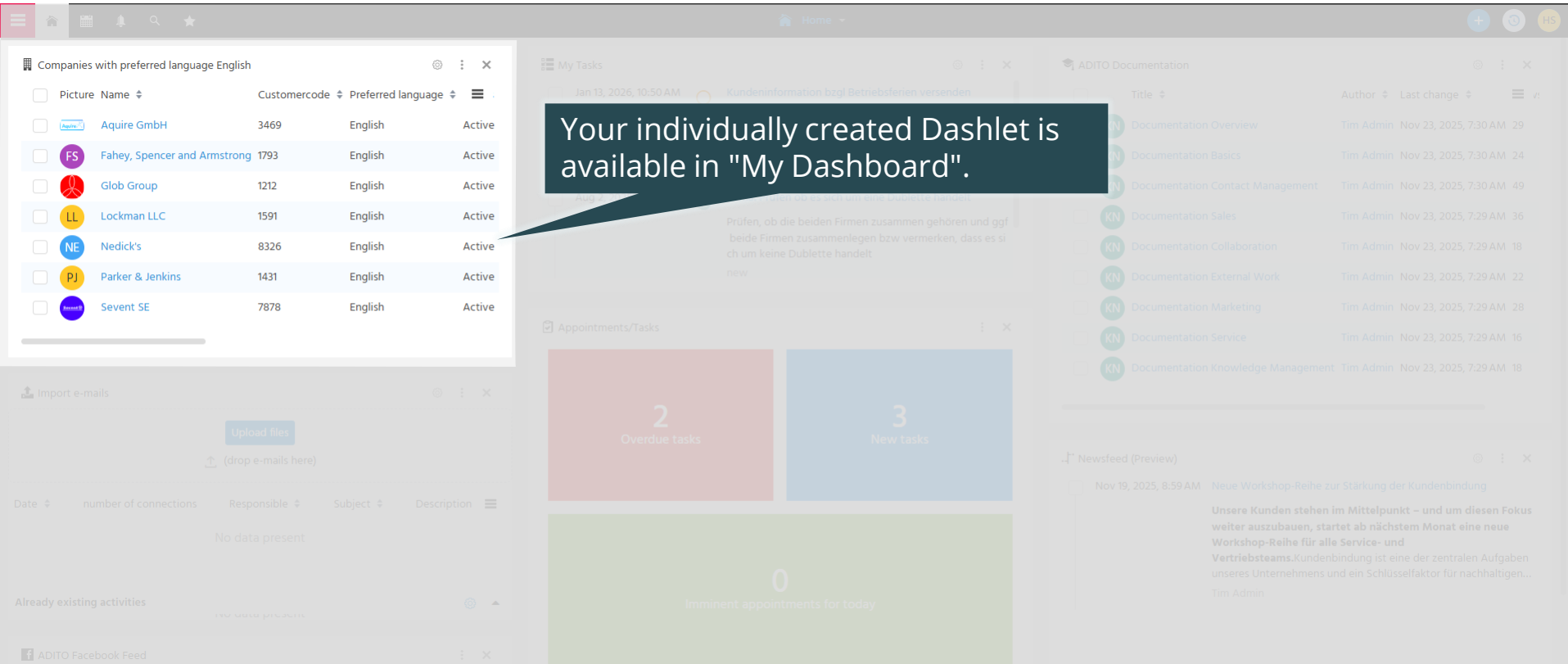
# Create individual Dashlets



The screenshot shows the ADITO interface with a table of companies. A modal dialog titled 'Create Dashlet' is open, allowing the user to name the dashlet. The dialog has a 'Title' field with a dropdown menu showing 'Companies with preferred language English' and 'My Dashboard'. There are 'OK' and 'Cancel' buttons at the bottom right of the dialog.

5 Name the Dashlet and click on OK.

# Create individual Dashlets



The screenshot displays the ADITO dashboard interface. A callout box points to the 'My Tasks' section, stating: "Your individually created Dashlet is available in 'My Dashboard'".

**Companies with preferred language English**

| Picture                                                                          | Name                         | Customercode | Preferred language | Active |
|----------------------------------------------------------------------------------|------------------------------|--------------|--------------------|--------|
|  | Aquire GmbH                  | 3469         | English            | Active |
|  | Fahey, Spencer and Armstrong | 1793         | English            | Active |
|  | Glob Group                   | 1212         | English            | Active |
|  | Lockman LLC                  | 1591         | English            | Active |
|  | Nedick's                     | 8326         | English            | Active |
|  | Parker & Jenkins             | 1431         | English            | Active |
|  | Sevent SE                    | 7878         | English            | Active |

**My Tasks**

Jan 13, 2026, 10:50 AM: Kundeninformation bzgl. Betriebsferien versenden

Prüfen, ob die beiden Firmen zusammen gehören und ggf. beide Firmen zusammenlegen bzw. vermerken, dass es sich um keine Dublette handelt

**Appointments/Tasks**

- 2 Overdue tasks
- 3 New tasks
- 0 Imminent appointments for today

**ADITO Documentation**

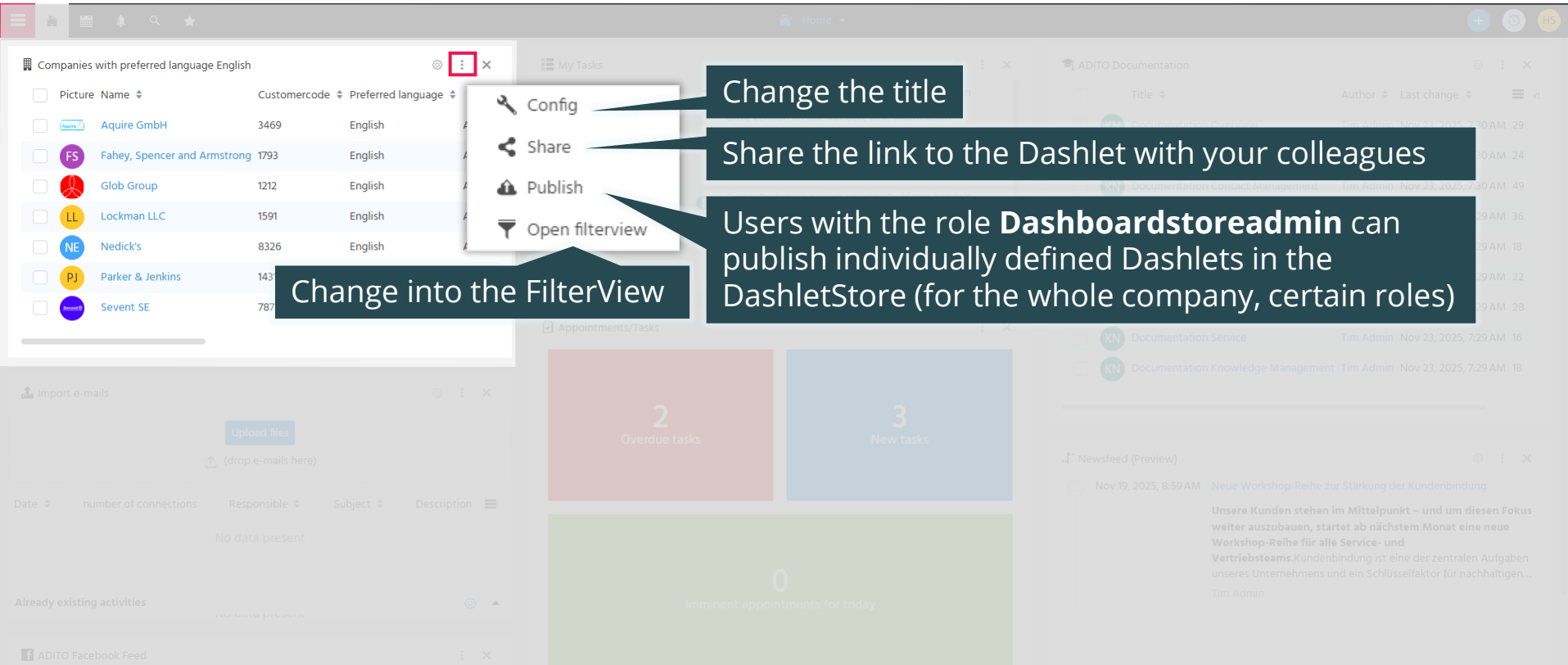
| Title                              | Author    | Last change           |
|------------------------------------|-----------|-----------------------|
| Documentation Overview             | Tim Admin | Nov 23, 2025, 7:30 AM |
| Documentation Basics               | Tim Admin | Nov 23, 2025, 7:30 AM |
| Documentation Contact Management   | Tim Admin | Nov 23, 2025, 7:30 AM |
| Documentation Sales                | Tim Admin | Nov 23, 2025, 7:29 AM |
| Documentation Collaboration        | Tim Admin | Nov 23, 2025, 7:29 AM |
| Documentation External Work        | Tim Admin | Nov 23, 2025, 7:29 AM |
| Documentation Marketing            | Tim Admin | Nov 23, 2025, 7:29 AM |
| Documentation Service              | Tim Admin | Nov 23, 2025, 7:29 AM |
| Documentation Knowledge Management | Tim Admin | Nov 23, 2025, 7:29 AM |

**Newsfeed (Preview)**

Nov 19, 2025, 8:59 AM: Neue Workshop-Reihe zur Stärkung der Kundenbindung

Unsere Kunden stehen im Mittelpunkt – und um diesen Fokus weiter auszubauen, startet ab nächstem Monat eine neue Workshop-Reihe für alle Service- und Vertriebsteam. Kundenbindung ist eine der zentralen Aufgaben unseres Unternehmens und ein Schlüsselfaktor für nachhaltigen...

# "Further Actions" button



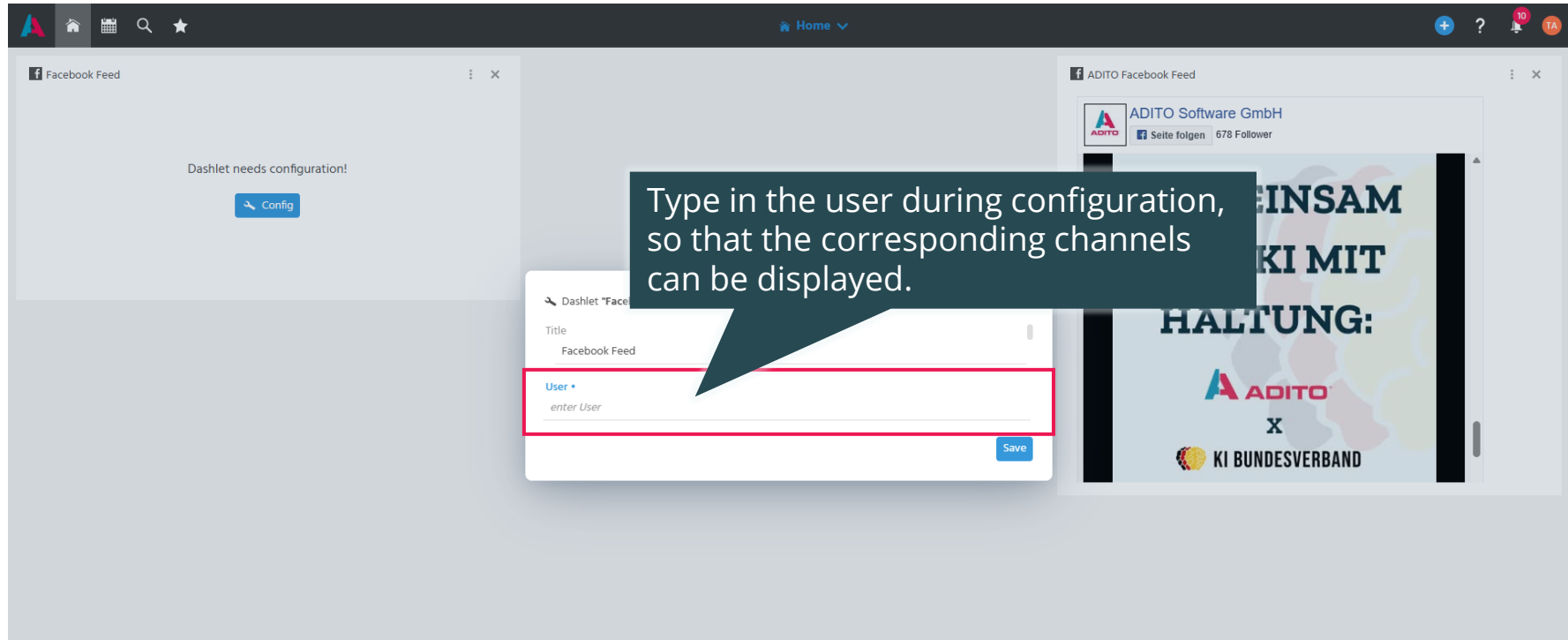
The screenshot shows the ADITO interface. A table titled 'Companies with preferred language English' is visible. A 'Further Actions' button (three dots) is highlighted in the table's header. A context menu is open, showing options: 'Config', 'Share', 'Publish', and 'Open filterview'. Callouts explain these actions:

- Change the title**: Points to the 'Config' option.
- Share the link to the Dashlet with your colleagues**: Points to the 'Share' option.
- Users with the role **Dashboardstoreadmin** can publish individually defined Dashlets in the DashletStore (for the whole company, certain roles)**: Points to the 'Publish' option.
- Change into the FilterView**: Points to the 'Open filterview' option.

The background interface includes a sidebar with 'Import e-mails', a main area with 'Upload files' and 'Appointments/tasks' (showing 2 overdue tasks, 3 new tasks, and 0 imminent appointments), and a 'Newsfeed (Preview)' section.

# Configure Dashlets

## Configuration of Social Media Dashlets



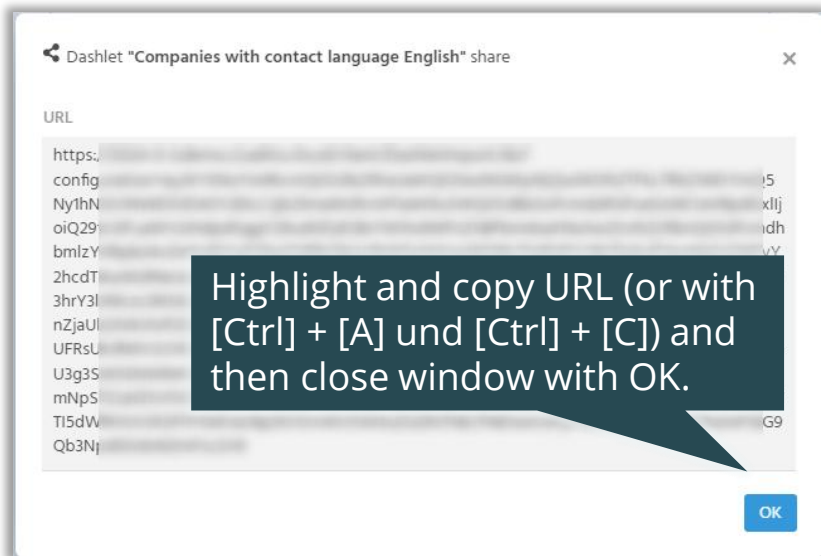
The screenshot displays the ADITO dashboard interface. On the left, a 'Facebook Feed' dashlet is in a configuration state, showing a 'Dashlet needs configuration!' message and a 'Config' button. In the center, a configuration modal is open for a 'Facebook Feed' dashlet. It contains fields for 'Title' (set to 'Facebook Feed') and 'User'. The 'User' field is highlighted with a red border and contains the placeholder text 'enter User'. A 'Save' button is located at the bottom right of the modal. A dark blue speech bubble with white text points to the 'User' field, stating: 'Type in the user during configuration, so that the corresponding channels can be displayed.' On the right, a completed 'ADITO Facebook Feed' dashlet is visible, showing the ADITO logo, 'ADITO Software GmbH', 'Seite folgen', '678 Follower', and a large graphic with the text 'EINSAM KI MIT HALTUNG: ADITO X KI BUNDESVERBAND'.

# Share Dashlets with individual colleagues



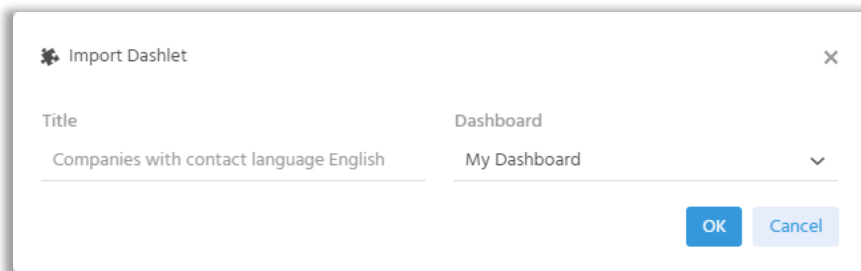
## Procedure of sending it:

Highlight and copy link and send it to the recipient.



## Procedure of importing it

Open link → Import Dashlet



# Publish Dashlets

## Company-wide in the DashletStore

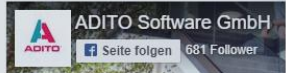
Someone with the **role "Dashboardstoreadmin"** can publish Dashlets in the DashletStore.

To do so, the following settings have to be taken care of:

- Assign the Dashlet to a **category** in the DashletStore
- Select **roles** that can use this Dashlet
  - A user with the role of "Dashboardstoreadmin" can only select roles that they possess themselves. For instance, if they do not have a role in Sales, they cannot publish Dashlets for Sales.
- Select **icon** for Dashlet.
- Upload **preview image**, which is used in the DashletStore.
- Button **"Unique per Dashboard"**:  
Specify whether the Dashlet can be placed on the Dashboard once or multiple times per user.



The screenshot shows a web form titled "Dashlet 'Companies with contact language English' publish". The form contains several sections: "Title" with the text "Companies with contact language English"; "Categories" with a dropdown menu showing "Contact Management" and a plus icon; "Description" with the text "Show all companies"; "Roles" with a dropdown menu showing "Select role"; "Extended Properties" with a dropdown menu showing "VAADIN:BUILDING"; "Preview" with a dashed box containing an "Upload File..." button and a "Drop file here" instruction; and "Unique per dashboard" with a toggle switch. A "Publish" button is located at the bottom right of the form.



ADITO Software GmbH  
vor 41 Minuten

Unser Unternehmen kann nur wachsen, Mitarbeiterinnen und Mitarbeiter weitere bei ADITO verschiedene Weiterbildungs du einen Überblick über unsere Angebot

- Externe Weiterbildung & eLearning
- Coffee & Learn
- ADITO Soft Skill Academy... Mehr an



Companies with contact language English

- ☐ Picture Name ↕
- ☐ Aquire GmbH
- ☐ Fahey, Spencer and Armstrong
- ☐ Glob Group
- ☐ Lockman LLC
- ☐ Nedick's
- ☐ Parker & Jenkins
- ☐ Sevent SE

Dashlets

All (81)

Admin (1)

Calendar (1)

Charts (7)

Contact Management (8)

Contact synchronisation (5)

Covid Information (2)

Districts (2)

Email (1)

Favorites (1)

Knowledge (3)

Marketing (10)

Notifications (1)

offline.SlaveAdministrationMyLastSync...

Project (3)

Sales (15)

Search (1)

Service (15)

Reset Dashboard

Search Dashlets...

Activities

Show all activities

Add

Companies with contact language English

Show all companies

Add

My Tasks

Contacts

Show all contacts

Add

My responsible Organisations

My Activities

Show my activities

Add

Dashletboardstoreadmins can subsequently edit the Dashlets they have published, as indicated by the "Further Actions" button.

- Edit
- Delete

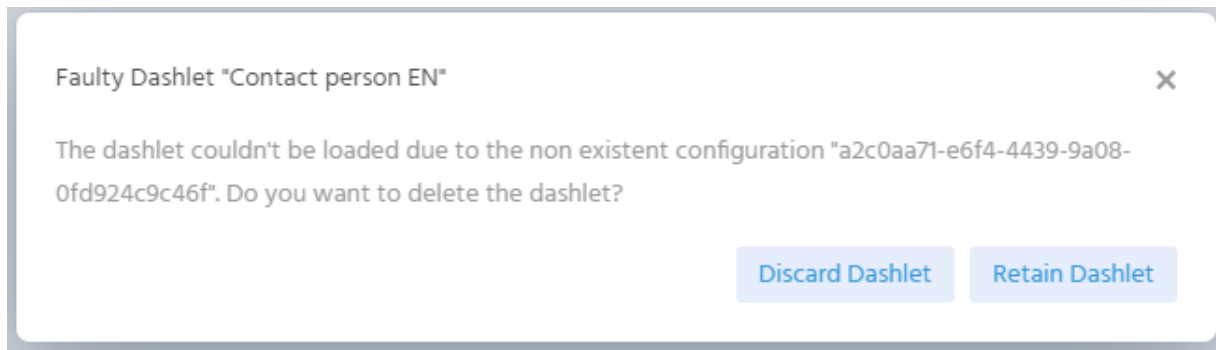
29

# Delete Dashlets

## Delete Dashlets from Dashboard if they have been removed from the DashletStore

If a Dashlet gets removed from the DashletStore because, for example, a filter had to be adjusted or the logic was revised (either by the Dashletboardstoreadmin or in Customizing), it also shouldn't be used anymore by its users.

→ Users receive this message and can either **discard** or **retain** the Dashlet

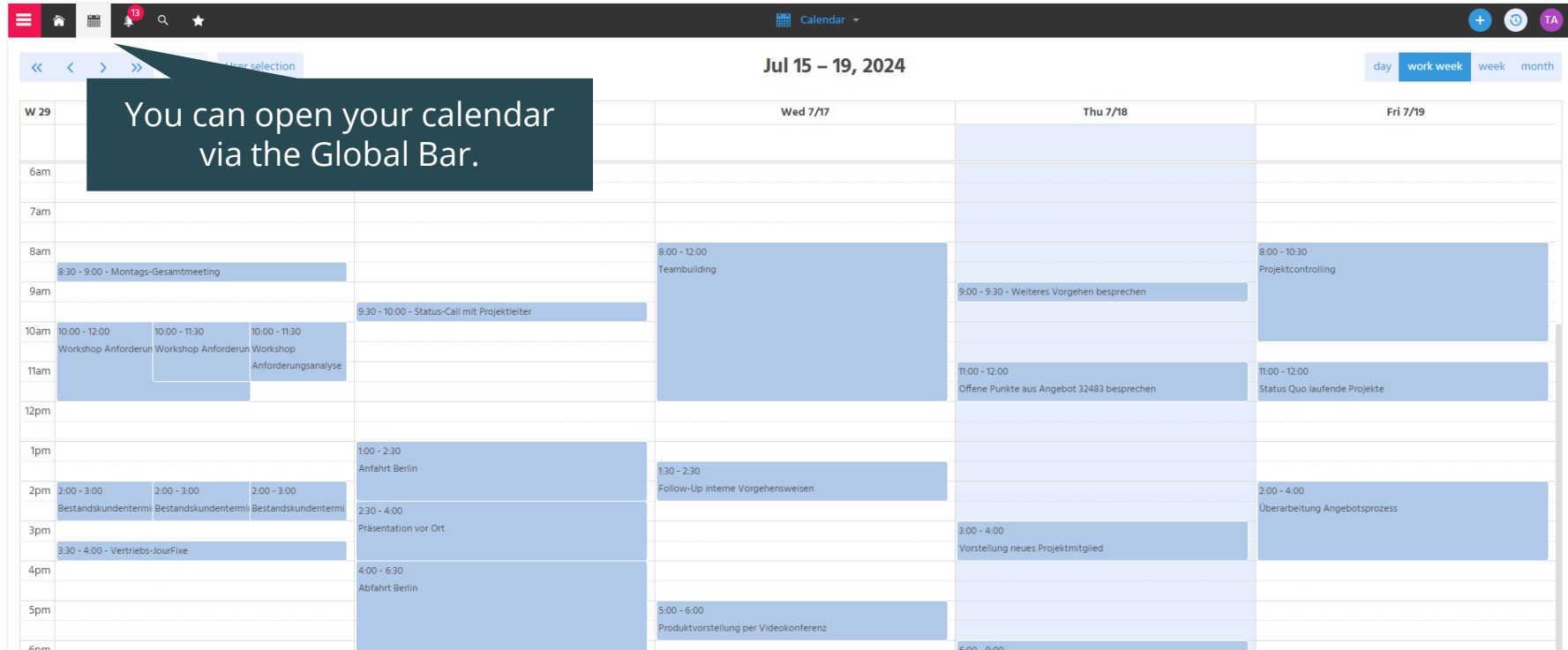


# Planning of appointments



# Calendar

## Using own calendar in ADITO

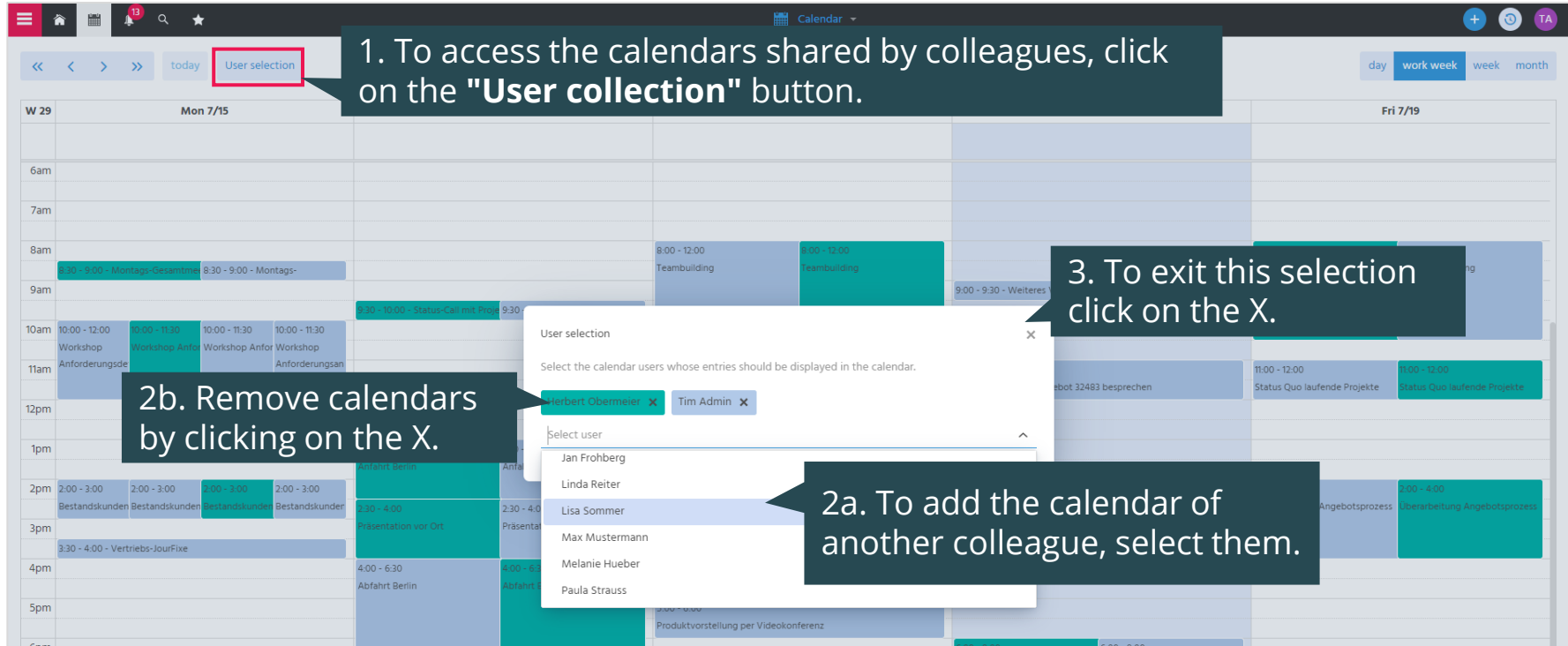
The screenshot shows the ADITO calendar interface. At the top, there's a dark navigation bar with icons for home, calendar, notifications, search, and favorites. A 'Calendar' dropdown menu is visible. On the right, there are buttons for '+', a clock icon, and 'TA'. Below the navigation bar, a date range 'Jul 15 - 19, 2024' is displayed, along with view toggles for 'day', 'work week' (selected), 'week', and 'month'. The main area shows a calendar grid for Wednesday (7/17), Thursday (7/18), and Friday (7/19). A dark blue callout box with white text points to the navigation bar, stating: 'You can open your calendar via the Global Bar.' The calendar grid contains various blue event blocks with titles and times.

You can open your calendar via the Global Bar.

| W 29 | Wed 7/17                                     | Thu 7/18                                                    | Fri 7/19                                      |
|------|----------------------------------------------|-------------------------------------------------------------|-----------------------------------------------|
| 6am  |                                              |                                                             |                                               |
| 7am  |                                              |                                                             |                                               |
| 8am  | 8:00 - 12:00<br>Teambuilding                 |                                                             | 8:00 - 10:30<br>Projektcontrolling            |
| 9am  | 9:30 - 10:00 - Status-Call mit Projektleiter | 9:00 - 9:30 - Weiteres Vorgehen besprechen                  |                                               |
| 10am | 10:00 - 12:00<br>Workshop Anforderun         |                                                             |                                               |
| 11am | 10:00 - 11:30<br>Workshop Anforderun         | 11:00 - 12:00<br>Offene Punkte aus Angebot 32483 besprechen | 11:00 - 12:00<br>Status Quo laufende Projekte |
| 12pm |                                              |                                                             |                                               |
| 1pm  | 1:00 - 2:30<br>Anfahrt Berlin                | 1:30 - 2:30<br>Follow-Up interne Vorgehensweisen            |                                               |
| 2pm  | 2:00 - 3:00<br>Bestandskundentermi           |                                                             | 2:00 - 4:00<br>Überarbeitung Angebotsprozess  |
| 3pm  | 2:30 - 4:00<br>Präsentation vor Ort          | 3:00 - 4:00<br>Vorstellung neues Projektmitglied            |                                               |
| 4pm  | 3:30 - 4:00 - Vertriebs-JourFixe             |                                                             |                                               |
| 5pm  | 4:00 - 6:30<br>Abfahrt Berlin                | 5:00 - 6:00<br>Produktvorstellung per Videokonferenz        |                                               |
| 6pm  |                                              | 6:00 - 8:00                                                 |                                               |

# Calendar

## Show calendar of colleagues



The screenshot shows the ADITO calendar application. At the top, there is a navigation bar with a menu icon, home icon, calendar icon, and a 'Calendar' dropdown. Below this is a toolbar with navigation arrows, a 'today' button, and a 'User selection' button highlighted with a red box. The main area displays a calendar grid for the week of Monday, July 15th to Friday, July 19th. Various events are shown as colored blocks, such as 'Teambuilding' and 'Status Quo laufende Projekte'. A 'User selection' dialog box is open in the center, showing a list of users to be added to the calendar. The dialog has a title 'User selection', a description 'Select the calendar users whose entries should be displayed in the calendar.', and a list of users: Jan Froberg, Linda Reiter, Lisa Sommer, Max Mustermann, Melanie Hueber, and Paula Strauss. The 'Herbert Obermeier' and 'Tim Admin' users are already selected and shown at the top of the dialog with an 'X' icon. Three callout boxes provide instructions: 1. To access the calendars shared by colleagues, click on the "User collection" button. 2b. Remove calendars by clicking on the X. 2a. To add the calendar of another colleague, select them. 3. To exit this selection click on the X.

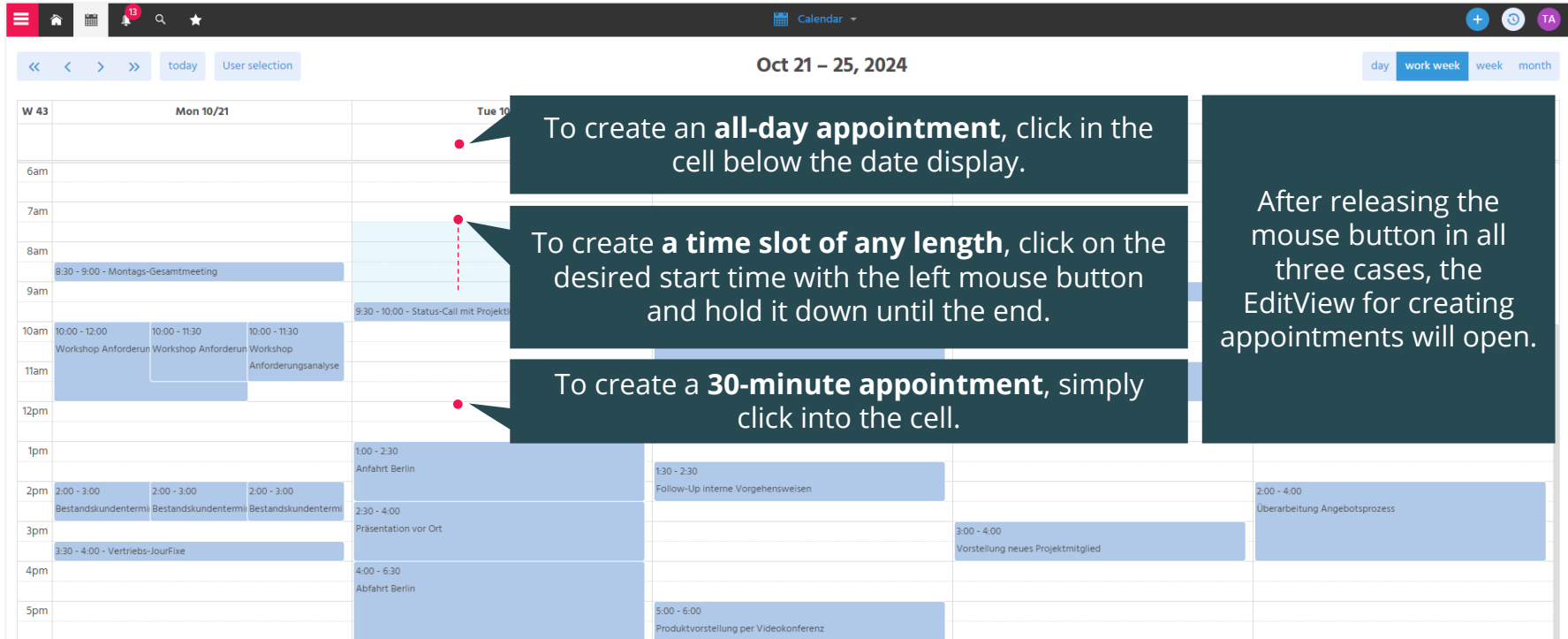
1. To access the calendars shared by colleagues, click on the "User collection" button.

2b. Remove calendars by clicking on the X.

2a. To add the calendar of another colleague, select them.

3. To exit this selection click on the X.

## Creating appointments in the calendar



Calendar

Oct 21 – 25, 2024

day work week week month

W 43 Mon 10/21 Tue 10/22

6am

7am

8am

9am

10am

11am

12pm

1pm

2pm

3pm

4pm

5pm

8:30 - 9:00 - Montags-Gesamtmeeting

9:30 - 10:00 - Status-Call mit Projektleiter

10:00 - 12:00 Workshop Anfordern

10:00 - 11:30 Workshop Anfordern

10:00 - 11:30 Workshop Anfordern

11:00 - 11:30 Workshop Anfordern

1:00 - 2:30 Anfahrt Berlin

2:00 - 3:00 Bestandskundentermin

2:00 - 3:00 Bestandskundentermin

2:00 - 3:00 Bestandskundentermin

2:30 - 4:00 Präsentation vor Ort

3:00 - 4:00 Vertriebs-JourFixe

4:00 - 6:30 Abfahrt Berlin

1:30 - 2:30 Follow-Up interne Vorgehensweisen

3:00 - 4:00 Vorstellung neues Projektmitglied

5:00 - 6:00 Produktvorstellung per Videokonferenz

2:00 - 4:00 Überarbeitung Angebotsprozess

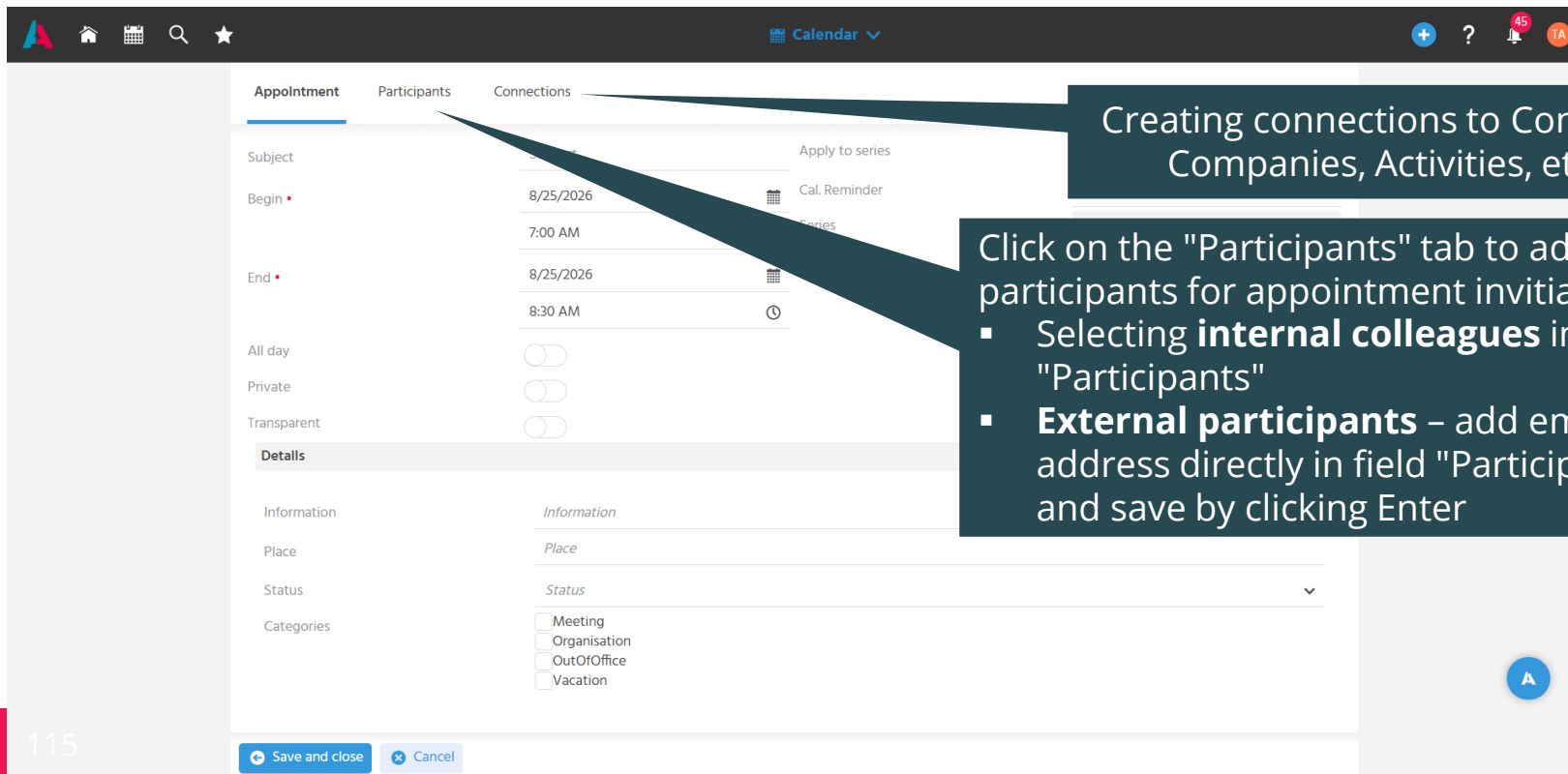
To create an **all-day appointment**, click in the cell below the date display.

To create a **time slot of any length**, click on the desired start time with the left mouse button and hold it down until the end.

To create a **30-minute appointment**, simply click into the cell.

After releasing the mouse button in all three cases, the EditView for creating appointments will open.

## Creating appointments



Calendar

Appointment Participants Connections

Subject

Begin • 8/25/2026 7:00 AM

End • 8/25/2026 8:30 AM

All day ☐

Private ☐

Transparent ☐

Details

Information

Place

Status

Categories

Apply to series

Cal. Reminder

Series

Information

Place

Status

☐ Meeting

☐ Organisation

☐ OutOfOffice

☐ Vacation

Save and close Cancel

Creating connections to Contacts, Companies, Activities, etc.

Click on the "Participants" tab to add participants for appointment invitations:

- Selecting **internal colleagues** in field "Participants"
- External participants** – add email address directly in field "Participants" and save by clicking Enter

# Calendar



## Create series appointments

1. Enable the "Apply to series" toggle to make further settings via the "Series" field.

2. Select series behavior

There are three ways to define an end for the custom series.

Apply to series ☒

Cal. Reminder *Cal. Reminder* ▼

Series *Series* ▼

Repeat every 1

Day ☒

Ends Never ☒

Apply to series ☒

Cal. Reminder *Cal. Reminder* ▼

Series *Series* ▼

Search

Daily

Weekly on Tuesday

Monthly on 4. Tuesday

Every year on 25.08.

Custom...

Apply to series ☒

Cal. Reminder *Cal. Reminder* ▼

Series *Custom...* ✕

Repeat every 1

Day ☒

Ends On ☒

Date end ☒

Date end ☒

Apply to series ☒

Cal. Reminder *Cal. Reminder* ▼

Series *Custom...* ✕

Repeat every 1

Day ☒

Ends After ☒



# Calendar

## Creating appointments in Company/Contact

If you create the appointment within the company, the link to it will be automatically generated.

The screenshot displays the user interface of the Bucher Unternehmensgruppe system. At the top, the company name 'Bucher Unternehmensgruppe' and customer number 'Cust.-No.: 3698' are visible. A sidebar on the left contains navigation links: Tags, Communication, Addresses, Further information, Relevant Documents, and Turnover. A dropdown menu is open, listing various actions. The 'New appointment' option is highlighted with a red rectangle. At the bottom, a status bar shows '26 Days inactive', '100% Turnover change', and 'BC Classification'. A red 'A' logo is in the bottom right corner.

- Observe dataset
- New task
- Write e-mail
- New letter
- Add to Campaign
- New offer
- New opportunity
- New operation recommendation
- Show Classification
- New operation
- Create operation task
- New appointment**
- Add to serial letter
- Add to bulk mail
- Open Location
- Radius Search
- Customer Base Sheet
- Start workflow
- Edit defaults
- Open admin view

26 Days inactive | 100% Turnover change | BC Classification

# Calendar



## Appointment preview

Calendar interface showing a weekly view for July 15 - 19, 2024. The interface includes a top navigation bar with icons for home, calendar, notifications, search, and settings. The main area displays a calendar grid with appointments listed by time slot. A callout box points to an appointment on Monday, July 15, at 10:00-11:30, labeled 'Status-Call mit Projektleiter'. The right sidebar shows the appointment details for 'Status-Call mit Projektleiter' on 07/16/2024 from 09:30 to 10:30 o'clock. The sidebar includes sections for Information, Details, Participants, and Connections. A callout box points to the 'Further Actions' menu in the top right corner of the sidebar, which contains options: 'Delete recurring appointment', 'New operation', and 'New activity'. Another callout box points to the 'Participants' list, which includes Admin, hobermeier, Isommer, and mmustermann. A third callout box points to the 'Connections' section, which lists 'Industrial Steel AG'.

Open the appointment preview by clicking on the appointment.

Further Actions

- Delete recurring appointment
- New operation
- New activity

Overview of all invited participants.

Overview of all linked data.



# Calendar



## Linked appointments e.g. within Company

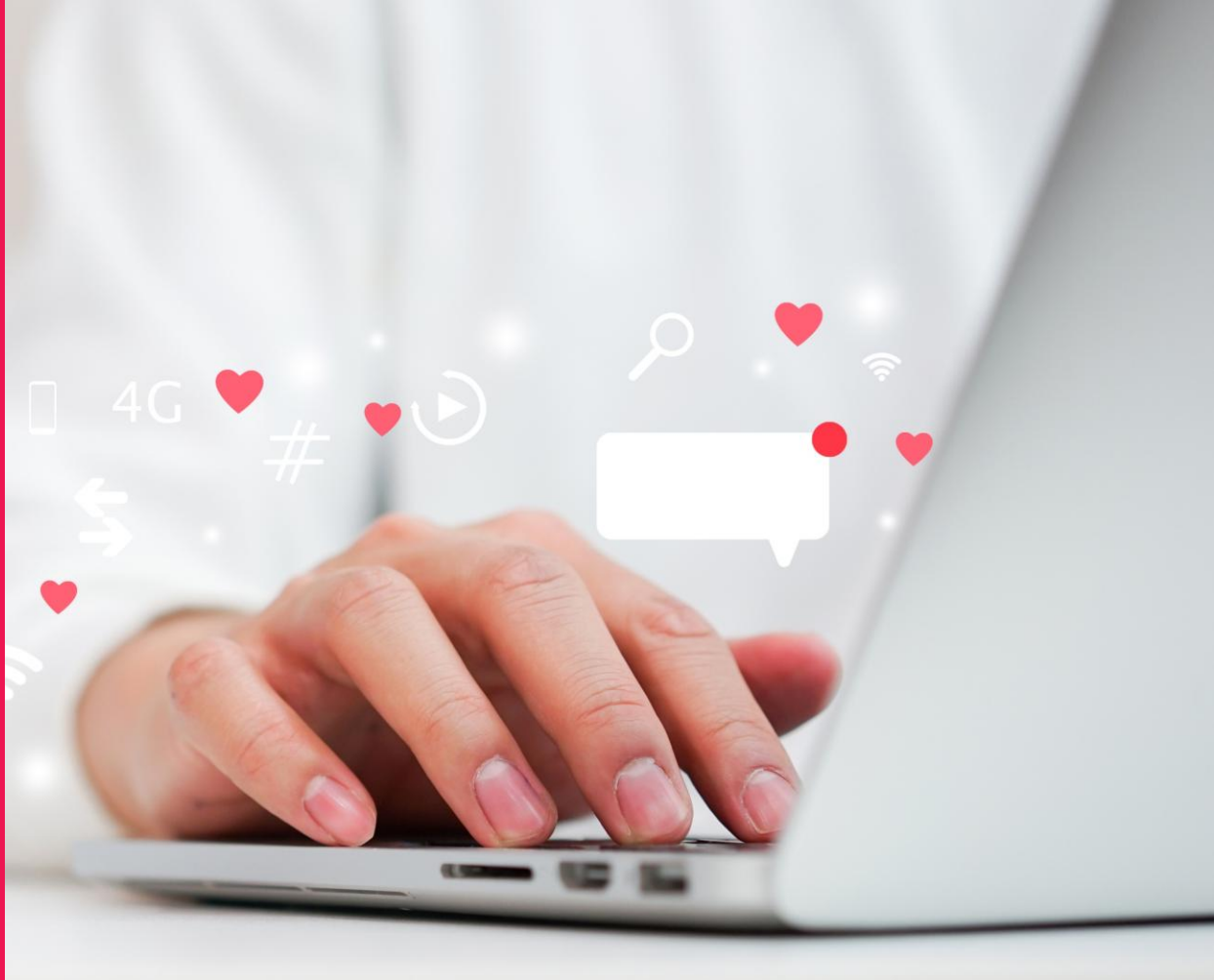
The screenshot displays the ADITO application interface for 'Industrial Steel AG'. The left sidebar contains company information: 'Industrial Steel AG', 'Cust.-No.: 1234', 'E-Mail: info@industrial-steel.de', 'Phone: +49 40 63520', 'Website: https://www.industrial-steel.de', 'Office address: Rathausmarkt 1, 20095 Hamburg, Germany', 'Turnover Current: 683,860.00 EUR', 'Turnover Last Year: 0.00 EUR', and 'Relevant documents: Information.pdf'. The main area shows a calendar view with a list of appointments. The appointments are:

- Jun 7, 2024, 3:36 AM: Verträge prüfen. Bitte die vorhanden Verträge überprüfen, alle Erweiterungen müssen darin abgedeckt sein. (new)
- May 21, 2024, 2:23 PM: Rahmenvertrag aktualisieren und an Herrn Altinger schicken. Mit Herrn Altinger telefoniert und die Rahmendaten des neuen Vertrages besprochen. Gültig ab sofort Zahlungsweise: Halbjährlich befristet auf ein Jahr. (new)
- May 17, 2024, 2:29 PM: Austausch über Newsletter - Bitte Frau Linder anrufen. Frau Linder hat angerufen und möchte sich mit einem unserer Marketingkollegen bzgl. Newsletter austauschen.
- May 12, 2024, 2:29 PM: (Appointment details are partially obscured by the speech bubble)
- May 9, 2024, 2:29 PM: (Appointment details are partially obscured by the speech bubble)

The right sidebar shows the details for the selected appointment: 'Status-Call mit Projektleiter', '07/16/2024 | 09:30 - 10:30 o'clock'. It includes sections for 'Information', 'Details' (Place: Online, Status: Confirmed), 'Participants' (Admin, hobermeier, Isommer, mmustermann), and 'Connections' (Company: Industrial Steel AG).



**Marking  
datasets as  
"important" or  
categorizing**



# Tags: overview

There are 2 possibilities to use tags:

## 1. **Public tags**

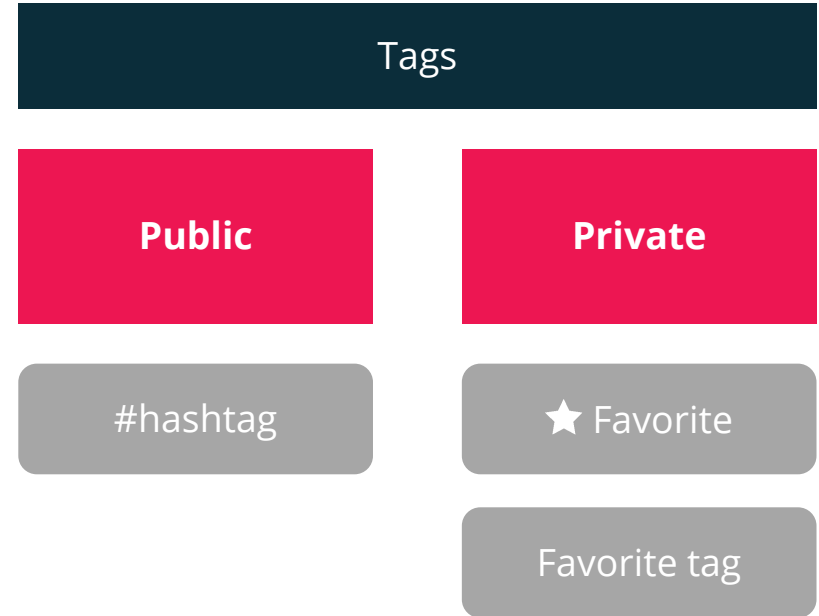
for a system-wide categorization and use in the index search.\*

## 2. **Private tags**

for marking important data

→ Quick access in the Context "Favorites"

→ Filter in the respective FilterView using the "Favorite groups" filter.



\*Can be compared to social networks. This function can be deactivated in the system if it is not required.

# Assigning tags (1)

## In the preview of a dataset

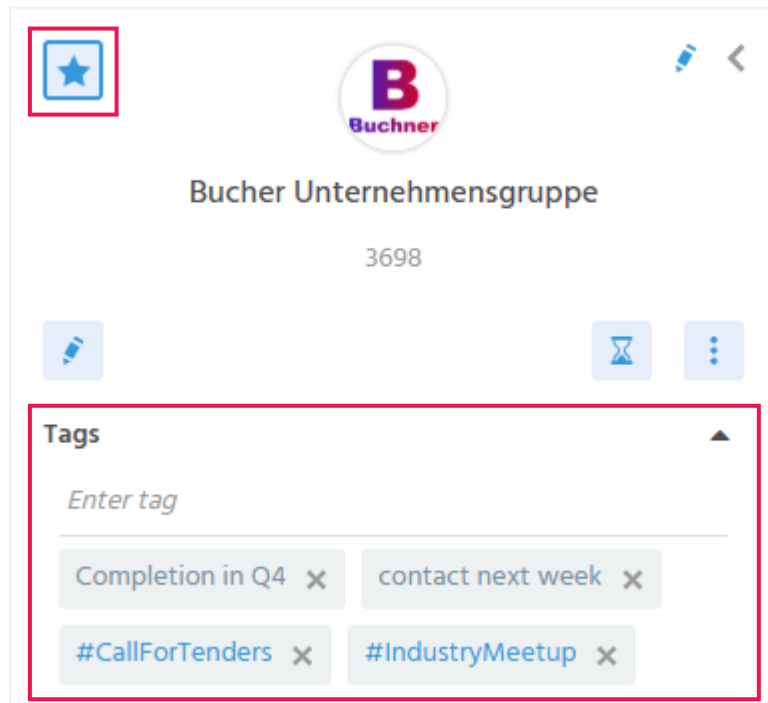
All tags can be assigned within the **"Tags"** section:

### ★ button

- **Favorite** is activated ★ or inactive ☆

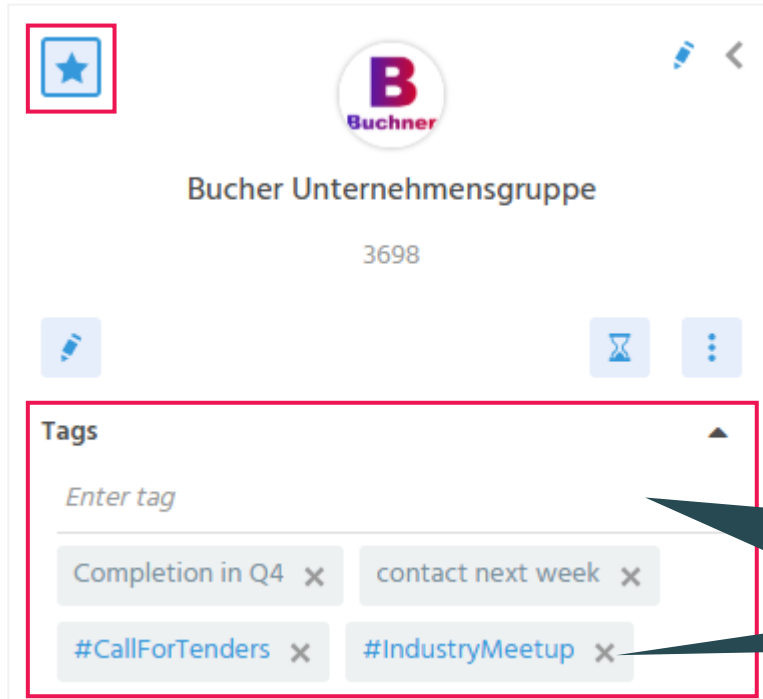
### Field "Enter tag" + ENTER

- **Private tags** cannot begin with #, can contain blank spaces
- **Public tags** must begin with #, cannot contain blank spaces



# Assigning tags (2)

In the preview of a dataset



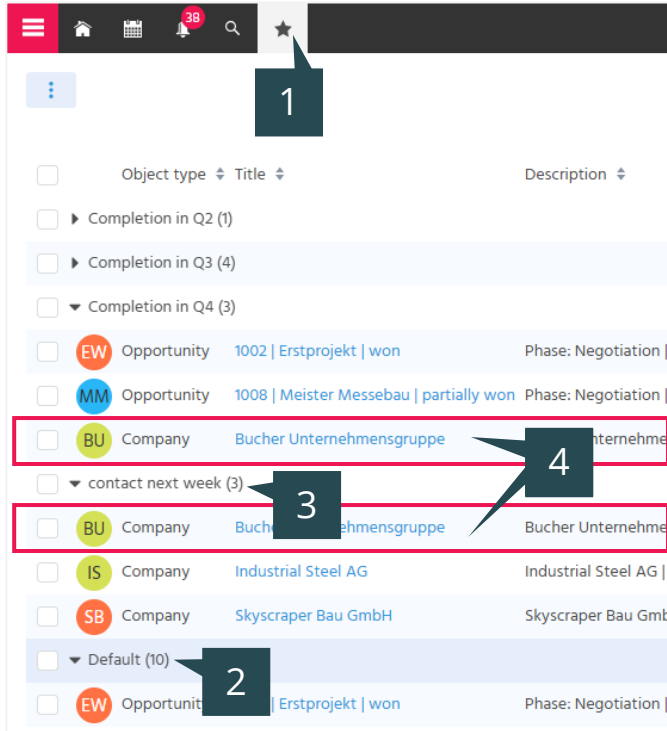
**A maximum of 100 tags** can be entered per dataset (sum of all private tags and public tags of all users)

If you enter any tag in the preview, **existing** tags will be displayed (via autocomplete or suggestion list). If a tag does not exist yet, it can be created by pressing **Enter**.

Click on the **X** to delete the tag.

# Favorite tags

## Overview in the Context "Favorite"

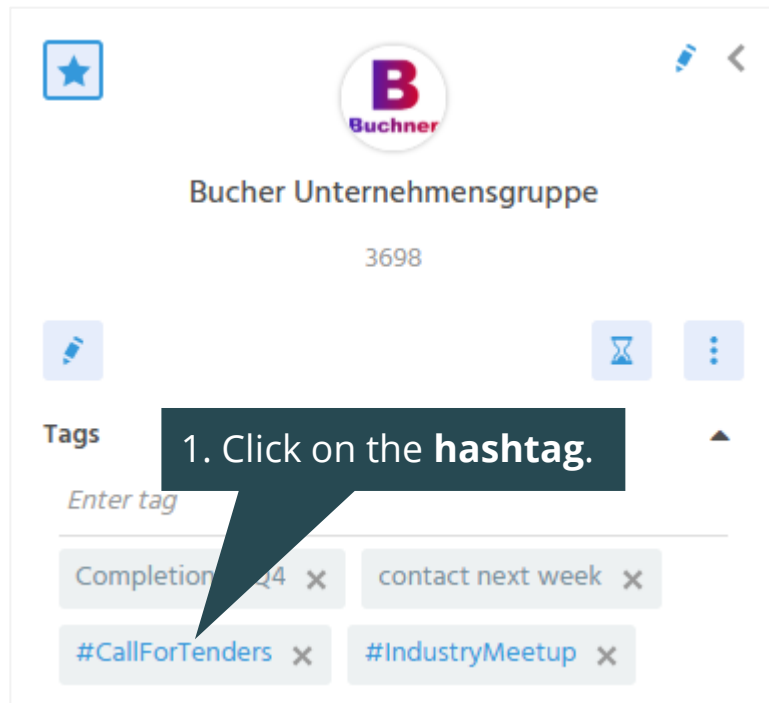


The screenshot shows the ADITO interface with the 'Favorite' context selected. The top navigation bar features a star icon (1) for favoriting datasets. Below, a list of datasets is displayed, including 'BU Company - Bucher Unternehmensgruppe' (3) and 'Default (10)' (2). A red box highlights the 'BU Company - Bucher Unternehmensgruppe' dataset, with callout 4 pointing to its tag section. Callout 3 points to the 'contact next week (3)' tag. Callout 2 points to the 'Default (10)' group.

1. In the Context "Favorite", the datasets are grouped by tag.
2. If you activated the ★ **button**, the datasets will be displayed in the private tag "**Default**".
3. When assigning an private tag, it will be displayed in the corresponding favorite tag (e.g. "**contact next week**").
4. If you assign more tags to a dataset, they will be displayed in the corresponding private tags section (★ button and/or one or more tags).

# #tags

Search system-wide for datasets that are linked with hashtags (1)



Bucher Unternehmensgruppe

3698

Tags

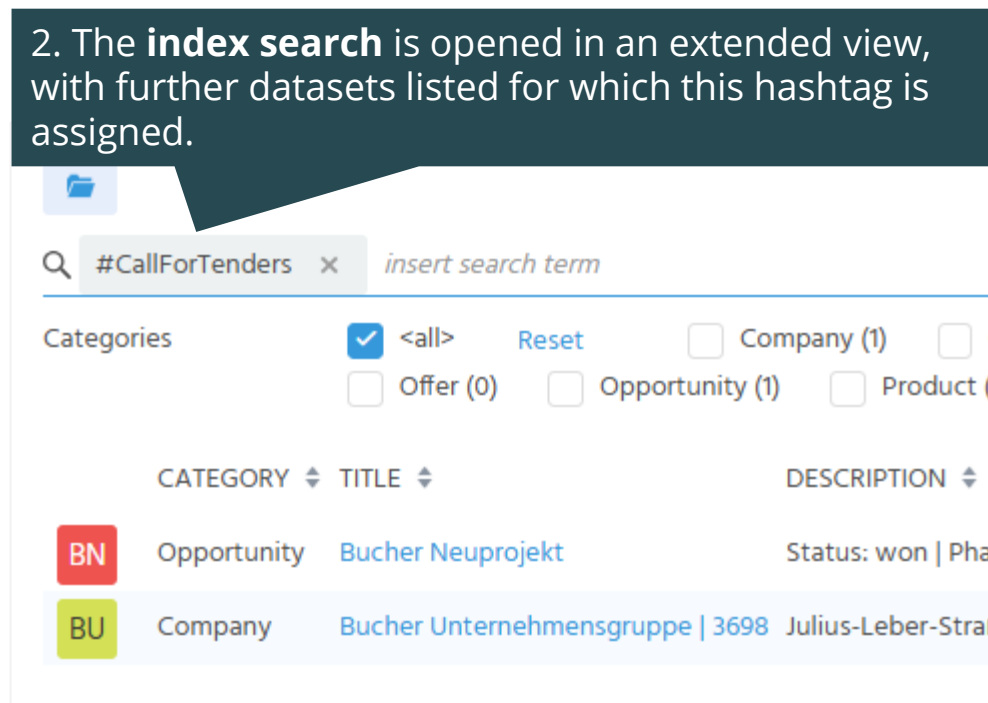
Enter tag

Completion 4 x contact next week x

#CallForTenders x #IndustryMeetup x

1. Click on the **hashtag**.

2. The **index search** is opened in an extended view, with further datasets listed for which this hashtag is assigned.



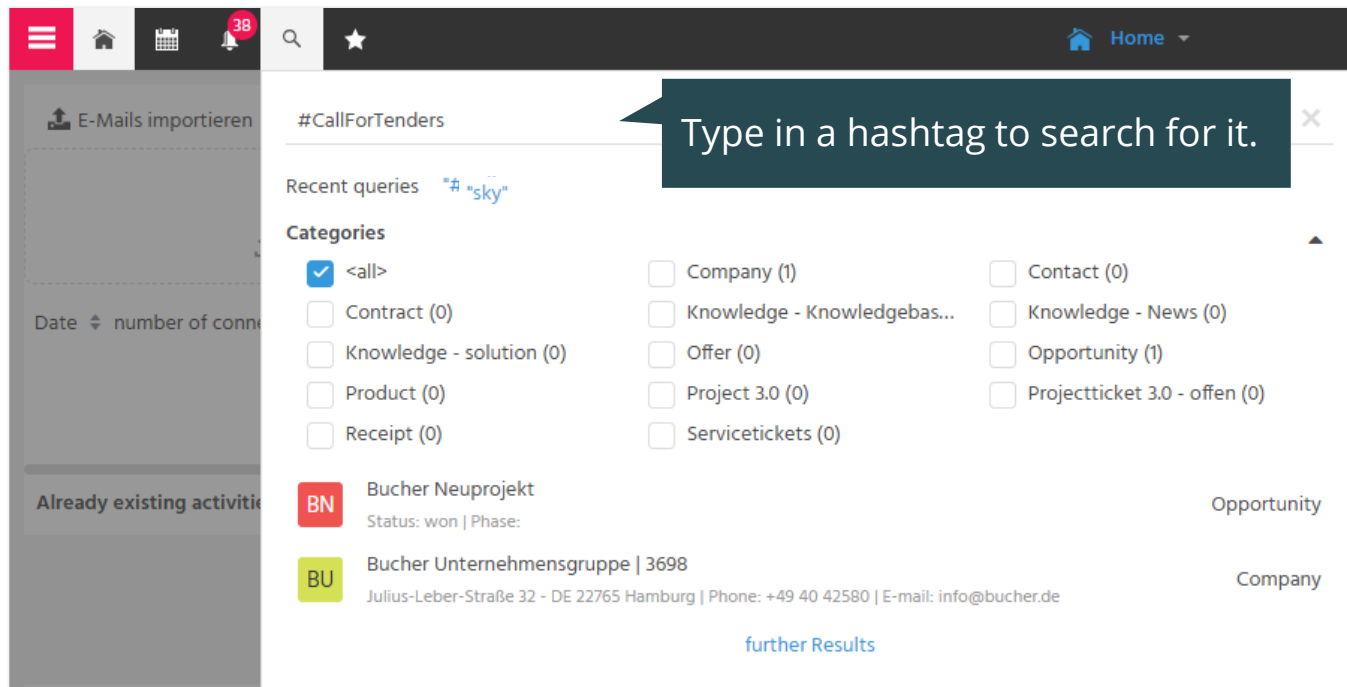
#CallForTenders x insert search term

Categories ☒ <all> Reset ☐ Company (1) ☐ Offer (0) ☐ Opportunity (1) ☐ Product (1)

| CATEGORY       | TITLE                            | DESCRIPTION        |
|----------------|----------------------------------|--------------------|
| BN Opportunity | Bucher Neuprojekt                | Status: won   Pha  |
| BU Company     | Bucher Unternehmensgruppe   3698 | Julius-Leber-Stral |

# #tags

## Search system-wide for datasets that are linked with hashtags (2)

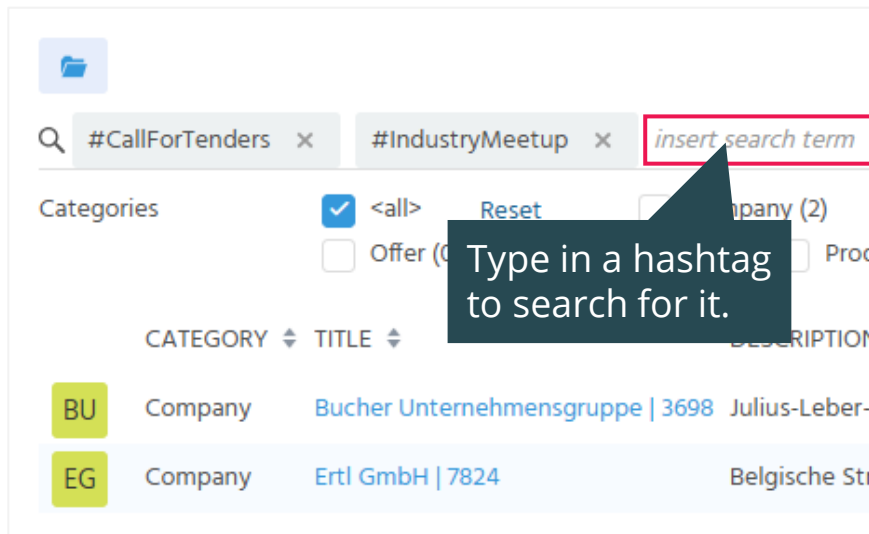


The screenshot shows the ADITO search interface. The search bar at the top contains the hashtag "#CallForTenders". A callout box points to the search bar with the text "Type in a hashtag to search for it." Below the search bar, the "Recent queries" section shows "#sky". The "Categories" section lists various categories with checkboxes and counts: <all> (checked), Contract (0), Knowledge - solution (0), Product (0), Receipt (0), Company (1), Knowledge - Knowledgebas... (0), Offer (0), Project 3.0 (0), Servicetickets (0), Contact (0), Knowledge - News (0), Opportunity (1), and Projectticket 3.0 - offen (0). Below the categories, two results are shown: "Bucher Neuprojekt" (BN) with status "won" and phase "Phase:", and "Bucher Unternehmensgruppe | 3698" (BU) with address "Julius-Leber-Straße 32 - DE 22765 Hamburg" and phone number "+49 40 42580". The results are categorized as "Opportunity" and "Company". A link "further Results" is at the bottom.

- Autocompletion is **not** available here.
- In the "**further results**" view, you can search for more tags.

# #tags

Search system-wide for datasets that are linked with hashtags (3)



Search bar: #CallForTenders x #IndustryMeetup x insert search term

Categories: ☒ <all> Reset ☐ Offer (0) ☐ Company (2) ☐ Proc

Type in a hashtag to search for it.

| CATEGORY | TITLE   | DESCRIPTION                                    |
|----------|---------|------------------------------------------------|
| BU       | Company | Bucher Unternehmensgruppe   3698 Julius-Leber- |
| EG       | Company | Ertl GmbH   7824 Belgische Str                 |

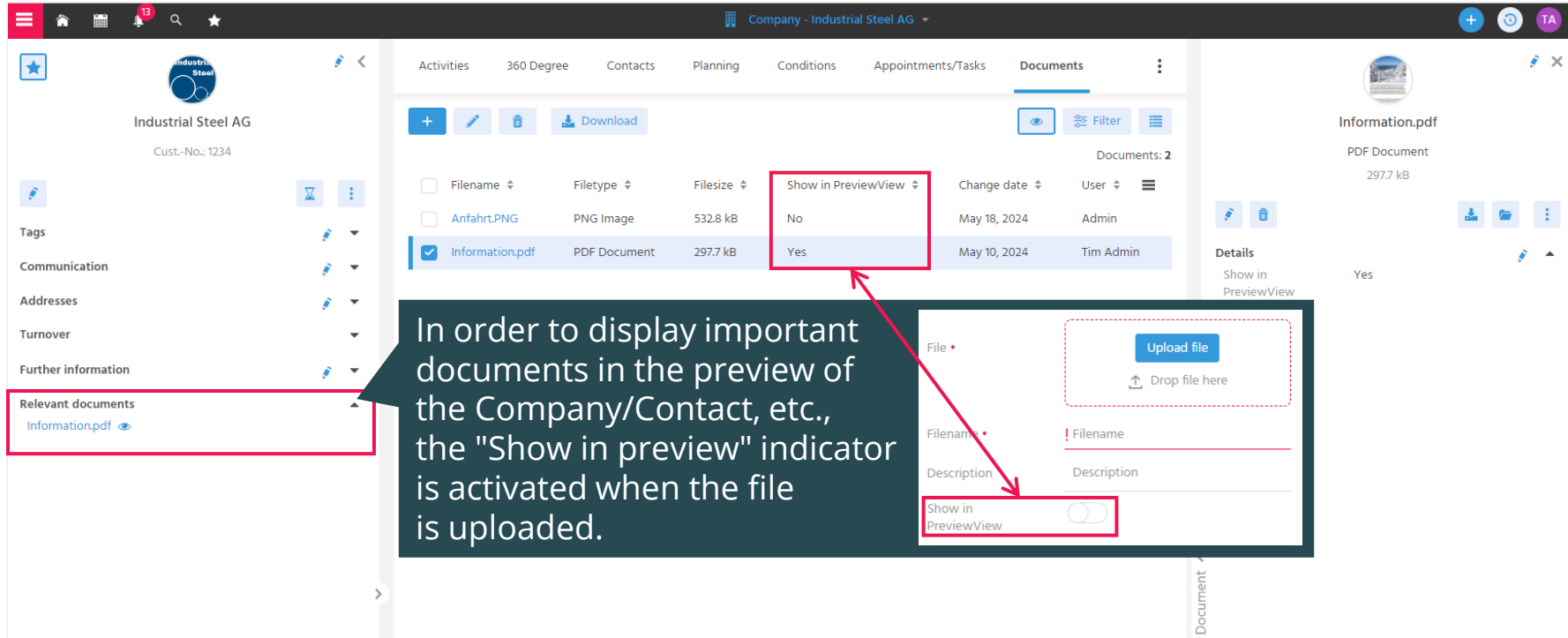
- As soon as # is typed in, the autocomplete or suggestion list becomes available.
- The datasets that are being searched for are displayed beneath the search bar.
- You can search for multiple hashtags simultaneously. In this scenario, the hashtags are connected with the operator **AND**, meaning that the results must be associated with **all** of the hashtags that have been searched for.

# Documents



# Documents

## Display of important documents in the preview



Industrial Steel AG  
Cust.-No.: 1234

Activities 360 Degree Contacts Planning Conditions Appointments/Tasks Documents

Download

| Filename        | Filetype     | Filesize | Show in PreviewView | Change date  | User      |
|-----------------|--------------|----------|---------------------|--------------|-----------|
| Anfahrt.PNG     | PNG Image    | 532.8 kB | No                  | May 18, 2024 | Admin     |
| Information.pdf | PDF Document | 297.7 kB | Yes                 | May 10, 2024 | Tim Admin |

Documents: 2

Information.pdf  
PDF Document  
297.7 kB

Details  
Show in PreviewView  
Yes

Relevant documents  
Information.pdf

In order to display important documents in the preview of the Company/Contact, etc., the "Show in preview" indicator is activated when the file is uploaded.

File • Upload file  
Drop file here

Filename • ! Filename

Description • Description

Show in PreviewView

This document is subject to copyright protection. Therefore all contents may only be used, saved or duplicated for designated purposes such as for ADITO workshops or ADITO projects. It is mandatory to consult ADITO first before changing, publishing or passing on contents to a third party, as well as any other possible purposes.



Einzigartige Beziehungen