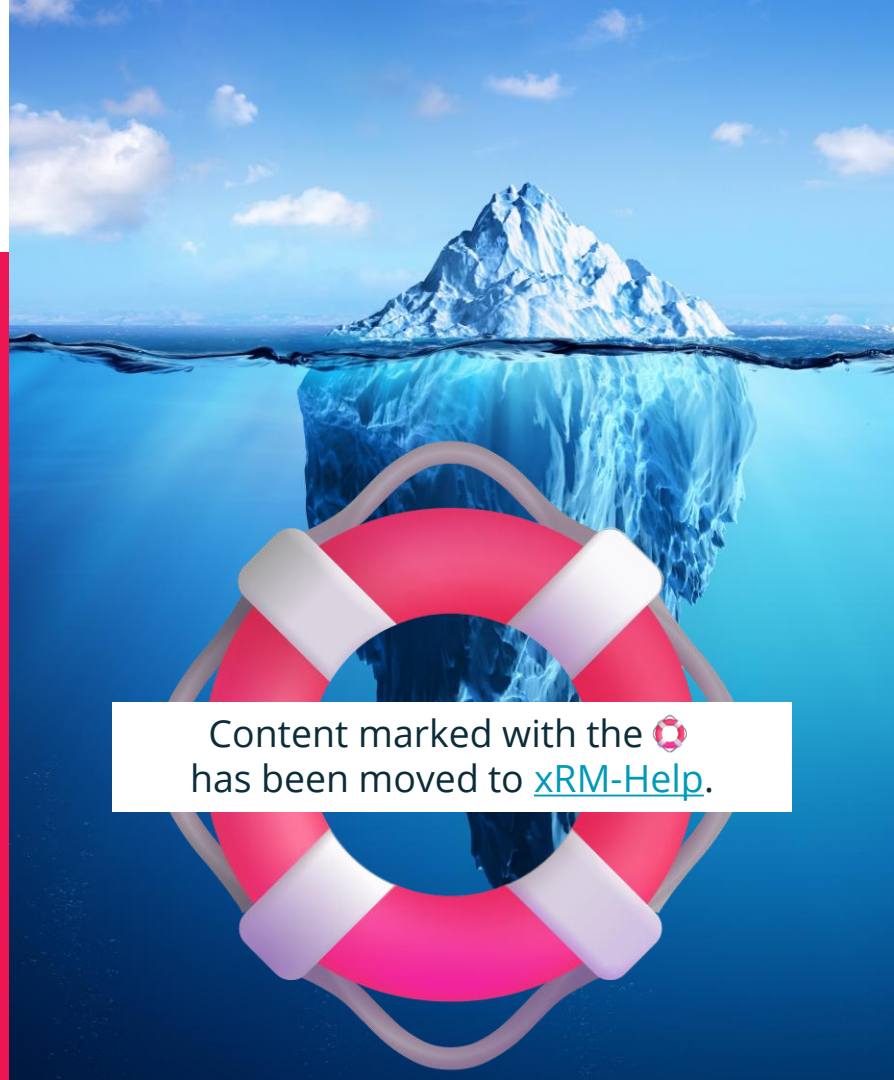




# Document templates, writing letters & emails

ADITO Software GmbH

From version xRM 2026.10.0 | October 2026



Content marked with the   
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.



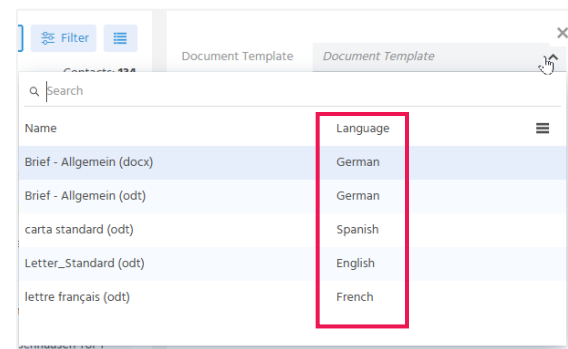
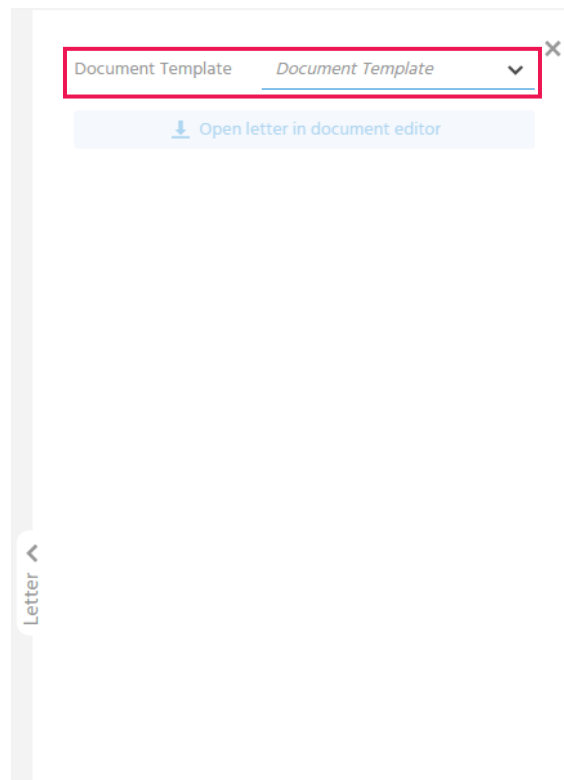
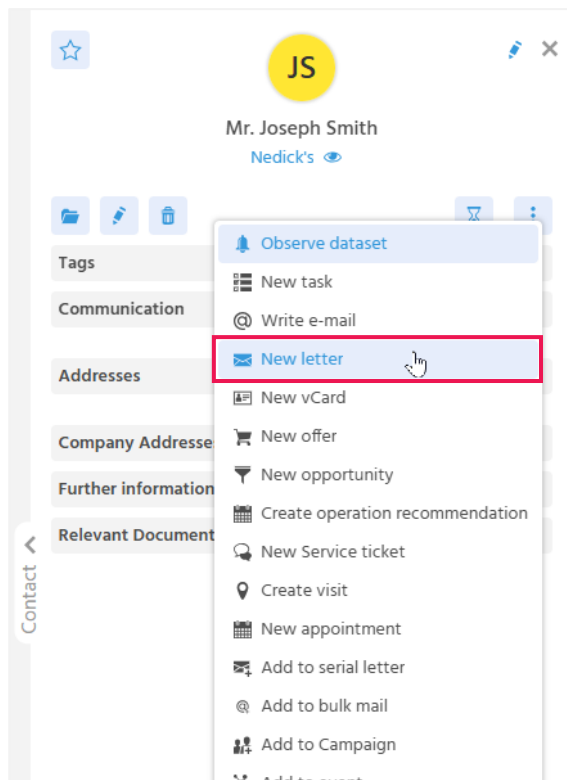
# Agenda

-  Document template
  -  Overview
  -  FilterView
  -  Preview
  -  Create Document template
    -  General
    -  Letter
    -  Email
    -  Text modular
    - Sub documents
  -  Overview file formats
  -  Overview placeholder
  -  Placeholder is not filled – Analysis
-  Language dependency
- [Write a letter](#)
- [Write emails – Mobile application](#)
- [Write emails – Desktop application](#)
- [Write emails with AI](#)
- Specific document templates
  -  Documents with QR-Code
  -  Contact Management
    -  Content template for Activities
    -  Signature for AI-generated emails
  -  Marketing
    -  Download
  -  Service, External Work
    -  Signature
    -  Response mails
    -  Emails
    -  Service operation report
  -  Digital Signature
  -  Collaboration
    -  Project description
    -  Project ticket description
    -  Comment description



**Write a letter**

# Writing a letter: select template



# Writing a letter: download letter

The screenshot displays a document editor window titled "Document". In the top toolbar, a button labeled "Download letter and create Activity" is highlighted with a red rectangle. The editor's interface includes a menu bar (File, Home, Insert, Layout, References, Review, Format, Form, View, Help) and a ribbon with various formatting options. The document content is a letter template with the following text:

**Subject:** Thank you for..

Dear Mr. Smith,

I am writing to you about your recent inquiry...

...

I look forward to hearing from you and appreciate your attention to this matter.

Geisenhausen, 09/29/2026

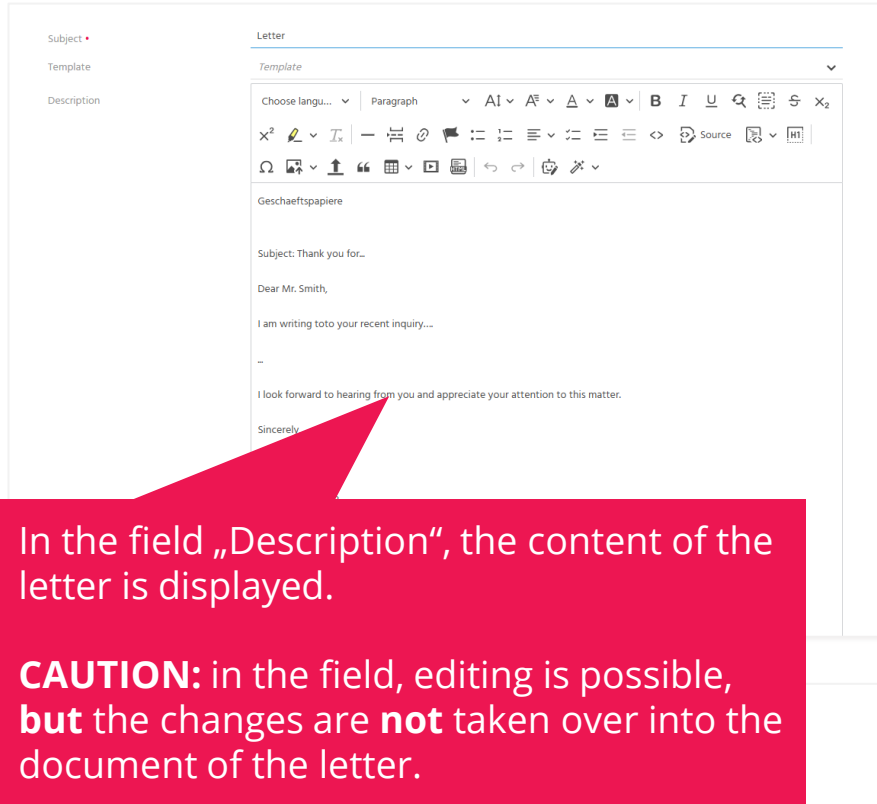
Page 1 of 1 | 77 words, 492 characters | German (Germany) |

The right-hand sidebar shows the "Style" and "Character" formatting panels. The "Style" panel includes "Paragraph Style" (Default Paragraph Style) and "Character" (Font Name: Calibri, Font Size: 11 pt). The "Character" panel includes options for Bold (B), Italic (I), Underline (U), Strikethrough (ABC), and other formatting tools.

The letter is opened and edited in the document editor.

The "Download Letter and Create Activity" action opens an activity and downloads the finished letter in PDF format.

# Writing a letter: edit Activity



The screenshot shows a form titled 'Letter' with a 'Description' field. The field contains the following text:

Subject: Thank you for...

Dear Mr. Smith,

I am writing to you your recent inquiry...

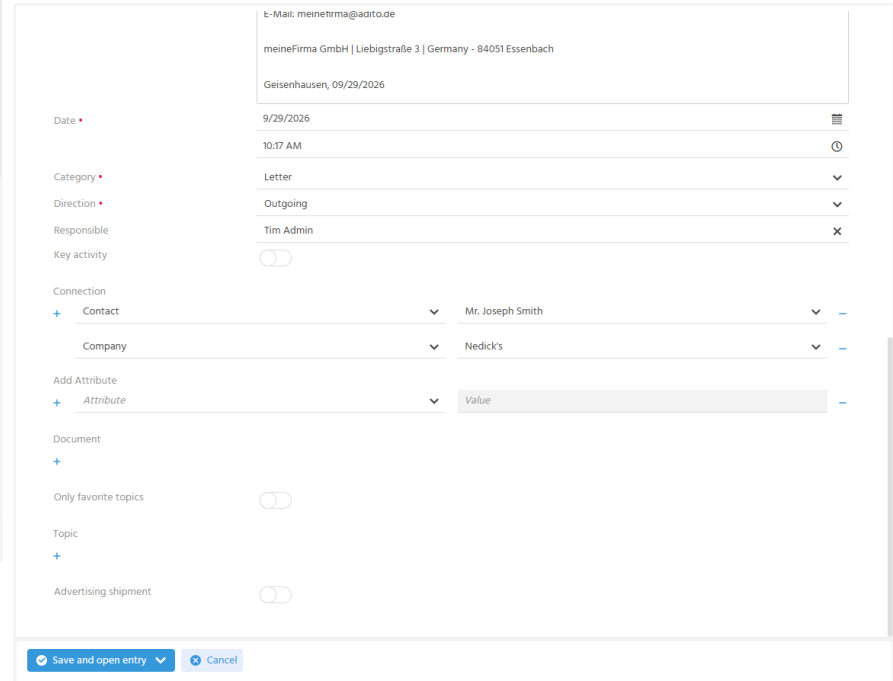
...

I look forward to hearing from you and appreciate your attention to this matter.

Sincerely,

A red callout box points to the 'Description' field with the text: 'In the field „Description“, the content of the letter is displayed.'

**CAUTION:** in the field, editing is possible, **but** the changes are **not** taken over into the document of the letter.



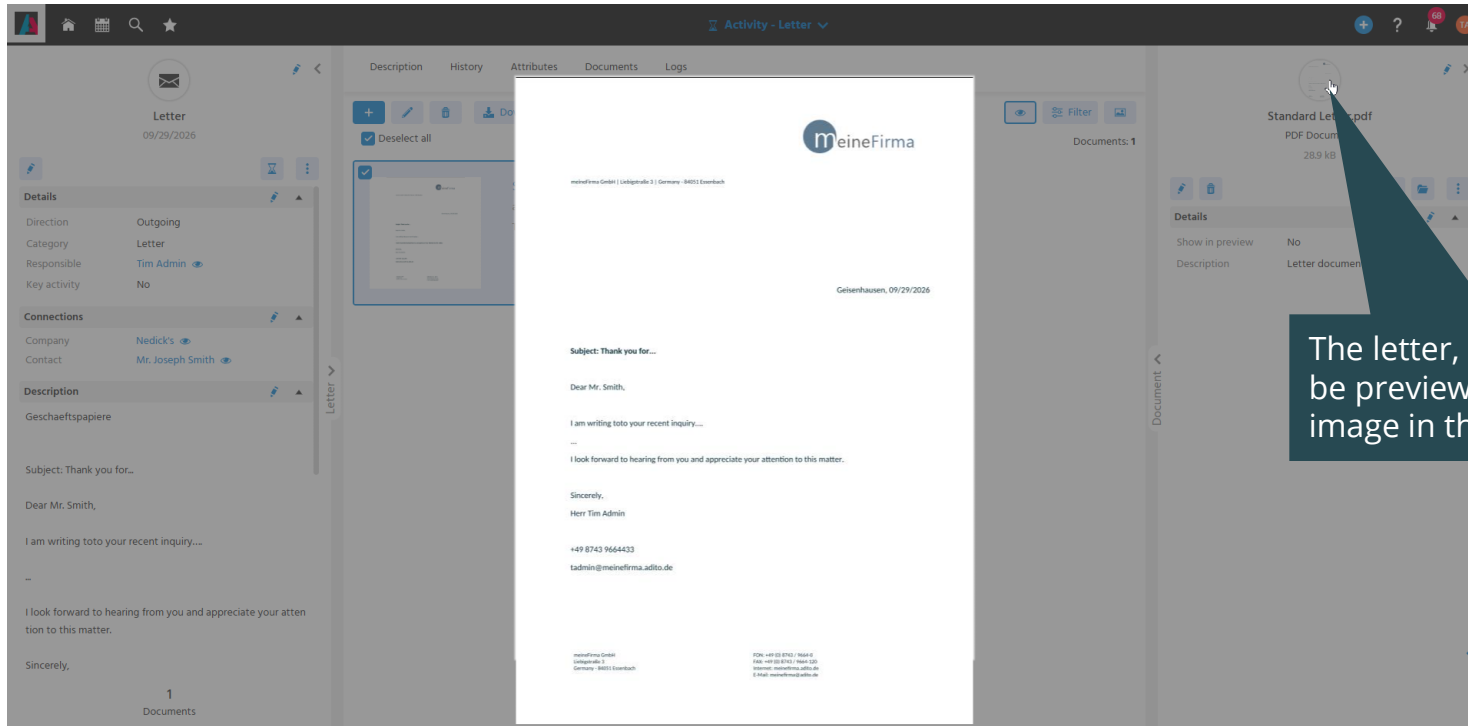
The screenshot shows the 'Letter' form in the 'Metadata' section. The form contains the following fields:

- E-Mail:** meinefirma@adito.de
- Address:** meineFirma GmbH | Liebigstraße 3 | Germany - 84051 Essenbach
- Date:** 9/29/2026
- Time:** 10:17 AM
- Category:** Letter
- Direction:** Outgoing
- Responsible:** Tim Admin
- Key activity:** ☐
- Connection:**
  - Contact:** Mr. Joseph Smith
  - Company:** Nedick's
- Add Attribute:**
  - Attribute:** Value
- Document:** ☐
- Only favorite topics:** ☐
- Topic:** ☐
- Advertising shipment:** ☐

Buttons at the bottom:

# Writing a letter

After saving, the MainView of the Activity opens with the letter in the Tab „Documents“.





**Write emails**

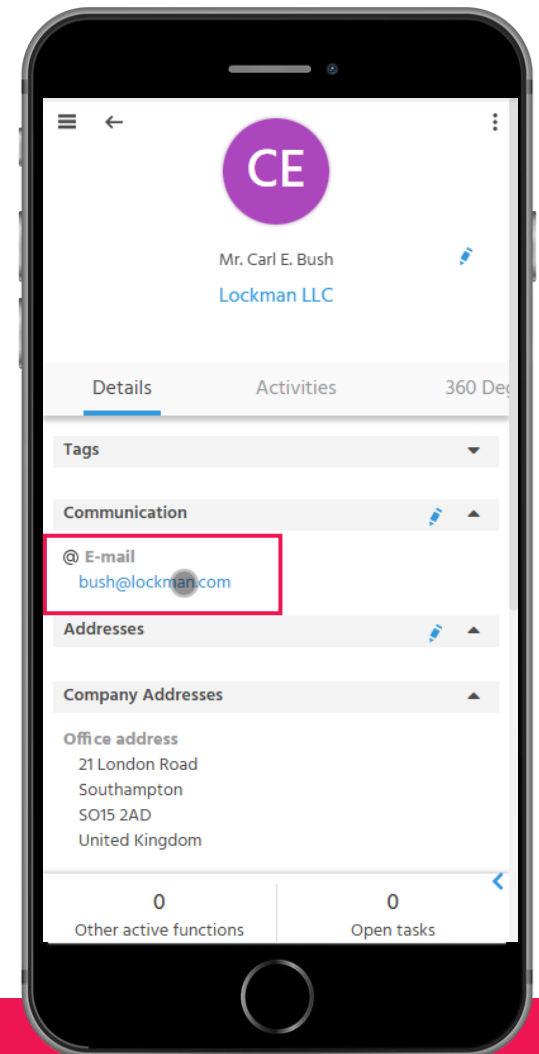
—

**Mobile  
application**

# Write emails

## Mobile application

If you are using the ADITO client on your mobile device, clicking on the email address (or the “Write email” action) will open the email app on your device using the “mailto function.”





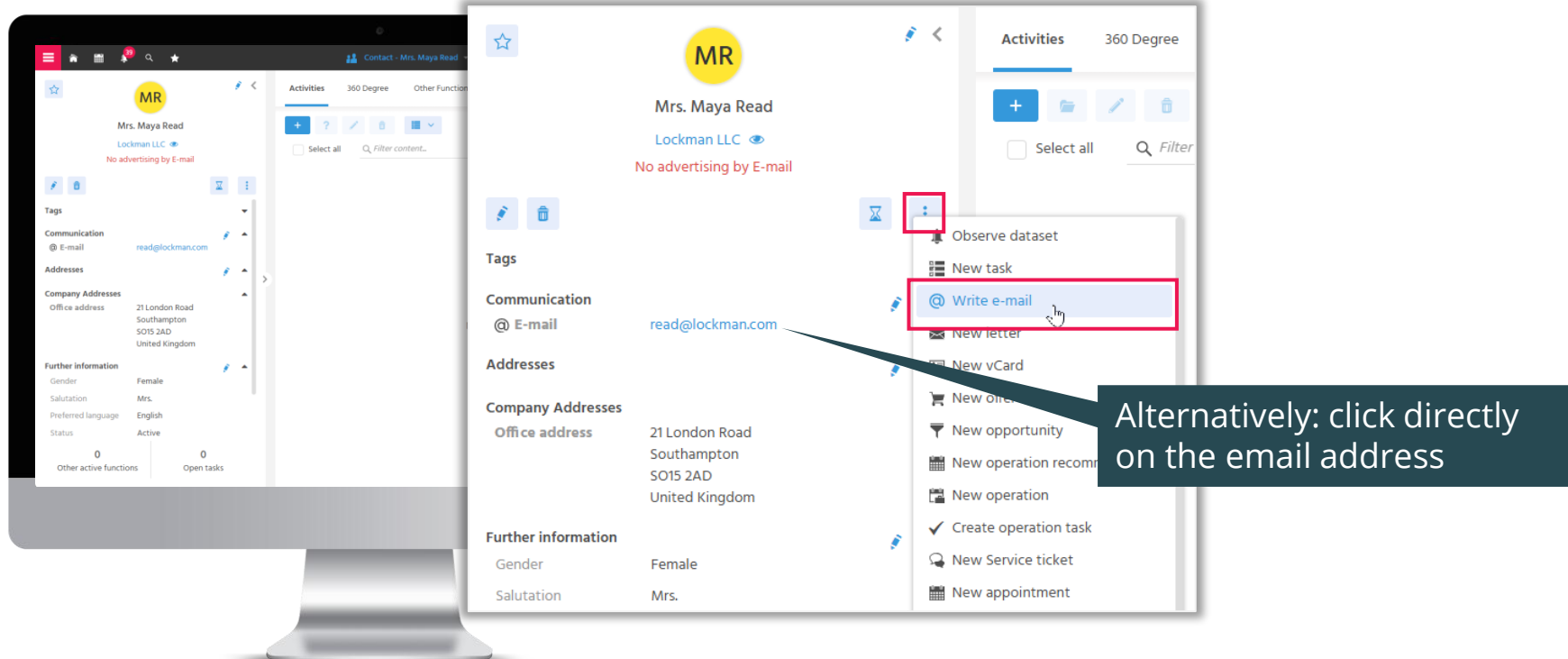
**Write emails**

—

**Desktop  
application**

# Write emails

## Desktop application



The screenshot displays the ADITO desktop application interface. The main contact profile for Mrs. Maya Read (Lockman LLC) is visible. The email address 'read@lockman.com' is highlighted, and a context menu is open over it. The 'Write e-mail' option is selected and highlighted with a red box. A callout box points to this option with the text: 'Alternatively: click directly on the email address'.

Activities 360 Degree

MR

Mrs. Maya Read

Lockman LLC

No advertising by E-mail

Tags

Communication @ E-mail read@lockman.com

Addresses

Company Addresses

Office address 21 London Road Southampton SO15 2AD United Kingdom

Further information

Gender Female

Salutation Mrs.

Preferred language English

Status Active

0 Other active functions 0 Open tasks

Observe dataset

New task

Write e-mail

New letter

New vCard

New operation

New opportunity

New operation recommendation

New operation

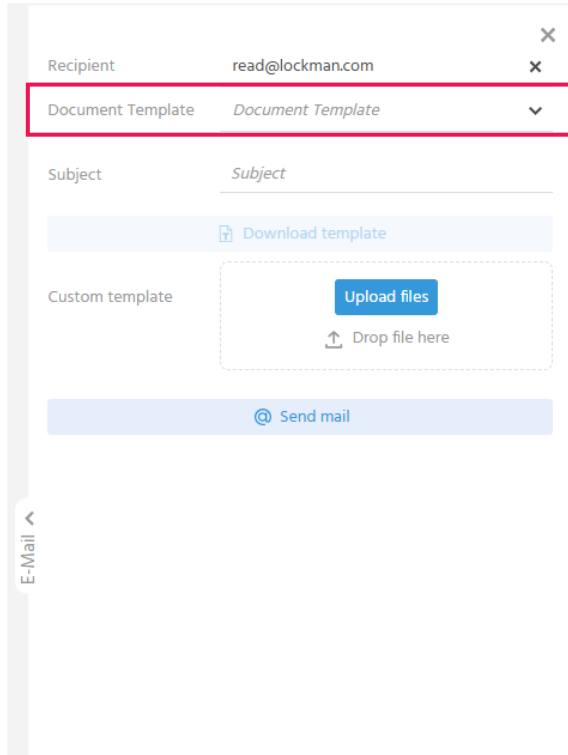
Create operation task

New Service ticket

New appointment

Alternatively: click directly on the email address

# Write emails: select template



Recipient: read@lockman.com

Document Template: Document Template

Subject: Subject

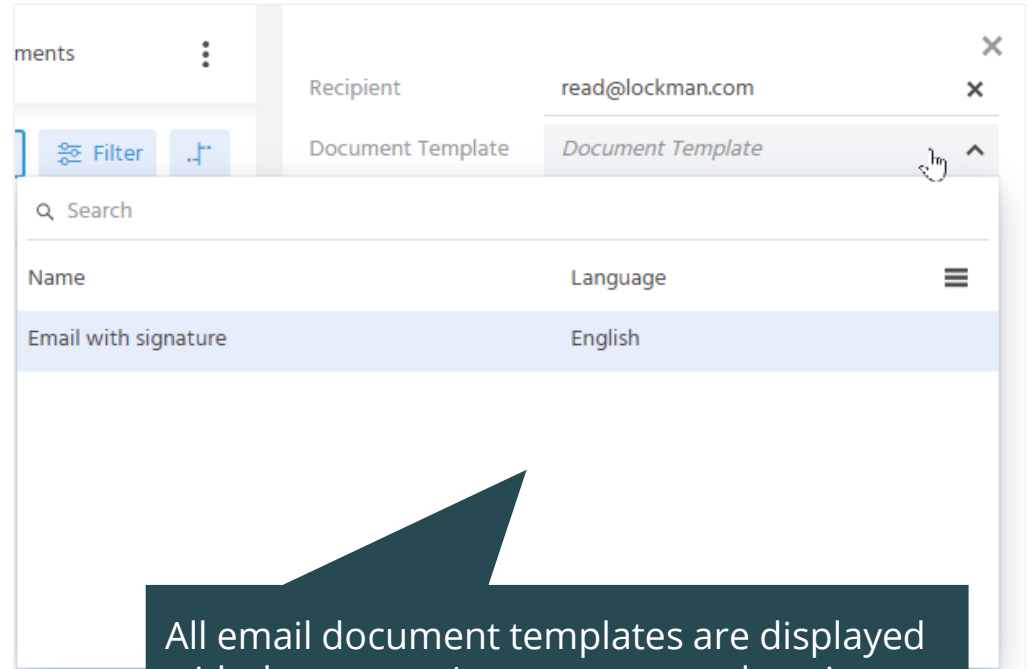
Download template

Custom template

Upload files

Drop file here

Send mail



Recipient: read@lockman.com

Document Template: Document Template

Filter

Search

| Name                 | Language |
|----------------------|----------|
| Email with signature | English  |

All email document templates are displayed with the contact/company usage location.

# Write emails: download/view template

Recipient \_\_\_\_\_

Document \_\_\_\_\_

Subject Subject

 Download template

Custom template  Upload files

 Drop file here

 Send mail

E-Mail <

Download the template with placeholders and open them in the download folder.

{@letterSalutation@},

Kind regards,  
{@senderName@}

{@senderOrgname@}  
{@senderAddress@}  
{@senderZipCity@}

Fon: {@senderPhone@}  
E-Mail: {@senderEmail@}  
Internet: [meinefirma.adito.de](https://meinefirma.adito.de)



meineFirma GmbH | CEO: Susanne Lustig, Tim Admin  
Registergericht AG Landshut HRB 2403 | Ust-IdNr. DE 1289465

```
{@letterSalutation@},  
<br><br>  
Kind regards,<br>  
{@senderName@}<br>  
<br><br>  
<b>{@senderOrgname@}</b><br>  
{@senderAddress@}<br>  
{@senderZipCity@}  
<br><br>  
Fon: {@senderPhone@}<br>  
E-Mail: {@senderEmail@}<br>  
Internet: <a href="https://meinefirma.adito.de">  
<br><br>  
<p><a href="https://meinefirma.adito.de/">  
<"data:image/png;base64,iVBORw0KGgoAAAANSUHu  
4OnhtcG1ldGEgeG1sbmM6eD0iYWRvYmU6bnM6bWV0Y  
j4gPHJkZjpeZXNjcmlwdGlvbiByZGY6YWJvdXQ9IiI  
jZVJlZiMiIHhtcDpDcmVhdG9yVG9vbD0iQWRvYmUgU  
UmFiA8eG1wTU06RGVyaXZlZEZyb20gc3RSZWY6aW5  
GPiA8L3g6eG1wbWV0YT4gPD94cGFja2V0IGVuZD0i  
+QSiAREkUAFAMiIPGAKBIQRSIBURRkPerlycY+/NR  
Owlmycz7mAbinyQ5xXgJjCOX38s2MzxCa0sf5iQTEf  
YdNdfXnbWt5vpJmbj8Qew+SGHALT768LxxhA88/q2Y  
ecvHLVbWxffb0S78Yft8thiAeha2cQu4LsBQgyDX01j  
GUo3oTLMSJubVvRY0QzjCxn5KM9J47h/swilzvK71N  
aE3gAMqI9Jb9mGMZ+j+toN5Muag/KgGpPFqXPQ0a8N  
fwYd8l+K0f5JMI6gyUAUjWGbost5SG9PgyDCBCePh  
2spFXssYEIldipRoY1g1R9k2uj2/1j3h5J0WV3cBQm  
AD+CfjtNm7H5QAAAAABJRU5ErkJggg==" /> </a><b  
<br />  
<span style="font-family:Calibri">meineFirm  
<span style="font-family:Calibri">Register
```

# Write emails: edit and upload template

{@letterSalutation@},  
Kind regards,  
{@senderName@}

{@senderOrgname@}  
{@senderAddress@}  
{@senderZipCity@}

Fon: {@senderPhone@}  
E-Mail: {@senderEmail@}  
Internet: [meinefirma.adito.de](http://meinefirma.adito.de)

 meineFirma

meineFirma GmbH | CEO: Susanne Lustig, Tim Admin  
Registergericht AG Landshut HRB 2403 | Ust-IdNr. DE 1289465

Edit text and placeholders  
and save the changes locally.

Upload the edited template.

Alternatively:  
Upload a document, which has  
not been selected as template,  
downloaded and edited.  
Consider the format and the  
possible placeholders in the  
document.

Recipient read@lockman.com

Document Template Email with signature

Subject Subject

Download template

Custom template

Upload files

Drop file here

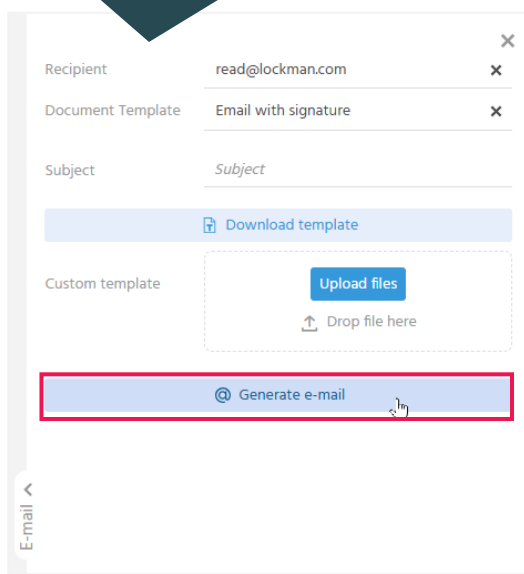
Send mail

# Download and send emails

1) Click on the Action „**Generate e-mail**“ to open the e-mail with the filled in placeholders in the overlay.

2) Add content, attachments, or the signature if necessary.

3) Click on the “Download generated e-mail” action to open the e-mail locally in your mail client, edit it again if necessary, and send it.



Recipient: read@lockman.com

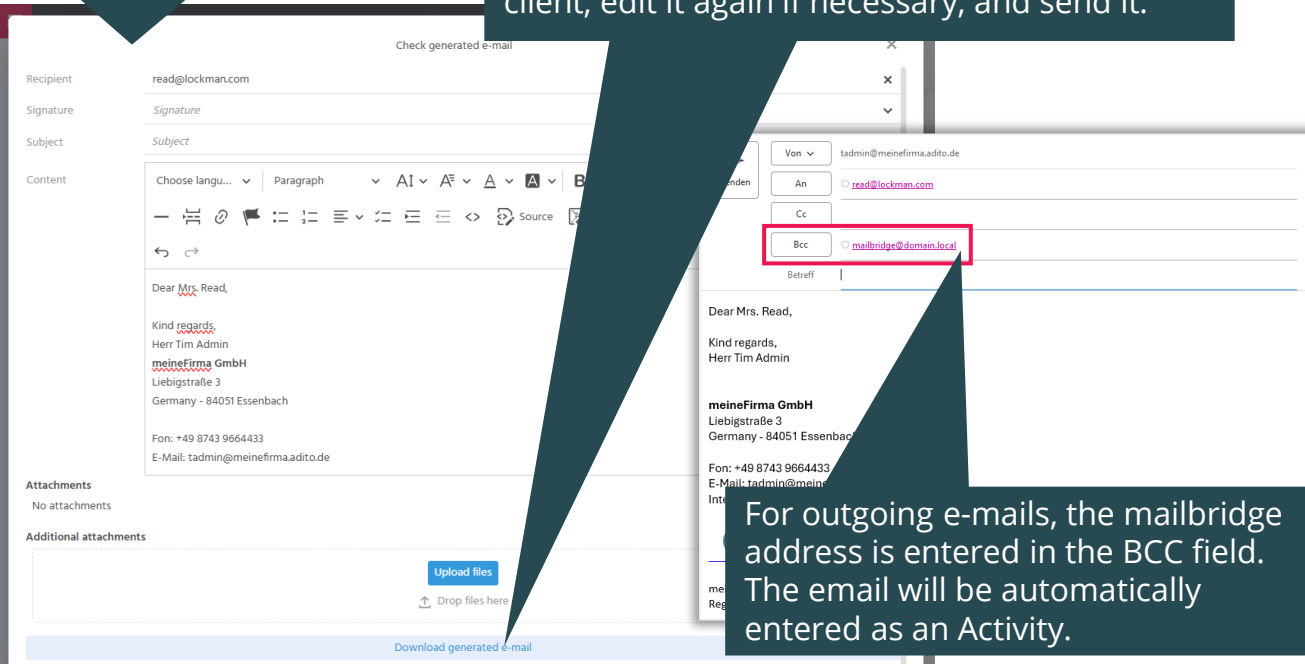
Document Template: Email with signature

Subject: Subject

[Download template](#)

Custom template: [Upload files](#) or [Drop file here](#)

[Generate e-mail](#)



Check generated e-mail

Recipient: read@lockman.com

Signature: Signature

Subject: Subject

Content:

Choose language: Paragraph

Dear Mrs. Read,

Kind regards,  
Herr Tim Admin  
meineFirma GmbH  
Liebigstraße 3  
Germany - 84051 Essenbach

Fon: +49 8743 9664433  
E-Mail: tadmin@meinefirma.adito.de

Attachments: No attachments

Additional attachments: [Upload files](#) or [Drop files here](#)

[Download generated e-mail](#)

Mail client preview:

Von: tadmin@meinefirma.adito.de

An: read@lockman.com

Cc:

Bcc: mailbridge@domain.local

Betreff:

Dear Mrs. Read,

Kind regards,  
Herr Tim Admin

meineFirma GmbH  
Liebigstraße 3  
Germany - 84051 Essenbach

Fon: +49 8743 9664433  
E-Mail: tadmin@meinefirma.adito.de

For outgoing e-mails, the mailbridge address is entered in the BCC field. The email will be automatically entered as an Activity.



**Write emails  
with AI**

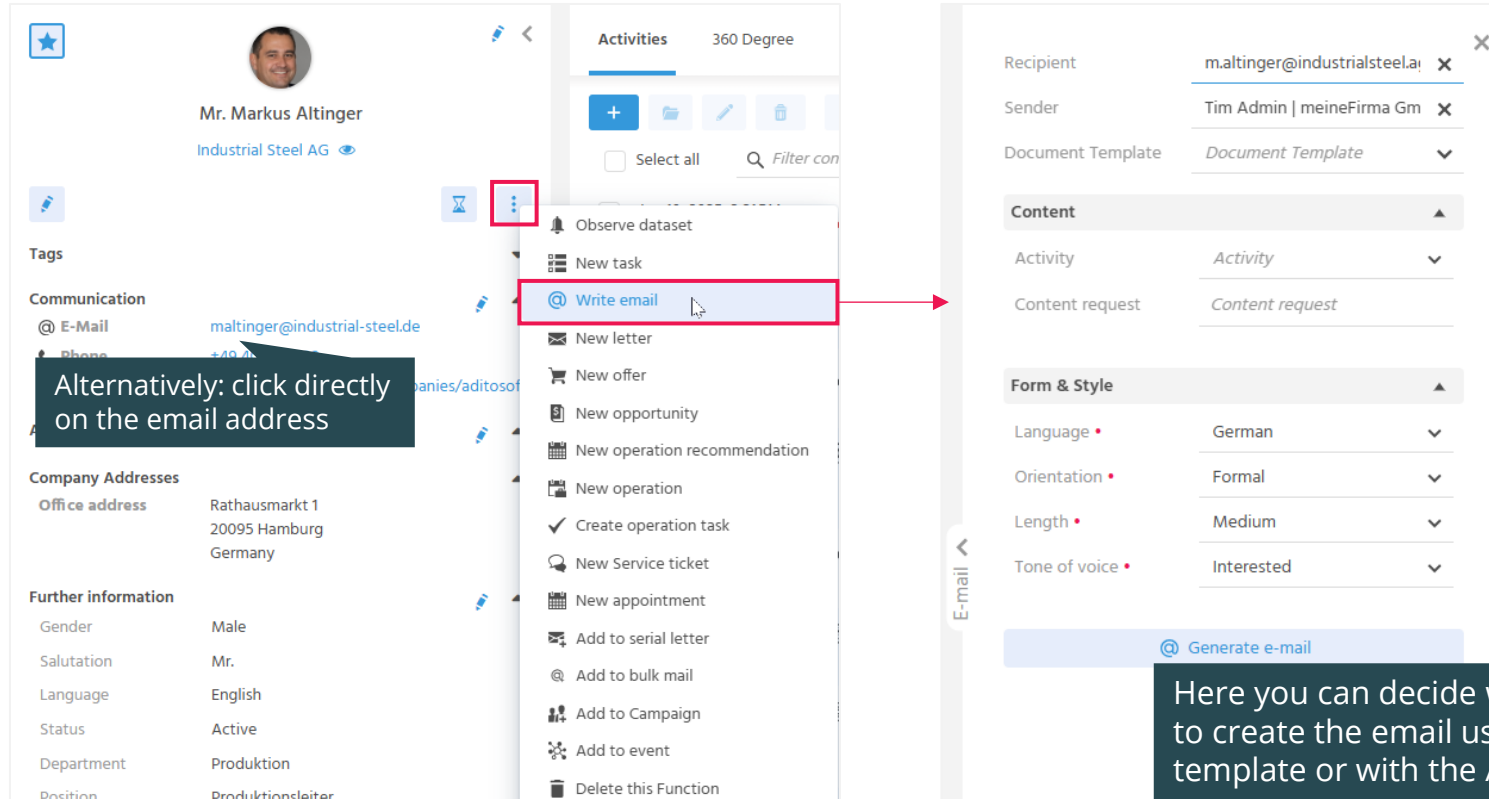
# Write emails with AI

## Requirement



In order to use the AI functions for generating email texts, **the AI modules must be used.**  
If the AI modules are not used, emails can be created as described [here](#).

# Write emails with AI



The screenshot illustrates the process of writing an email in the ADITO system. On the left, a contact card for Mr. Markus Altinger is shown. A red box highlights the 'Write email' option in the 'Activities' menu, which is also highlighted by a red arrow pointing to the email composition screen on the right. The email composition screen shows fields for Recipient, Sender, Document Template, Content, and Form & Style. A red box highlights the 'Generate e-mail' button at the bottom of the composition screen.

Mr. Markus Altinger  
Industrial Steel AG

Activities 360 Degree

Write email

Recipient: m.altinger@industrialsteel.de

Sender: Tim Admin | meineFirma Gm

Document Template: Document Template

Content

Activity: Activity

Content request: Content request

Form & Style

Language: German

Orientation: Formal

Length: Medium

Tone of voice: Interested

Generate e-mail

Alternatively: click directly on the email address

Here you can decide whether you want to create the email using a document template or with the AI functions.

# Write emails with AI

## Create email with document template

Recipient m.altinger@industrialsteel.a ✕

Sender Tim Admin | meineFirma Gm ✕

**Document Template** Document Template ▼

**Content** ▲

Activity Activity ▼

Content request Content request

**Form & Style** ▲

Language • German ▼

Orientation • Formal ▼

Length • Medium ▼

Tone of voice • Interested ▼

[Generate e-mail](#)

Recipient maltinger@industrial-steel.de ✕

**Document Template** E-Mail\_mit\_Signatur ✕

[Generate mail](#)

Once you have selected a document template, the AI-specific fields are hidden.

Check generated e-mail

Recipient maltinger@industrial-steel.de

Signature Signature

Subject Mail for

Content

Choose langu... ▼ Paragraph ▼ AI ▼ A ▼ A ▼ A ▼ B I U Q X<sub>2</sub> X<sub>1</sub> ▼

[The content is taken from the document template.](#)

Leibgottstraße 3  
Germany - 84091 Essenbach

Attachments  
No attachments

Additional attachments

[Upload files](#)

[Download generated](#)

# Write emails with AI

## Create emails with AI features

E-mail <

|                           |                              |   |
|---------------------------|------------------------------|---|
| Recipient                 | m.altinger@industrialsteel.a | X |
| Sender                    | Tim Admin   meineFirma Gm    | X |
| Document Template         | Document Template            | ▼ |
| <b>Content</b> ▲          |                              |   |
| Activity                  | Activity                     | ▼ |
| Content request           | Content request              |   |
| <b>Form &amp; Style</b> ▲ |                              |   |
| Language •                | German                       | ▼ |
| Orientation •             | Formal                       | ▼ |
| Length •                  | Medium                       | ▼ |
| Tone of voice •           | Interested                   | ▼ |

@ Generate e-mail

E-mail <

|                           |                                   |   |
|---------------------------|-----------------------------------|---|
| Recipient                 | m.altinger@industrialsteel.a      | X |
| Sender                    | Tim Admin   meineFirma Gm         | X |
| Document Template         | Document Template                 | ▼ |
| <b>Content</b> ▲          |                                   |   |
| Activity                  | Activity                          | ▼ |
| Content request           | Invitation to the General Meeting |   |
| <b>Form &amp; Style</b> ▲ |                                   |   |
| Language •                | German                            | ▼ |
| Orientation •             | Formal                            | ▼ |
| Length •                  | Medium                            | ▼ |
| Tone of voice •           | Interested                        | ▼ |

@ Generate e-mail

Specify a prompt to generate email text from it.

Form & style can be selected accordingly to generate the text in the desired language and length, for example.

# Write emails with AI



Create an email with AI features – with reference to a previous activity

E-mail <

|                           |                              |   |
|---------------------------|------------------------------|---|
| Recipient                 | m.altinger@industrialsteel.a | X |
| Sender                    | Tim Admin   meineFirma Gm    | X |
| Document Template         | Document Template            | ▼ |
| <b>Content</b> ▲          |                              |   |
| Activity                  | Activity                     | ▼ |
| Content request           | Content request              |   |
| <b>Form &amp; Style</b> ▲ |                              |   |
| Language •                | German                       | ▼ |
| Orientation •             | Formal                       | ▼ |
| Length •                  | Medium                       | ▼ |
| Tone of voice •           | Interested                   | ▼ |

📧 Generate e-mail

E-mail <

|                           |                                   |   |
|---------------------------|-----------------------------------|---|
| Recipient                 | m.altinger@industrialsteel.a      | X |
| Sender                    | Tim Admin   meineFirma Gm         | X |
| Document Template         | Document Template                 | ▼ |
| <b>Content</b> ▲          |                                   |   |
| Activity                  | Activity                          | ▼ |
| Content request           | Invitation to the General Meeting |   |
| <b>Form &amp; Style</b> ▲ |                                   |   |
| Language •                | German                            | ▼ |
| Orientation •             | Formal                            | ▼ |
| Length •                  | Medium                            | ▼ |
| Tone of voice •           | Interested                        | ▼ |

📧 Generate e-mail

To refer to an activity associated with the contact or company, it can be selected here.

The email text is then generated from the contents of the selected activity and the specified prompt.



# Write emails with AI

## Generate/customize email

Regardless of whether the email was created using a document template or a prompt, this view opens after clicking on "Create email."

Here you will see either the information from the document template or the AI-generated information. You can also edit the information later.

The subject line is

- Taken from the document template (if maintained)
- Generated by AI
- Entered or added manually

The content is

- Taken from the document template
- Generated by AI
- Entered or added manually

Check generated e-mail

Recipient: maltinger@industrial-steel.de

Signature: *Signature*

Subject: Invitation to the Annual General Meeting

Content:

Choose langu... Paragraph AI

Dear Mr. Altinger,  
I hope this message finds you well. We are pleased to invite you to our Annual General Meeting and engage with our valued stakeholders.  
Your participation is highly valued, as your insights and contributions are essential for our success.  
Please confirm your attendance at your earliest convenience by replying to this email or contacting our administrative office. We look forward to your presence and the opportunity to collaborate further. Should you have any questions or hesitate to reach out.

Attachments: No attachments

Additional attachments:

Upload files

Drop files here

The recipient's email address is transferred.

If the email does not yet contain a signature, one can be selected here. The signature(s) are maintained in the document templates of the type "Signature."

# Write emails with AI

## Attachments

Check generated e-mail

Recipient

maltinger@industrial-steel.de

Signature

Signature

Subject

Invitation to the Annual General Meeting

Content

Choose langu... Paragraph A1 A A B I U Q S X2 X2 Ix

Dear Mr. Altinger,  
I hope this message finds you well. We are pleased to invite you to the Annual General Meeting of Industrial Steel AG, which will take place on [insert date] at [insert venue]. This event is an excellent opportunity to review our company's achievements, discuss future strategies, and engage with our valued stakeholders.  
Your participation is highly valued, as your insights and contributions are instrumental to our continued success. The meeting will cover key financial updates, strategic initiatives, and important decisions that will shape the direction of our company in the coming year.  
Please confirm your attendance at your earliest convenience by replying to this email or contacting our administrative office. We look forward to your presence and the opportunity to collaborate further. Should you have any questions or require additional information, do not hesitate to reach out.

Attachments

No attachments

Additional attachments

Upload files

Drop files here

If the document template already contained attachments, these are listed here.

If an offer is sent by email, the offer will also be listed here as a PDF file.

Additional attachments can be uploaded individually per email. It is possible to upload multiple files in this upload field.

[illegible]

When the email is opened in the respective mail client, it contains:

- ☒ From: Sender address
- ☒ To: Recipient address
- ☒ Bcc: Mailbridge address
- ☒ Subject (if specified)
- ☒ All attachments
- ☒ Content
- ☒ Signature



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