



Sales

ADITO Software GmbH

As of version 2026.10.0 | October 2026





Screenshots

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



Agenda (1/3)

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Agenda (2/3)

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

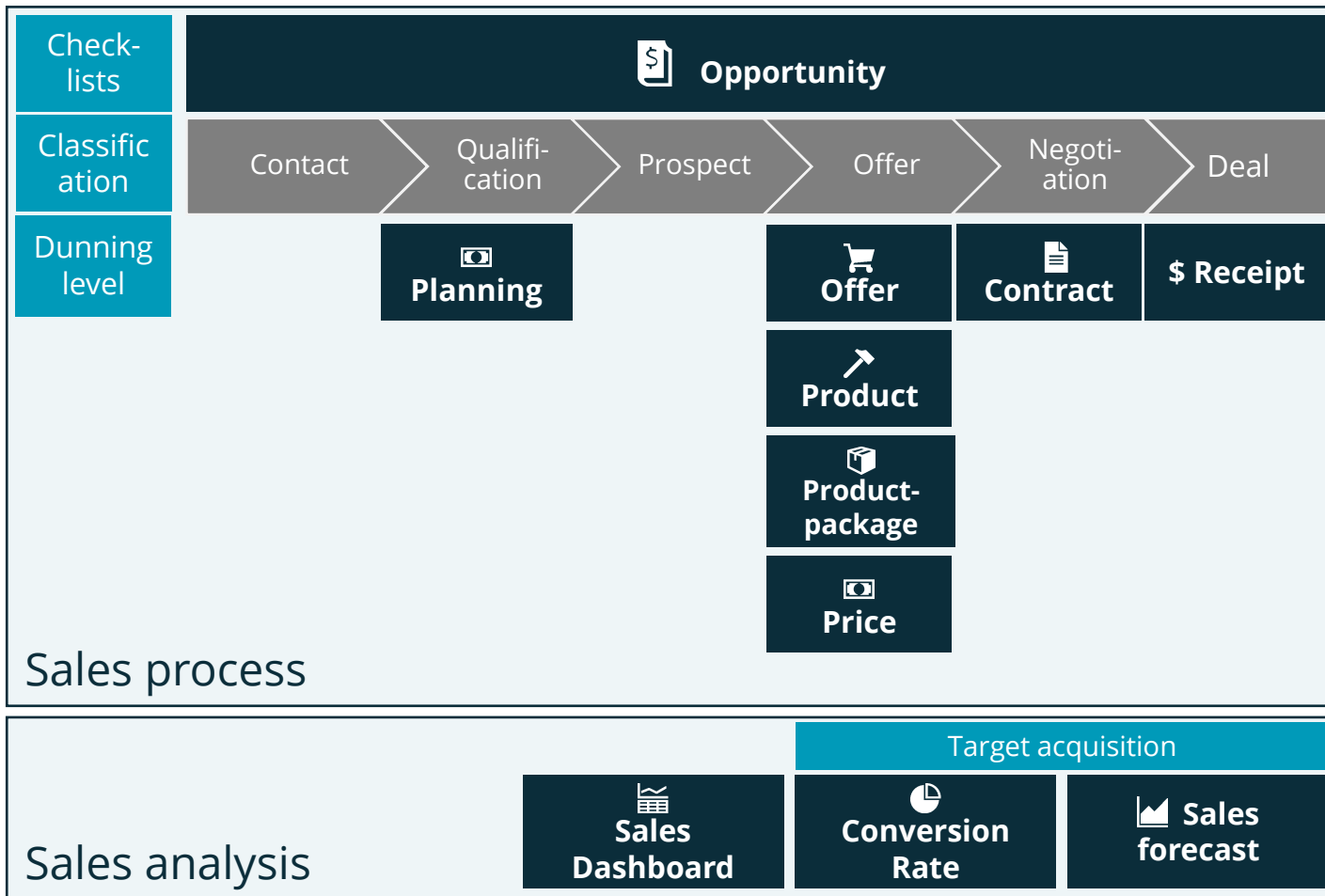
-  Offer
 -  Create offer
 -  Evaluation in the filter view
 -  Multiedit table vs. Tree table
 -  Insert offer item – Multiedit
 -  Adjust offer item - Multiedit
 -  Insert offer item – Tree table
 -  Insert offer item – Tab „Products“
 -  Insert parts list items – Multiedit
 -  Insert parts list items – Tree table
 -  Product configuration in the offer
 -  Insert product as sub-item – Multiedit
 -  Insert product as sub-item – Tree table
 -  Optional parent item
 -  Insert product package
 -  Calculation of prices in the offer
 -  Discounts
 -  Item without article
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 -  Other tabs in the offer
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 - Create receipt - document types “Invoice”, “Credit”, “Cancellation”
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 - [ZUGFeRD](#)
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 - [Field differences receipt type “Credit”](#)
 - [Download XRechnung \(XML\)](#)
 - [Open Invoice as PDF inclusive XML-Datei](#)
 - [Difference xml „XRechnung“ und xml „ZUGFeRD“](#)

Agenda (3/3)

- Beleg
 - [Send receipt via e-mail](#)
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 - [Set, increase, decrease dunning levels manually – Overview](#)
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- [Sales analysis](#)
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 - [Create turnover planning for companies](#)
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 - [Planning – Change status via serial action](#)
 - [Planning – Change responsible person via serial action](#)
 - [Tab „Planning“ in the company](#)
 - [Forecast in the Opportunity](#)
 - [Context „Sales forecast“](#)
 - [Excursus into the administration - Enter turnover target for a financial year](#)

Overview sales



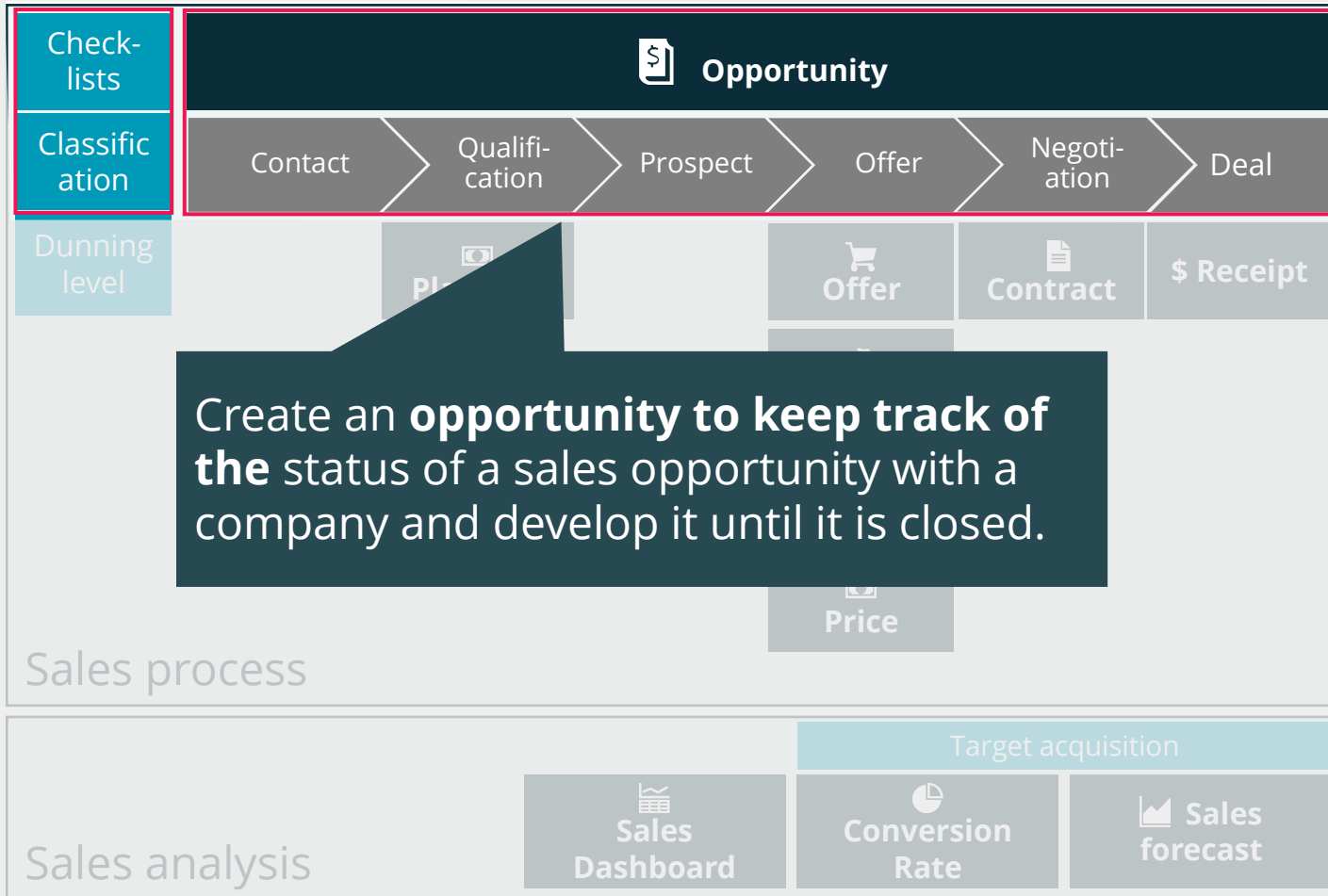


-  To be created in advance by the administrator
-  In use "daily" by end users

Sales process



Opportunity



- To be created in advance by the administrator
- In use "daily" by end users

Opportunity

Sales phases

Assignment of responsibilities:



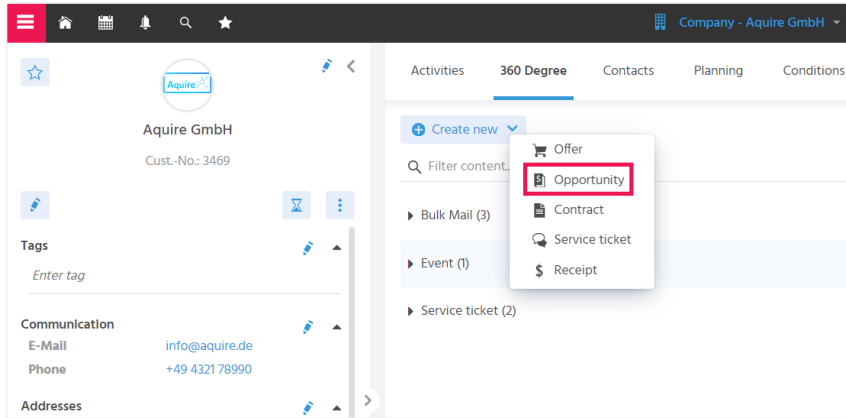
Opportunity

What information/processes are mapped in an opportunity?

- The opportunity is divided into **phases** and processed with the help of linked **checklists**.
- By **adding** contacts in the **Buying & Selling Center**, you can keep track of the people involved.
- The **classification** allows you to evaluate the opportunity.
- Enter **forecasts** in the opportunity that show the potential turnover generated by the opportunity.
- Use **activities** to document coordination, e-mails sent, telephone calls, etc. In addition, linked campaigns, offers, events, etc. can be viewed via **touchpoints**.
- Place files in a SharePoint folder and **link the SharePoint folder** in Opportunity.
- An evaluation shows you **how long** the opportunity was **in which phase**.
- You can record your **competitors to** document who is also interested in this project and why they lost or won the contract.
- **Operations** (on-site visits) linked to the opportunity can be viewed in the Operations/tasks tab.

Create opportunity

Start: Company



- Open company
- Open tab "360 Degree"
- Button "Create new" => Opportunity
- Automatically links the company to the opportunity
- All opportunities of a company are listed in the "360 Degree" view

Create opportunity



Start: Global bar

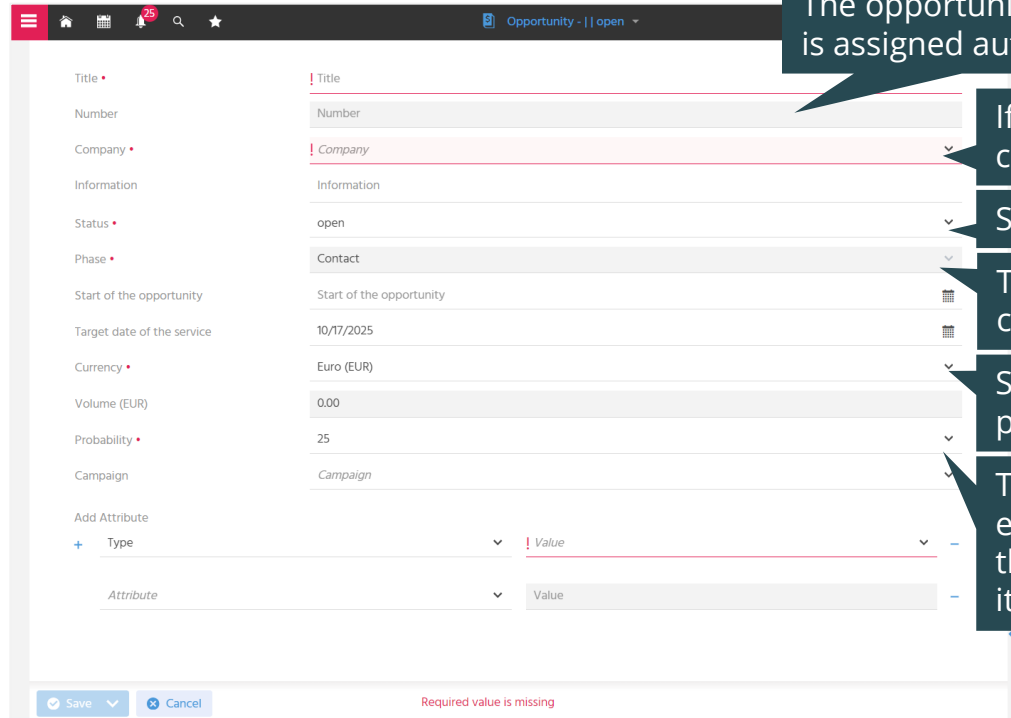
The screenshot displays the ADITO application interface. The top navigation bar includes a home icon, a calendar icon, a notification bell, a search icon, and a star icon. The main content area is divided into three panels: 'Import Mails' (with an 'Upload files' button and a 'No data present' message), 'Appointments/Tasks' (showing 10 overdue tasks, 8 new tasks, and 3 imminent appointments), and 'My Tasks' (a list of tasks with status and subject columns). A 'Quick Entry' menu is open on the right, listing various entry types: Contact, Company, Receipt, Offer, Activity, Knowledge, Opportunity (highlighted with a red box), Task, Service ticket, and Contact & Serviceticket. A dark blue callout box with white text points to the 'Opportunity' option, stating: 'Create a new opportunity via the quick entry.'

Picture	Name	Customercode	Language	Status	Classification	Email	Phone	Address
	Aquire GmbH	3469	English	Active	--	info@aquire.de	+49 4321 78990	Friedenstraße 12 b - DE 93053 Regensburg
	Bohrmarkt GmbH	9612	German	Active		info@bohrmarkt.de	+49 9246 552	Innstraße 11 - DE 93059 Regensburg



Create opportunity

Create new opportunity



The screenshot shows the 'Create new opportunity' form in the ADITO system. The form is titled 'Opportunity - || open'. The fields are as follows:

Field	Value
Title	!
Number	Number
Company	!
Information	Information
Status	open
Phase	Contact
Start of the opportunity	Start of the opportunity
Target date of the service	10/17/2025
Currency	Euro (EUR)
Volume (EUR)	0.00
Probability	25
Campaign	Campaign

At the bottom, there is a red error message: 'Required value is missing'. The form also includes a 'Save' button and a 'Cancel' button.

The opportunity number is assigned automatically.

If you create an opportunity from a company, the company is automatically preset.

Status is automatically "Open".

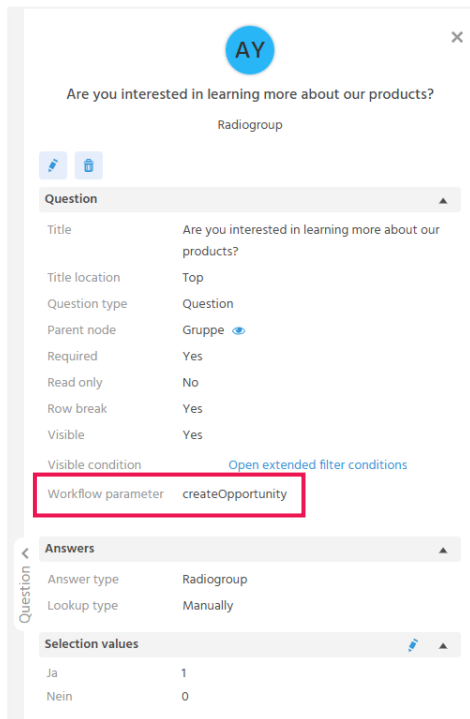
The first phase is automatically preset. The phase cannot be adjusted here.

Select here the currency in which the project is to be processed.

The administrator can assign a probability to each phase. Depending on the selected phase, the probability is filled automatically. However, it can be adjusted manually.

Create opportunity

Start: Questionnaire



AY

Are you interested in learning more about our products?

Radiogroup

Question

Title	Are you interested in learning more about our products?
Title location	Top
Question type	Question
Parent node	Gruppe
Required	Yes
Read only	No
Row break	Yes
Visible	Yes
Visible condition	Open extended filter conditions
Workflow parameter	createOpportunity

Answers

Answer type	Radiogroup
Lookup type	Manually

Selection values

Ja	1
Nein	0

You can have an opportunity created automatically based on an answer provided in a questionnaire.

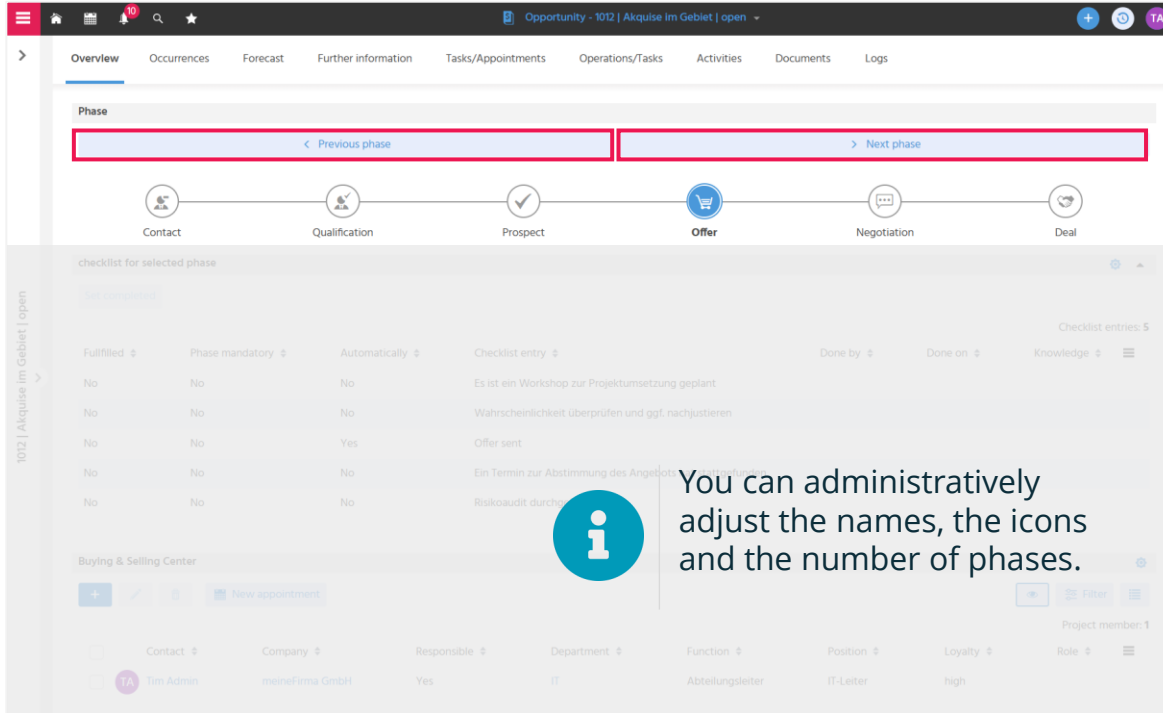
- The name of the questionnaire is used as the title for the opportunity.
- The contact recorded in the questionnaire is entered as the “Initiator” in the opportunity in the Buying & Selling Center.
- If an active supervisor with the “Field Service” role is associated with the company specified in the questionnaire, that supervisor is recorded in the opportunity in the Buying & Selling Center with the role “Internal: Sales.”.



Admin Note: To do this, use the “createOpportunity” workflow parameter. For more information on using workflow parameters in questionnaires, see the “Marketing: Questionnaires” documentation.

Opportunity

“Overview” tab: Phases



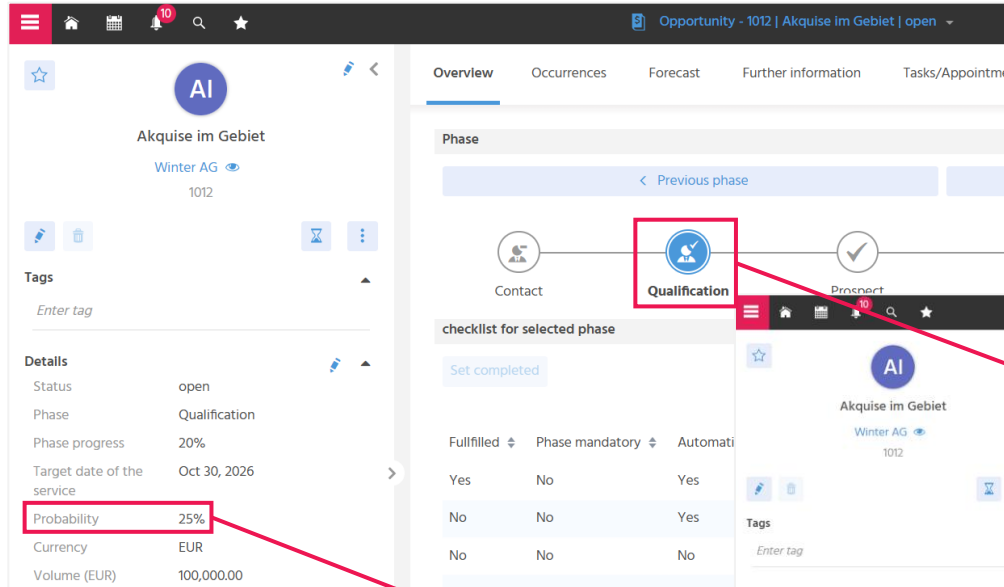
The screenshot shows the 'Overview' tab of the 'Opportunity' module. The 'Phases' section displays a sequence of phases: Contact, Qualification, Prospect, Offer, Negotiation, and Deal. The 'Offer' phase is currently selected and highlighted in blue. Above the phase sequence, there are buttons for 'Previous phase' and 'Next phase'. Below the phase sequence, there is a table with columns: Fulfilled, Phase mandatory, Automatically, Checklist entry, Done by, Done on, and Knowledge. The table contains several rows of data. A blue information icon is overlaid on the table.

You can administratively adjust the names, the icons and the number of phases.

- In the upper area, the **opportunity phases** are shown in a stepper component.
- The **current** phase is highlighted in **blue**.
- **You can switch between the phases with** the help of the buttons “Previous phase” and “Next phase”.

Opportunity

Probability: Automatic adjustment in case of phase change



Overview Occurrences Forecast Further information Tasks/Appointme

Phase

< Previous phase

Contact Qualification Prospect

checklist for selected phase

Set completed

Fullfilled	Phase mandatory	Automati
Yes	No	Yes
No	No	Yes
No	No	No

Details

Status open

Phase Qualification

Phase progress 20%

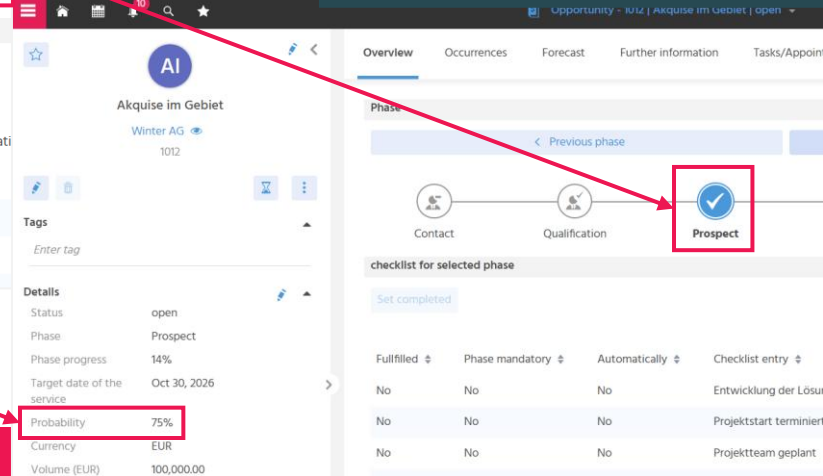
Target date of the service Oct 30, 2026

Probability 25%

Currency EUR

Volume (EUR) 100,000.00

The administrator can assign a probability to each phase. When changing phases, the probability is filled automatically depending on the selected phase. However, it can be adjusted manually. If a manually entered probability is already higher than the automatic probability of the upcoming phase, the probability is not overwritten.



Overview Occurrences Forecast Further information Tasks/Appoint

Phase

< Previous phase

Contact Qualification Prospect

checklist for selected phase

Set completed

Fullfilled	Phase mandatory	Automatically	Checklist entry
No	No	No	Entwicklung der Lösung
No	No	No	Projektstart terminiert
No	No	No	Projektteam geplant

Details

Status open

Phase Prospect

Phase progress 14%

Target date of the service Oct 30, 2026

Probability 75%

Currency EUR

Volume (EUR) 100,000.00

Opportunity



Tab “Overview”: Checklist for selected phase

1012 | Akquise im Gebiet | open

Overview Occurrences Forecast Further information Tasks/Appointments Operations/Tasks Activities Documents Logs

Phase

← Previous phase → Next phase

Contact Qualification **Prospect** Offer Negotiation Deal

checklist for selected phase

Set completed

Fulfilled	Phase mandatory	Automatically	Checklist entry	Done by	Done on	Knowledge
No	No	No	Entwicklung der Lösungsstrategie			Leitfaden Lösungsstrategie
No	No	No	Projektstart terminiert			
No	No	No	Projektteam geplant			
Yes	No	Yes	Further customer meetings			
No	No	Yes	Project team: "Internal distribution"			
No	No	No	Analyse des Wettbewerbs			

Checklist entries: 7

Buying & Selling Center

i You can administratively adjust the definition and configuration of the entries.

Project member: 1

Tom Adran meinefirma GmbH Yes IT Abteilungsleiter IT-Leiter high

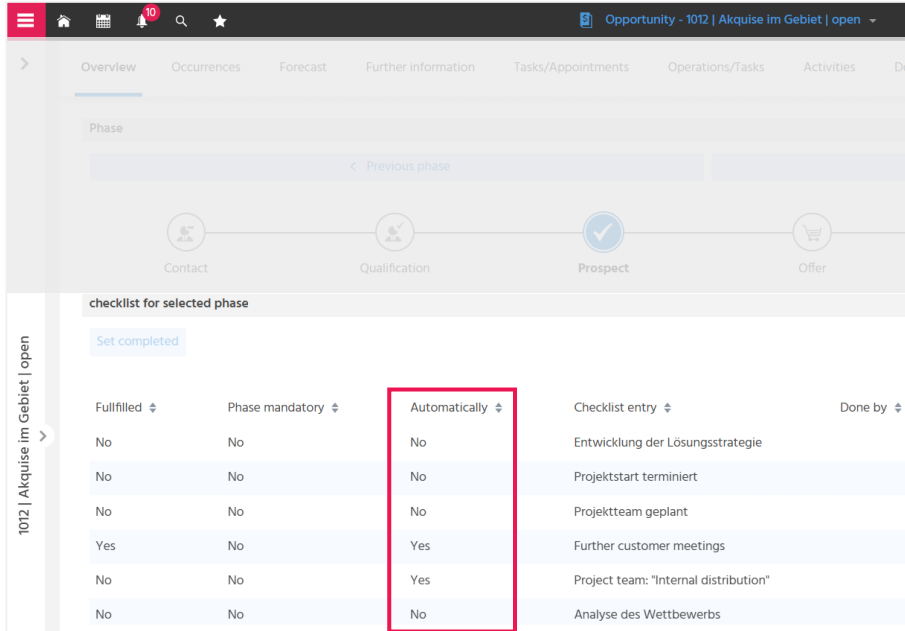
The **checklist entries** belonging to the respective phase are displayed below the stepper component. The checklist entries are **to-dos that you must/should complete in the respective phase.**

A **knowledge entry** can be stored with a checklist entry if the checklist is not meaningful enough on its own.



Opportunity

Tab “Overview”: Checklist for selected phase

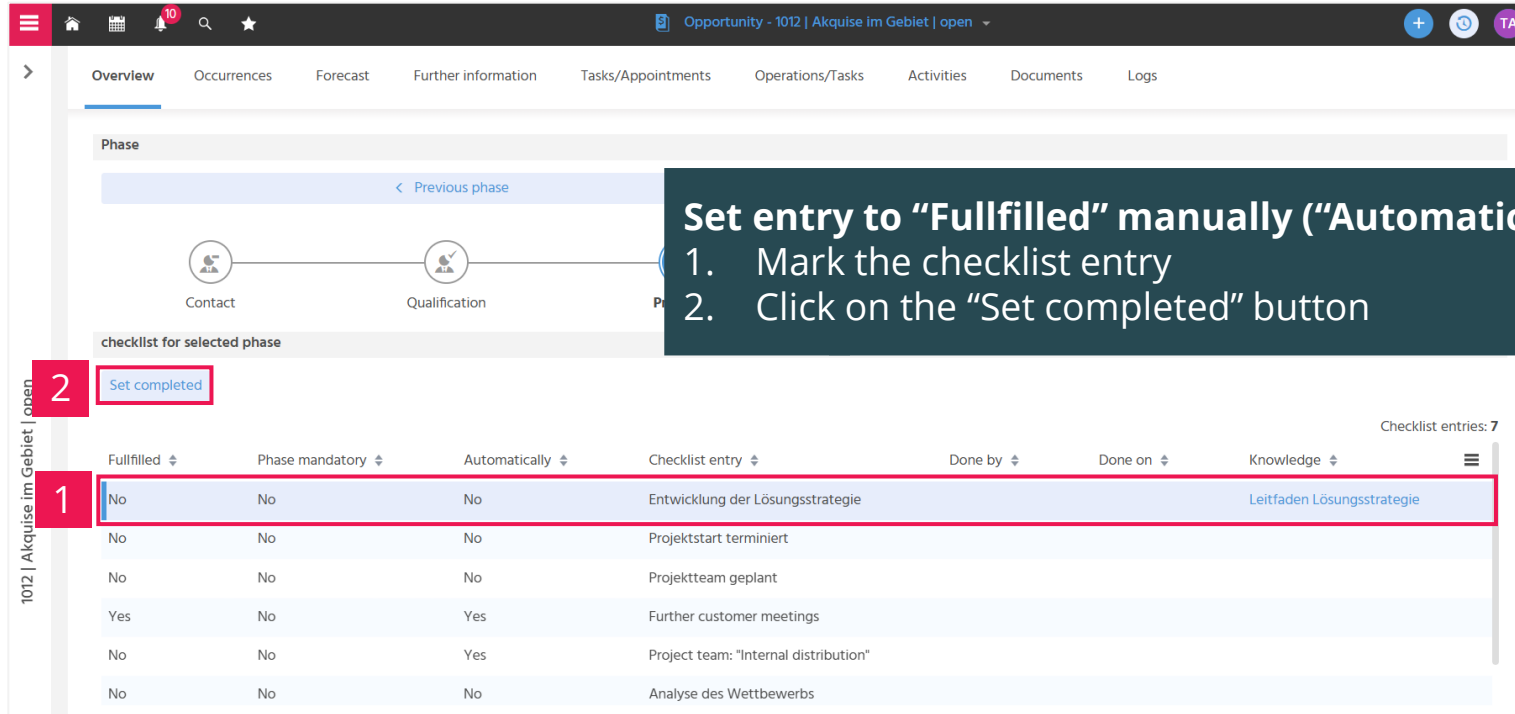


The screenshot shows the ADITO Opportunity Overview tab. At the top, there's a navigation bar with tabs: Overview, Occurrences, Forecast, Further information, Tasks/Appointments, Operations/Tasks, and Activities. Below this, a phase progression diagram shows four stages: Contact, Qualification, Prospect, and Offer. The Prospect stage is currently selected and highlighted with a blue checkmark. Below the diagram, a section titled "checklist for selected phase" contains a table. The table has five columns: "Fulfilled", "Phase mandatory", "Automatically", "Checklist entry", and "Done by". The "Automatically" column is highlighted with a red box. The table lists six checklist items, each with a "Fulfilled" status and a "Checklist entry" description.

Fulfilled	Phase mandatory	Automatically	Checklist entry	Done by
No	No	No	Entwicklung der Lösungsstrategie	
No	No	No	Projektstart terminiert	
No	No	No	Projektteam geplant	
Yes	No	Yes	Further customer meetings	
No	No	Yes	Project team: "Internal distribution"	
No	No	No	Analyse des Wettbewerbs	

- A checklist can contain entries that must be manually set to “Fullfilled” and entries that are automatically set to “Fullfilled”.
- Entries which are set to “Fullfilled” **manually** are checked by the user and set to “Fullfilled”.
- Entries which are set to “Fullfilled” **automatically** are checked by the system and set to “Fullfilled” as soon as the user has entered the required information in the system (e.g. Buying & Selling Center has at least one entry).

Set entry to "Fullfilled" manually



Opportunity - 1012 | Akquise im Gebiet | open

Overview Occurrences Forecast Further information Tasks/Appointments Operations/Tasks Activities Documents Logs

Phase

< Previous phase

Contact Qualification

checklist for selected phase

Set completed

1012 | Akquise im Gebiet | open

1

2

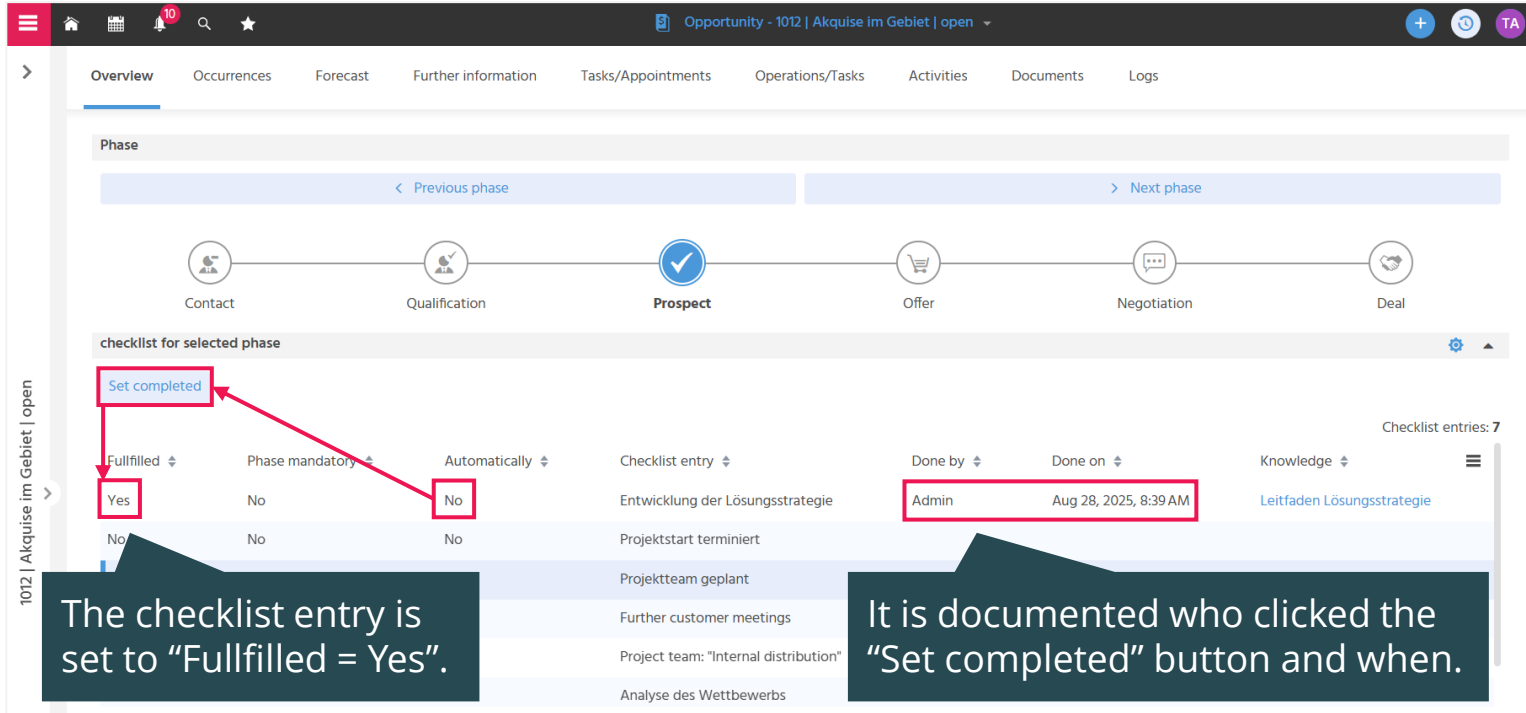
Set entry to "Fullfilled" manually ("Automatically" = "No")

1. Mark the checklist entry
2. Click on the "Set completed" button

Fullfilled	Phase mandatory	Automatically	Checklist entry	Done by	Done on	Knowledge
No	No	No	Entwicklung der Lösungsstrategie			Leitfaden Lösungsstrategie
No	No	No	Projektstart terminiert			
No	No	No	Projektteam geplant			
Yes	No	Yes	Further customer meetings			
No	No	Yes	Project team: "Internal distribution"			
No	No	No	Analyse des Wettbewerbs			

Opportunity

Set entry to "Fullfilled" manually



The screenshot displays the ADITO Opportunity management interface. The top navigation bar shows the current opportunity: "Opportunity - 1012 | Akquise im Gebiet | open". Below this, a horizontal menu includes "Overview", "Occurrences", "Forecast", "Further information", "Tasks/Appointments", "Operations/Tasks", "Activities", "Documents", and "Logs". The "Overview" tab is selected, showing a phase diagram with icons for Contact, Qualification, Prospect (highlighted with a blue checkmark), Offer, Negotiation, and Deal. Below the phase diagram, a section titled "checklist for selected phase" contains a table with 7 entries. The first entry, "Entwicklung der Lösungsstrategie", is highlighted. A red box highlights the "Set completed" button in the top left of the checklist section. A red arrow points from this button to the "Yes" option in the "Fullfilled" column of the first row. Another red box highlights the "Yes" option in the "Fullfilled" column. A third red box highlights the "Admin" user and "Aug 28, 2025, 8:39 AM" timestamp in the "Done by" and "Done on" columns of the first row. Two dark blue callout boxes provide additional context: one states "The checklist entry is set to 'Fullfilled = Yes'." and the other states "It is documented who clicked the 'Set completed' button and when."

1012 | Akquise im Gebiet | open

Overview Occurrences Forecast Further information Tasks/Appointments Operations/Tasks Activities Documents Logs

Phase

< Previous phase > Next phase

Contact Qualification **Prospect** Offer Negotiation Deal

checklist for selected phase

Set completed

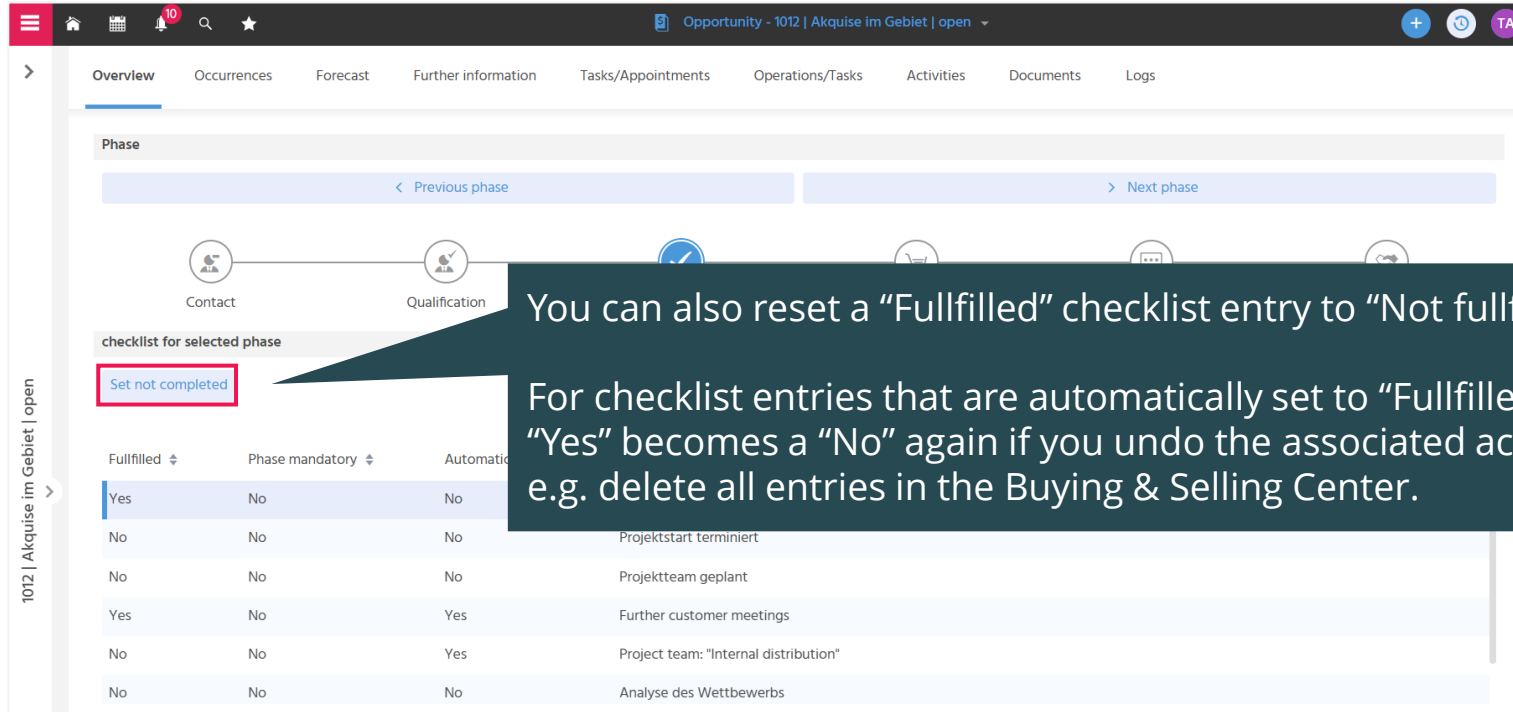
Fullfilled	Phase mandatory	Automatically	Checklist entry	Done by	Done on	Knowledge
Yes	No	No	Entwicklung der Lösungsstrategie	Admin	Aug 28, 2025, 8:39 AM	Leitfaden Lösungsstrategie
No	No	No	Projektstart terminiert			
			Projektteam geplant			
			Further customer meetings			
			Project team: "Internal distribution"			
			Analyse des Wettbewerbs			

Checklist entries: 7

The checklist entry is set to "Fullfilled = Yes".

It is documented who clicked the "Set completed" button and when.

Set entry to "Fullfilled" manually



The screenshot shows the ADITO Opportunity management interface. The top navigation bar includes tabs for Overview, Occurrences, Forecast, Further information, Tasks/Appointments, Operations/Tasks, Activities, Documents, and Logs. The 'Overview' tab is selected. Below the navigation bar, there is a 'Phase' section with buttons for 'Previous phase' and 'Next phase'. A process flow diagram shows 'Contact' and 'Qualification' phases. A 'checklist for selected phase' is displayed, with a button labeled 'Set not completed' highlighted in a red box. Below the checklist, a table shows the status of various tasks.

Fullfilled	Phase mandatory	Automatic	Task
Yes	No	No	
No	No	No	Projektstart terminiert
No	No	No	Projektteam geplant
Yes	No	Yes	Further customer meetings
No	No	Yes	Project team: "Internal distribution"
No	No	No	Analyse des Wettbewerbs

You can also reset a "Fullfilled" checklist entry to "Not fullfilled".

For checklist entries that are automatically set to "Fullfilled", the "Yes" becomes a "No" again if you undo the associated action, e.g. delete all entries in the Buying & Selling Center.

Opportunity

Observe dataset Cancel ID Observation Export

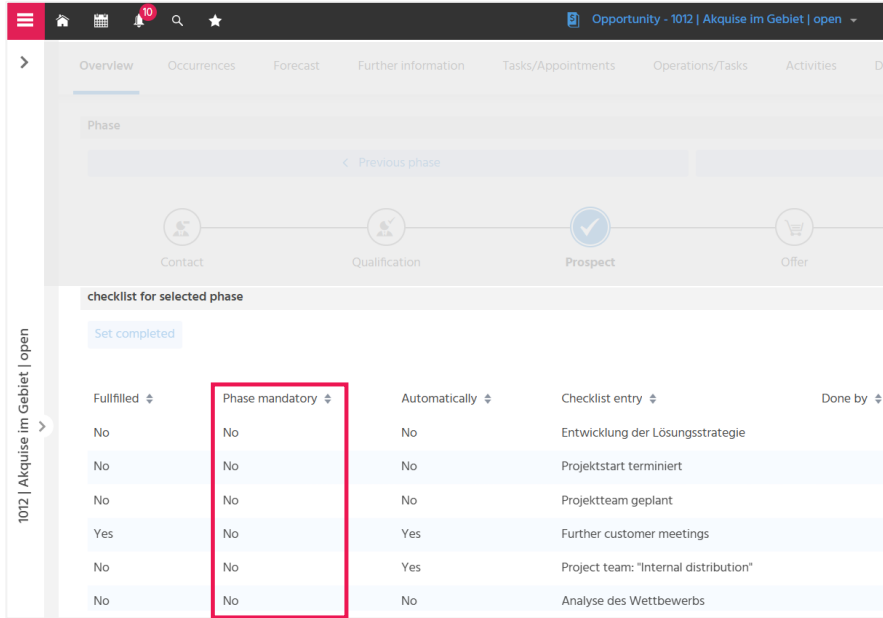
Opportunities: 15

	Number	Title	Company	Classification	Days inactive	Created on	Start of the opportunity	Target date of the service	Phase	Status	Phase progress	Probability	Volume Weight
	1012	Akquise im Gebiet	Winter AG	BC	41	Dec 30, 2023, 7:49:04 AM		Dec 25, 2025	Offer	open	0%	25%	25,000.00
	1006	Bucher Neuprojekt	Bucher Unternehmensgruppe	BC	29	Dec 22, 2023, 12:22:17 PM	Jun 11, 2024	Aug 1, 2025	Offer	won	60%	75%	525,000.00
	1007	Einführung DPR Version 3.5	Glob Group	BB	29	Jan 27, 2024, 12:22:17 PM	Jul 3, 2024		Qualification	open	60%	50%	17,267.00
	1002	Erstprojekt	Industrial Steel AG	AB	23	Oct 19, 2023, 1:22:17 PM	Mar 22, 2024		Negotiation	won	80%	75%	412,500.00
	1010	FSA Projekteinführung	Fahey, Spencer and Armstrong	BB	42	Feb 26, 2024, 9:07:56 AM	Mar 9, 2024		Prospect	open	0%	75%	201,000.00
	1005	Kronen Pilotprojekt	Kronen AG	AC	52	Dec 11, 2023, 12:22:17 PM	Jul 23, 2024	Aug 1, 2025	Offer	open	0%	50%	12,500.00
	1001	Magic Gray - Produkteinführung	Magic Gray	BD	316	Jul 29, 2022, 11:18:33 AM	Dec 27, 2022	Dec 25, 2025	Contact	open	100%	25%	
	1008	Meister Messebau	Meister Messebau GmbH	BB	42	Feb 16, 2024, 1:32:50 PM	Mar 10, 2024	Sep 7, 2025	Negotiation	partially won	20%	75%	75,000.00
	1009	Meister Messebau/ Umsetzung	Meister Messebau GmbH	CC	79	Feb 26, 2024, 7:27:52 AM	Mar 12, 2024		Qualification	open	20%	0%	
	1015	Neddict's - Process Refactoring	Neddict's	BC						open	100%	50%	92,000.00
	1014	OmniTech - Erstprojekt	OmniTech	BC						open	100%	75%	74,250.00
	1011	Projekt - Fortsetzung	Industrial Steel AG	AB						open	60%	75%	319,816.50
	1013	Schäferland Handelswelt / Neukundenprojekt	Schäferland Handelswelt GmbH							open	14%	25%	
	1003	Skyscraper / Pilotprojekt	Skyscraper Bau GmbH	BC						on open	20%	50%	73,000.00
	1004	Transatlantik Initialprojekt	Transatlantik Logistics GmbH	BC						on open	20%	75%	281,250.00

The progress column shows the percentage of checklist entries that have been completed in the respective phase. For phases that do not contain any checklist entries, "100%" is displayed.

Opportunity

Tab “Overview”: Phase mandatory



The screenshot shows the ADITO Opportunity Overview tab. The top navigation bar includes tabs for Overview, Occurrences, Forecast, Further information, Tasks/Appointments, Operations/Tasks, and Activities. The main content area displays a phase progression diagram with four stages: Contact, Qualification, Prospect, and Offer. Below this, a table titled "checklist for selected phase" is shown. The table has five columns: "Fulfilled", "Phase mandatory", "Automatically", "Checklist entry", and "Done by". The "Phase mandatory" column is highlighted with a red border. The table contains six rows of data.

Fulfilled	Phase mandatory	Automatically	Checklist entry	Done by
No	No	No	Entwicklung der Lösungsstrategie	
No	No	No	Projektstart terminiert	
No	No	No	Projektteam geplant	
Yes	No	Yes	Further customer meetings	
No	No	Yes	Project team: "Internal distribution"	
No	No	No	Analyse des Wettbewerbs	

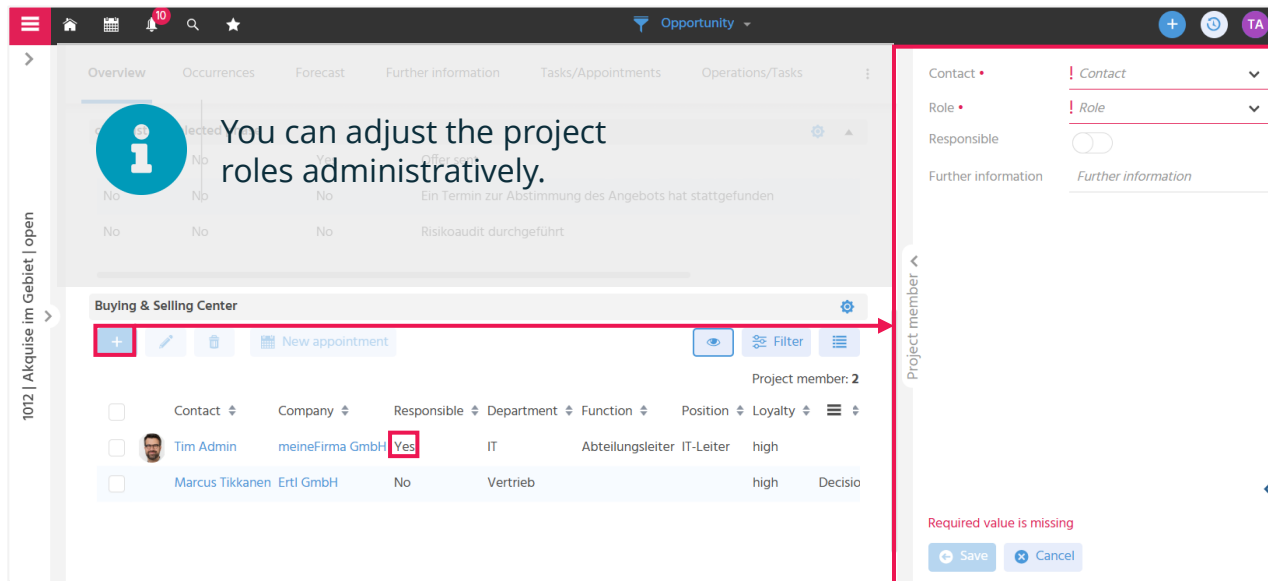
In the column **“Phase mandatory”** you can see whether a checklist entry must be fulfilled so that you can switch to the next phase or whether you can switch to the next phase without having set the checklist entry to **“Fullfilled”**.

“Yes” means that the checklist entry must be set to **“Fullfilled”** in order to move to the next phase.



Users with the Administrator role can also change the phase if a checklist entry with **“Phase mandatory = Yes”** has not been fulfilled.

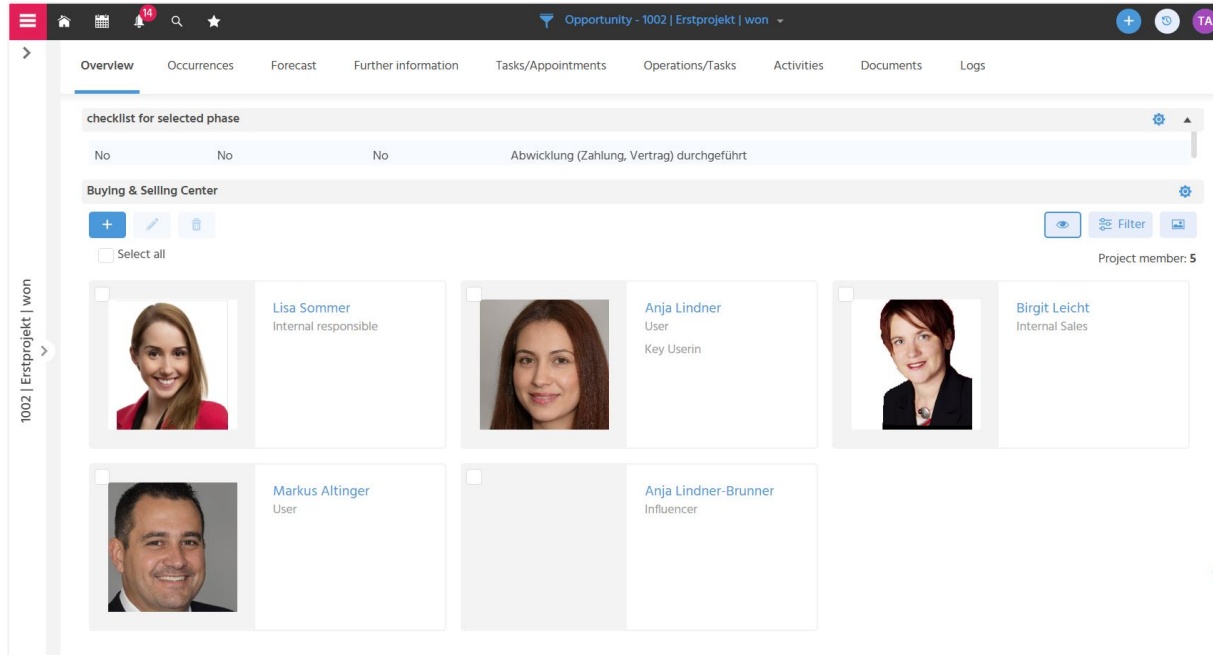
"Overview" tab: Buying & Selling Center



Enter important transaction- and role-related information in the "Further information" field that may increase the likelihood of closing the deal.

Opportunity

“Overview” tab: Buying & Selling Center



The screenshot shows the ADITO interface for a project named '1002 | Erstprojekt | won'. The 'Overview' tab is selected, displaying a checklist for the selected phase and a 'Buying & Selling Center' section. The 'Buying & Selling Center' section shows a grid of user tiles, each with a photo and name. The tiles are:

- Lisa Sommer (Internal responsible)
- Anja Lindner (User, Key Userin)
- Birgit Leicht (Internal Sales)
- Markus Altinger (User)
- Anja Lindner-Brunner (Influencer)

There are also icons for '+', 'Filter', and 'Project member: 5'.

You can also open the Buying & Selling Center in tile view so that you can quickly identify people in an appointment based on their photos, for example.

Opportunity

Buying Center and...

Each contact is given a specific role in an opportunity:

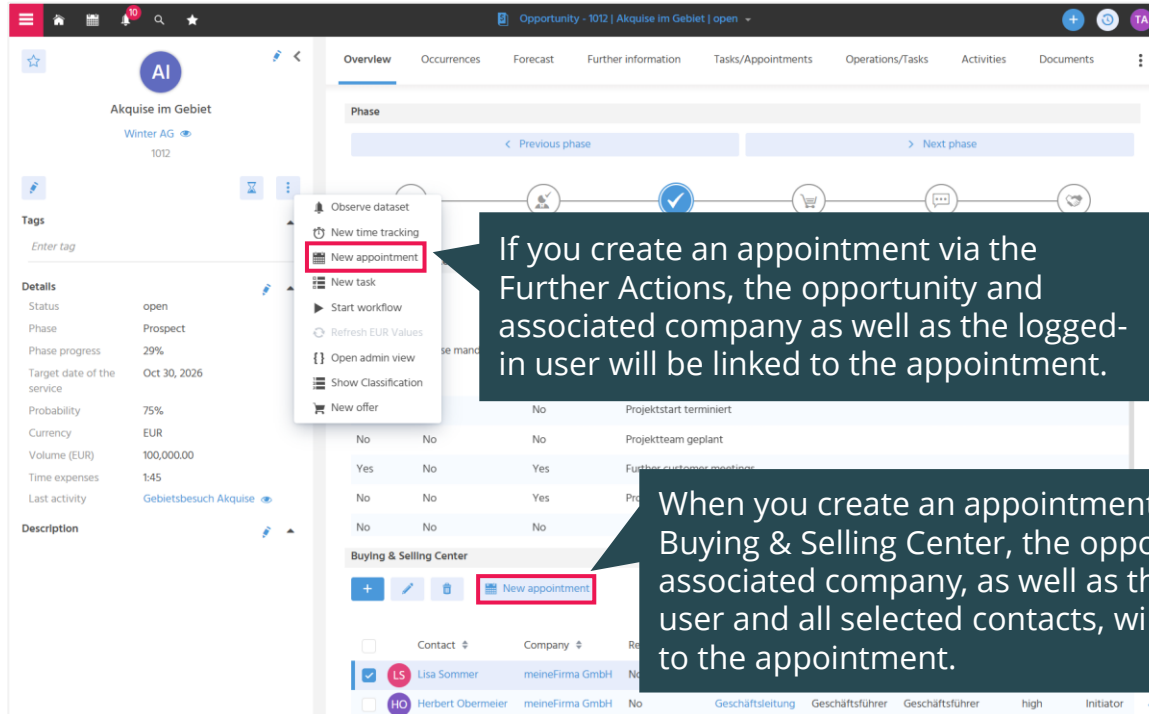
- The **initiator** identifies a need that is to be purchased in order to be able to achieve a goal.
- The **decision-maker** strengthens the company through his decisions.
- The **influencer** supports the profiling of the new problem solution.
- **The user's** work is made easier by the application of the innovation.
- The **buyer** negotiates the conditions.

...Selling Center

- internal sales

Opportunity

Appointments



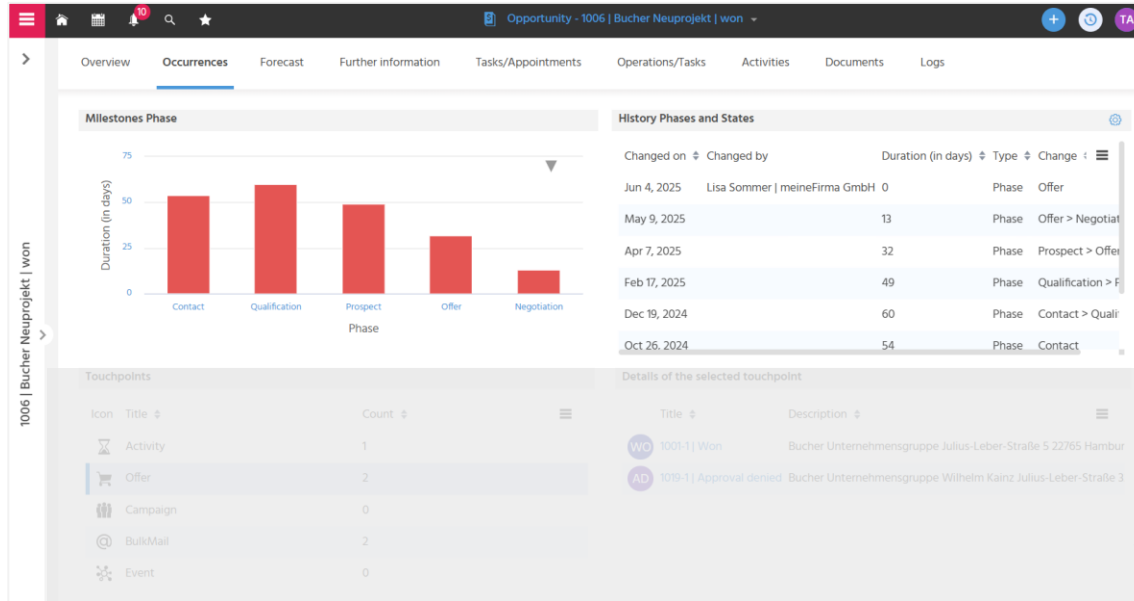
The screenshot displays the ADITO interface for an opportunity named 'Akquise im Gebiet' (1012). The left sidebar shows details like status (open), phase (Prospect), and target date (Oct 30, 2026). The main area has tabs for Overview, Occurrences, Forecast, Further information, Tasks/Appointments, Operations/Tasks, Activities, and Documents. A 'Further Actions' menu is open, highlighting 'New appointment'. Below, the 'Buying & Selling Center' shows a table of contacts with a 'New appointment' button highlighted.

If you create an appointment via the Further Actions, the opportunity and associated company as well as the logged-in user will be linked to the appointment.

When you create an appointment via the Buying & Selling Center, the opportunity and associated company, as well as the logged-in user and all selected contacts, will be linked to the appointment.

Opportunity

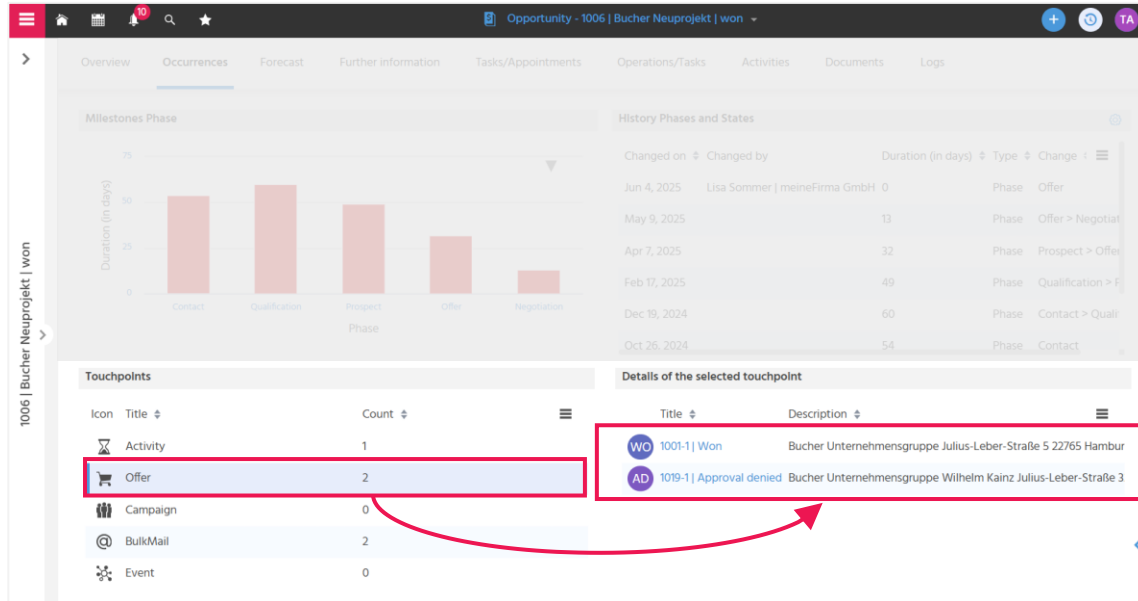
Tab “Occurrences” - “Phases” and “States”



- In the **“Milestones phase”** section, the length of time the opportunity has been in which phase is shown graphically.
- In the **“History Phases and States”** section, you will find the data on how long an opportunity was in which phase and in which state.

Opportunity

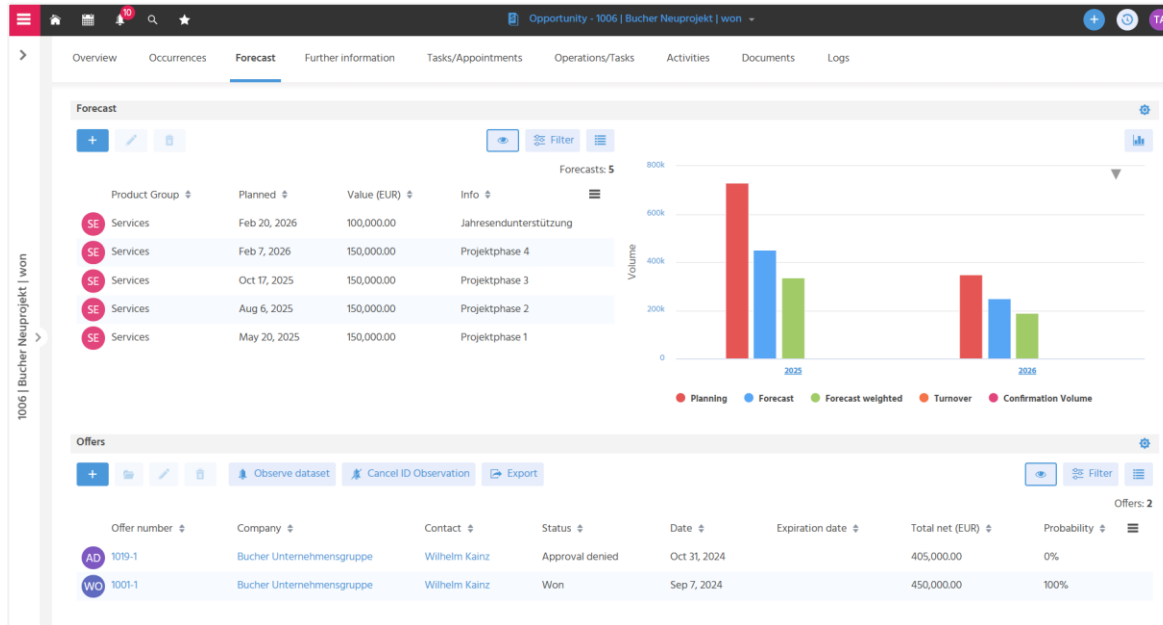
Tab “Occurrences” - Touchpoints and related details



By selecting one of the points in the **“Touchpoints”** area, you can view the records associated with that touchpoint in the **“Details of Selected Touchpoint”** area. Only records associated with the company for which the opportunity was created are displayed. The number of touchpoints indicates how many records are linked.

Opportunity

Tab “Forecast”

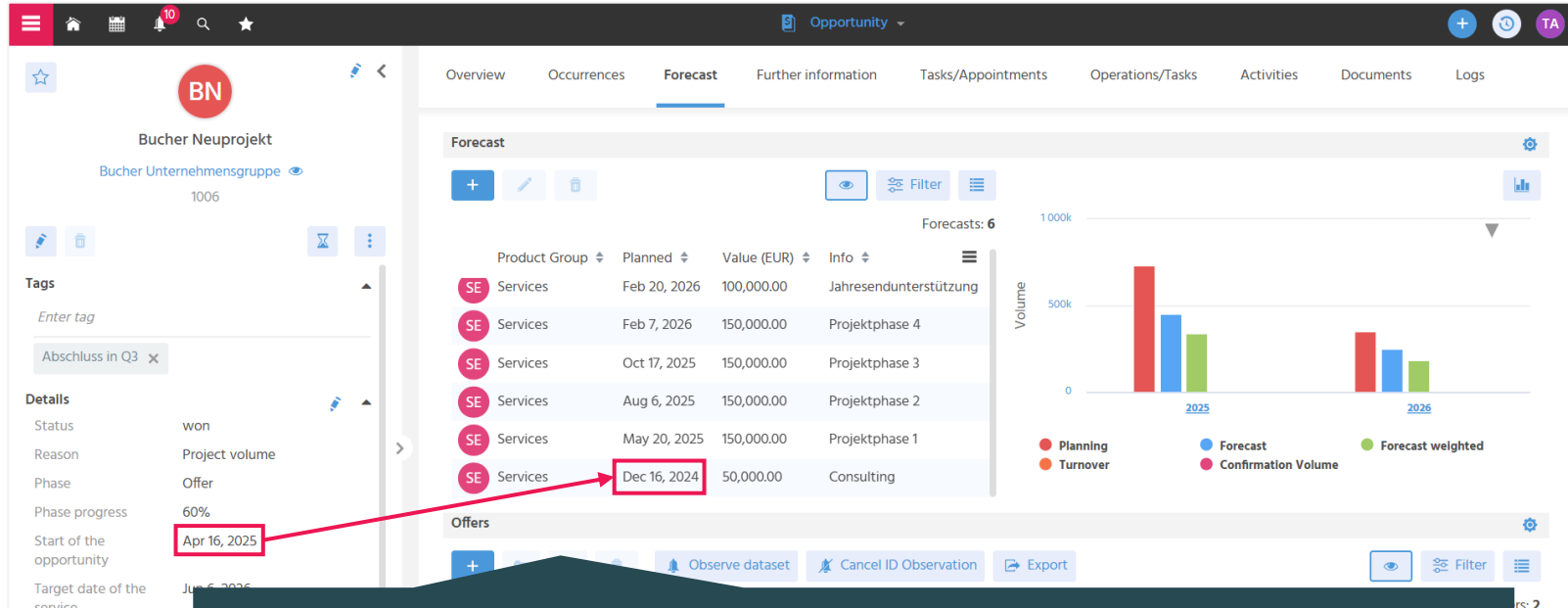


In the **“Forecast”** area, you can enter forecasts for the opportunity on the left. Forecasts **with planning dates after the start date of the opportunity** are shown graphically on the right and are compared with the following values:

- the Planning recorded in the company,
- the Turnover that resulted from the opportunity (net totals from invoices sent but not canceled),
- the Confirmation volume that resulted from the opportunity (net totals from order confirmations sent but not canceled).

Opportunity

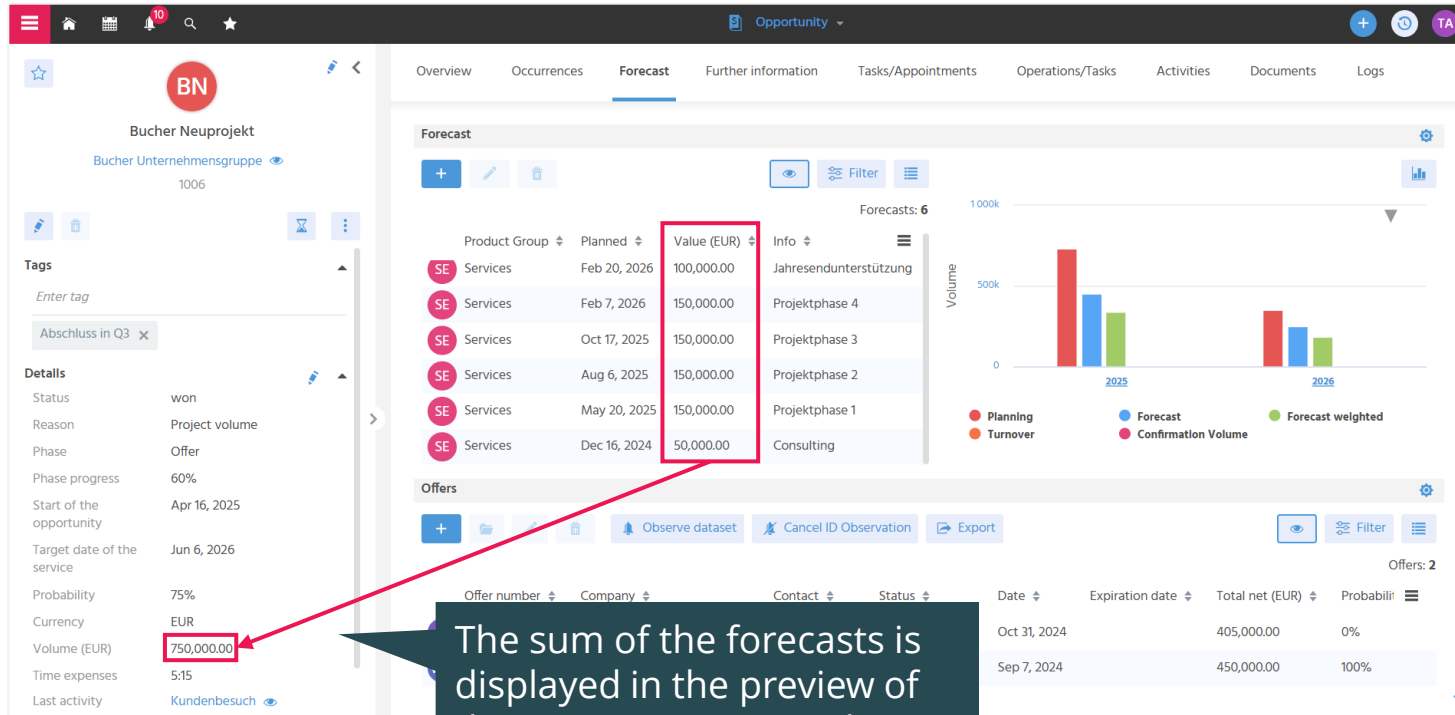
Tab "Forecast"



The Opportunity starts on Apr 16, 2025. One of the forecasts has a planning date in the year before the start of the Opportunity (Dec 16, 2024) => The forecast for 2024 is not shown in the diagram.

Opportunity

Tab "Forecast"



The screenshot displays the ADITO Opportunity Forecast tab. On the left, a sidebar shows details for 'Bucher Neuprojekt' (Bucher Unternehmensgruppe, 1006), including tags like 'Abschluss in Q3' and various project details. The main area is divided into two sections: 'Forecast' and 'Offers'.

Forecast Section:

- Buttons: +, Edit, Delete, Filter, List.
- Table with 6 forecasts:

Product Group	Planned	Value (EUR)	Info
SE Services	Feb 20, 2026	100,000.00	Jahresendunterstützung
SE Services	Feb 7, 2026	150,000.00	Projektphase 4
SE Services	Oct 17, 2025	150,000.00	Projektphase 3
SE Services	Aug 6, 2025	150,000.00	Projektphase 2
SE Services	May 20, 2025	150,000.00	Projektphase 1
SE Services	Dec 16, 2024	50,000.00	Consulting

Offers Section:

- Buttons: +, Folder, Delete, Observe dataset, Cancel ID Observation, Export.
- Table with 2 offers:

Offer number	Company	Contact	Status	Date	Expiration date	Total net (EUR)	Probability
				Oct 31, 2024		405,000.00	0%
				Sep 7, 2024		450,000.00	100%

Forecast Chart:

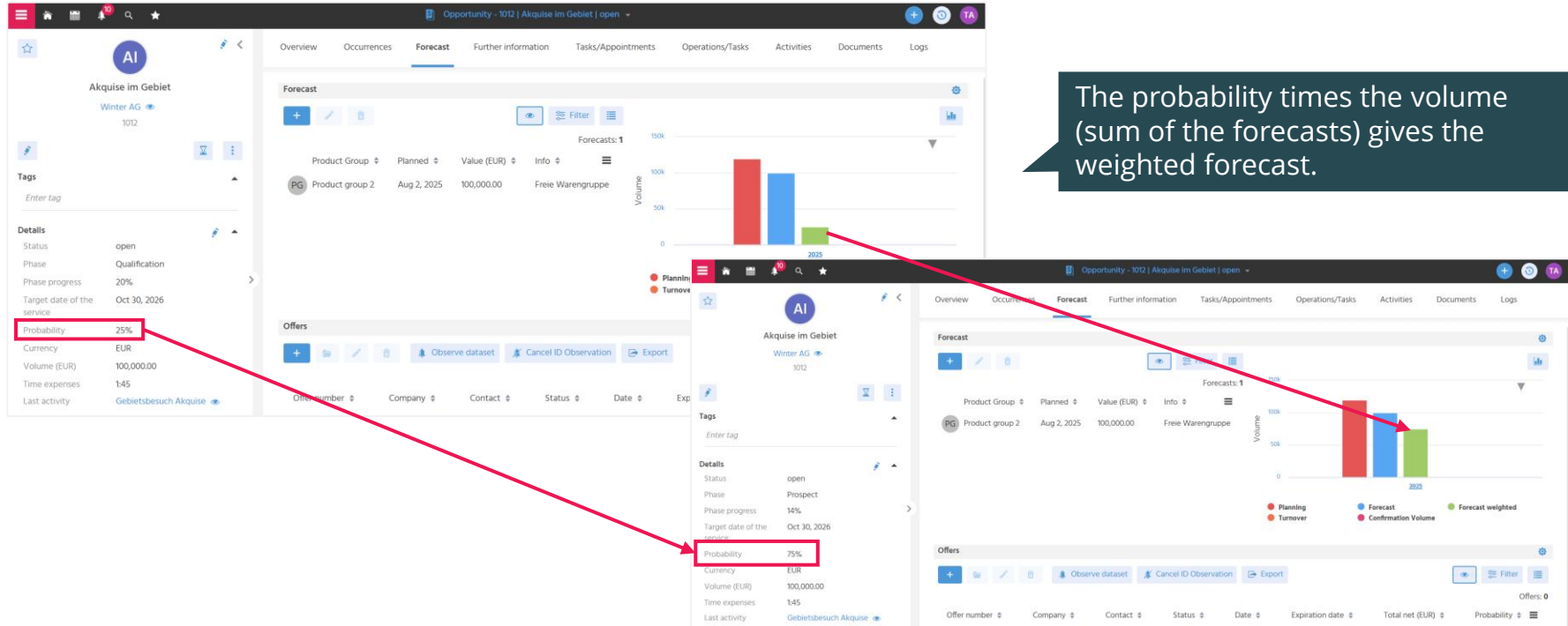
A bar chart titled 'Forecasts: 6' showing 'Volume' on the y-axis (0 to 1000k) and years on the x-axis (2025, 2026). The legend indicates: Planning (red), Forecast (blue), Confirmation Volume (pink), and Forecast weighted (green).

Summary:

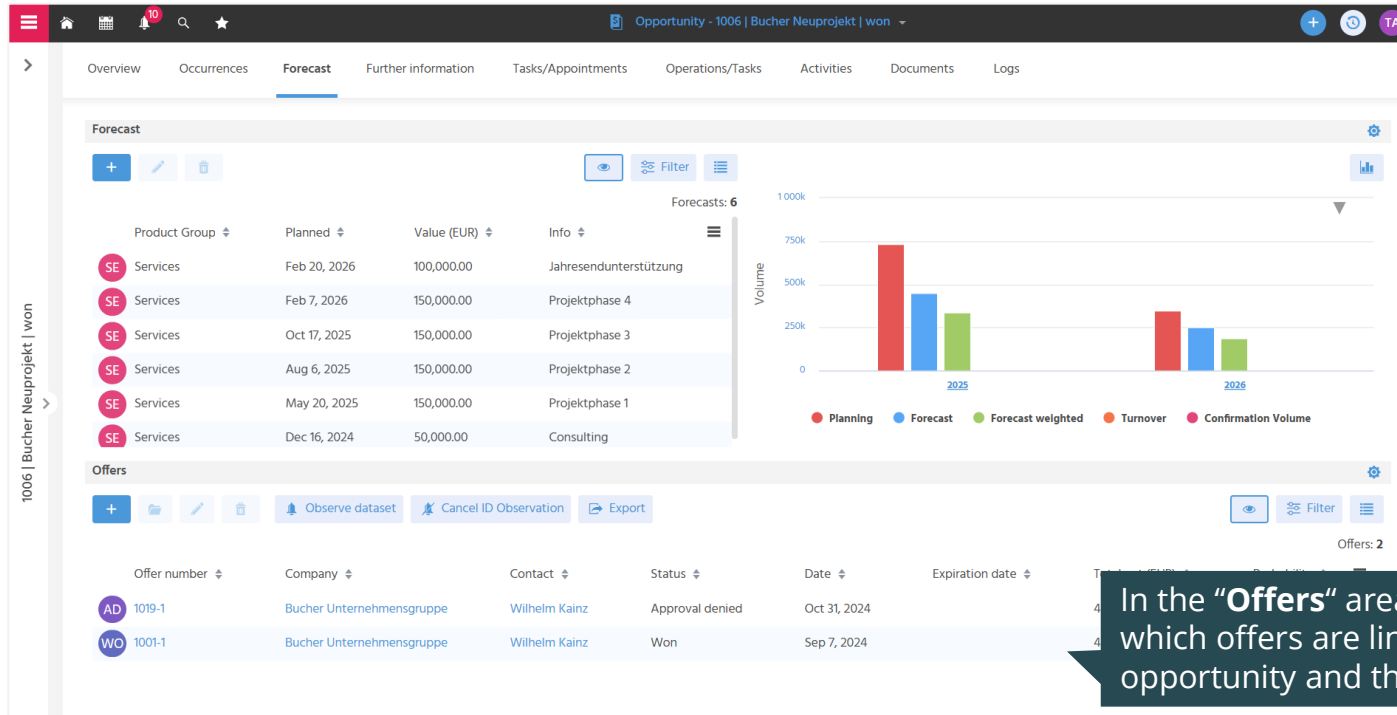
- The 'Volume (EUR)' field in the sidebar shows a total of 750,000.00, which is the sum of the forecast values.
- A callout box points to this value, stating: "The sum of the forecasts is displayed in the preview of the opportunity as 'Volume'."

Opportunity

Probability: Forecast weighted

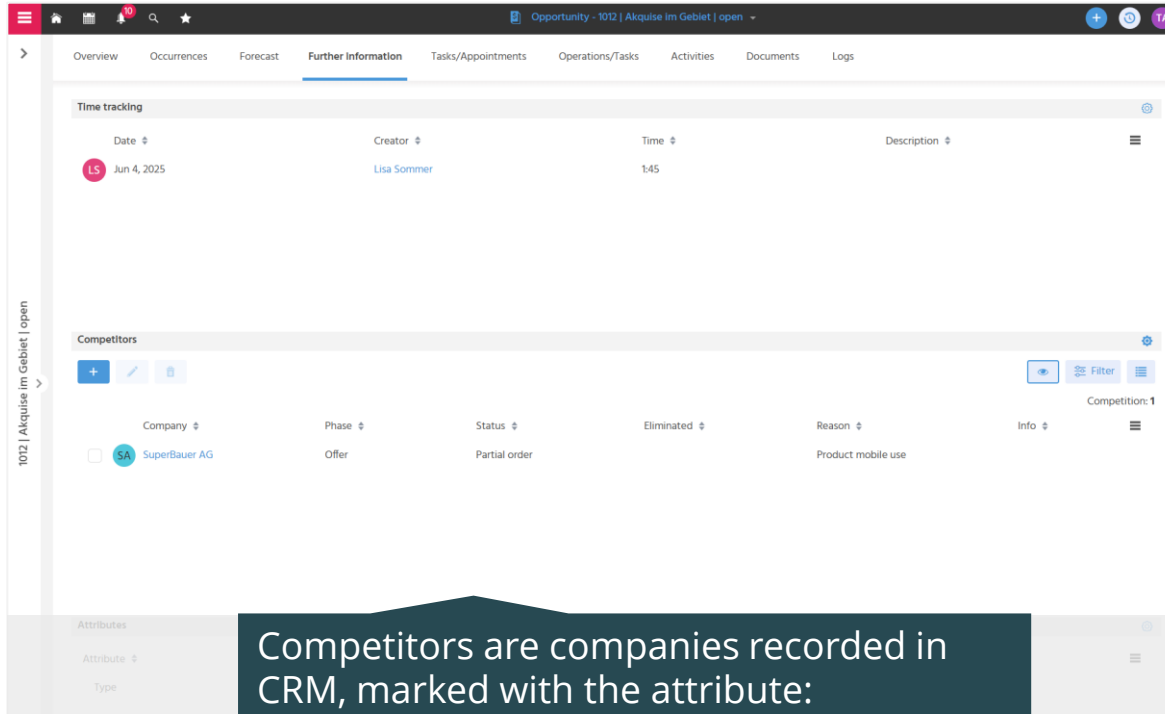


Tab "Forecast"



Opportunity

Tab “Further Information”



Time tracking

Date	Creator	Time	Description
Jun 4, 2025	Lisa Sommer	1:45	

Competitors

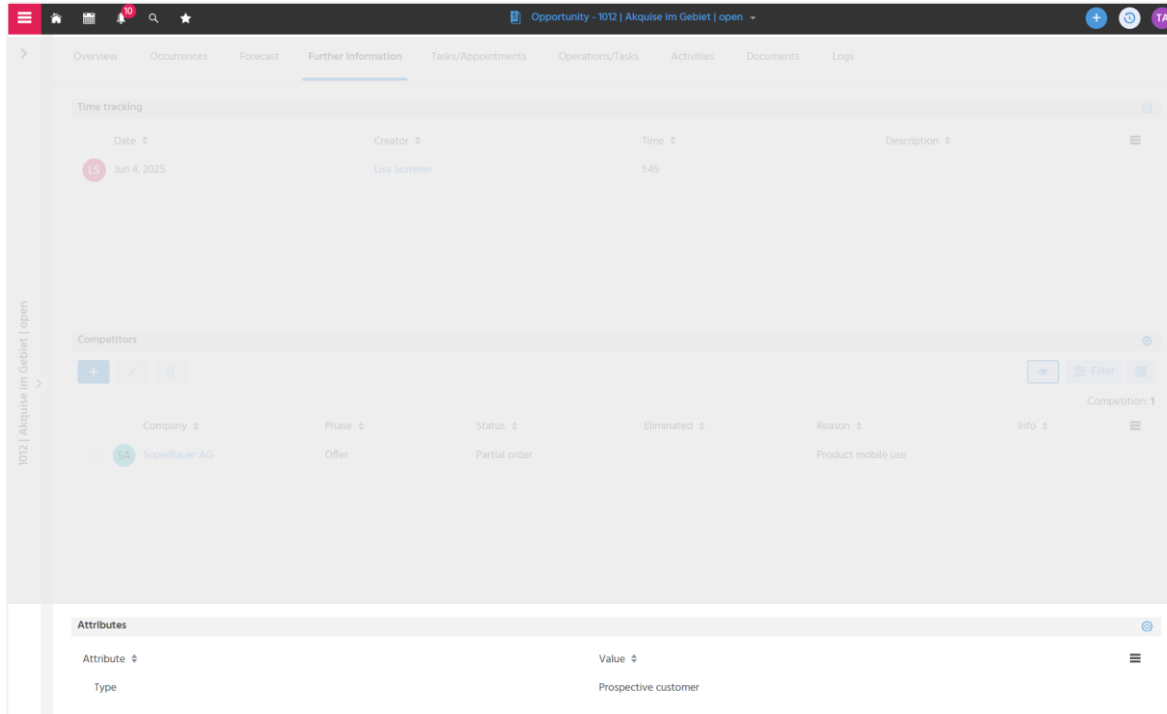
Company	Phase	Status	Eliminated	Reason	Info
SuperBauer AG	Offer	Partial order		Product mobile use	

- In the **“Timetracking”** area, you can record who was occupied for how long and with what.
- In the **“Competitors”** area you can enter the competitors who are also interested in this opportunity.

Competitors are companies recorded in CRM, marked with the attribute:
Target group = Competitor.

Opportunity

Tab “Further Information”



The screenshot displays the ADITO software interface for an opportunity. The top navigation bar includes tabs for Overview, Occurrences, Forecast, Further Information (selected), Tasks/Appointments, Operations/Tasks, Activities, Documents, and Logs. The main content area is divided into two sections: Time tracking and Competitors.

Time tracking

Date	Creator	Time	Description
Jun 4, 2025	Lisa Sommer	1:45	

Competitors

Company	Phase	Status	Eliminated	Reason	Info
SuperBauer AG	Offer	Partial order		Product mobile use	

Attributes

Attribute	Value
Type	Prospective customer

Use attributes to qualify the opportunity with **additional information.**

Opportunity

Tab “Operations/Tasks”



The screenshot displays the ADITO software interface for an opportunity named '1002 | Erstprojekt | won'. The 'Operations/Tasks' tab is selected, showing a list of operations and a resource planning grid.

Operations/Tasks Tab:

- Operations:** A list of operations with columns: Number, Title, Kind, Begin, End. One operation is listed: 017, Product presentation, service operation, Aug 28, 2025, 2:00 PM, Aug 28, 2025, 2:30 PM.
- Operation Tasks:** A list of tasks with columns: Subject, Operation, Status, Priority, estimated ti. Two tasks are listed: 'Hand over product samples' (Product presentation, new, low) and 'Present product' (Product presentation, new, low).

Resource planning:

The resource planning grid shows the schedule for August 28, 2025, from 2am to 4pm. The grid is divided into columns for each hour. The resources listed are Lisa Sommer, Melanie Hueber, and Birgit Leicht. A task is scheduled for Lisa Sommer from 2:00 PM to 2:30 PM.

Here you can see linked **operations, associated operation tasks** and have **access to resource planning**.



Opportunity



More tabs

- **Tab “Tasks/Appointments”:** Tasks and appointments associated with the opportunity are displayed here.
- **Tab „Activities”:** Activities associated with the opportunity are displayed here.
- **Tab “Documents”:** Binary files can be stored in the document folder.
- **Tab “Logs”:** Here, changes to the opportunity are documented by the system.



Evaluate opportunity AI-supported according to BANT criteria

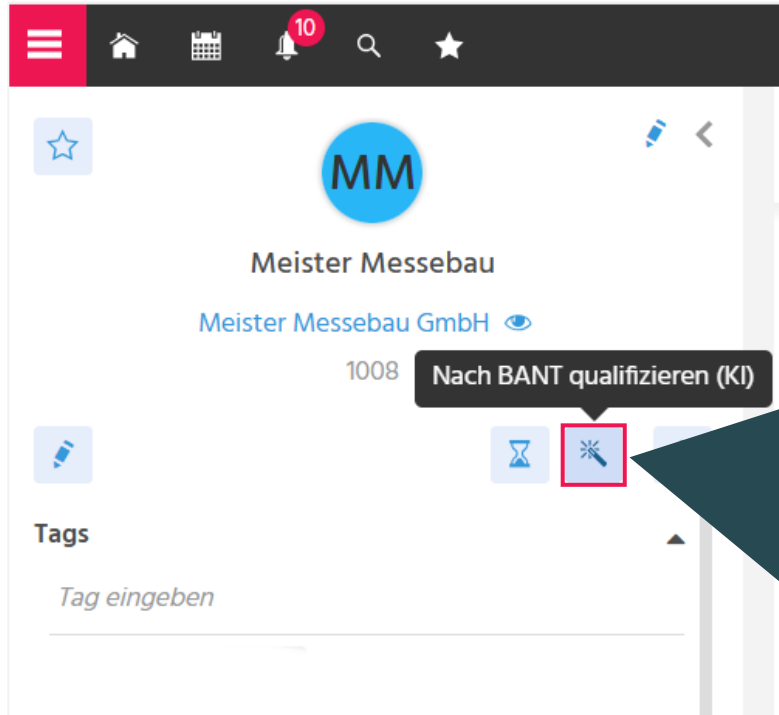
What is the BANT method?

The BANT method is a four-dimensional qualification framework developed by IBM in the 1960s. The acronym BANT stands for:

- **B**udget: Is there a budget?
- **A**uthority: Does my contact person have decision-making authority?
- **N**eed: Is there a clear need/pain point?
- **T**iming: Is there a specific timeframe?

Evaluate opportunity AI-supported according to BANT criteria

Action „Qualify by BANT (AI)“



When you perform the 'Qualify by BANT (AI)' action, an overlay opens where you can view the assessment created by the AI. The following data is evaluated for the assessment :

Budget

- Activities
- Opportunity Description

Authority

- Activities
- Opportunity Description
- Buying Center

Need

- Activities
- Opportunity Description
- Forecast: Field „Product Group“

Timing

- Activities
- Opportunity Description
- Start of the Opportunity
- Target Date of the Service

Opportunity KI-gestützt nach BANT-Kriterien bewerten



Aktion „Nach BANT qualifizieren (KI)“

Opportunitätsbewertung (BANT)

Die Opportunity wurde mit Hilfe von KI nach **Budget, Authority, Need und Timing** qualifiziert und bewertet, welche dieser Kriterien bereits erfüllt , teilweise erfüllt  oder nicht erfüllt  sind.

Budget 

Es gibt keine Informationen über das Budget oder finanzielle Verfügbarkeit im vorliegenden Datenmaterial. Weder wurden Budgetangaben gemacht noch Hinweise auf interne Budgetfreigaben oder finanzielle Planungen gegeben, sodass eine Einschätzung des Budgetstatus nicht möglich ist.

Empfohlene Fragen:

- Wie wird aktuell die Finanzierung von neuen Lösungen in der Abteilung eingeschätzt?
- Inwiefern spielt die Kostenstruktur bei der Auswahl neuer Technologien eine Rolle?
- Welche Überlegungen gibt es derzeit zu Investitionen in ähnliche Angebote?

Authority 

Die verantwortliche Person ist bereits identifiziert und es wurde eine zuständige Person aus dem Vertrieb genannt. Dies deutet darauf hin, dass die Entscheidungsbefugnis klar zugeordnet ist und ein Ansprechpartner vorhanden ist.

Empfohlene Fragen:

- Wie sieht die interne Entscheidungsstruktur bei der Auswahl neuer Lösungen aus?
- Welche Rolle spielt die Vertriebsabteilung bei der finalen Entscheidung?
- Wie wird aktuell die Zuständigkeit für Investitionsentscheidungen im Team gesehen?

Need 

Es wurde eine Produktvorstellung durchgeführt, jedoch gibt es keine detaillierten Informationen über spezifische Anforderungen, Probleme oder Wünsche des Kunden. Die Interessen sind angedeutet, aber nicht konkretisiert, was eine unvollständige Einschätzung der Bedürfnisse ermöglicht.

Empfohlene Fragen:

- Wie wird aktuell der Bedarf an neuen Lösungen in der täglichen Arbeit eingeschätzt?
- Welche Herausforderungen bestehen derzeit bei der Nutzung der aktuellen Systeme?
- Inwiefern sind Verbesserungen oder Erweiterungen in der Prozessabwicklung erwünscht?

Als Aktivität speichern

You can save the evaluation as an activity.

The evaluation shows you whether the BANT criteria are

-  fulfilled,
-  partially fulfilled or
-  not fulfilled.

For each criterion, you will find a brief **summary** as well as **questions** that are recommended for further communication with the prospective customer. At the end of the evaluation, the recommended **next steps** are also listed.

Opportunity

Preview

Detail **area** - depending on which phase the opportunity is in, there may be only a little or already very detailed information in the detail area.

- Status, Phase, Start of the opportunity, Target date of the service and Probability can be edited.
- A reason can be specified for the statuses “aborted”, “partially won”, “won” or “lost.”
- The phase can only be adjusted using the buttons in the “Overview” tab.
- The “Currency” field can be edited as long as no forecast has been entered in the opportunity.
- The volume is the sum of all forecasts recorded in the opportunity.
- The displayed “Time expenses” results from the times recorded in the tab “Further information”.
- In the “Campaign” field you can choose from all current campaigns in which the company linked to the opportunity or an employee of the company are participants. This way you link campaign and opportunity.
- Under “Last activity” you can see the activity that was last created with a link to the opportunity.
- You can link a SharePoint folder.

The screenshot shows the 'Opportunity' detail view in a software application. At the top, there is a star icon, a purple circle with 'ER', and a close button. Below this, the title 'Erstprojekt' is displayed, followed by 'Industrial Steel AG' with an eye icon and the number '1002'. On the left side, there is a vertical tab labeled 'Opportunity' with a left arrow. The main content area is divided into several sections: 'Tags' (empty), 'Details' (with a right arrow), 'Description' (with a right arrow), and 'Relevant Documents' (with a right arrow). The 'Details' section contains a table with the following data:

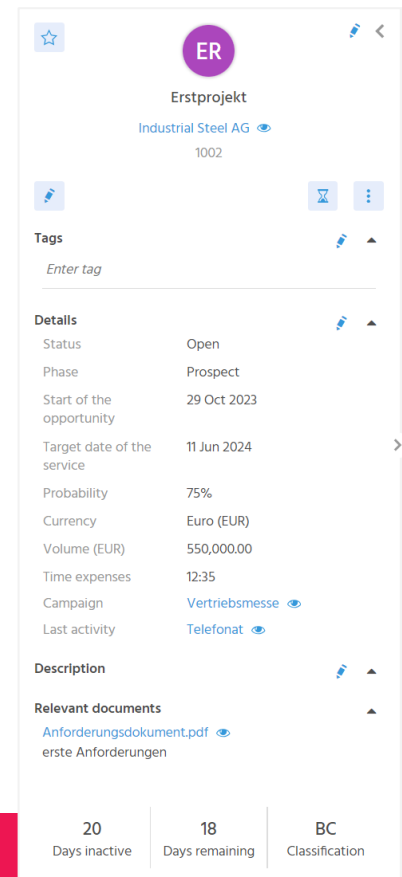
Status	won
Reason	Project volume, Project reference, Product GUI, Product flexibility
Phase	Negotiation
Phase progress	80%
Start of the opportunity	Jan 25, 2025
Target date of the service	Jun 30, 2025
Probability	75%
Currency	EUR
Volume (EUR)	935,000.00
Time expenses	12:35
Campaign	Vertriebsmesse
Last activity	Telefonat
SharePoint Link	https://aditosoftware.sharepoint.com/sites/adit

The 'Description' section is currently empty. The 'Relevant Documents' section shows a document titled 'Anforderungsdokument.pdf' with an eye icon and the text 'erste Anforderungen'. At the bottom, there are three status indicators: '0 Days inactive', '0 Days remaining', and 'AB Classification'.

Opportunity

Preview

- **Description** - here you can enter information as free text.
- **Relevant documents** - Documents for which the button “Show in preview” has been activated in the documents tab are shown in the preview.
- **Days inactive** - Period in which no new activities with a link to the opportunity have been recorded (since the opportunity was created or since the last activity).
- **Days remaining** - period between today and the “Target date of the service”.
- **Classification** - rating calculated on the basis of the information collected.



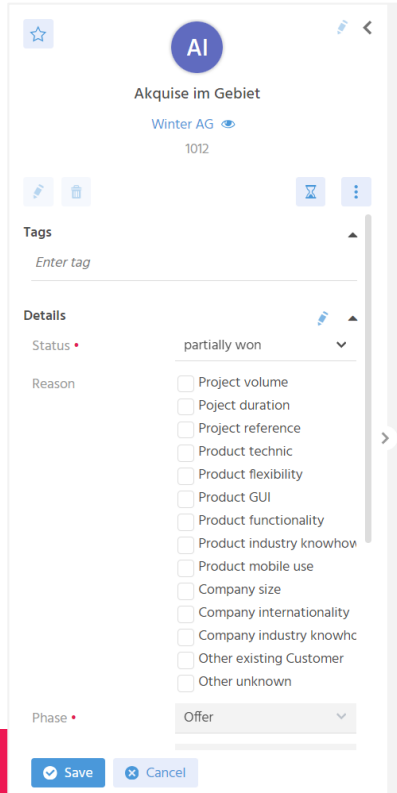
The screenshot shows the ADITO interface for an opportunity. At the top, there's a star icon, a purple circle with 'ER', and a back arrow. Below this, the opportunity name 'Erstprojekt' is displayed, followed by 'Industrial Steel AG' with an eye icon and the number '1002'. There are icons for editing, a timer, and a menu. The 'Tags' section has an 'Enter tag' input field. The 'Details' section is a table with various fields and values, including 'Status: Open', 'Phase: Prospect', 'Start of the opportunity: 29 Oct 2023', 'Target date of the service: 11 Jun 2024', 'Probability: 75%', 'Currency: Euro (EUR)', 'Volume (EUR): 550,000.00', 'Time expenses: 12:35', 'Campaign: Vertriebsmesse', and 'Last activity: Telefonat'. The 'Description' section has an edit icon and an upward arrow. The 'Relevant documents' section shows a document titled 'Anforderungsdokument.pdf' with the subtitle 'erste Anforderungen'. At the bottom, there are three summary boxes: '20 Days inactive', '18 Days remaining', and 'BC Classification'.

Details	
Status	Open
Phase	Prospect
Start of the opportunity	29 Oct 2023
Target date of the service	11 Jun 2024
Probability	75%
Currency	Euro (EUR)
Volume (EUR)	550,000.00
Time expenses	12:35
Campaign	Vertriebsmesse
Last activity	Telefonat

Summary	
20	Days inactive
18	Days remaining
BC	Classification

Opportunity

Justify status



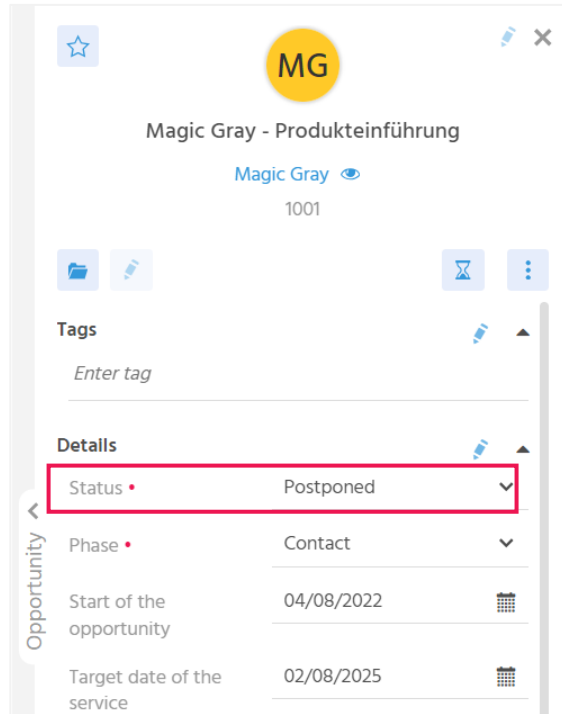
The screenshot shows a mobile application interface for justifying an opportunity status. At the top, there is a star icon, a circular profile icon with 'AI', and the text 'Akquise im Gebiet', 'Winter AG', and '1012'. Below this are icons for edit, delete, and a menu. The 'Tags' section has a text input 'Enter tag'. The 'Details' section has a 'Status' dropdown set to 'partially won' and a 'Reason' section with a list of checkboxes: Project volume, Project duration, Project reference, Product technic, Product flexibility, Product GUI, Product functionality, Product industry knowhow, Product mobile use, Company size, Company internationality, Company industry knowhc, Other existing Customer, and Other unknown. At the bottom, there is a 'Phase' dropdown set to 'Offer' and 'Save' and 'Cancel' buttons.

If you select one of the following status values, you can select reasons why this status was set :

- aborted
- partially won
- won
- lost

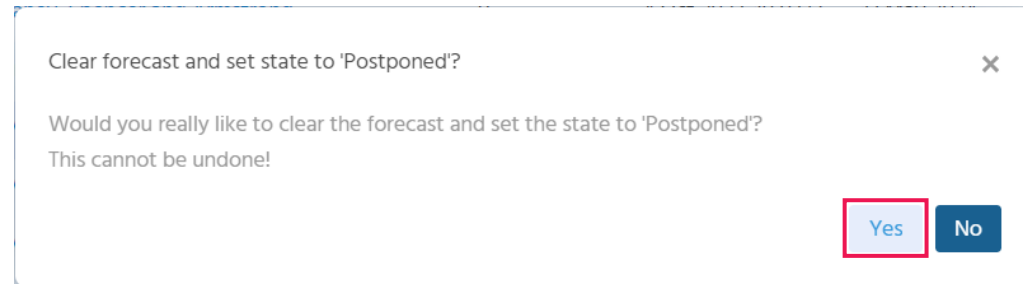
Excursus "Postpone opportunity"

State "Postponed"



Details	
Status •	Postponed ▼
Phase •	Contact ▼
Start of the opportunity	04/08/2022 📅
Target date of the service	02/08/2025 📅

If you set the **state of** the opportunity to **"Postponed"** and confirm the pop-up, a task is automatically created with the responsible person, which is due six months later. So you do not have to resubmit this task yourself. The person who set the opportunity to "Postponed" is entered as the "Requester" of the task.



Clear forecast and set state to 'Postponed?' ✕

Would you really like to clear the forecast and set the state to 'Postponed'?
This cannot be undone!

Yes No

Opportunity



Classification

Why is the classification used in opportunities?

If you were to assess opportunities only according to the company classification, you might come to the wrong conclusions when prioritising.

As an example, let's take two possible opportunities of a car dealer:

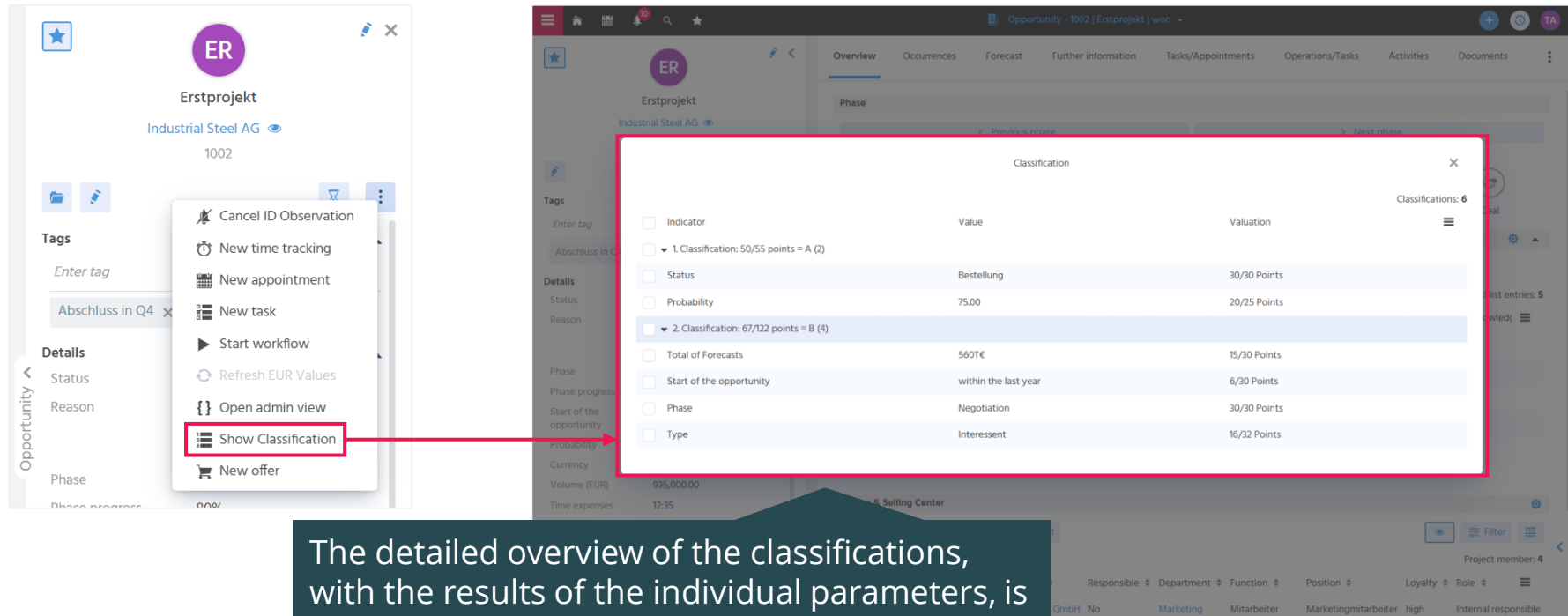
- An A-customer wants to buy a new car for his fleet.
- A C-customer only wants cars of your brand in his fleet in future and therefore orders 10 of them at once.

Your C-client's project would be more important to you in this case.



Opportunity

Classifications



The screenshot illustrates the process of viewing detailed opportunity classifications in the ADITO system. On the left, the 'Opportunity' card for 'Erstprojekt' (Industrial Steel AG, ID 1002) is shown. A context menu is open, highlighting the 'Show Classification' option. A red arrow points from this option to the right, where a detailed 'Classification' modal is displayed. This modal provides a comprehensive overview of the opportunity's classification parameters and their resulting point values.

Indicator	Value	Valuation
Classifications: 6		
☐ 1. Classification: 50/55 points = A (2)		
☐ Status	Bestellung	30/30 Points
☐ Probability	75.00	20/25 Points
☒ 2. Classification: 67/122 points = B (4)		
☐ Total of Forecasts	560T€	15/30 Points
☐ Start of the opportunity	within the last year	6/30 Points
☐ Phase	Negotiation	30/30 Points
☐ Type	Interessent	16/32 Points

The detailed overview of the classifications, with the results of the individual parameters, is called up with the "Show classification" action.

Opportunity

Classifications



The classifications with their indicators, values and valuations can be created by the administrator.

Classification

Indicator	Value	Valuation
1. Classification	50/55 points = A (2)	
Status	Bestellung	30/30 Points
Probability	75.00	20/25 Points
2. Classification	67/122 points = B (4)	
Total of Forecast	560T€	15/30 Points
Start of the opportunity	within the last year	6/30 Points
Phase	Negotiation	30/30 Points
Type	Interessent	16/32 Points

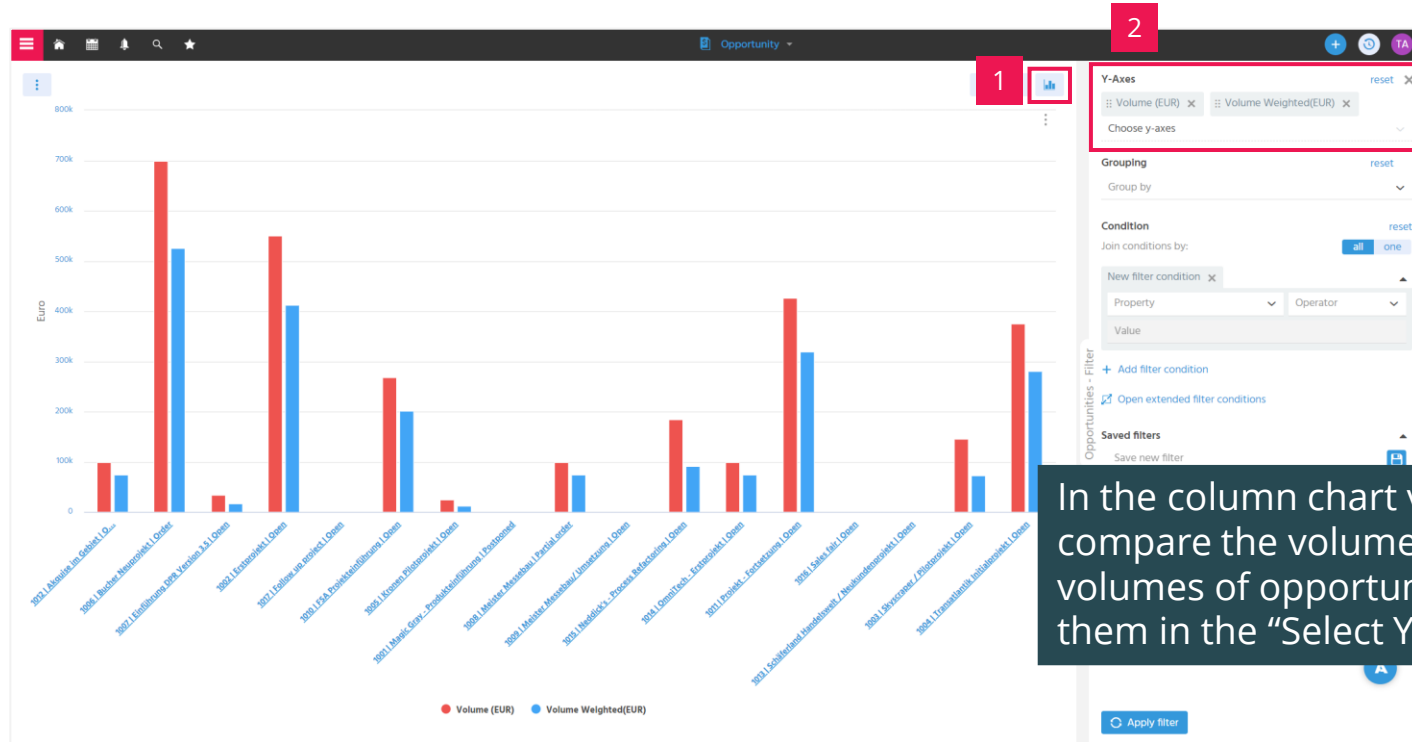
AB

The classes (A, B, C, D ...) result from the number of points achieved for the parameters.



Opportunity

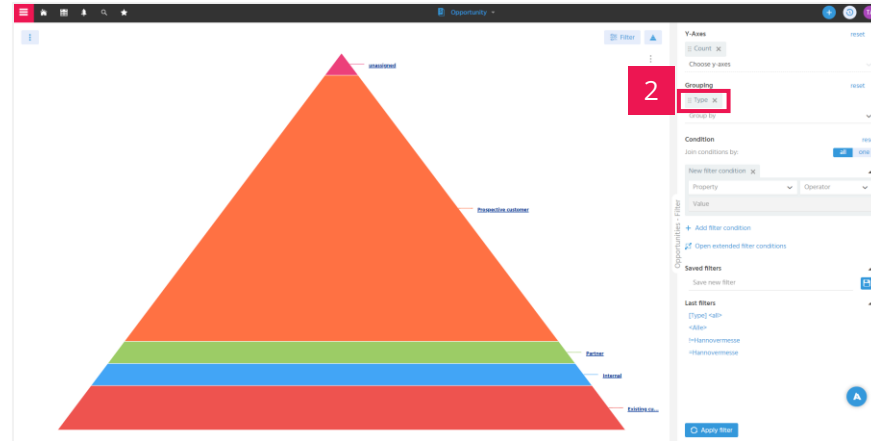
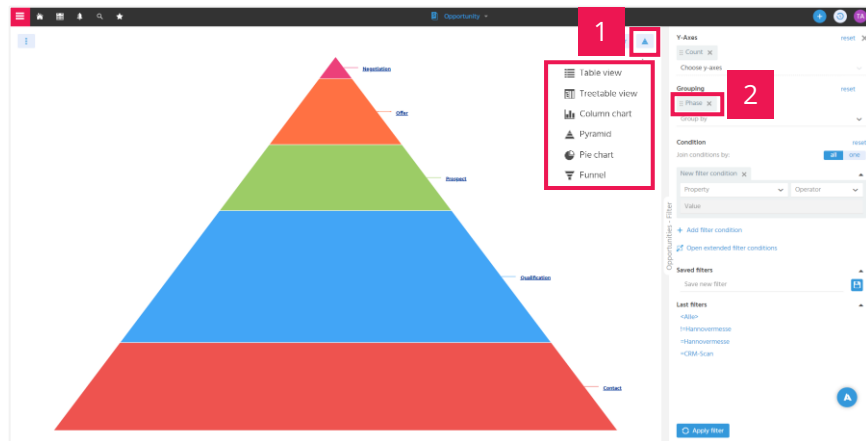
Column chart view



In the column chart view (1), you can compare the volumes and/or weighted volumes of opportunities by selecting them in the "Select Y-Axes" field (2).

Opportunity

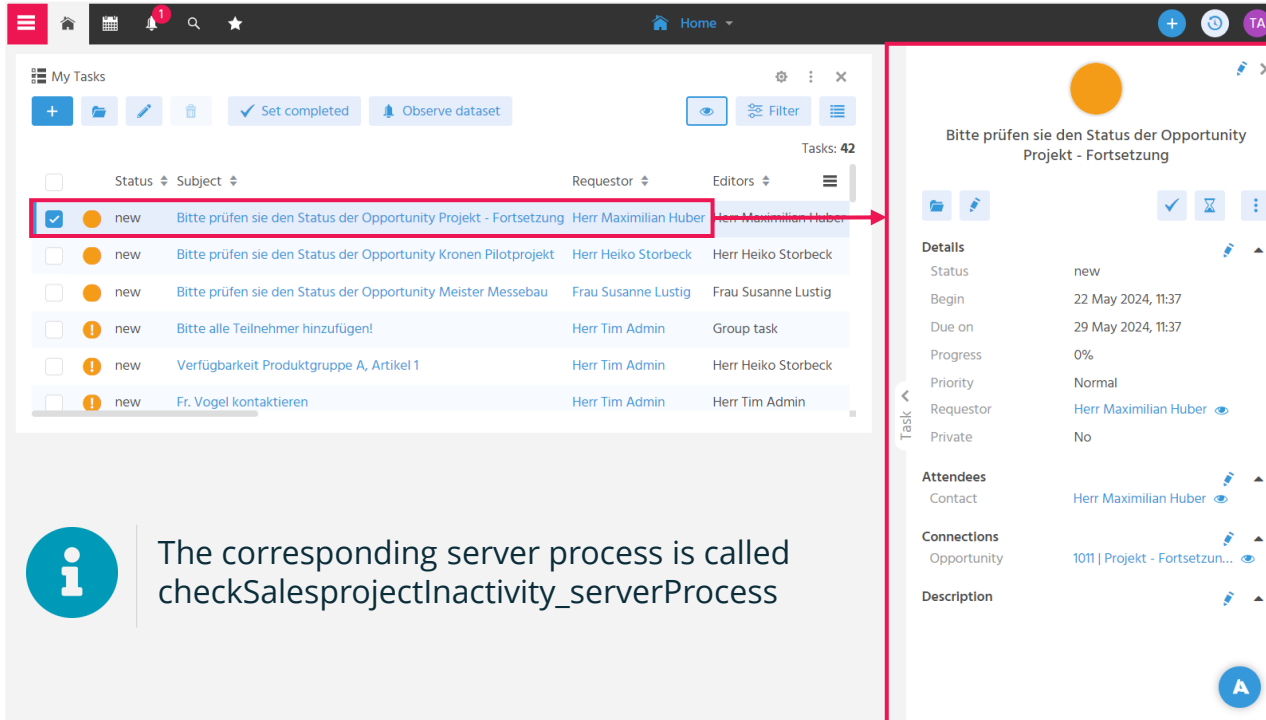
Pyramid, Pie chart, Funnel



You can also display the opportunities as a pyramid, pie chart or funnel (1). This gives you a visual overview of various parameters that you can select via the grouping (2).

Excursus server process

Task when opportunity is inactive



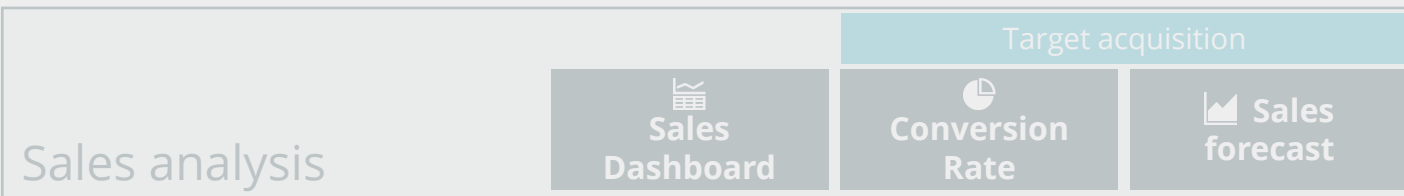
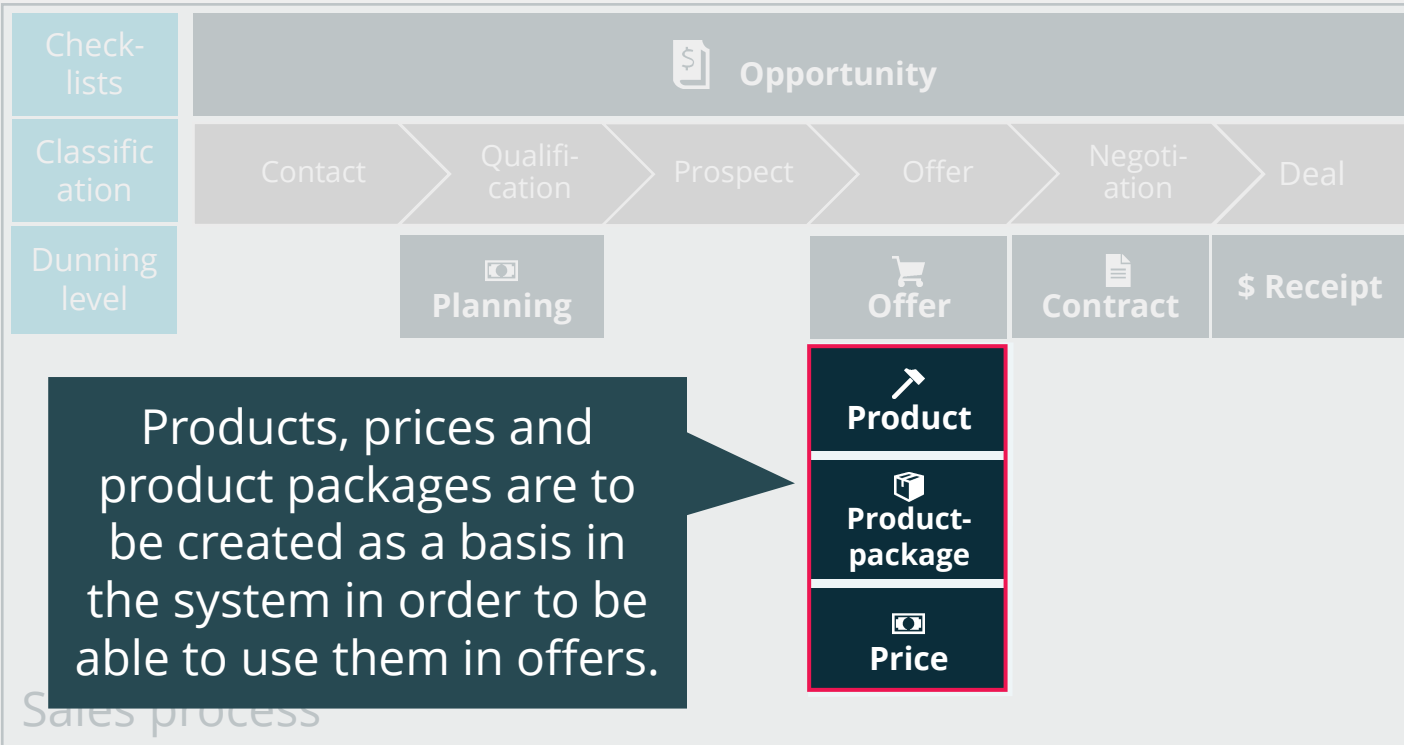
The screenshot displays the ADITO task management interface. On the left, a list of tasks is shown under the 'My Tasks' header. One task is highlighted with a red box: 'Bitte prüfen sie den Status der Opportunity Projekt - Fortsetzung' by 'Herr Maximilian Huber'. A red arrow points from this task to the right pane, which shows the details of this task. The details pane shows the task title, status (new), begin/end dates, progress (0%), priority (Normal), requestor (Herr Maximilian Huber), and attendees (Herr Maximilian Huber). The task is linked to an opportunity '1011 | Projekt - Fortsetzun...'.

The corresponding server process is called `checkSalesprojectInactivity_serverProcess`

You can have **the system create tasks for the person responsible for an opportunity** if no activity with a link to the opportunity has been created within a certain period of time. The following criteria are defined in the standard system:

- Opportunity with A classification
=> task after 7 days
- Opportunity with B classification
=> task after 14 days
- Opportunity with C classification
=> task after 21 days

Products, Product packages & Prices

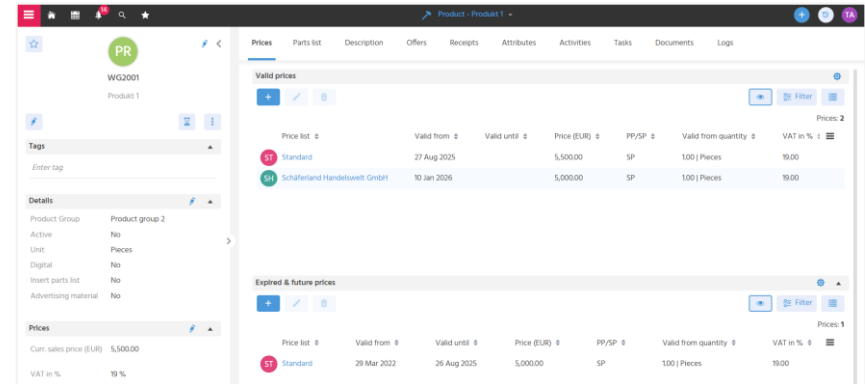


-  To be created in advance by the administrator
-  In use "daily" by end users

Product

What information can be recorded at the product?

- Product image
- Product description multilingual
- Product parts lists
- Product prices
- Product specific documents
- Product indicators: e.g. product groups, attributes



The screenshot displays the ADITO software interface for a product named 'WG2001'. The left sidebar shows product details, including tags, a description, and pricing information. The main area displays two tables: 'Valid prices' and 'Expired & future prices'.

Valid prices

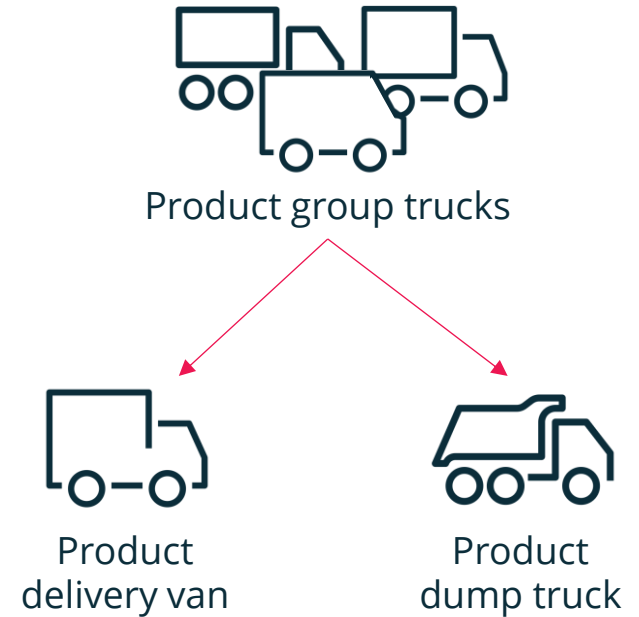
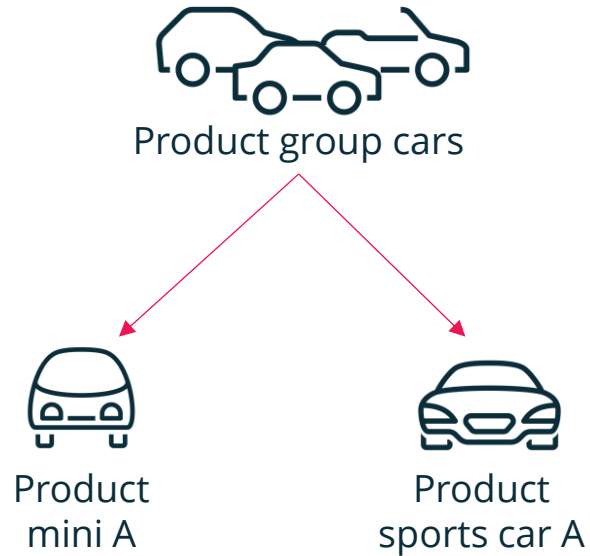
Price list	Valid from	Valid until	Price (EUR)	PP/SP	Valid from quantity	VAT in %
Standard	27 Aug 2025		5,500.00	SP	100 Pieces	19.00
Schäferland Handelskett GmbH	10 Jan 2026		5,000.00	SP	100 Pieces	19.00

Expired & future prices

Price list	Valid from	Valid until	Price (EUR)	PP/SP	Valid from quantity	VAT in %
Standard	29 Mar 2022	26 Aug 2025	5,000.00	SP	100 Pieces	19.00

Product

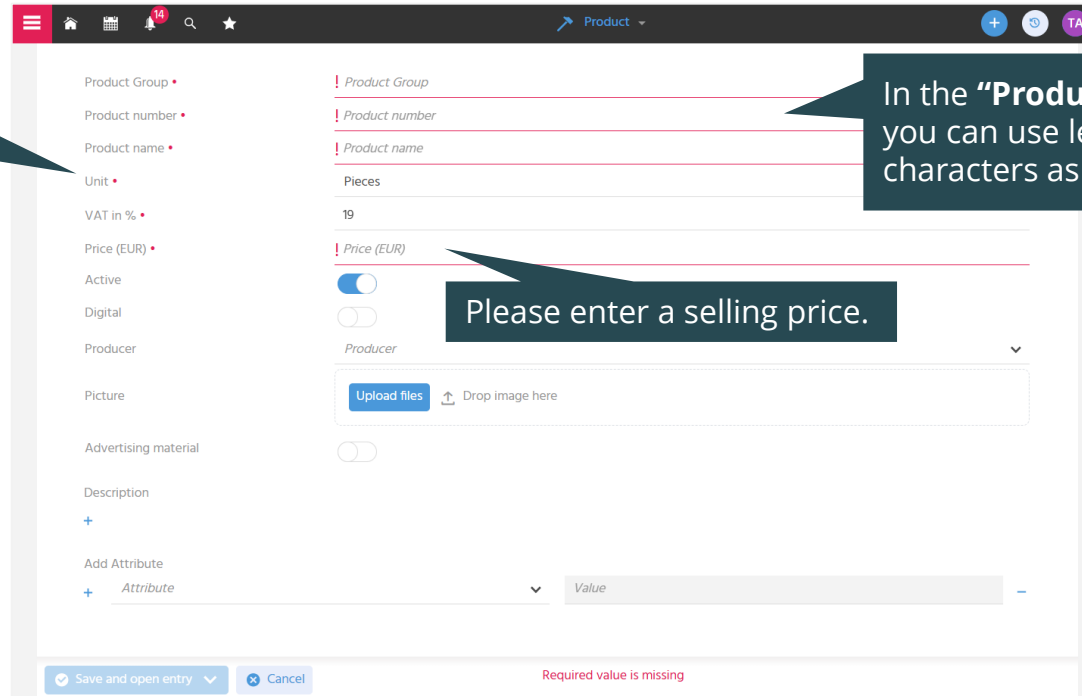
Product groups for product segmentation



Product

Create new

Select the **unit** of the product, e.g. piece, kg, hours, etc.



The screenshot shows the 'Create new Product' form in the ADITO application. The form is divided into two main sections: a left sidebar with a list of fields and a main form area on the right. The sidebar fields are: Product Group, Product number, Product name, Unit, VAT in %, Price (EUR), Active, Digital, Producer, Picture, Advertising material, Description, and Add Attribute. The main form area contains input fields for each of these fields. The 'Unit' field is currently set to 'Pieces'. The 'Price (EUR)' field is currently empty and has a red exclamation mark icon next to it, indicating a required field. The 'Active' field is a toggle switch that is currently turned on. The 'Digital' field is a toggle switch that is currently turned off. The 'Producer' field is a dropdown menu currently showing 'Producer'. The 'Picture' field is a file upload area with a blue 'Upload files' button and a 'Drop image here' prompt. The 'Advertising material' field is a toggle switch that is currently turned off. The 'Description' field is a text area. The 'Add Attribute' field is a table with two columns: 'Attribute' and 'Value'. At the bottom of the form, there are two buttons: 'Save and open entry' and 'Cancel'. A red error message 'Required value is missing' is displayed at the bottom right of the form.

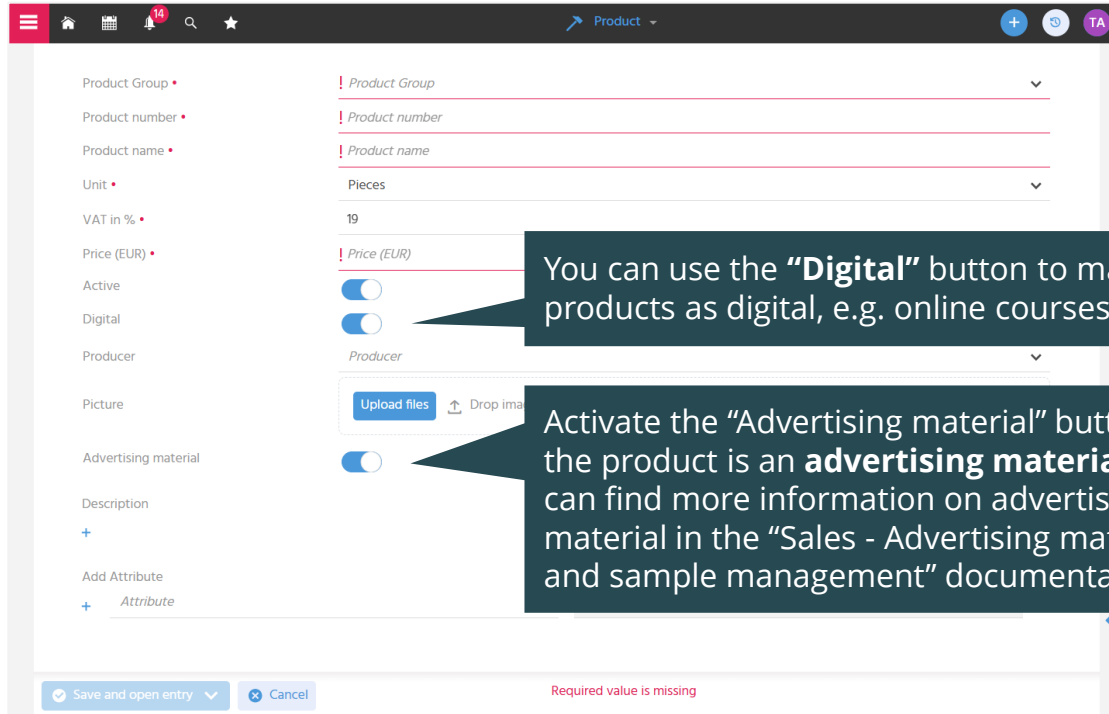
Field	Value
Product Group	Product Group
Product number	Product number
Product name	Product name
Unit	Pieces
VAT in %	19
Price (EUR)	
Active	On
Digital	Off
Producer	Producer
Picture	Upload files / Drop image here
Advertising material	Off
Description	
Add Attribute	

In the **"Product number"** field, you can use letters and special characters as well as numbers.

Please enter a selling price.

Product

Create new



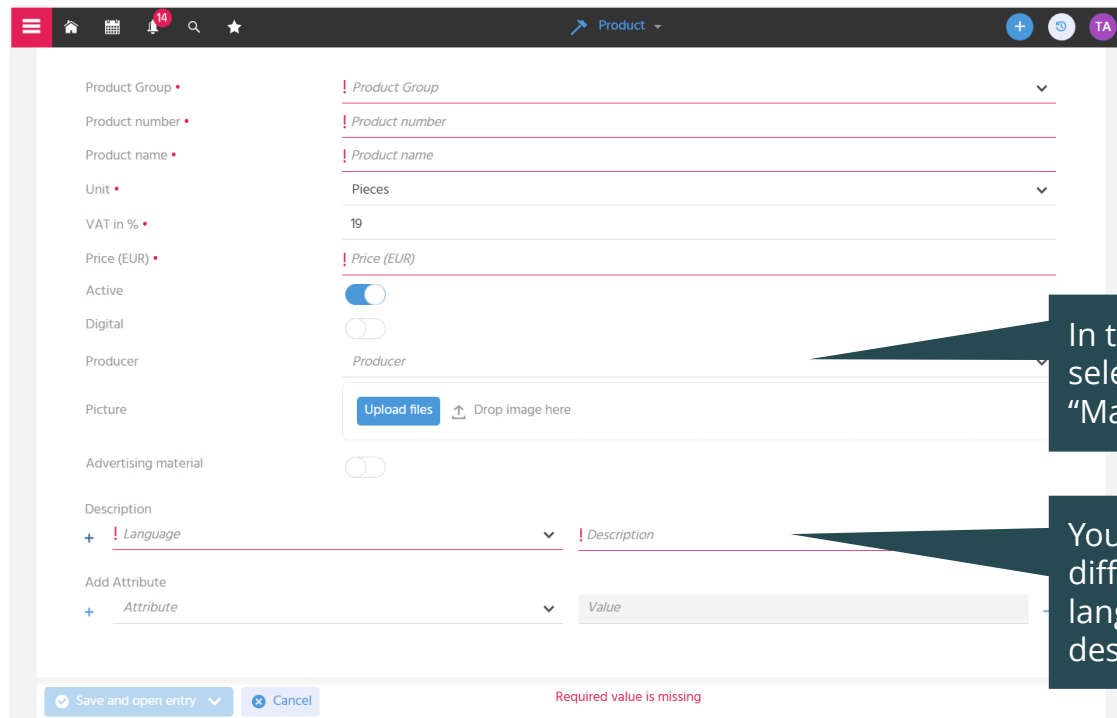
The screenshot shows the 'Create new' product form in the ADITO system. The form is divided into several sections:

- Product Group:** A dropdown menu with a red exclamation mark icon and a warning message 'Product Group'.
- Product number:** A text input field with a red exclamation mark icon and a warning message 'Product number'.
- Product name:** A text input field with a red exclamation mark icon and a warning message 'Product name'.
- Unit:** A dropdown menu with 'Pieces' selected.
- VAT in %:** A text input field with '19' entered.
- Price (EUR):** A text input field with a red exclamation mark icon and a warning message 'Price (EUR)'.
- Active:** A toggle switch that is currently turned on.
- Digital:** A toggle switch that is currently turned on. A callout box explains: "You can use the 'Digital' button to mark products as digital, e.g. online courses."
- Producer:** A dropdown menu with 'Producer' selected.
- Picture:** A section with an 'Upload files' button and a 'Drop image' area.
- Advertising material:** A toggle switch that is currently turned on. A callout box explains: "Activate the 'Advertising material' button if the product is an **advertising material**. You can find more information on advertising material in the 'Sales - Advertising material and sample management' documentation."
- Description:** A text area with a '+' icon.
- Add Attribute:** A text area with a '+' icon and the word 'Attribute'.

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

Product

Create new



Product Group • ! Product Group

Product number • ! Product number

Product name • ! Product name

Unit • Pieces

VAT in % • 19

Price (EUR) • ! Price (EUR)

Active ☒

Digital ☐

Producer Producer

Picture

Advertising material ☐

Description

+ ! Language Description

Add Attribute

+ Attribute Value

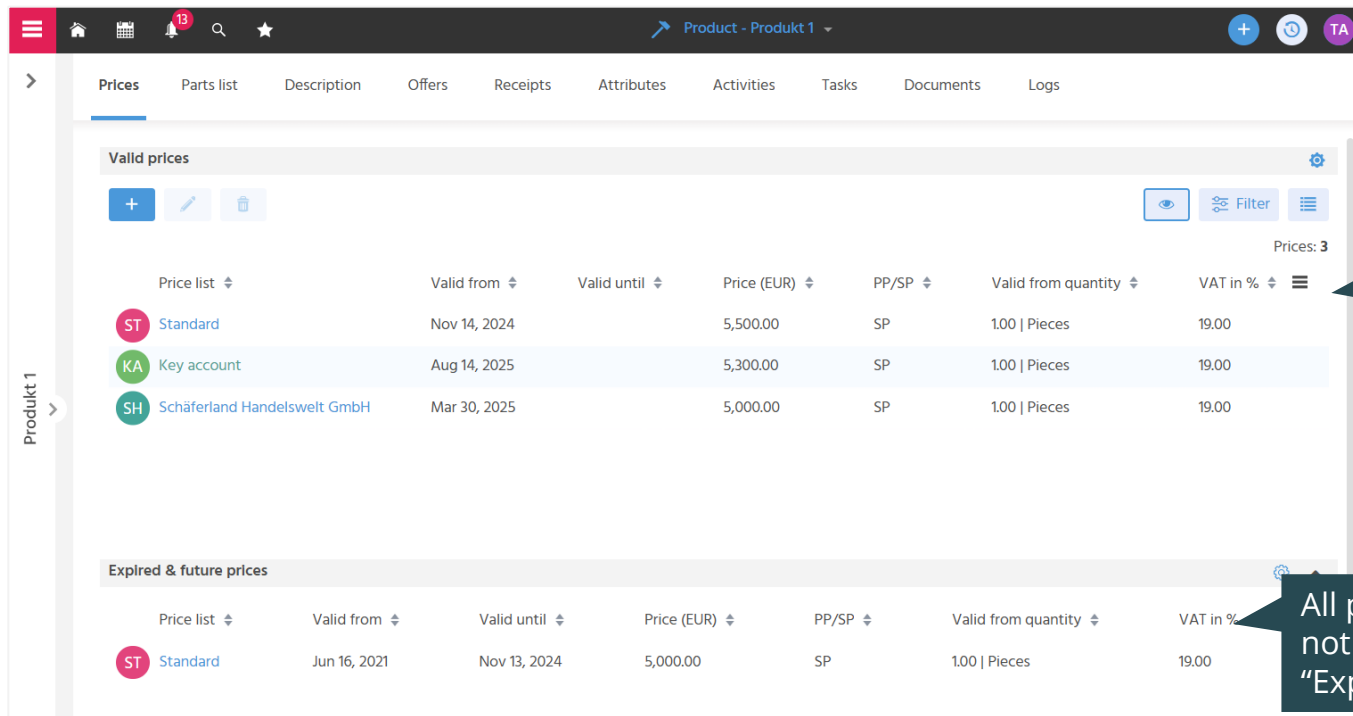
Required value is missing

In the "Producer" field, you can select all companies of the type "Manufacturer".

You can enter short product descriptions in different languages. Depending on the language selected in the offer, the appropriate description will be displayed on the product.

Product

Tab "Prices"



Product - Produkt 1

Prices Parts list Description Offers Receipts Attributes Activities Tasks Documents Logs

Valid prices

Prices: 3

Price list	Valid from	Valid until	Price (EUR)	PP/SP	Valid from quantity	VAT in %
ST Standard	Nov 14, 2024		5,500.00	SP	1.00 Pieces	19.00
KA Key account	Aug 14, 2025		5,300.00	SP	1.00 Pieces	19.00
SH Schäferland Handelswelt GmbH	Mar 30, 2025		5,000.00	SP	1.00 Pieces	19.00

Expired & future prices

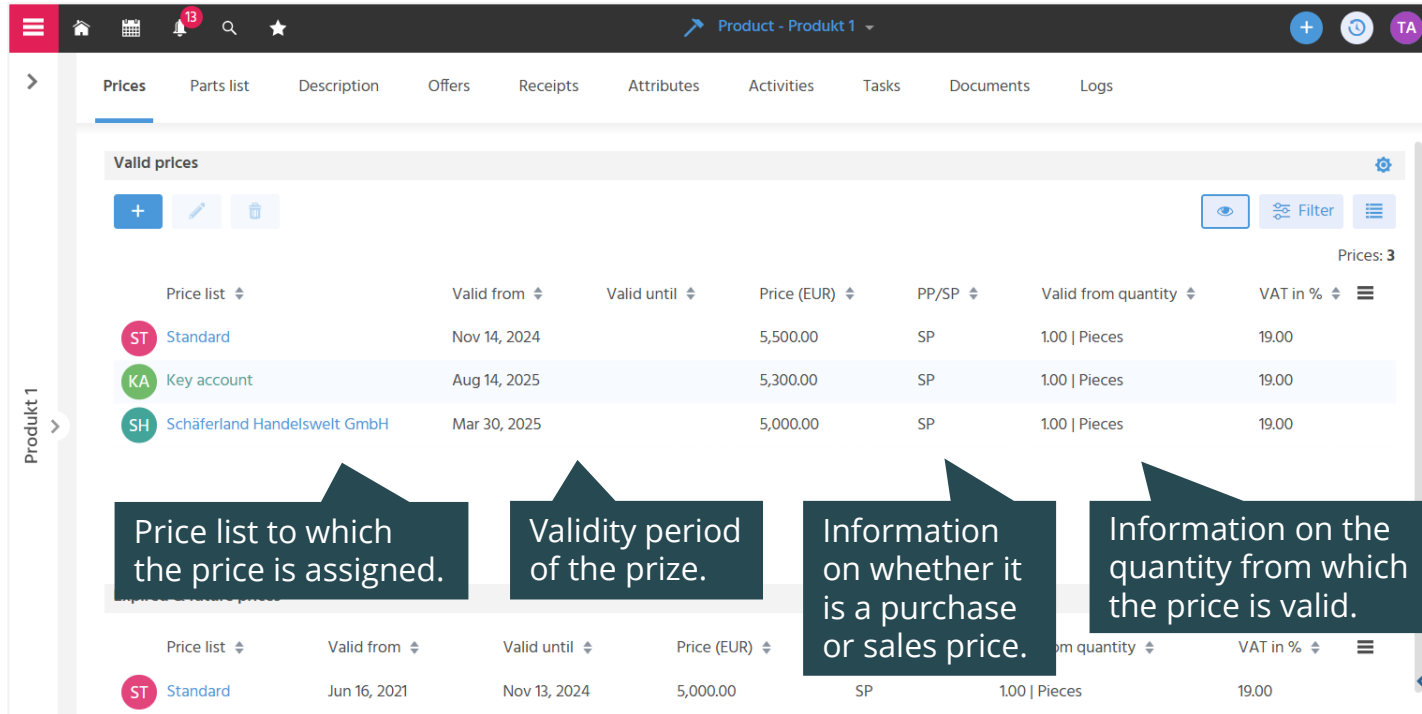
Price list	Valid from	Valid until	Price (EUR)	PP/SP	Valid from quantity	VAT in %
ST Standard	Jun 16, 2021	Nov 13, 2024	5,000.00	SP	1.00 Pieces	19.00

All currently valid prices are displayed in the "Valid prices" area.

All prices that are currently not valid are displayed in the "Expired & future prices" area.

Product

Tab "Prices"



Product - Produkt 1

Prices

Valid prices

Price list	Valid from	Valid until	Price (EUR)	PP/SP	Valid from quantity	VAT in %
ST Standard	Nov 14, 2024		5,500.00	SP	1.00 Pieces	19.00
KA Key account	Aug 14, 2025		5,300.00	SP	1.00 Pieces	19.00
SH Schäferland Handelswelt GmbH	Mar 30, 2025		5,000.00	SP	1.00 Pieces	19.00

Prices: 3

Price list to which the price is assigned.

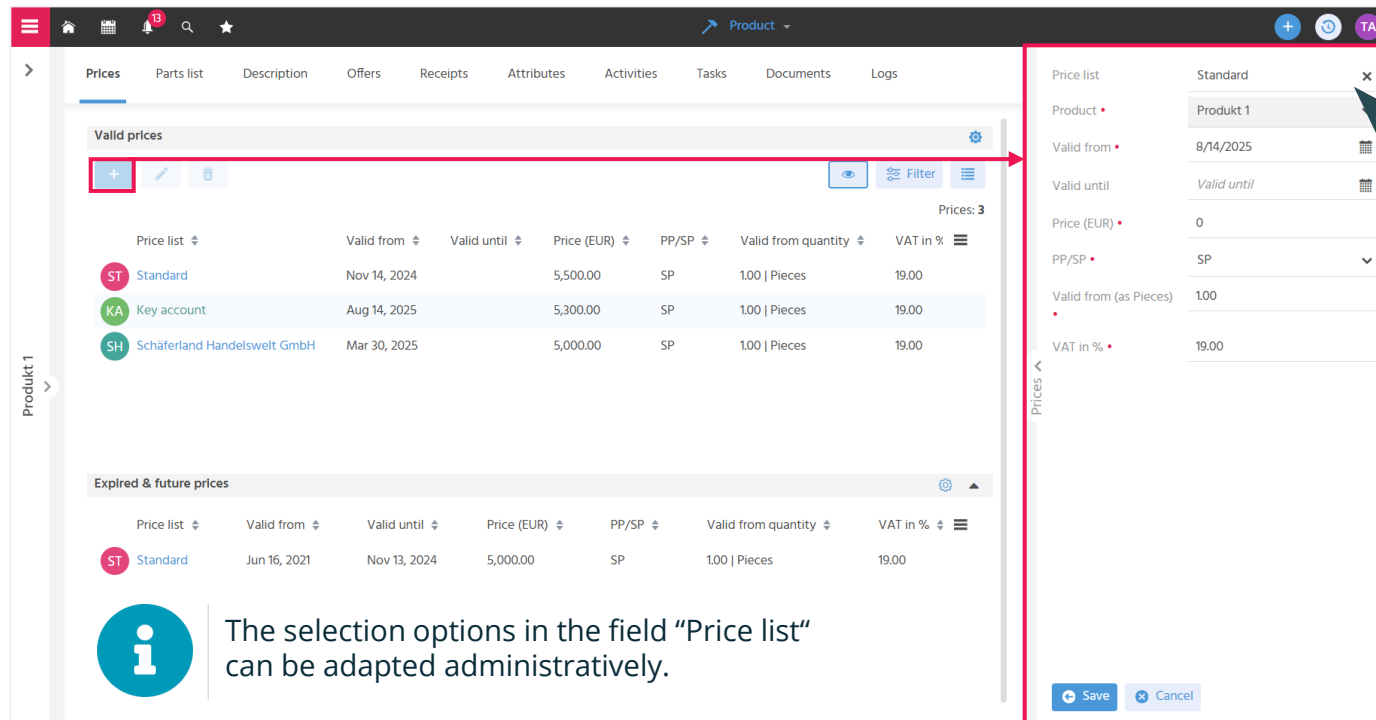
Validity period of the price.

Information on whether it is a purchase or sales price.

Information on the quantity from which the price is valid.

Product

Tab “Prices” - Add price



The screenshot shows the ADITO interface for the 'Product' tab, specifically the 'Prices' sub-tab. A red box highlights the '+ Add' button in the 'Valid prices' section. To the right, the 'Price list' dropdown menu is expanded, showing a list of price lists with 'Standard' selected. A red arrow points from the '+ Add' button to the dropdown menu.

Valid prices

Price list	Valid from	Valid until	Price (EUR)	PP/SP	Valid from quantity	VAT in %
ST Standard	Nov 14, 2024		5,500.00	SP	1.00 Pieces	19.00
KA Key account	Aug 14, 2025		5,300.00	SP	1.00 Pieces	19.00
SH Schäferland Handelswelt GmbH	Mar 30, 2025		5,000.00	SP	1.00 Pieces	19.00

Expired & future prices

Price list	Valid from	Valid until	Price (EUR)	PP/SP	Valid from quantity	VAT in %
ST Standard	Jun 16, 2021	Nov 13, 2024	5,000.00	SP	1.00 Pieces	19.00

Price list options (from dropdown):

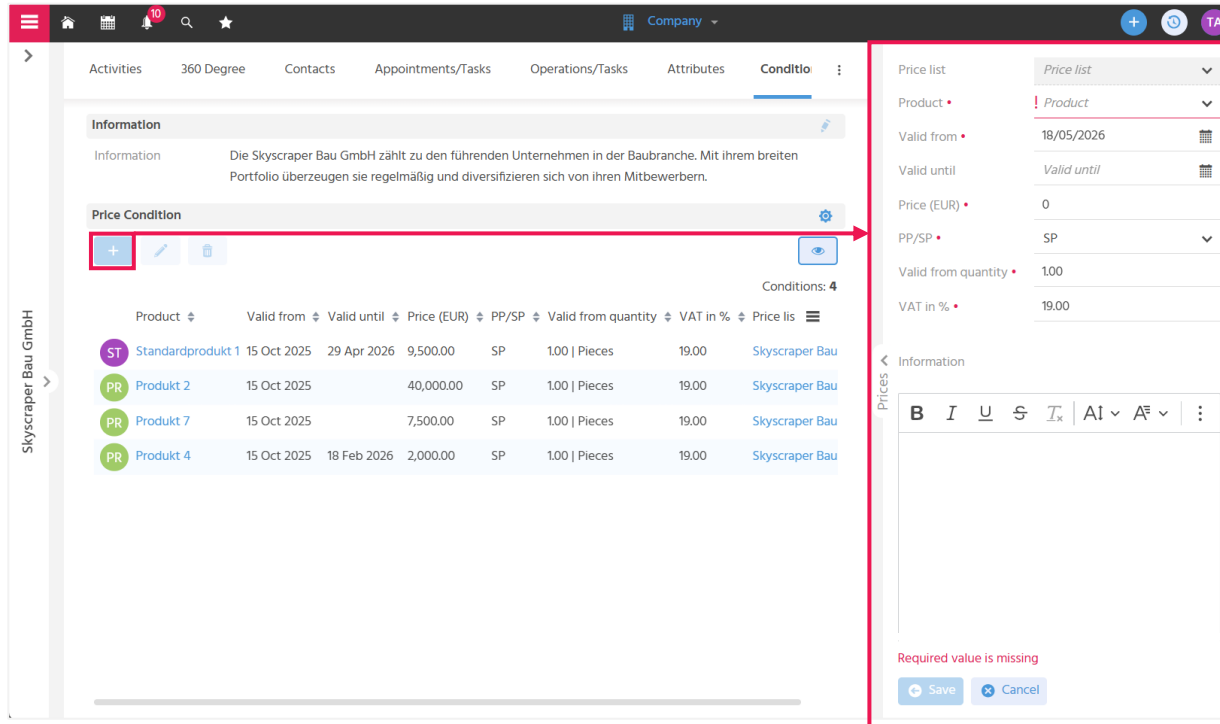
- Price list: Standard
- Product: Produkt 1
- Valid from: 8/14/2025
- Valid until: Valid until
- Price (EUR): 0
- PP/SP: SP
- Valid from (as Pieces): 1.00
- VAT in %: 19.00

Buttons: Save, Cancel

Here you select to which price list the price should belong, e.g. Standard, Special price list, etc. Company price lists cannot be selected. They are generated automatically if you enter a company-specific price for the company.

Excursus into the company

Maintenance of customer-specific prices at the company



Activities 360 Degree Contacts Appointments/Tasks Operations/Tasks Attributes **Conditions**

Information

Information Die Skyscraper Bau GmbH zählt zu den führenden Unternehmen in der Baubranche. Mit ihrem breiten Portfolio überzeugen sie regelmäßig und diversifizieren sich von ihren Mitbewerbern.

Price Condition

+ [edit] [delete] [eye]

Conditions: 4

Product	Valid from	Valid until	Price (EUR)	PP/SP	Valid from quantity	VAT in %	Price list
ST Standardprodukt 1	15 Oct 2025	29 Apr 2026	9,500.00	SP	1.00 Pieces	19.00	Skyscraper Bau
PR Produkt 2	15 Oct 2025		40,000.00	SP	1.00 Pieces	19.00	Skyscraper Bau
PR Produkt 7	15 Oct 2025		7,500.00	SP	1.00 Pieces	19.00	Skyscraper Bau
PR Produkt 4	15 Oct 2025	18 Feb 2026	2,000.00	SP	1.00 Pieces	19.00	Skyscraper Bau

Price list Price list

Product Product

Valid from 18/05/2026

Valid until Valid until

Price (EUR) 0

PP/SP SP

Valid from quantity 1.00

VAT in % 19.00

Prices < Information

B I U S T_x | At v A[€] v | :

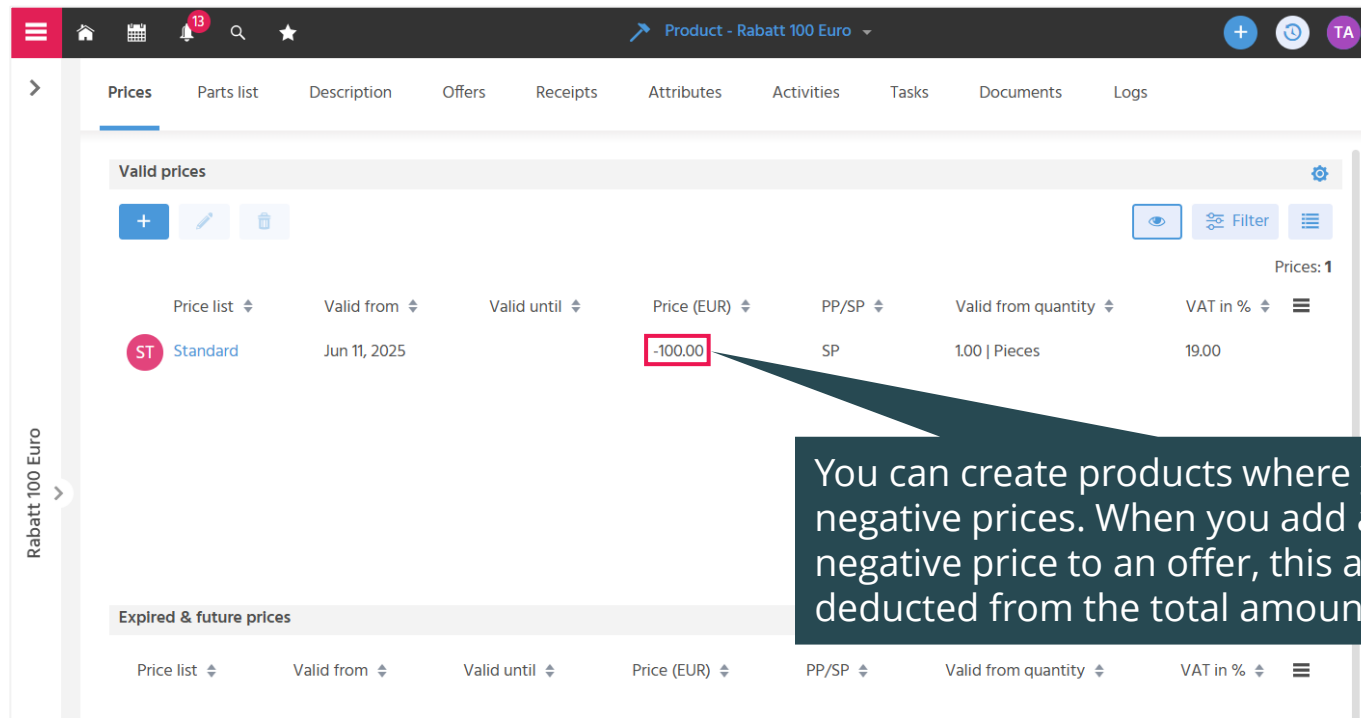
Required value is missing

Save Cancel

In the “Conditions” tab at a company, you can create company-specific prices that only apply to this company. This automatically creates a price list that is given the name of the company.

Prices

Negative prices



The screenshot shows the ADITO software interface for managing prices. The top navigation bar includes a menu icon, home, calendar, notifications (13), search, and star icons. The main header displays the product name "Product - Rabatt 100 Euro" and action buttons (+, refresh, and a user profile icon labeled "TA"). Below the header, a tabbed interface shows "Prices" as the active tab, with other tabs like "Parts list", "Description", "Offers", "Receipts", "Attributes", "Activities", "Tasks", "Documents", and "Logs".

The "Valid prices" section contains a table with the following columns: Price list, Valid from, Valid until, Price (EUR), PP/SP, Valid from quantity, and VAT in %. A single price entry is shown:

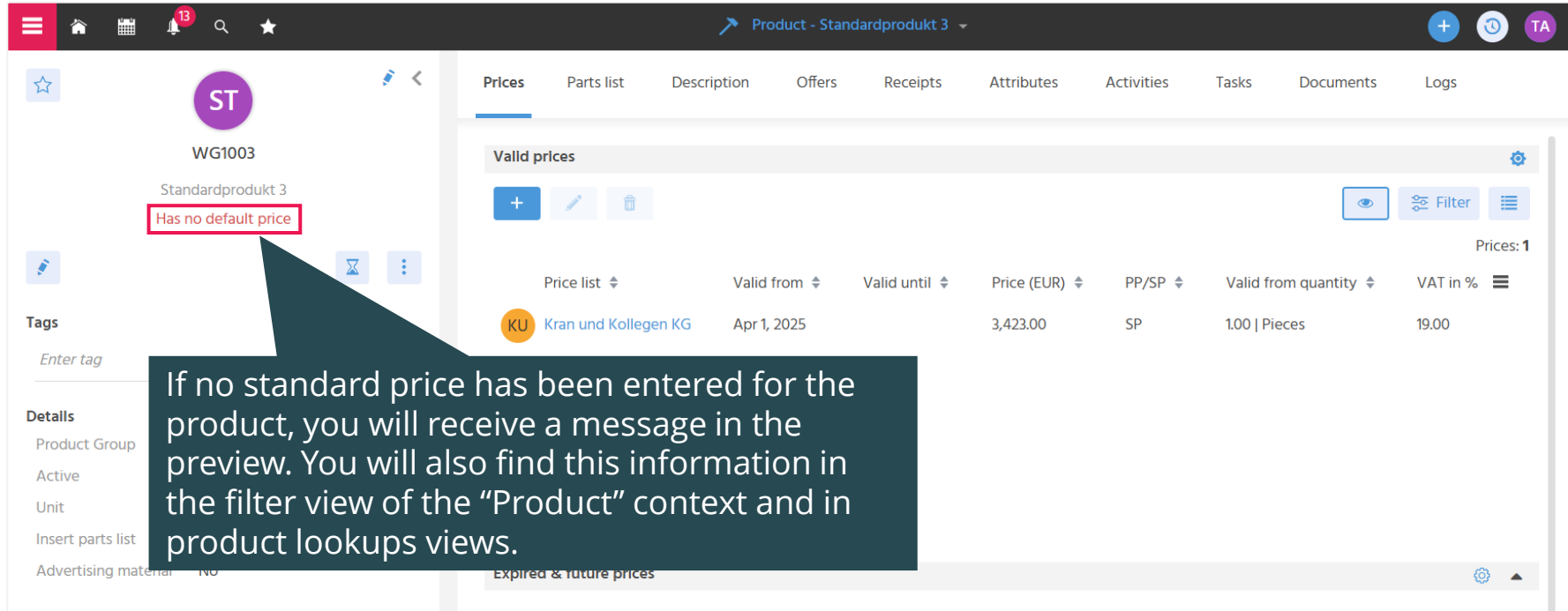
Price list	Valid from	Valid until	Price (EUR)	PP/SP	Valid from quantity	VAT in %
ST Standard	Jun 11, 2025		-100.00	SP	1.00 Pieces	19.00

The value "-100.00" in the Price (EUR) column is highlighted with a red box. A callout box points to this value, containing the text: "You can create products where you create negative prices. When you add a product with a negative price to an offer, this amount is deducted from the total amount of the offer."

Below the "Valid prices" section, there is a section for "Expired & future prices" with a similar table structure.

Prices

Standard price



The screenshot shows the ADITO interface for the 'Product - Standardprodukt 3'. The 'Prices' tab is active, displaying a table of 'Valid prices'. A red box highlights the message 'Has no default price' under the product name 'Standardprodukt 3'. A callout box explains that this message appears in the preview, filter view, and product lookups views.

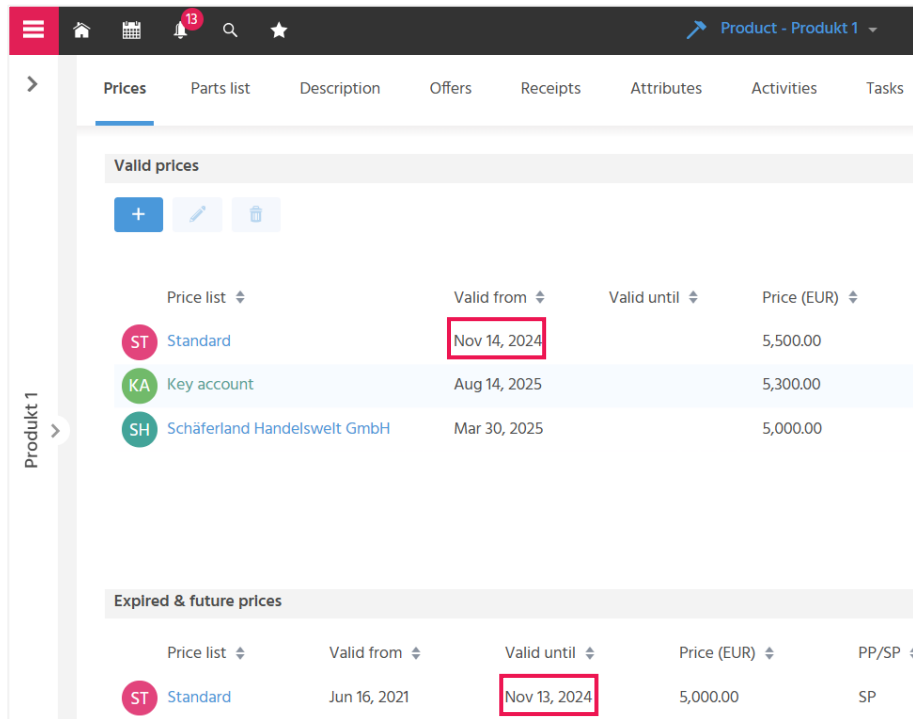
Valid prices

Price list	Valid from	Valid until	Price (EUR)	PP/SP	Valid from quantity	VAT in %
KU Kran und Kollegen KG	Apr 1, 2025		3,423.00	SP	1.00 Pieces	19.00

Expired & future prices

Prices

Validity period



The screenshot shows the ADITO interface for managing prices for 'Produkt 1'. The 'Valid prices' section contains three entries. The 'Valid until' date for the 'Standard' price list is highlighted with a red box. The 'Expired & future prices' section contains one entry. The 'Valid until' date for this entry is also highlighted with a red box.

Price list	Valid from	Valid until	Price (EUR)
ST Standard	Nov 14, 2024		5,500.00
KA Key account	Aug 14, 2025		5,300.00
SH Schäferland Handelswelt GmbH	Mar 30, 2025		5,000.00

Price list	Valid from	Valid until	Price (EUR)	PP/SP
ST Standard	Jun 16, 2021	Nov 13, 2024	5,000.00	SP

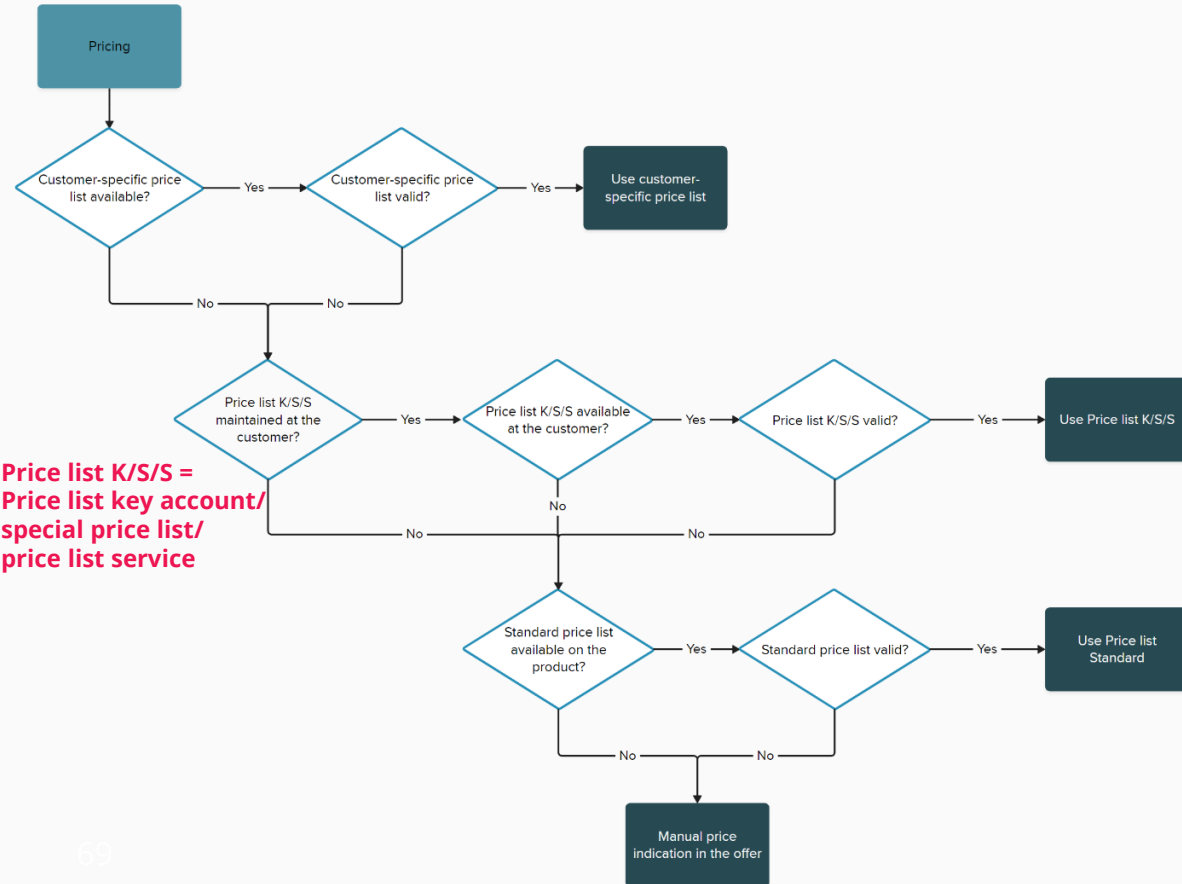
A price has been entered for a product and assigned to the “Standard” price list, for example. If you now enter a new price that you assign to the “Standard” price list, the **valid until** date of the previous price is **automatically set to one day before the valid from date** of the new price.

Pricing logic in the offer

What price is drawn in the offer?

1. Check whether a customer-specific price is stored for the product at the company
If **yes**: **transfer customer-specific price to the offer**
If **no**:
2. Check for the value of the “Price list” attribute in the “Attributes” tab in the company and check whether there is a price for this price list on the product (e.g. special price list)
If **match**: (e.g. special price list attribute in the company and product price with special price list), then **drag the price of this price list**
If **no match**: (e.g. special price list attribute in the company, but no product price with special price list),
3. **Drag the standard price**

Pricing logic in the offer



Further price list types, in addition to standard, key account, special price list and service, can be added administratively as keyword entries for PRODUCTPRICELIST.

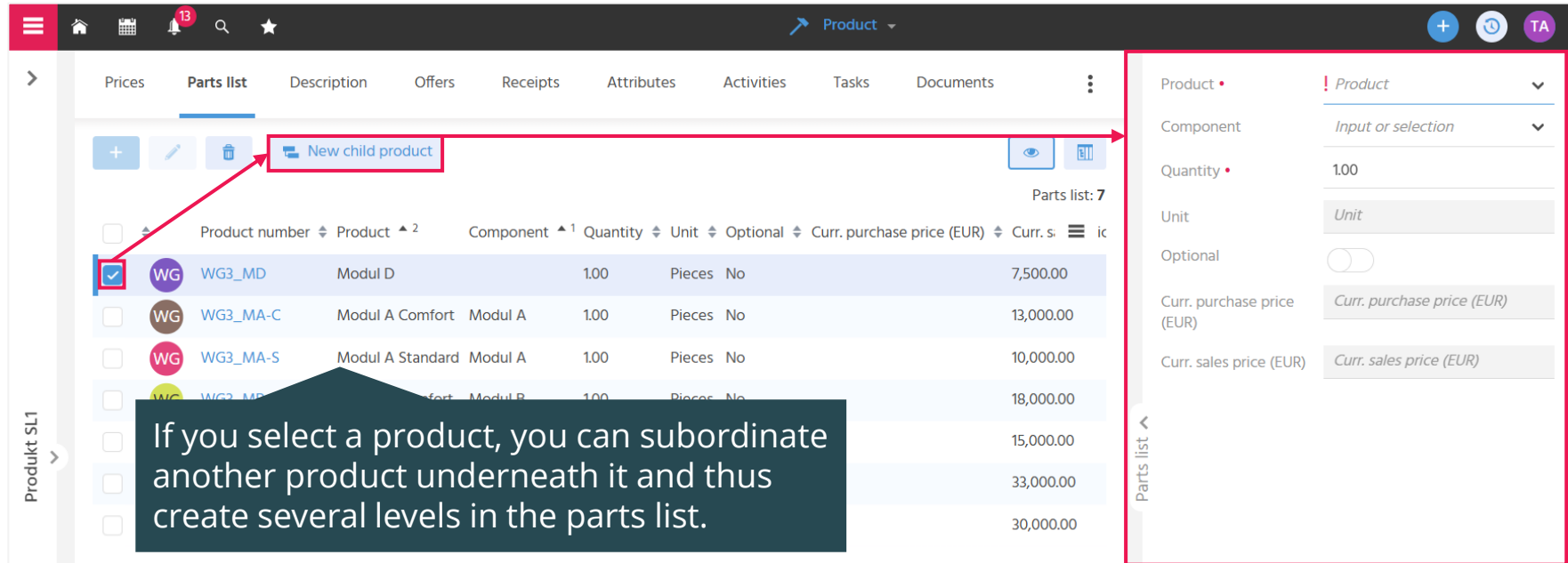
The screenshot displays the SAP S/4HANA Product Master - Parts List tab. The main table lists parts for product SL1. A red box highlights the '+' icon in the top left corner of the table area. A red arrow points from this box to the right-hand side of the screen, which displays the details of the selected part, WG3_MB-C.

	Product number	Product	Component	Quantity	Unit	Optional	Curr. purchase price (EUR)	Curr. s.
☐	WG3_MD	Modul D		1.00	Pieces	No	7,500.00	
☐	WG3_MA-C	Modul A Comfort	Modul A	1.00	Pieces	No	13,000.00	
☐	WG3_MA-S	Modul A Standard	Modul A	1.00	Pieces	No	10,000.00	
☐	WG3_MB-C	Modul B Comfort	Modul B	1.00	Pieces	No	18,000.00	
☐	WG3_MB-S	Modul B Standard	Modul B	2.00	Pieces	Yes	15,000.00	
☐	WG3_ML-C	Modul C Comfort	Modul C	1.00	Pieces	No	33,000.00	
☐	WG3_ML-S	Modul C Standard	Modul C	1.00	Pieces	No	30,000.00	

The right-hand side of the screen displays the details of the selected part, WG3_MB-C. It includes fields for Component, Quantity, Unit, Optional, Curr. purchase price (EUR), and Curr. sales price (EUR).

Product parts list

Maintain parts lists on the product



Product parts list

Product number Product Component Quantity Unit Optional Curr. purchase price (EUR) Curr. sales price (EUR)

Product number	Product	Component	Quantity	Unit	Optional	Curr. purchase price (EUR)	Curr. sales price (EUR)
WG3_MD	Modul D		1.00	Pieces	No	7,500.00	
WG3_MA-C	Modul A Comfort	Modul A	1.00	Pieces	No	13,000.00	
WG3_MA-S	Modul A Standard	Modul A	1.00	Pieces	No	10,000.00	
WG3_MB	Modul B		1.00	Pieces	No	18,000.00	
						15,000.00	
						33,000.00	
						30,000.00	

If you select a product, you can subordinate another product underneath it and thus create several levels in the parts list.

Product

Component

Quantity

Unit

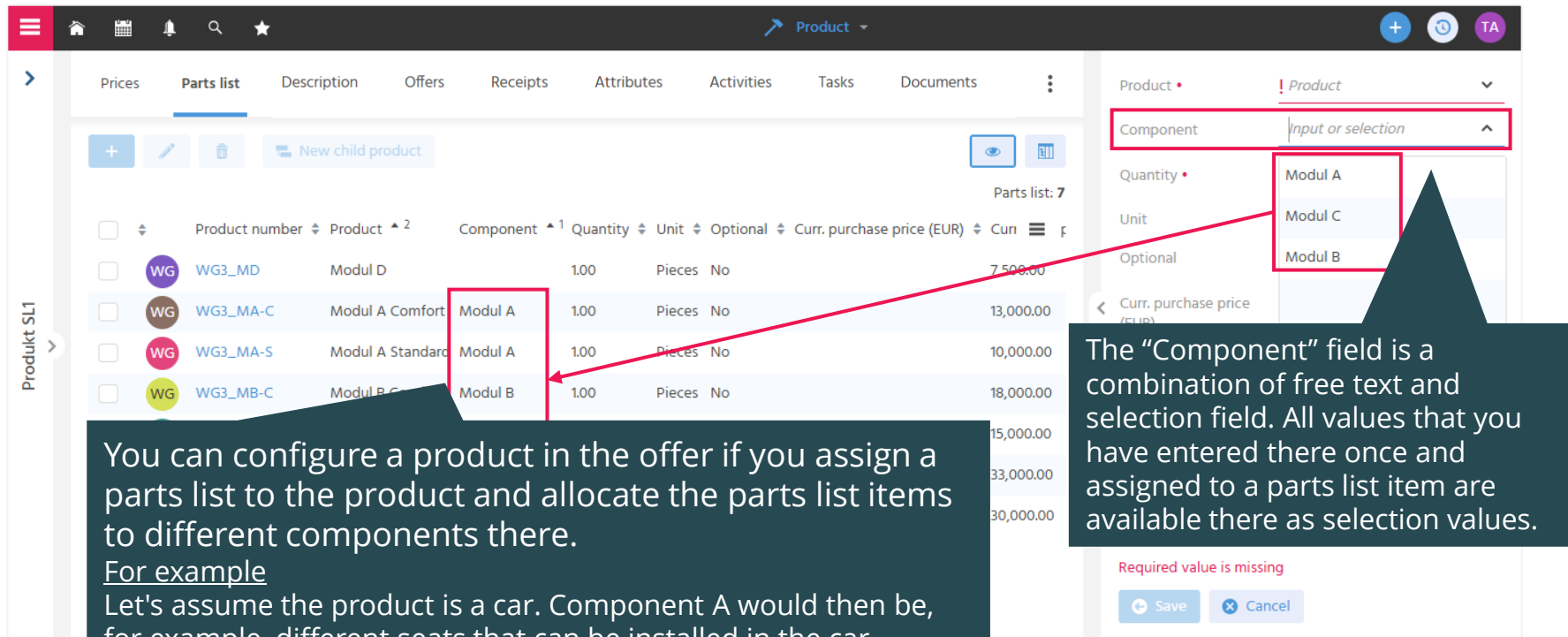
Optional

Curr. purchase price (EUR)

Curr. sales price (EUR)

Product parts list

Making a product configurable



The screenshot displays the ADITO software interface. The main window shows a 'Parts list' for a product. The table lists components with their respective quantities, units, and prices. A red box highlights the 'Component' column, and a red arrow points from it to a text box. The text box contains the following text:

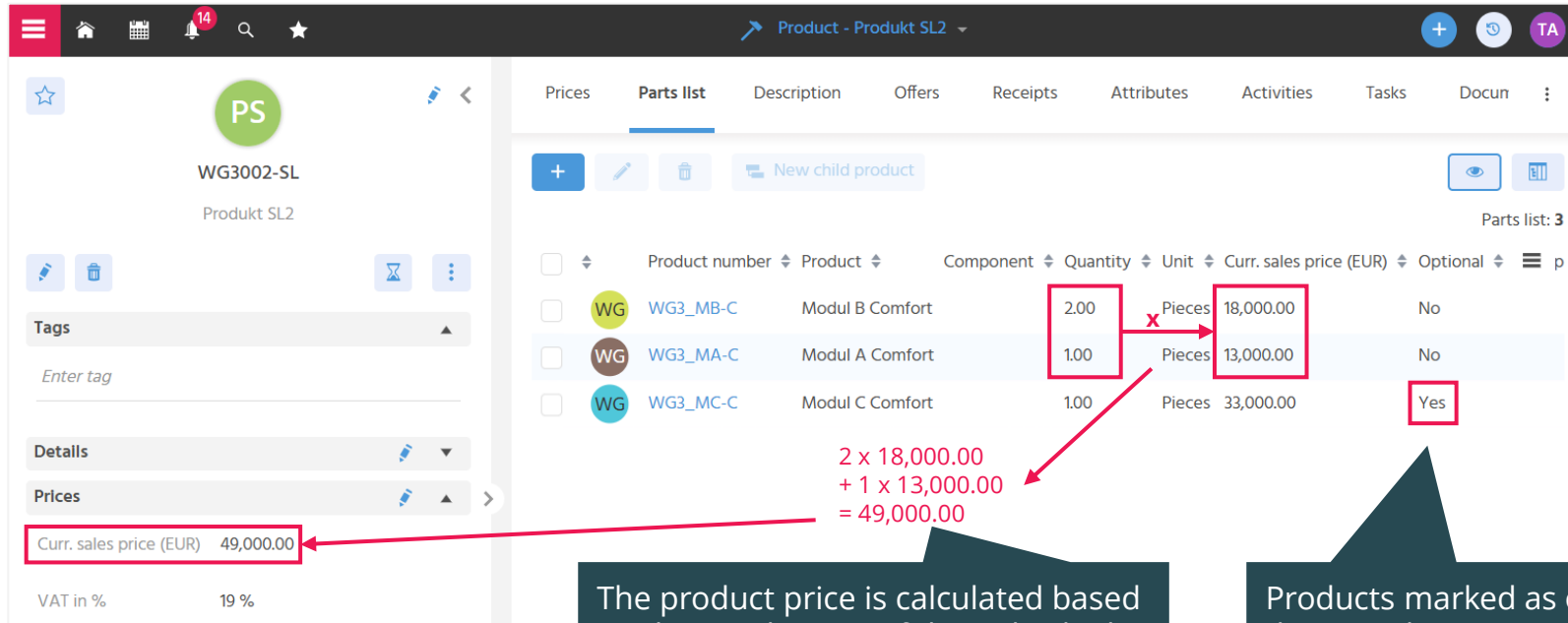
You can configure a product in the offer if you assign a parts list to the product and allocate the parts list items to different components there.
For example
Let's assume the product is a car. Component A would then be, for example, different seats that can be installed in the car.
Component B would be the colors in which the car is available.

On the right side, a configuration modal is open. It shows a 'Component' field with a dropdown menu. The dropdown menu is open, showing a list of components: 'Modul A', 'Modul C', and 'Modul B'. A red box highlights the dropdown menu, and a red arrow points from the 'Component' field in the main table to it. The modal also shows a 'Quantity' field, a 'Unit' field, and an 'Optional' checkbox. At the bottom of the modal, there is a red error message: 'Required value is missing'. Below the error message are 'Save' and 'Cancel' buttons.

Product number	Product	Component	Quantity	Unit	Optional	Curr. purchase price (EUR)
WG3_MD	Modul D		1.00	Pieces	No	7,500.00
WG3_MA-C	Modul A Comfort	Modul A	1.00	Pieces	No	13,000.00
WG3_MA-S	Modul A Standard	Modul A	1.00	Pieces	No	10,000.00
WG3_MB-C	Modul B Comfort	Modul B	1.00	Pieces	No	18,000.00

Product parts list

Automatic total price calculation



The screenshot shows the 'Parts list' for product 'WG3002-SL'. The table lists three components:

Product number	Product	Component	Quantity	Unit	Curr. sales price (EUR)	Optional
WG3_MB-C	Modul B Comfort		2.00	Pieces	18,000.00	No
WG3_MA-C	Modul A Comfort		1.00	Pieces	13,000.00	No
WG3_MC-C	Modul C Comfort		1.00	Pieces	33,000.00	Yes

Red boxes highlight the quantities (2.00, 1.00, 1.00) and prices (18,000.00, 13,000.00, 33,000.00) for the first two components. A red arrow points from the first two rows to the calculation:

$$2 \times 18,000.00 + 1 \times 13,000.00 = 49,000.00$$

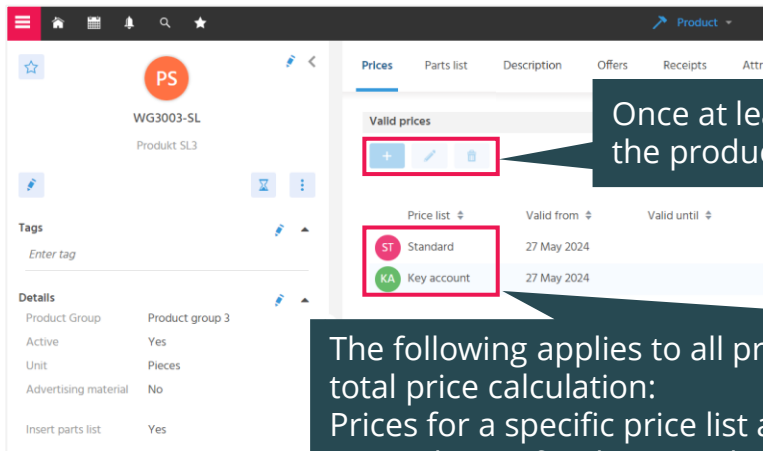
Another red arrow points from this calculation to the 'Curr. sales price (EUR)' field in the sidebar, which displays '49,000.00'. A third red arrow points from the 'Optional' column to a callout box.

Callout 1: The product price is calculated based on the retail prices of the individual items in the parts list.

Callout 2: Products marked as optional in the parts list are not included in the total product price.

Product parts list

Automatic total price calculation



Prices	Parts list	Description	Offers	Receipts	Attr
Valid prices					
+ -					
Price list					
Valid from					
Valid until					
ST Standard					
27 May 2024					
KA Key account					
27 May 2024					

Once at least one parts list item has been entered, the product price can no longer be edited manually.

The following applies to all price lists (except customer-specific price lists) for the automatic total price calculation:

Prices for a specific price list are stored **for all non-optional sub-items** of a parts list product => total price for this price list is calculated automatically.

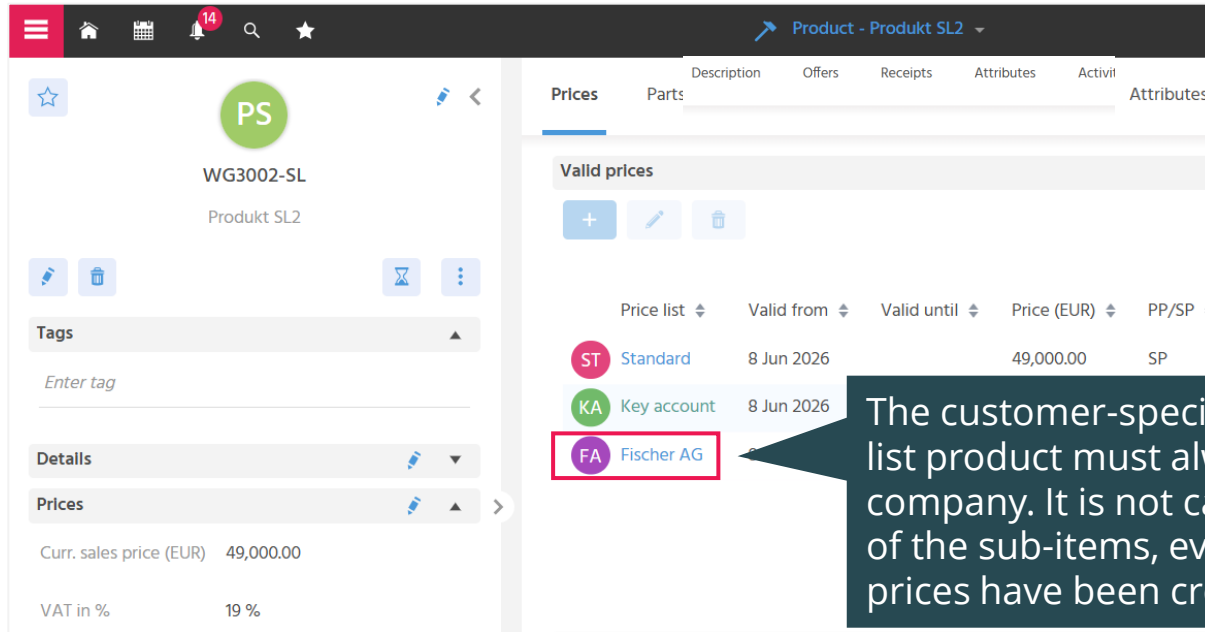
For example:

- Prices for price list "Standard" are stored for **all** non-optional sub-items => total price "Standard" is calculated automatically.
- Prices for price list "Key account" are stored for **all** non-optional sub-items => total price "Key account" is calculated automatically.

If the price for a price list is missing for at least one sub-item, no total price is calculated for this price list.

Product parts list

Automatic total price calculation

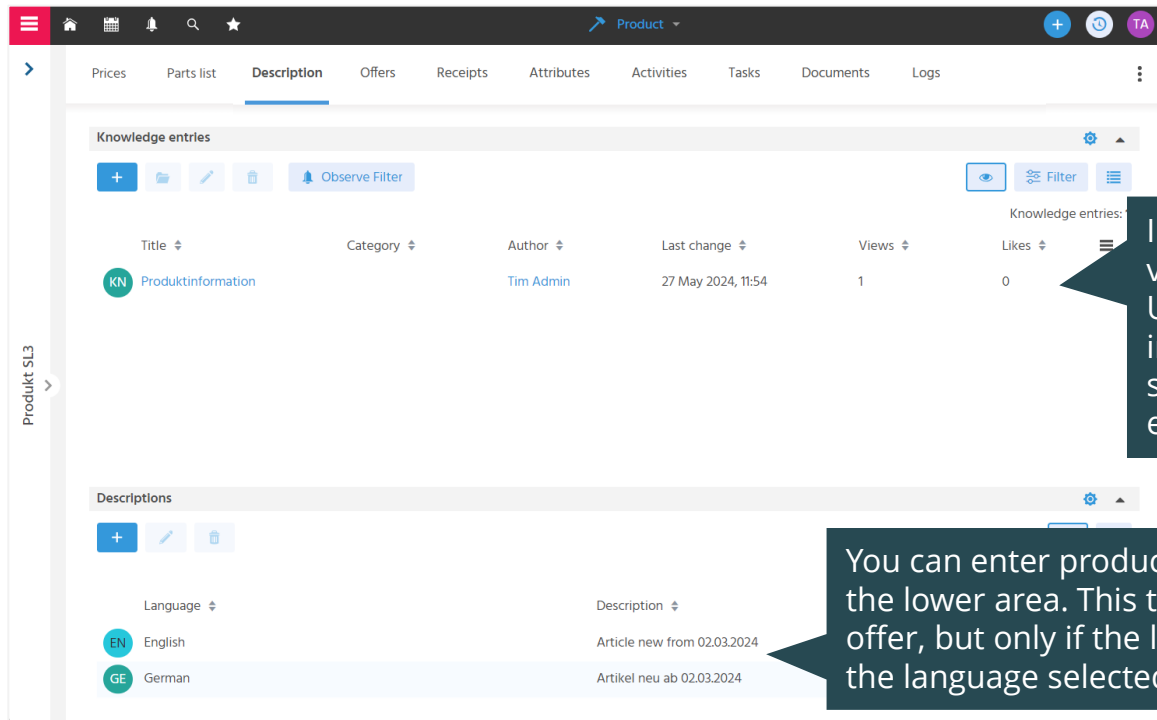


The screenshot displays the ADITO software interface for managing product parts. The main section shows a table of 'Valid prices' for the product 'WG3002-SL'. The table has columns for 'Price list', 'Valid from', 'Valid until', 'Price (EUR)', and 'PP/SP'. Three price lists are listed: 'Standard', 'Key account', and 'Fischer AG'. The 'Fischer AG' entry is highlighted with a red box. A callout box points to this entry with the text: 'The customer-specific total price of a parts list product must always be stored at the company. It is not calculated from the prices of the sub-items, even if customer-specific prices have been created for all sub-items.'

Price list	Valid from	Valid until	Price (EUR)	PP/SP
ST Standard	8 Jun 2026		49,000.00	SP
KA Key account	8 Jun 2026			
FA Fischer AG				

Product description

Complete the description on the product



The screenshot shows the ADITO product description interface. The top navigation bar includes a menu icon, home, calendar, notifications, search, and star icons, along with a 'Product' dropdown and user profile icons. The main content area is divided into two sections: 'Knowledge entries' and 'Descriptions'.

Knowledge entries section:

- Buttons: +, folder icon, edit icon, trash icon, and 'Observe Filter'.
- Table with columns: Title, Category, Author, Last change, Views, Likes.
- Row 1: Title 'Produktinformation', Category (empty), Author 'Tim Admin', Last change '27 May 2024, 11:54', Views '1', Likes '0'.

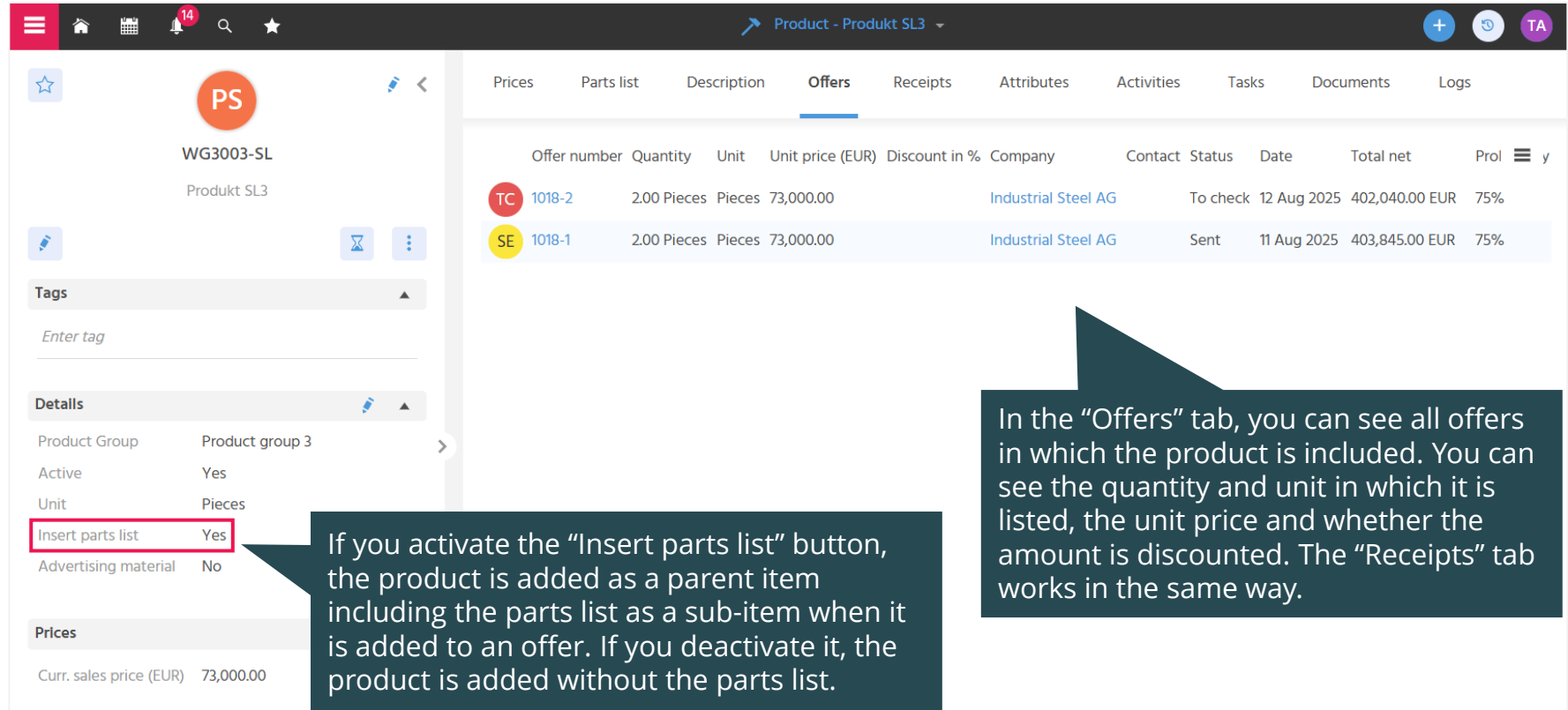
Descriptions section:

- Buttons: +, edit icon, trash icon.
- Table with columns: Language, Description.
- Row 1: Language 'EN' (English), Description 'Article new from 02.03.2024'.
- Row 2: Language 'GE' (German), Description 'Artikel neu ab 02.03.2024'.

In the upper area, you can create and view knowledge entries for this product. Use this, for example, to store extensive information about the product in the system. You can also call up knowledge entries via the "Knowledge" context.

You can enter product information in different languages in the lower area. This text is displayed below the product in the offer, but only if the language selected here corresponds to the language selected in the offer.

Product in offers/receipts



The screenshot shows the ADITO software interface. The top navigation bar includes a menu icon, home, calendar, notifications (14), search, and a star icon. The breadcrumb trail is 'Product - Produkt SL3'. The main navigation tabs are Prices, Parts list, Description, Offers (selected), Receipts, Attributes, Activities, Tasks, Documents, and Logs.

The left sidebar shows the product details for 'WG3003-SL' (Produkt SL3). The 'Details' section includes fields for Product Group (Product group 3), Active (Yes), Unit (Pieces), and 'Insert parts list' (Yes, highlighted with a red box). The 'Prices' section shows the current sales price (EUR) as 73,000.00.

The main table displays the 'Offers' for this product. The table has columns: Offer number, Quantity, Unit, Unit price (EUR), Discount in %, Company, Contact, Status, Date, Total net, and Prol. The data rows are:

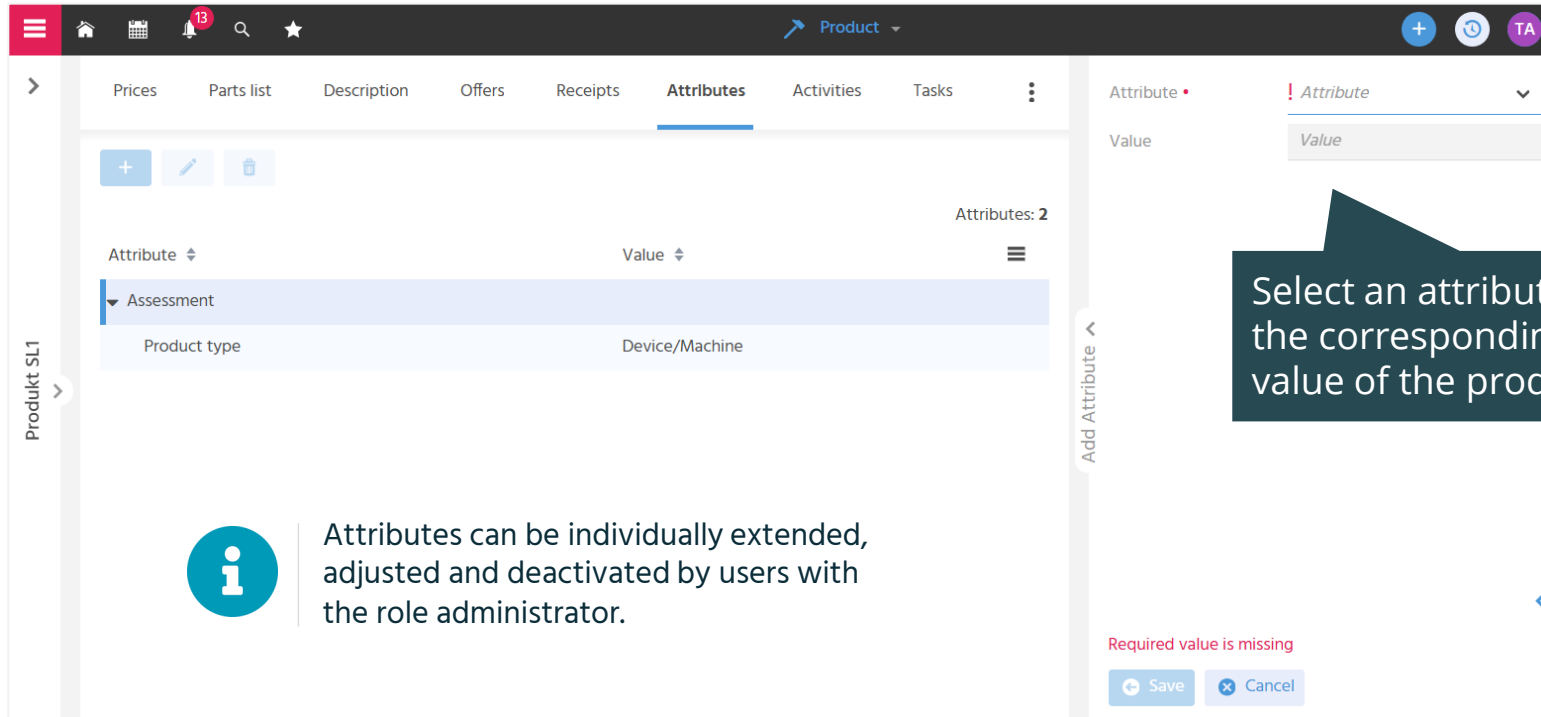
Offer number	Quantity	Unit	Unit price (EUR)	Discount in %	Company	Contact	Status	Date	Total net	Prol
TC 1018-2	2.00	Pieces	73,000.00		Industrial Steel AG		To check	12 Aug 2025	402,040.00 EUR	75%
SE 1018-1	2.00	Pieces	73,000.00		Industrial Steel AG		Sent	11 Aug 2025	403,845.00 EUR	75%

Callout 1 (left): If you activate the "Insert parts list" button, the product is added as a parent item including the parts list as a sub-item when it is added to an offer. If you deactivate it, the product is added without the parts list.

Callout 2 (right): In the "Offers" tab, you can see all offers in which the product is included. You can see the quantity and unit in which it is listed, the unit price and whether the amount is discounted. The "Receipts" tab works in the same way.

Product features

Maintain attributes on the product



The screenshot shows the 'Product' management interface in ADITO. The 'Attributes' tab is selected, displaying a table for 'Produkt SL1'. The table has two columns: 'Attribute' and 'Value'. The first row is 'Assessment' with a value of 'Product type'. The second row is 'Device/Machine' with a value of 'Device/Machine'. A sidebar on the left shows 'Produkt SL1' and a list of attributes. A right sidebar shows a form to add a new attribute, with a dropdown for 'Attribute' and a text input for 'Value'. A red error message 'Required value is missing' is displayed below the input field. A blue callout box points to the 'Attribute' dropdown in the right sidebar.

Attributes: 2

Attribute	Value
Assessment	Product type
Device/Machine	Device/Machine

Produkt SL1

Attributes can be individually extended, adjusted and deactivated by users with the role administrator.

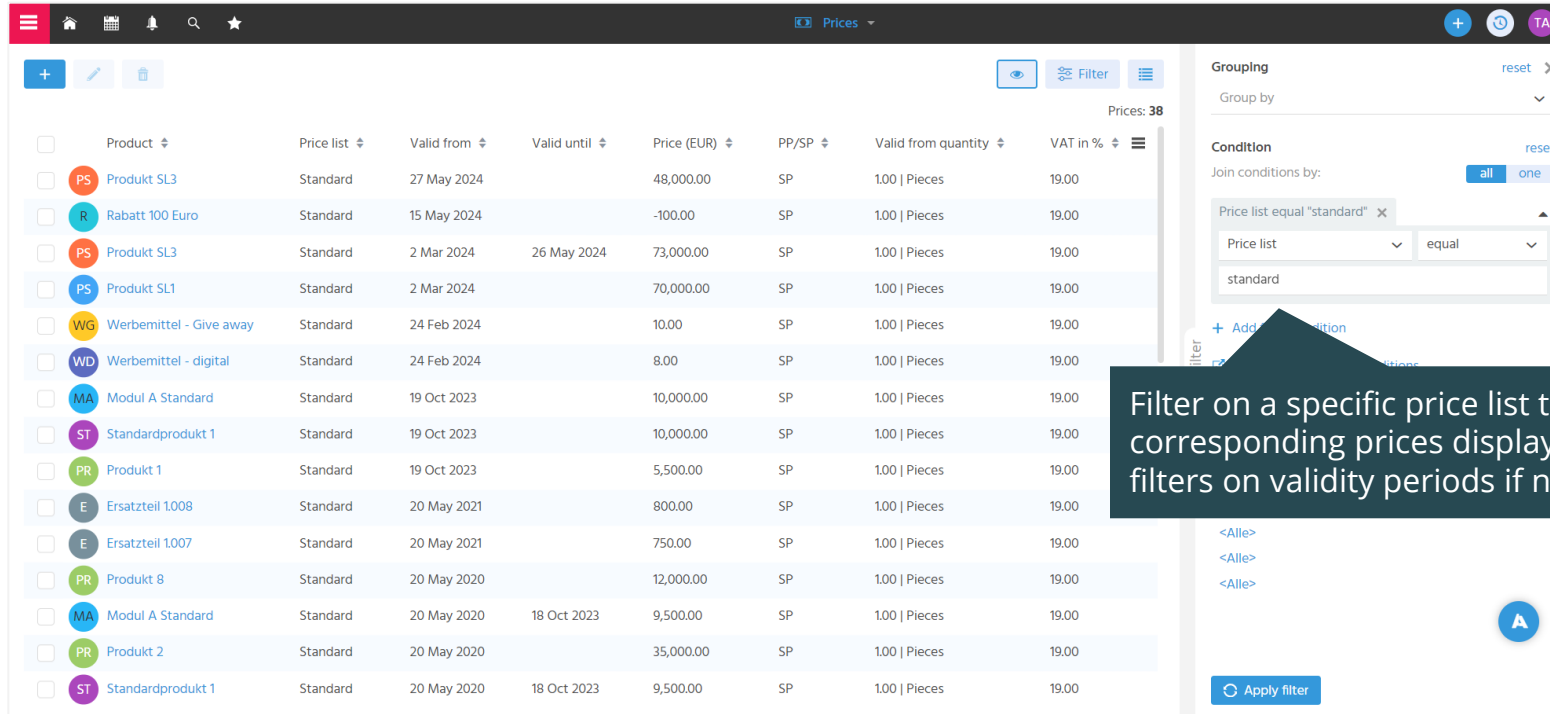
Required value is missing

Save Cancel

Select an attribute and enter the corresponding attribute value of the product.

Context "Prices"

Filter by price list



The screenshot displays the ADITO 'Prices' interface. The main table lists various products and their associated price lists. The table has columns for Product, Price list, Valid from, Valid until, Price (EUR), PP/SP, Valid from quantity, and VAT in %. The table is filtered to show 38 results. The filter sidebar on the right shows the 'Grouping' section with 'Group by' set to 'Price list'. The 'Condition' section shows a filter for 'Price list equal "standard"'. The 'Apply filter' button is visible at the bottom of the sidebar.

Product	Price list	Valid from	Valid until	Price (EUR)	PP/SP	Valid from quantity	VAT in %
Produkt SL3	Standard	27 May 2024		48,000.00	SP	1.00 Pieces	19.00
Rabatt 100 Euro	Standard	15 May 2024		-100.00	SP	1.00 Pieces	19.00
Produkt SL3	Standard	2 Mar 2024	26 May 2024	73,000.00	SP	1.00 Pieces	19.00
Produkt SL1	Standard	2 Mar 2024		70,000.00	SP	1.00 Pieces	19.00
Werbemittel - Give away	Standard	24 Feb 2024		10.00	SP	1.00 Pieces	19.00
Werbemittel - digital	Standard	24 Feb 2024		8.00	SP	1.00 Pieces	19.00
Modul A Standard	Standard	19 Oct 2023		10,000.00	SP	1.00 Pieces	19.00
Standardprodukt 1	Standard	19 Oct 2023		10,000.00	SP	1.00 Pieces	19.00
Produkt 1	Standard	19 Oct 2023		5,500.00	SP	1.00 Pieces	19.00
Ersatzteil 1008	Standard	20 May 2021		800.00	SP	1.00 Pieces	19.00
Ersatzteil 1007	Standard	20 May 2021		750.00	SP	1.00 Pieces	19.00
Produkt 8	Standard	20 May 2020		12,000.00	SP	1.00 Pieces	19.00
Modul A Standard	Standard	20 May 2020	18 Oct 2023	9,500.00	SP	1.00 Pieces	19.00
Produkt 2	Standard	20 May 2020		35,000.00	SP	1.00 Pieces	19.00
Standardprodukt 1	Standard	20 May 2020	18 Oct 2023	9,500.00	SP	1.00 Pieces	19.00

Filter on a specific price list to get only the corresponding prices displayed and add filters on validity periods if necessary.

Product package

Definition

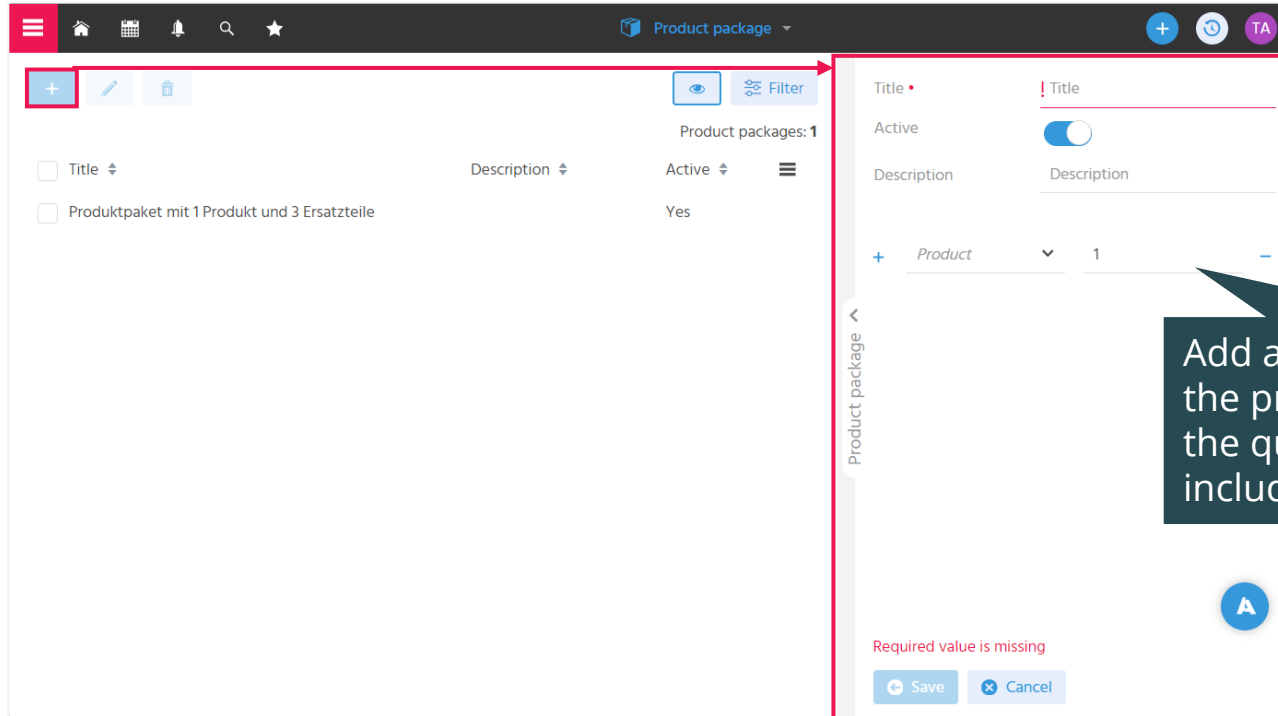
You create a product package if you always offer the same product combinations in offers.

Example:

You sell furniture and always offer a dining table, dining chairs and a corner bench as a dining room set as a package.

Product package

Create Product package



Product package

Product packages: 1

Title	Description	Active
Produktpaket mit 1 Produkt und 3 Ersatzteile		Yes

Product package

Title

Active

Description

Product 1

Required value is missing

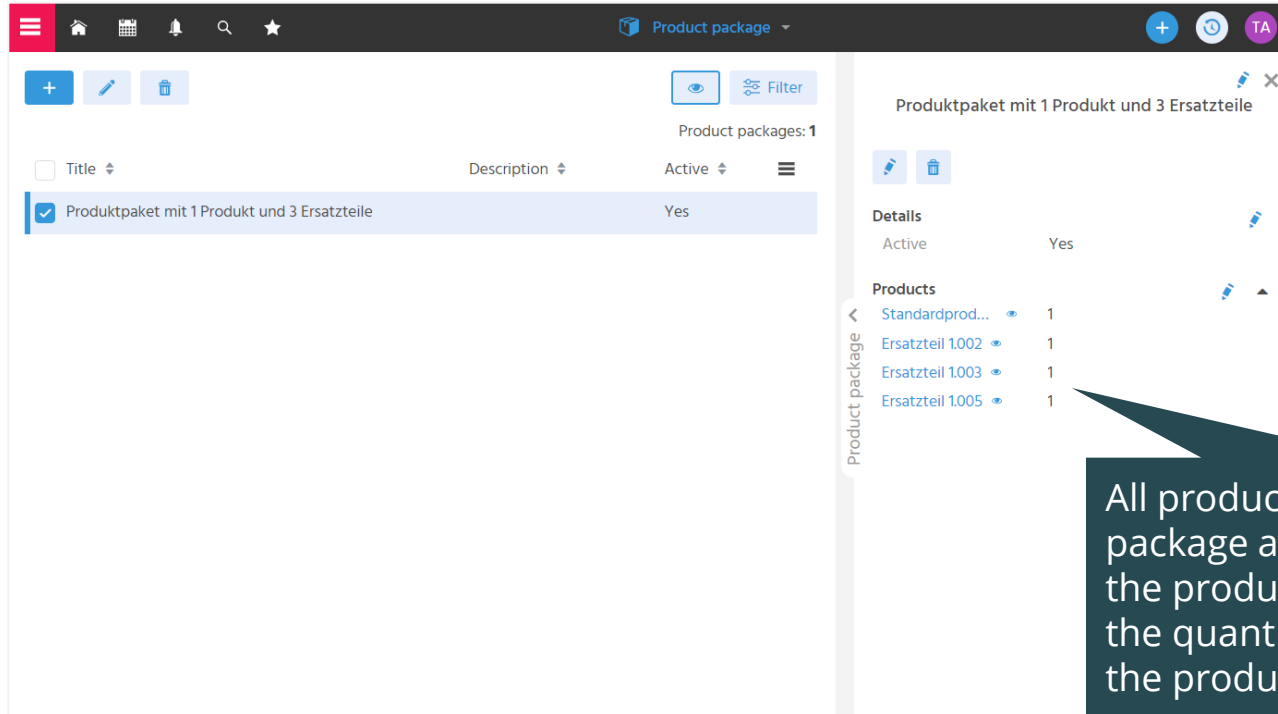
Save Cancel

Give the product package a title.

Add any number of products to the product package and specify the quantity of the product to be included in the product package.

Product package

Preview



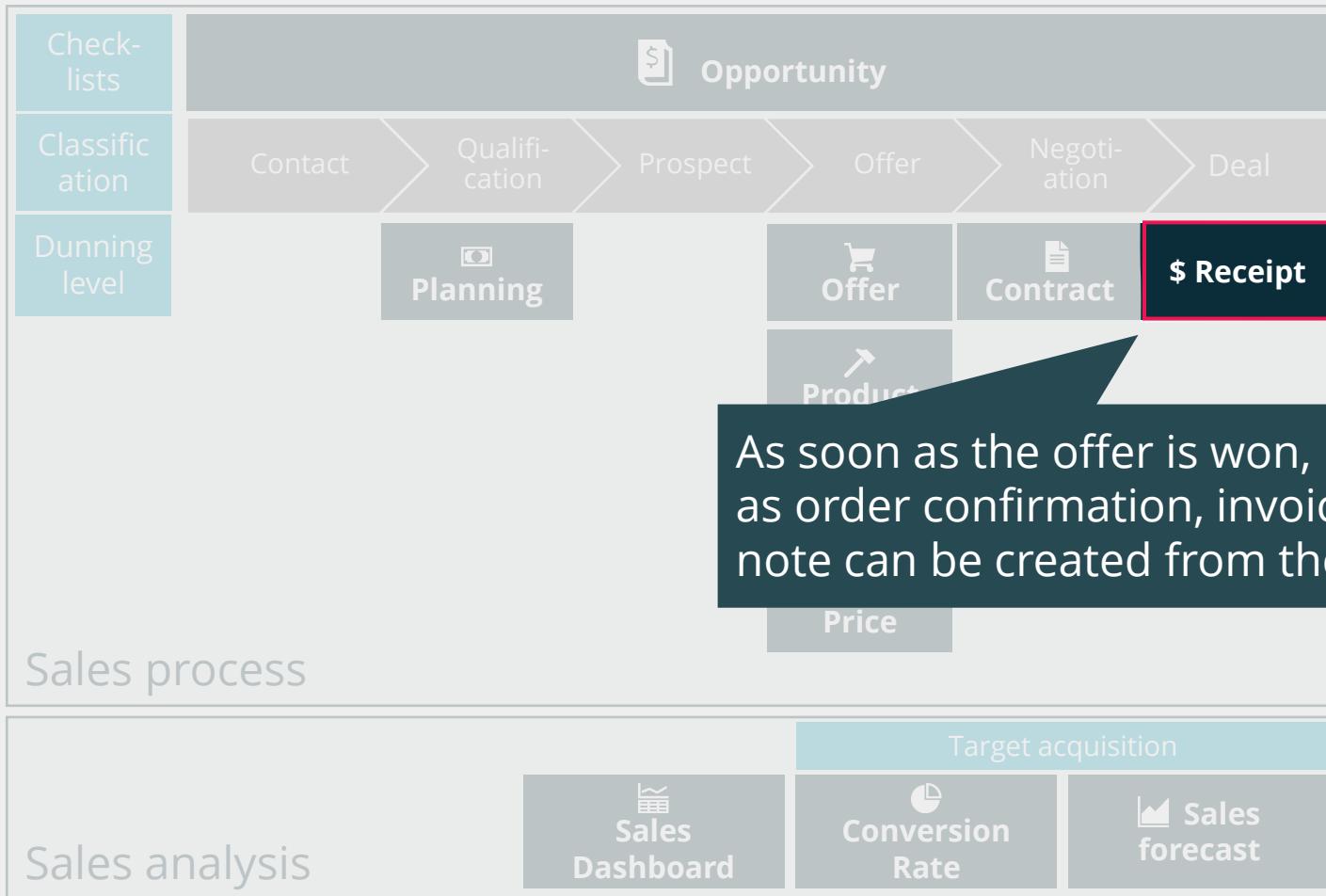
The screenshot displays the ADITO 'Product package' interface. On the left, a table lists product packages. The first package, 'Produktpaket mit 1 Produkt und 3 Ersatzteile', is selected. On the right, a detailed preview of this package is shown, including its title, active status, and a list of included products with their quantities.

Title	Description	Active
☒ Produktpaket mit 1 Produkt und 3 Ersatzteile		Yes

Produktpaket mit 1 Produkt und 3 Ersatzteile	
Details	
Active	Yes
Products	
Standardprod...	1
Ersatzteil 1.002	1
Ersatzteil 1.003	1
Ersatzteil 1.005	1

All products included in the product package are listed in the preview of the product package. It also shows the quantity of products included in the product package.

Receipt



- To be created in advance by the administrator
- In use "daily" by end users

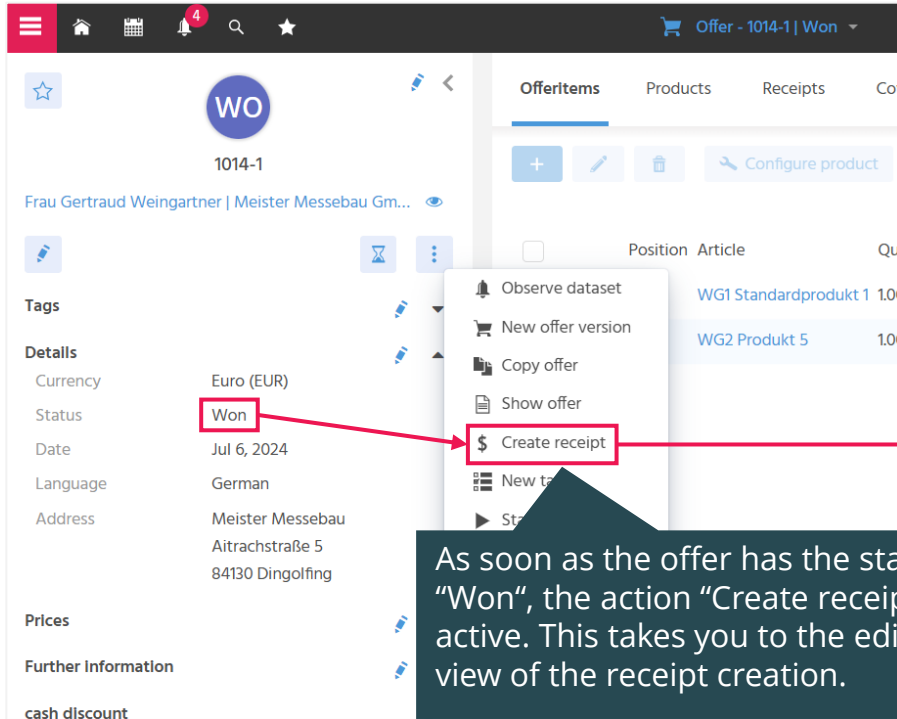
Receipt in general

Receipt



Receipt

Excursus into the offer



The screenshot shows the ADITO software interface. On the left, a sidebar contains a search bar, a star icon, and a list of tags and details for the offer. The main area displays the offer details for '1014-1' by 'Frau Gertraud Weingartner | Meister Messebau Gm...'. The offer status is 'Won', which is highlighted with a red box. A red arrow points from this box to the 'Create receipt' button in the 'OfferItems' tab, which is also highlighted with a red box. A red arrow points from the 'Create receipt' button to a modal dialog box on the right.

OfferItems Products Receipts Cov

+ Edit Archive Configure product

Position Article Qua

WG1 Standardprodukt 1 1.00

WG2 Produkt 5 1.00

Observe dataset

New offer version

Copy offer

Show offer

Create receipt

New ta

St

Details

Currency

Status

Date

Language

Address

Prices

Further Information

cash discount

1014-1

Frau Gertraud Weingartner | Meister Messebau Gm...

Euro (EUR)

Won

Jul 6, 2024

German

Meister Messebau

Aitrachstraße 5

84130 Dingolfing

If the offer includes optional items, an overlay will appear asking if you really want to create the receipt. If so, the optional items from the offer will be transferred to the document as non-optional items.

Do you want to create the receipt?

The offer includes optional items. These will be included in the receipt as mandatory items.

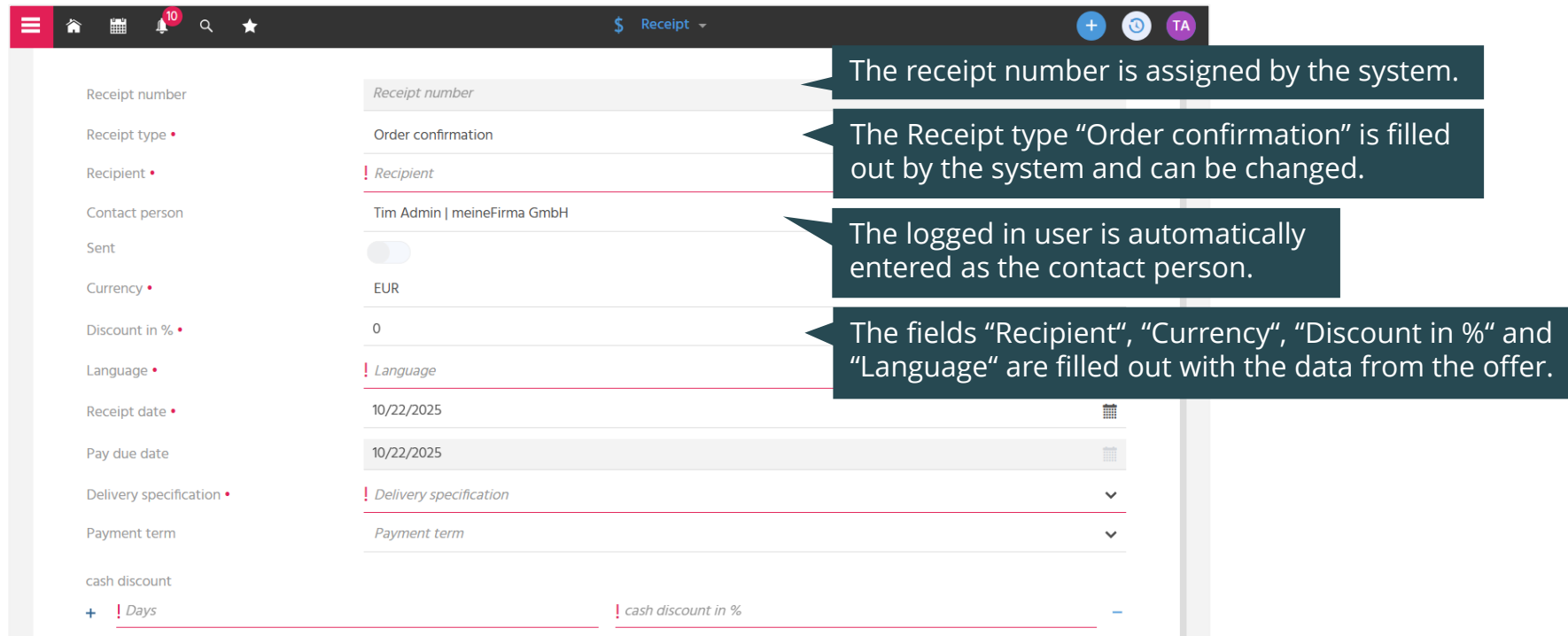
Yes

No

As soon as the offer has the status "Won", the action "Create receipt" is active. This takes you to the editing view of the receipt creation.

Receipt

Create receipt

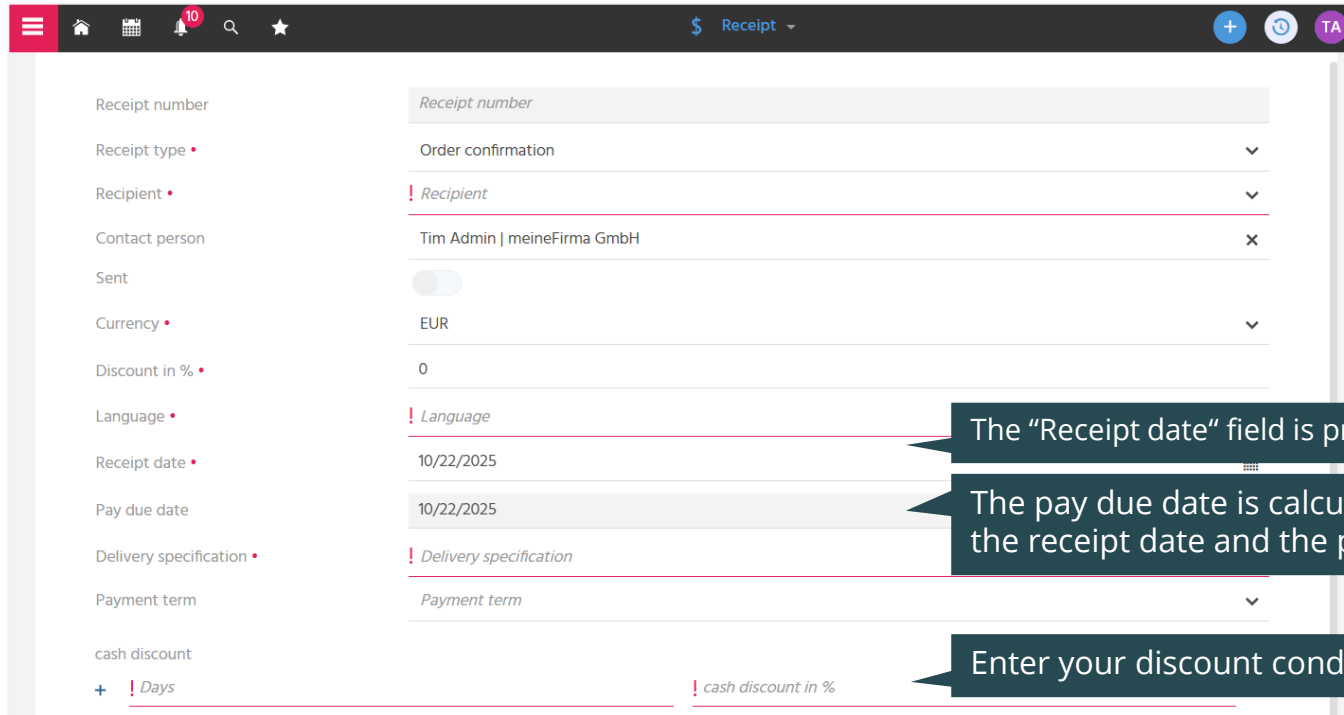


The screenshot shows the 'Create receipt' form in the ADITO system. The form is divided into two columns. The left column contains labels for various fields, and the right column contains the values. Callouts provide additional information about certain fields.

Field Label	Value	Explanation
Receipt number	Receipt number	The receipt number is assigned by the system.
Receipt type •	Order confirmation	The Receipt type "Order confirmation" is filled out by the system and can be changed.
Recipient •	! Recipient	
Contact person	Tim Admin meineFirma GmbH	The logged in user is automatically entered as the contact person.
Sent	☐	
Currency •	EUR	
Discount in % •	0	
Language •	! Language	The fields "Recipient", "Currency", "Discount in %" and "Language" are filled out with the data from the offer.
Receipt date •	10/22/2025	
Pay due date	10/22/2025	
Delivery specification •	! Delivery specification	
Payment term	Payment term	
cash discount	+ ! Days	! cash discount in %

Receipt

Create receipt



The screenshot shows the ADITO receipt creation interface. The top navigation bar includes a hamburger menu, home, calendar, notifications (10), search, and star icons. The main header displays a currency symbol (\$), the word 'Receipt', and user profile icons (+, TA). The form fields are as follows:

Field Label	Value	Action
Receipt number	<i>Receipt number</i>	
Receipt type •	Order confirmation	▼
Recipient •	! Recipient	▼
Contact person	Tim Admin meineFirma GmbH	✕
Sent	☐	
Currency •	EUR	▼
Discount in % •	0	
Language •	! Language	
Receipt date •	10/22/2025	
Pay due date	10/22/2025	
Delivery specification •	! Delivery specification	
Payment term	<i>Payment term</i>	▼
cash discount	+ ! Days	! cash discount in %

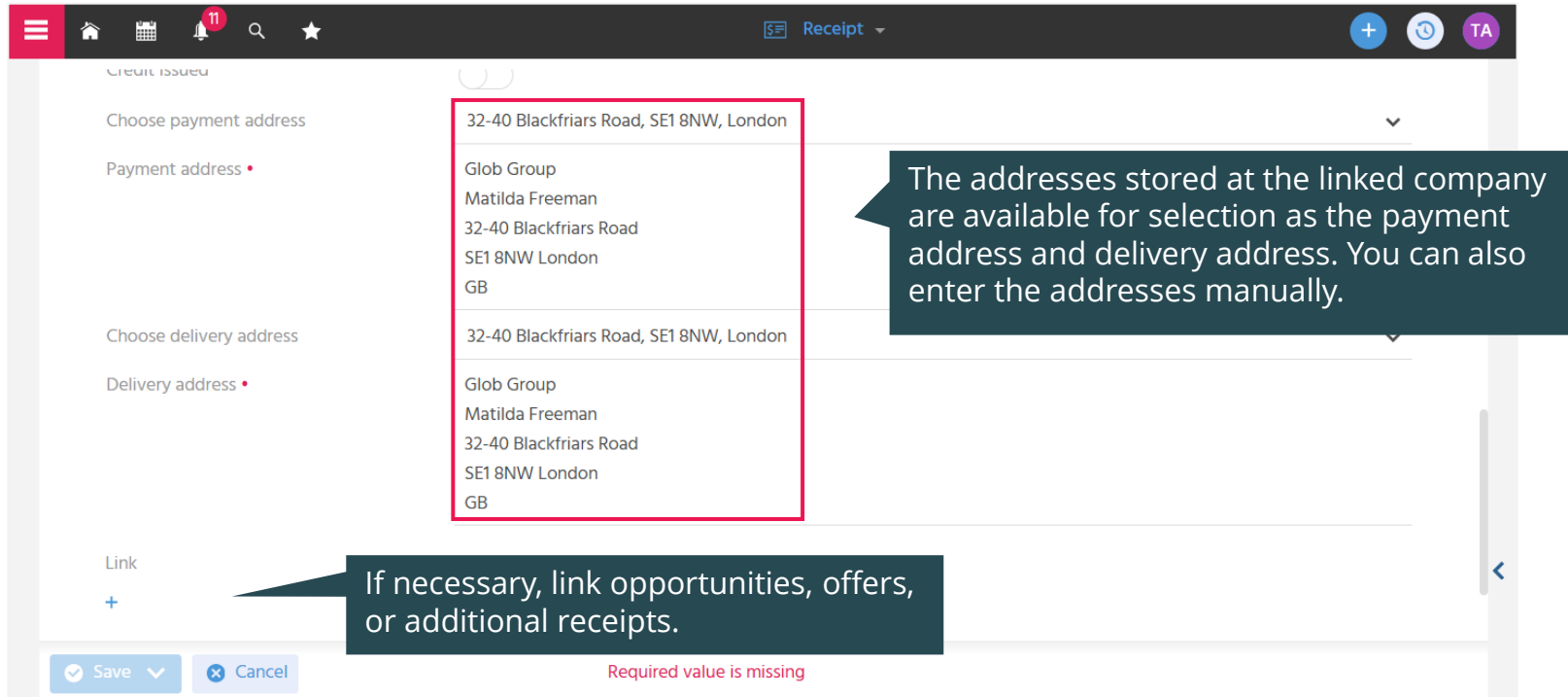
The "Receipt date" field is preset with the current date.

The pay due date is calculated based on the receipt date and the payment terms.

Enter your discount conditions here.

Receipt

Create receipt



Choose payment address

Payment address •

Choose delivery address

Delivery address •

Link

+

Save

Cancel

Required value is missing

32-40 Blackfriars Road, SE1 8NW, London

Glob Group

Matilda Freeman

32-40 Blackfriars Road

SE1 8NW London

GB

32-40 Blackfriars Road, SE1 8NW, London

Glob Group

Matilda Freeman

32-40 Blackfriars Road

SE1 8NW London

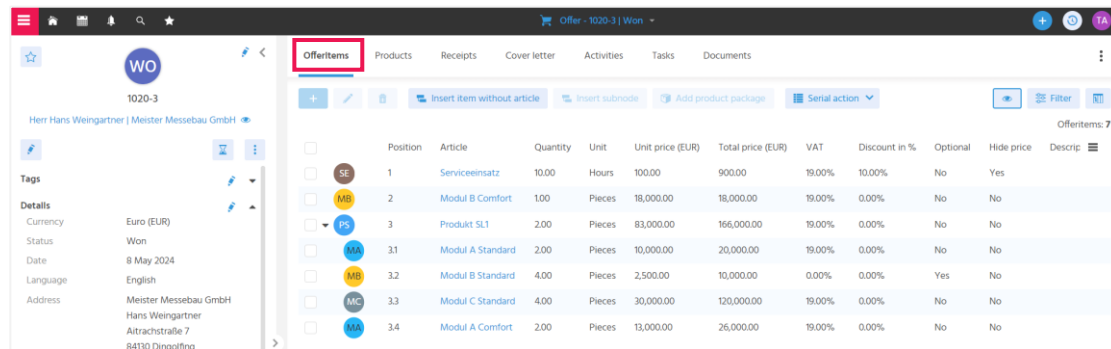
GB

The addresses stored at the linked company are available for selection as the payment address and delivery address. You can also enter the addresses manually.

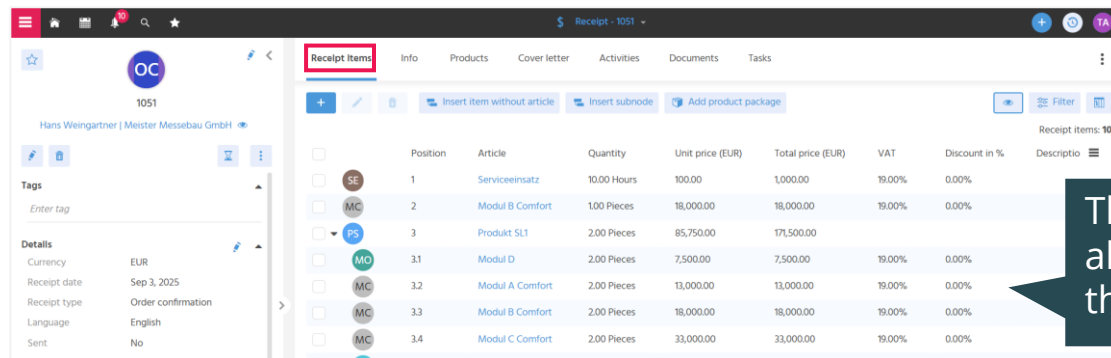
If necessary, link opportunities, offers, or additional receipts.

Receipt

Order item



	Position	Article	Quantity	Unit	Unit price (EUR)	Total price (EUR)	VAT	Discount in %	Optional	Hide price	Descr:
☐	1	Serviceinsatz	10.00	Hours	100.00	900.00	19.00%	10.00%	No	Yes	
☐	2	Modul B Comfort	1.00	Pieces	18,000.00	18,000.00	19.00%	0.00%	No	No	
☐	3	Produkt SL1	2.00	Pieces	83,000.00	166,000.00	19.00%	0.00%	No	No	
☐	3.1	Modul A Standard	2.00	Pieces	10,000.00	20,000.00	19.00%	0.00%	No	No	
☐	3.2	Modul B Standard	4.00	Pieces	2,500.00	10,000.00	0.00%	0.00%	Yes	No	
☐	3.3	Modul C Standard	4.00	Pieces	30,000.00	120,000.00	19.00%	0.00%	No	No	
☐	3.4	Modul A Comfort	2.00	Pieces	13,000.00	26,000.00	19.00%	0.00%	No	No	

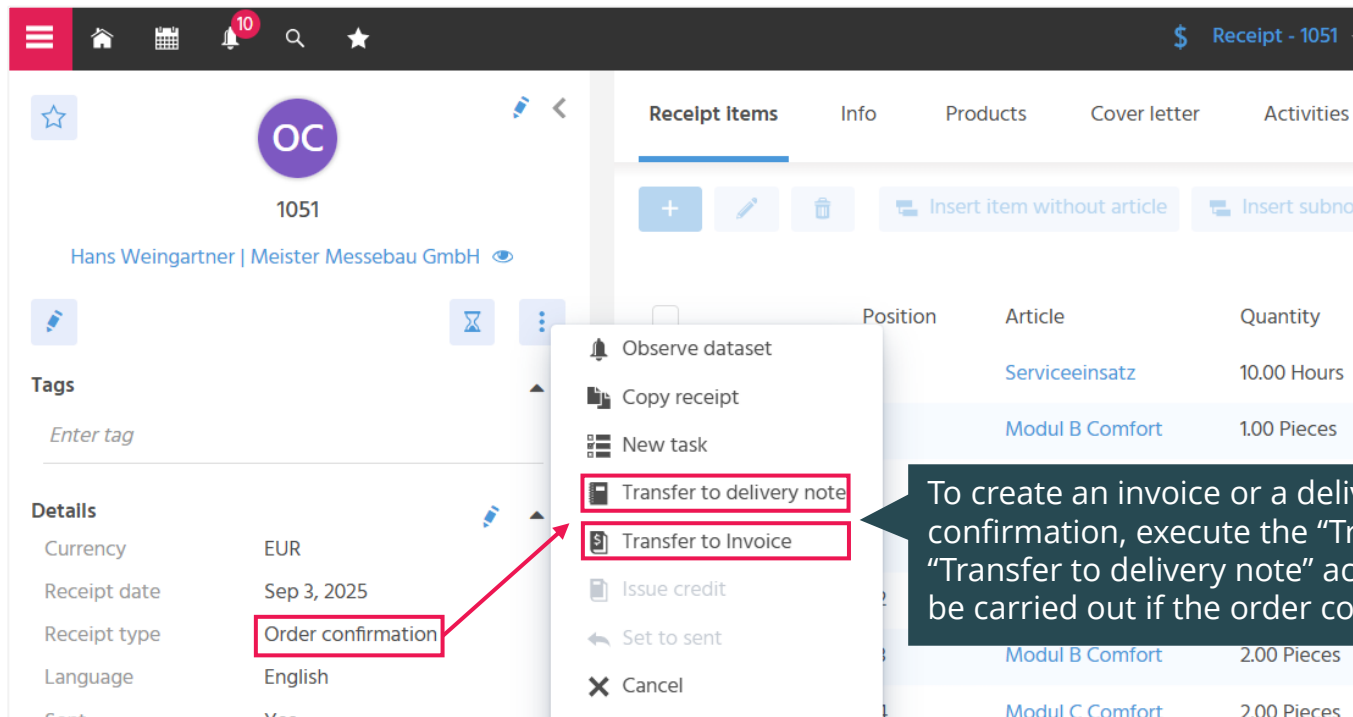


	Position	Article	Quantity	Unit price (EUR)	Total price (EUR)	VAT	Discount in %	Description
☐	1	Serviceinsatz	10.00	Hours	100.00	1,000.00	19.00%	0.00%
☐	2	Modul B Comfort	1.00	Pieces	18,000.00	18,000.00	19.00%	0.00%
☐	3	Produkt SL1	2.00	Pieces	85,750.00	171,500.00		
☐	3.1	Modul D	2.00	Pieces	7,500.00	7,500.00	19.00%	0.00%
☐	3.2	Modul A Comfort	2.00	Pieces	13,000.00	13,000.00	19.00%	0.00%
☐	3.3	Modul B Comfort	2.00	Pieces	18,000.00	18,000.00	19.00%	0.00%
☐	3.4	Modul C Comfort	2.00	Pieces	33,000.00	33,000.00	19.00%	0.00%

The receipt items are taken over with all information from the offer or from the receipt from which you started.

Receipt

Transfer to delivery note/invoice



The screenshot displays the ADITO Receipt interface for receipt number 1051, issued by Hans Weingartner | Meister Messebau GmbH. The interface includes a top navigation bar with icons for home, calendar, notifications (10), search, and favorites. The main content area shows the receipt details and a list of items. A context menu is open over the items list, highlighting the 'Transfer to delivery note' and 'Transfer to Invoice' options. A red arrow points from the 'Order confirmation' status in the details section to the 'Transfer to delivery note' option in the menu.

Receipt Details:

- Receipt number: 1051
- Customer: Hans Weingartner | Meister Messebau GmbH
- Tags: Enter tag
- Details:
 - Currency: EUR
 - Receipt date: Sep 3, 2025
 - Receipt type: Order confirmation
 - Language: English

Receipt Items:

Position	Article	Quantity
	Serviceeeinsatz	10.00 Hours
	Modul B Comfort	1.00 Pieces
	Modul B Comfort	2.00 Pieces
	Modul C Comfort	2.00 Pieces

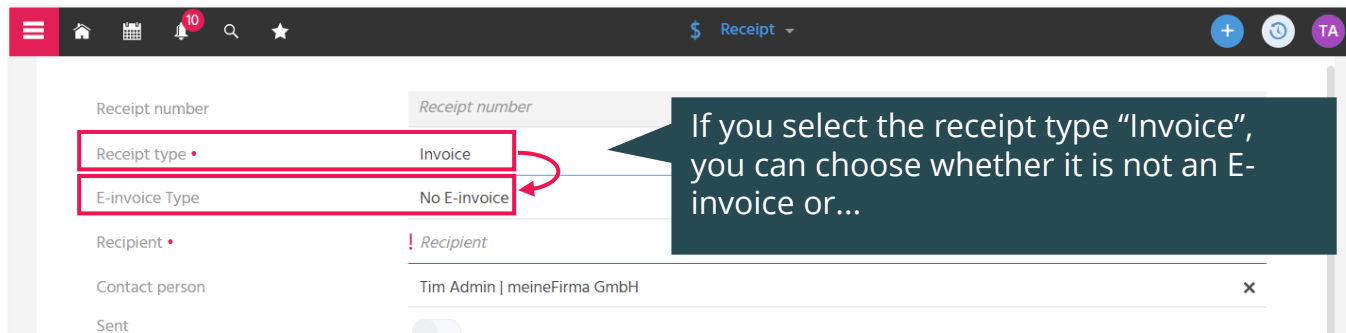
Context Menu Options:

- Observe dataset
- Copy receipt
- New task
- Transfer to delivery note
- Transfer to Invoice
- Issue credit
- Set to sent
- Cancel

To create an invoice or a delivery note from the order confirmation, execute the "Transfer to invoice" or "Transfer to delivery note" action. The actions can only be carried out if the order confirmation has been sent.

Receipt

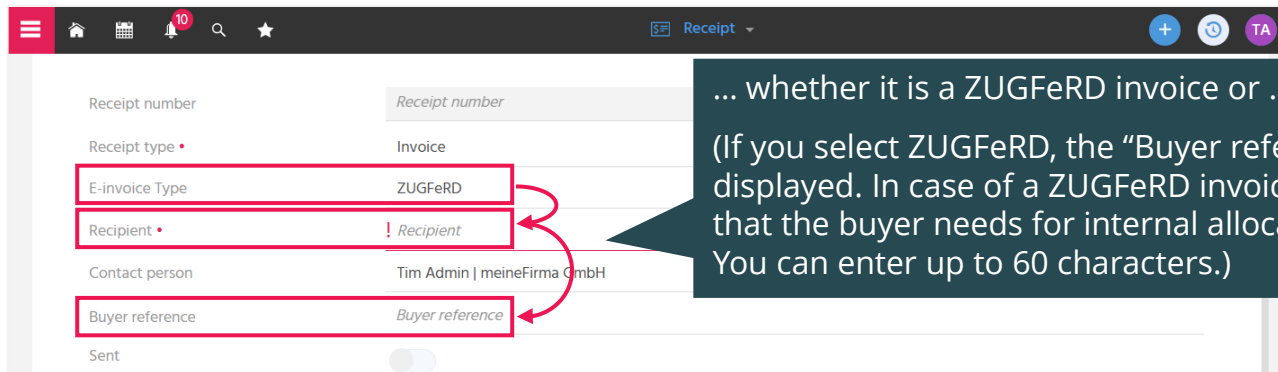
Create receipt - document types "Invoice", "Credit", "Cancellation"



The screenshot shows the ADITO receipt creation interface. The 'Receipt type' is set to 'Invoice'. The 'E-invoice Type' is set to 'No E-invoice'. The 'Recipient' field is empty, indicated by an exclamation mark. The 'Contact person' is 'Tim Admin | meineFirma GmbH'. The 'Sent' toggle is off.

Field	Value
Receipt number	Receipt number
Receipt type	Invoice
E-invoice Type	No E-invoice
Recipient	! Recipient
Contact person	Tim Admin meineFirma GmbH
Sent	☐

If you select the receipt type "Invoice", you can choose whether it is not an E-invoice or...



The screenshot shows the ADITO receipt creation interface. The 'Receipt type' is set to 'Invoice'. The 'E-invoice Type' is set to 'ZUGFeRD'. The 'Recipient' field is empty, indicated by an exclamation mark. The 'Contact person' is 'Tim Admin | meineFirma GmbH'. The 'Buyer reference' field is empty. The 'Sent' toggle is off.

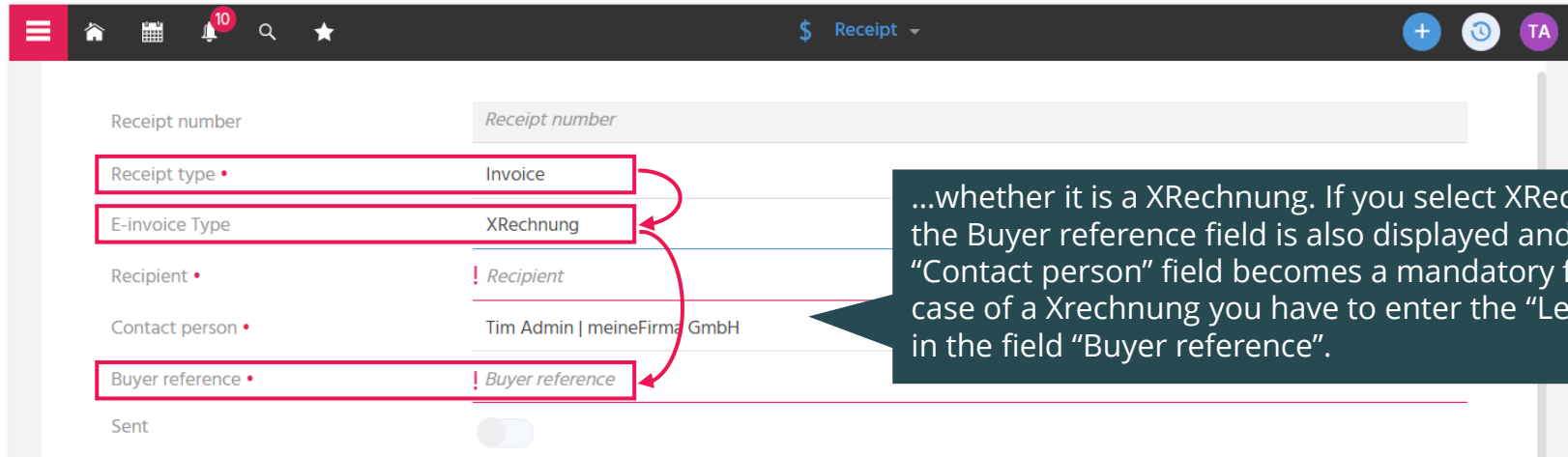
Field	Value
Receipt number	Receipt number
Receipt type	Invoice
E-invoice Type	ZUGFeRD
Recipient	! Recipient
Contact person	Tim Admin meineFirma GmbH
Buyer reference	Buyer reference
Sent	☐

... whether it is a ZUGFeRD invoice or ...

(If you select ZUGFeRD, the "Buyer reference" field will also be displayed. In case of a ZUGFeRD invoice, enter the information that the buyer needs for internal allocation of the invoice there. You can enter up to 60 characters.)

Receipt

Create receipt - document types "Invoice", "Credit", "Cancellation"



Receipt number

Receipt type • Invoice

E-invoice Type XRechnung

Recipient • ! Recipient

Contact person • Tim Admin | meineFirma GmbH

Buyer reference • ! Buyer reference

Sent

...whether it is a XRechnung. If you select XRechnung, the Buyer reference field is also displayed and the "Contact person" field becomes a mandatory field. In case of a Xrechnung you have to enter the "Leitweg-ID" in the field "Buyer reference".

Excursus on laws and standards

Directive 2014/55/EU requires the use of E-invoices in the public sector. This was implemented in Germany by

- 2017: the E-invoicing Law
- 2018: the E-invoicing Ordinance (ERechV)

The E-invoicing Ordinance specifies that **suppliers to the federal government** are obliged to submit invoices electronically and in compliance with E-invoice (EN 16931) **from 27.11.2020**.



EN 16931

- defines the semantic data model for the E-invoice
- Thus implements the directive technically

The Growth Opportunities Act specifies that

- **from 01.01. 25 domestic entrepreneurs** must be able to issue and receive **E-invoices for B2B sales**
- the format must comply with directive 2014/55/EU ergo EN 16931
- everything that does not comply with EN 16931 is an "other invoice" (postal, PDF, ...)
- there are the following transitional arrangements
 - 2025 – 2026: Paper invoices or other electronic invoices* permitted (the latter only with the consent of the recipient)
 - 2027: analogous to the previous year, if sales in the previous year < 800K€**
 - 2028 Only E-invoices (EN 16931-compliant)

*EDI-Format inclusive

**EDI-Format 2027 still independent of turnover

Excursus on terms

Generic term

E-	invoice
electronically transmittable, receivable & processable	Invoices, cancellations, credit notes and other “document types”
Must contain structured data à la EN 16931, e.g. <code><rsm:ExchangedDocument></code> <code><ram:ID>NUMFACT</ram:ID></code> <code><ram:TypeCode>380</ram:TypeCode></code>	

Other invoice

All invoices that do not meet the requirements for E-invoices (paper, PDF, etc.)

Standardized formats

Format	XRechnung	ZUGFeRD* (FACTUR-X)
Structure	Pure XML file More mandatory fields in the XML (e.g. Buyer Reference = Leitweg-ID)	Hybrid: PDF/A-3 file with embedded XML file Different profiles: Minimum, Basic WL, Basic, EN16931, Extended and X-Invoice (can also be made as a hybrid in consultation with the recipient)
XML-Standard	UBL oder CII Universal Business Language und Cross Industrie Invoice are XML-based syntaxes	CII
Law/Application	Standard and mandatory for B2G in Germany since 2020	For B2B: mandatory in the “EN16931” profile since 2025

Implementation in the ADITO xRM



Professional

As an ADITO user, I can create invoices, cancelations and credit notes in XRechnung (version 3.0.1) or ZUGFeRD (version 2.3.2) format and send them to the recipient by e-mail.

Technical

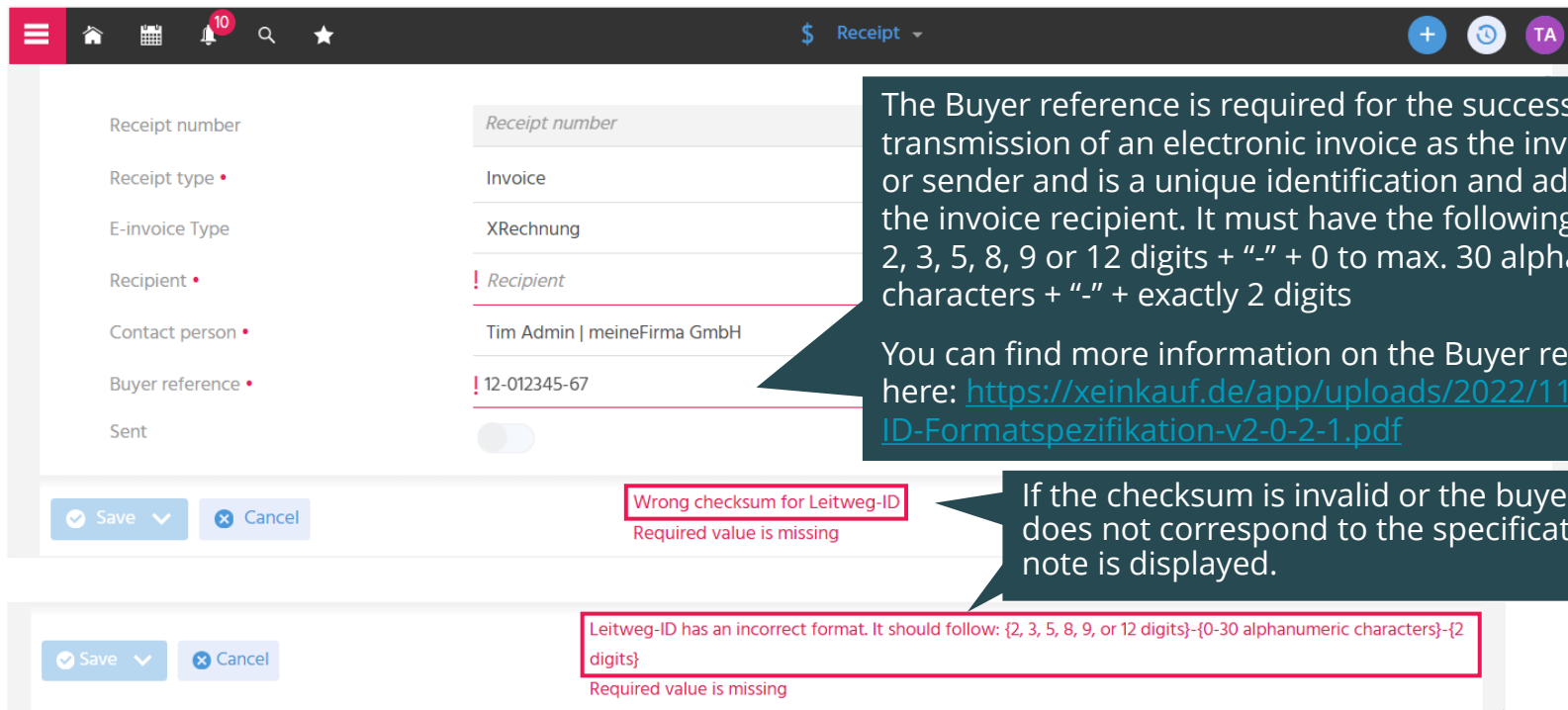
- new Java plugin with the open source library “mustangproject” (version 2.15.0)
- An XML file is generated and returned in xRM from the receipt data
- if you also transfer a PDF file to the plugin, this is converted to PDF/A-3 and provided with the previously created XML

[Plugins/E-invoice - GitLab](#)



Receipt

Create receipt - document types "Invoice", "Credit", "Cancellation"



Receipt number

Receipt type • Invoice

E-invoice Type XRechnung

Recipient • ! Recipient

Contact person • Tim Admin | meineFirma GmbH

Buyer reference • ! 12-012345-67

Sent ☐

Save Cancel

Wrong checksum for Leitweg-ID
Required value is missing

Leitweg-ID has an incorrect format. It should follow: {2, 3, 5, 8, 9, or 12 digits}-{0-30 alphanumeric characters}-{2 digits}
Required value is missing

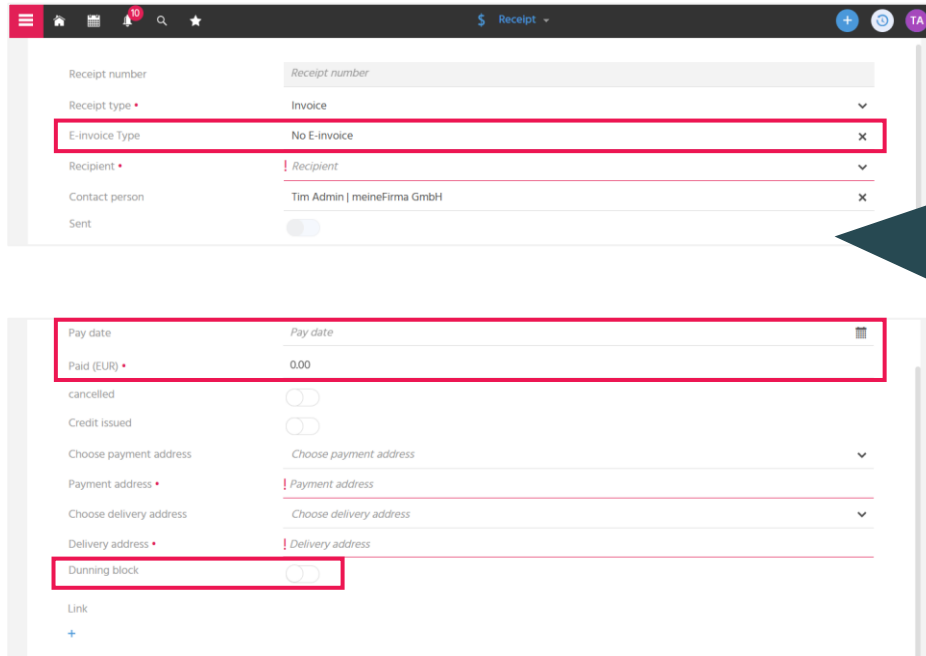
The Buyer reference is required for the successful transmission of an electronic invoice as the invoice issuer or sender and is a unique identification and addressing of the invoice recipient. It must have the following structure: 2, 3, 5, 8, 9 or 12 digits + "-" + 0 to max. 30 alphanumeric characters + "-" + exactly 2 digits

You can find more information on the Buyer reference here: <https://xeinkauf.de/app/uploads/2022/11/Leitweg-ID-Formatspezifikation-v2-0-2-1.pdf>

If the checksum is invalid or the buyer reference does not correspond to the specifications, a note is displayed.

Receipt

Create receipt - receipt type „Invoice“



Receipt number

Receipt type • Invoice

E-invoice Type No E-invoice

Recipient • Recipient

Contact person Tim Admin | meineFirma GmbH

Sent

Pay date Pay date

Paid (EUR) • 0.00

cancelled

Credit issued

Choose payment address Choose payment address

Payment address • Payment address

Choose delivery address Choose delivery address

Delivery address • Delivery address

Dunning block

Link

If you select the receipt type “Invoice”, the following fields are also displayed in addition:

- E-invoice Type
- Paydate
- Paid (EUR)
- Dunning block

Receipt

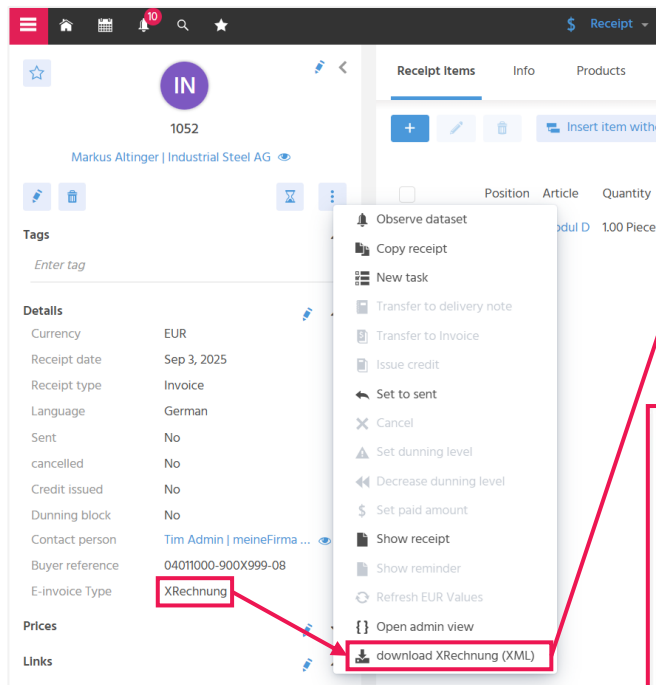
Create receipt – receipt type „Credit“

If you select the “Credit” receipt type, the following changes compared to the invoice:

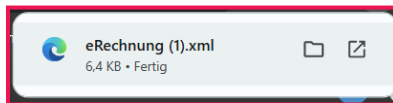
- The field “Discount in %” is not displayed
- The “Dunning block” button is not displayed

Receipt

Download XRechnung (XML)



The screenshot shows the ADITO interface for a receipt. The receipt is from Markus Altinger | Industrial Steel AG, dated Sep 3, 2025, in EUR, with a receipt type of Invoice. The currency is EUR, and the receipt date is Sep 3, 2025. The receipt type is Invoice, and the language is German. The receipt is not sent, cancelled, or credited. The dunning block is not issued. The contact person is Tim Admin | meineFirma..., and the buyer reference is 04011000-900X999-08. The e-invoice type is XRechnung. The dropdown menu shows the following options: Observe dataset, Copy receipt, New task, Transfer to delivery note, Transfer to Invoice, Issue credit, Set to sent, Cancel, Decrease dunning level, Set paid amount, Show receipt, Show reminder, Refresh EUR Values, Open admin view, and download XRechnung (XML).



For the E-invoice Type “XRechnung”, you will find the action “download XRechnung (XML)”.

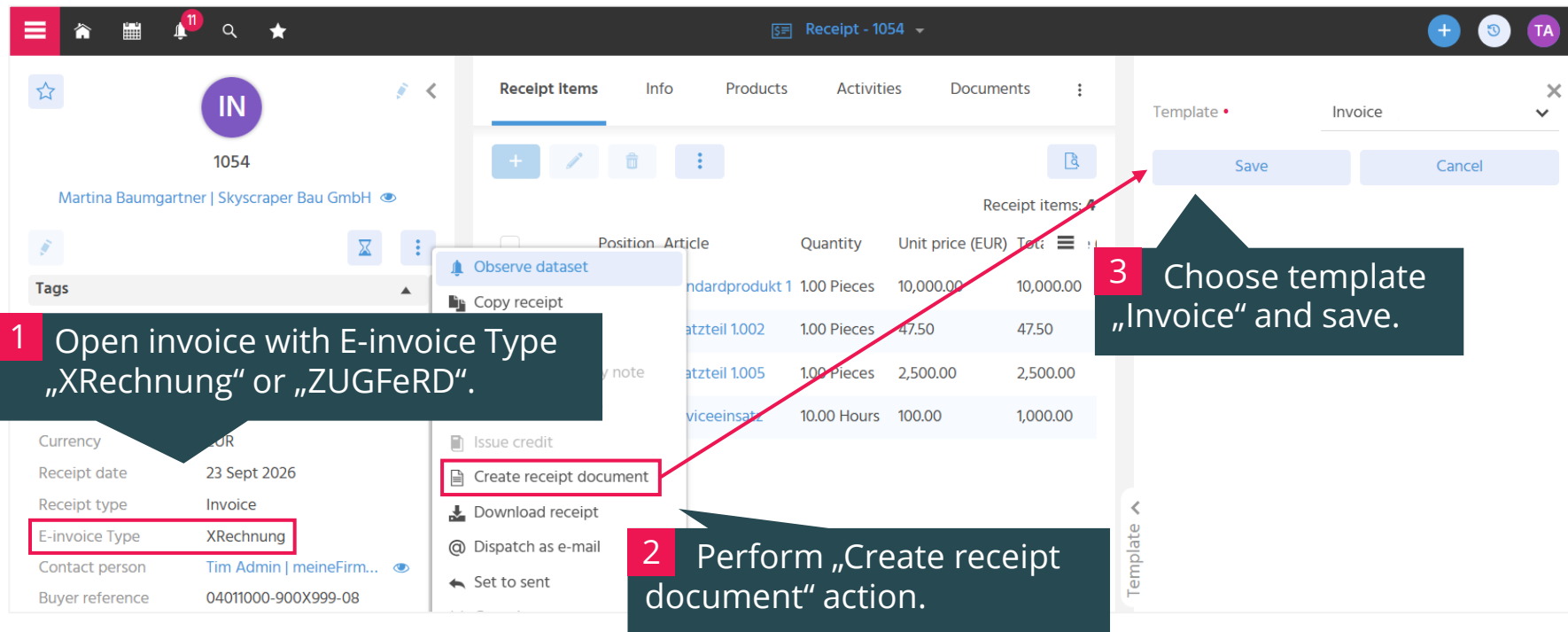
This XML file does not appear to have any style information associated with it. The document tree is shown below:

```
<?xml version='1.0' encoding='UTF-8'>
<xsi:schemaLocation xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xmlns:ram="urn:un:ces:uncefact:data:standard:ReusableAggregateBusinessInformationEntity:100"
xmlns:udt="urn:un:ces:uncefact:data:standard:QualifiedDataType:100" xmlns:qdt="urn:un:ces:uncefact:data:standard:QualifiedDataType:100">
  <ram:ExchangeDocumentContext>
    <ram:BusinessProcess>
      <ram:BusinessProcessParameters>
        <ram:ID>urn:fdc:peppol.eu:2017:poacc:billing:01:1:0</ram:ID>
      </ram:BusinessProcessParameters>
    </ram:BusinessProcess>
    <ram:GuidelineSpecifiedInDocumentContextParameters>
      <ram:ID>urn:cen.eu:en16931:2017#compliant:urn:ce:in:kauf.de:kesit:rechnung:3.0</ram:ID>
    </ram:GuidelineSpecifiedInDocumentContextParameters>
  </ram:ExchangeDocumentContext>
  <ram:ExchangeDocument>
    <ram:TypeCode>380</ram:TypeCode>
    <ram:IssueDateTime>
      <udt:DateTimeString Format="ISO7241118" udt:DateTimeString="20241118" />
    </ram:IssueDateTime>
    <ram:SupplyChainTradeTransaction>
      <ram:IncludedSupplyChainTradeLineItem>
        <ram:AssociatedDocumentLineDocument>
          <ram:LineID>1</ram:LineID>
          <ram:SpecifiedTradeProducts>
            <ram:Name>Schokolade</ram:Name>
            <ram:SpecifiedTradeProduct>
              <ram:SpecifiedInTradePrice>
                <ram:ChargeAmount>50.00000</ram:ChargeAmount>
                <ram:BasisQuantity>1000</ram:BasisQuantity>
                <ram:SpecifiedInTradePrice>
                  <ram:RateApplicablePercent>19.00</ram:RateApplicablePercent>
                </ram:SpecifiedInTradePrice>
              </ram:SpecifiedTradeProduct>
            </ram:SpecifiedTradeProducts>
          </ram:AssociatedDocumentLineDocument>
        </ram:IncludedSupplyChainTradeLineItem>
      </ram:SupplyChainTradeTransaction>
    </ram:ExchangeDocument>
  </ram:ExchangeDocument>
</xsi:schemaLocation>
</?xml>
```

The TypeCode of invoices is “380”.

Receipt

Create receipt document



The screenshot shows the ADITO interface for creating a receipt document. The top navigation bar includes a hamburger menu, home, calendar, notifications (11), search, and star icons. The main header shows 'Receipt - 1054' and user avatars. The left sidebar displays a profile for 'Martina Baumgartner | Skyscraper Bau GmbH' with a star icon and a 'Tags' section. The main content area has tabs for 'Receipt Items', 'Info', 'Products', 'Activities', and 'Documents'. A table of receipt items is visible with columns: Position, Article, Quantity, Unit price (EUR), and Total. The table contains four rows of data. A context menu is open over the table, showing options: 'Observe dataset', 'Copy receipt', 'Issue credit', 'Create receipt document' (highlighted with a red box), 'Download receipt', 'Dispatch as e-mail', and 'Set to sent'. A red arrow points from the 'Create receipt document' option to a callout box. Another red arrow points from the 'Save' button in the top right to a third callout box. The left sidebar also shows a 'Tags' section with a dropdown menu where 'E-invoice Type' is selected and 'XRechnung' is chosen (highlighted with a red box).

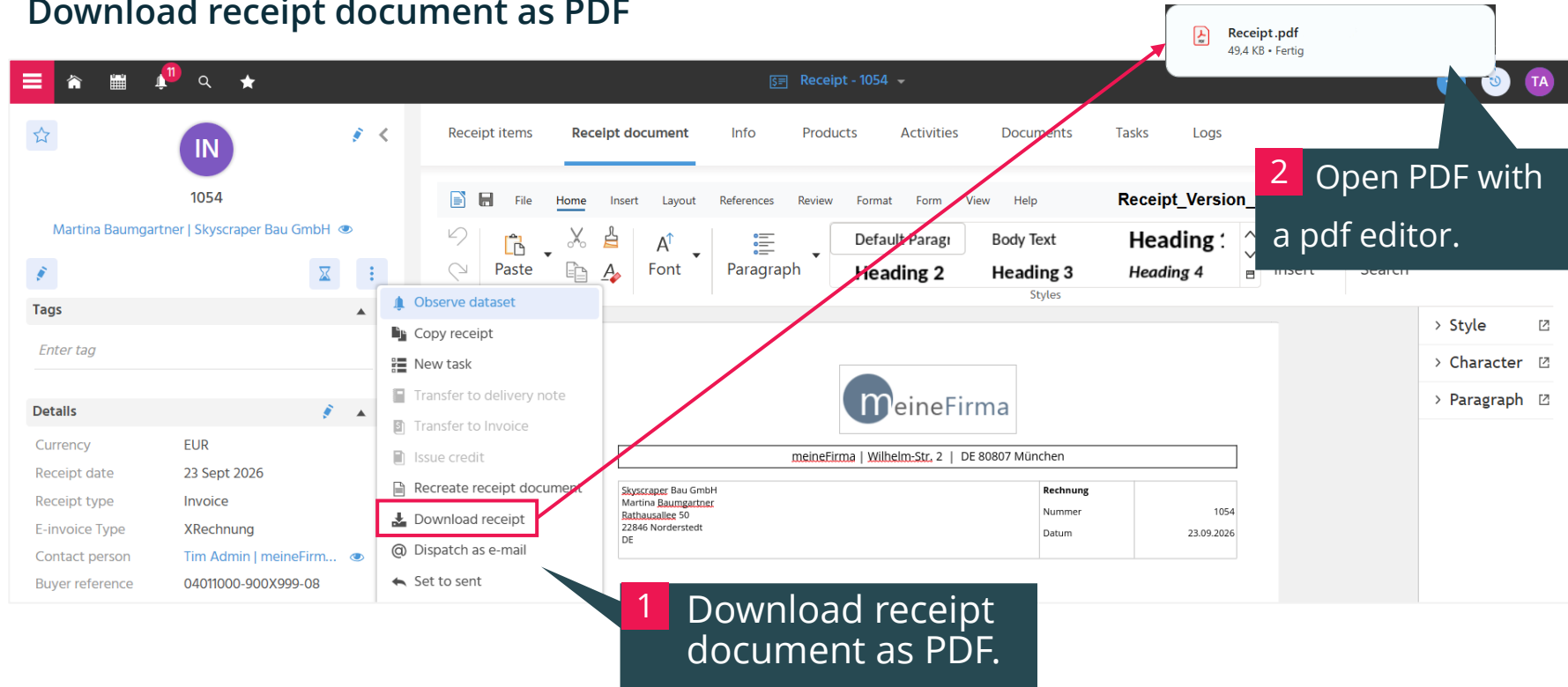
1 Open invoice with E-invoice Type „XRechnung“ or „ZUGFeRD“.

2 Perform „Create receipt document“ action.

3 Choose template „Invoice“ and save.

Receipt

Download receipt document as PDF



The screenshot shows the ADITO interface for a receipt document. The document is titled "Receipt - 1054" and is associated with the company "meineFirma". The document is a receipt for "Skyscraper Bau GmbH" dated "23.09.2026". The document is in the "Receipt document" tab, and the "Download receipt" option is highlighted in the "More" menu.

1 Download receipt document as PDF.

2 Open PDF with a pdf editor.

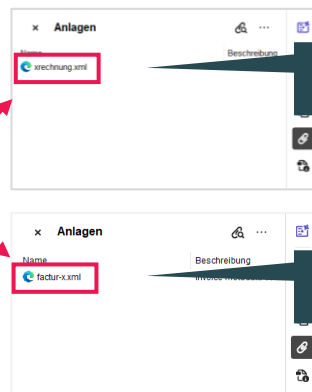
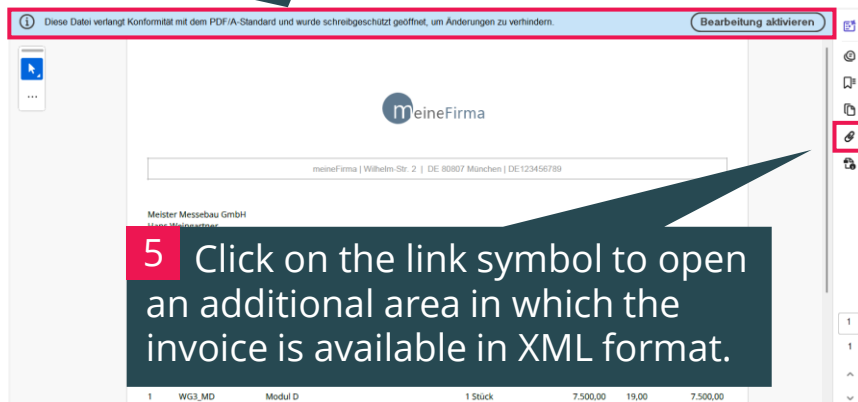
The document content includes the company logo "meineFirma" and the address "meineFirma | Wilhelm-Str. 2 | DE 80807 München". The receipt details are as follows:

Skyscraper Bau GmbH		Rechnung	
Martina Baumgartner		Nummer	1054
Rathausallee 50		Datum	23.09.2026
22846 Norderstedt			
DE			

Receipt

Open invoice as PDF including XML file

The PDF is opened read-only.



E-invoice Type „XRechnung“

E-invoice Type „ZUGFeRD“



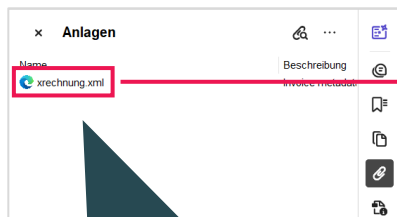
If no e-mail address is stored for the recipient, the PDF will open without an attachment.



If you create the PDF via “Document/File/Download”, no e-invoice details will be added to the PDF.

Receipt

Open invoice as PDF including XML file



6 Double-click on the XML file to open the invoice in XML format.

This XML file does not appear to have any style information associated with it. The document tree is shown below:

```
<?xml version="1.0" encoding="UTF-8" standalone="yes" ?>
<rsm:CrossIndustryInvoice xmlns:rsm="urn:un:unece:uncefact:data:standard:CrossIndustryInvoice:100" xmlns:udt="urn:un:unece:uncefact:data:standard:UnqualifiedDataType:100" xmlns:qdt="urn:un:unece:uncefact:data:standard:QualifiedDataType:100" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" generated-by="mustangproject.org vnull --">
  <rsm:ExchangedDocumentContext>
    <rsm:BusinessProcessSpecifiedDocumentContextParameter>
      <ram:ID>urn:fdc:peppol.eu:2017:poacc:billing:01:1.0</ram:ID>
    </ram:BusinessProcessSpecifiedDocumentContextParameter>
    <rsm:GuidelineSpecifiedDocumentContextParameter>
      <ram:ID>urn:cen.eu:en16931:2017#compliant#urn:xeinkauf.de:kosit:xrechnung_3</ram:ID>
    </ram:GuidelineSpecifiedDocumentContextParameter>
  </rsm:ExchangedDocumentContext>
  <rsm:ExchangedDocument>
    <ram:ID>1058</ram:ID>
    <ram:TypeCode>380</ram:TypeCode>
    <ram:IssueDateTime>
      <udt:DateTimeString format="102">20241114</udt:DateTimeString>
    </ram:IssueDateTime>
  </rsm:ExchangedDocument>
  <rsm:SupplyChainTradeTransaction>
    <ram:IncludedSupplyChainTradeLineItem>
      <ram:AssociatedDocumentLineDocument>
        <ram:LineID>1</ram:LineID>
        <ram:AssociatedDocumentLineDocument>
          <ram:SpecifiedTradeProduct>
            <ram:Name>Standardprodukt 1</ram:Name>
          </ram:SpecifiedTradeProduct>
          <ram:SpecifiedTradePrice>
            <ram:NetPriceProductTradePrice>
              <ram:ChargeAmount>10000.0000</ram:ChargeAmount>
              <ram:BasisQuantity unitCode="C62">1.0000</ram:BasisQuantity>
            </ram:NetPriceProductTradePrice>
            <ram:SpecifiedLineTradeAgreement>
              <ram:SpecifiedLineTradeDelivery>
                <ram:BilledQuantity unitCode="C62">1.0000</ram:BilledQuantity>
              </ram:SpecifiedLineTradeDelivery>
              <ram:SpecifiedLineTradeSettlement>
                <ram:ApplicableTradeTax>
                  <ram:TypeCode>WAT</ram:TypeCode>
                  <ram:CategoryCode>3</ram:CategoryCode>
                  <ram:RateApplicablePercent>19.00</ram:RateApplicablePercent>
                </ram:ApplicableTradeTax>
              </ram:SpecifiedLineTradeSettlement>
            </ram:SpecifiedLineTradeAgreement>
          </ram:SpecifiedTradePrice>
        </ram:AssociatedDocumentLineDocument>
      </ram:AssociatedDocumentLineDocument>
    </ram:IncludedSupplyChainTradeLineItem>
  </rsm:SupplyChainTradeTransaction>
</rsm:CrossIndustryInvoice>
```

This XML file does not appear to have any style information associated with it. The document tree is shown below:

```
<?xml version="1.0" encoding="UTF-8" standalone="yes" ?>
<rsm:CrossIndustryInvoice xmlns:rsm="urn:un:unece:uncefact:data:standard:CrossIndustryInvoice:100" xmlns:udt="urn:un:unece:uncefact:data:standard:UnqualifiedDataType:100" xmlns:qdt="urn:un:unece:uncefact:data:standard:QualifiedDataType:100" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" generated-by="mustangproject.org vnull --">
  <rsm:ExchangedDocumentContext>
    <rsm:BusinessProcessSpecifiedDocumentContextParameter>
      <ram:ID>urn:fdc:peppol.eu:2017:poacc:billing:01:1.0</ram:ID>
    </ram:BusinessProcessSpecifiedDocumentContextParameter>
    <rsm:GuidelineSpecifiedDocumentContextParameter>
      <ram:ID>urn:cen.eu:en16931:2017#compliant#urn:xeinkauf.de:kosit:xrechnung_3</ram:ID>
    </ram:GuidelineSpecifiedDocumentContextParameter>
  </rsm:ExchangedDocumentContext>
  <rsm:ExchangedDocument>
    <ram:ID>1058</ram:ID>
    <ram:TypeCode>380</ram:TypeCode>
    <ram:IssueDateTime>
      <udt:DateTimeString format="102">20241114</udt:DateTimeString>
    </ram:IssueDateTime>
  </rsm:ExchangedDocument>
  <rsm:SupplyChainTradeTransaction>
    <ram:IncludedSupplyChainTradeLineItem>
      <ram:AssociatedDocumentLineDocument>
        <ram:LineID>1</ram:LineID>
        <ram:AssociatedDocumentLineDocument>
          <ram:SpecifiedTradeProduct>
            <ram:Name>Standardprodukt 1</ram:Name>
          </ram:SpecifiedTradeProduct>
          <ram:SpecifiedTradePrice>
            <ram:NetPriceProductTradePrice>
              <ram:ChargeAmount>10000.0000</ram:ChargeAmount>
              <ram:BasisQuantity unitCode="C62">1.0000</ram:BasisQuantity>
            </ram:NetPriceProductTradePrice>
            <ram:SpecifiedLineTradeAgreement>
              <ram:SpecifiedLineTradeDelivery>
                <ram:BilledQuantity unitCode="C62">1.0000</ram:BilledQuantity>
              </ram:SpecifiedLineTradeDelivery>
              <ram:SpecifiedLineTradeSettlement>
                <ram:ApplicableTradeTax>
                  <ram:TypeCode>WAT</ram:TypeCode>
                  <ram:CategoryCode>3</ram:CategoryCode>
                  <ram:RateApplicablePercent>19.00</ram:RateApplicablePercent>
                </ram:ApplicableTradeTax>
              </ram:SpecifiedLineTradeSettlement>
            </ram:SpecifiedLineTradeAgreement>
          </ram:SpecifiedTradePrice>
        </ram:AssociatedDocumentLineDocument>
      </ram:AssociatedDocumentLineDocument>
    </ram:IncludedSupplyChainTradeLineItem>
  </rsm:SupplyChainTradeTransaction>
</rsm:CrossIndustryInvoice>
```

The TypeCode for an invoice is always "380", regardless of whether it is XRechnung or ZUGFeRD.

Receipt

Difference xml „XRechnung“ and xml „ZUGFeRD“

← ↻ ⓘ Datei | C:/Users/r.felsl/AppData/Local/Temp/acrobat_sbx/A9wnmhvr_1o4s91l_774.tmp/xrechnung.xml

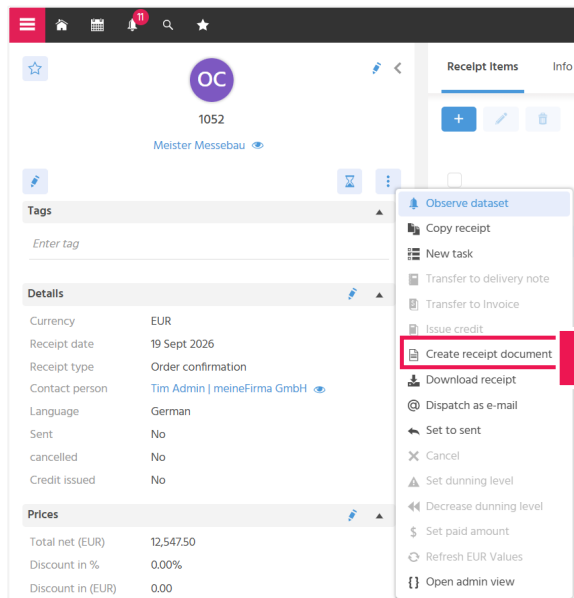
This XML file does not appear to have any style information associated with it. The document tree is shown below.

```
<?xml version="1.0" encoding="UTF-8" ?>
<rsm:CrossIndustryInvoice xmlns:rsm="urn:un:unece:uncefact:data:standard:CrossIndustryInvoice:100" xmlns:xs="http://www.w3.org/2001/XMLSchema-1"
xmlns:udt="urn:un:unece:uncefact:data:standard:UnqualifiedDataType:100" xmlns:qdt="urn:un:unece:uncefact:data:standard:QualifiedDataType:100"
<!-- generated by: mustangproject.org v2.15.0 -->
<rsm:ExchangedDocumentContext>
  <ram:BusinessProcessSpecifiedDocumentContextParameter>
    <ram:ID>urn:fdc:peppol.eu:2017:poacc:billing:01:1.0</ram:ID>
  </ram:BusinessProcessSpecifiedDocumentContextParameter>
  <ram:GuidelineSpecifiedDocumentContextParameter>
    <ram:ID>urn:cen.eu:en16931:2017#compliant#urn:xeinkauf.de:kosit:xrechnung_3.0</ram:ID>
  </ram:GuidelineSpecifiedDocumentContextParameter>
</rsm:ExchangedDocumentContext>
<rsm:ExchangedDocument>
  <ram:ID>1051</ram:ID>
  <ram:TypeCode>380</ram:TypeCode>
  <ram:IssueDateTime>
    <udt:DateTimeString format="102">20250507</udt:DateTimeString>
  </ram:IssueDateTime>
</rsm:ExchangedDocument>
<rsm:SupplyChainTradeTransaction>
  <ram:IncludedSupplyChainTradeLineItem>
    <ram:AssociatedDocumentLineDocument>
      <ram:LineID>1</ram:LineID>
    </ram:AssociatedDocumentLineDocument>
    <ram:SpecifiedTradeProduct>
      <ram:Name>Standardprodukt 1</ram:Name>
      <ram:Description>Standard Stahlträger mit den Maßen 5m x 0,3m x 0,3m.</ram:Description>
    </ram:SpecifiedTradeProduct>
    <ram:SpecifiedLineTradeAgreement>
      <ram:NetPriceProductTradePrice>
        <ram:ChargeAmount>10000.0000</ram:ChargeAmount>
        <ram:BasisQuantity unitCode="C62">1.0000</ram:BasisQuantity>
      </ram:NetPriceProductTradePrice>
    </ram:SpecifiedLineTradeAgreement>
  </ram:IncludedSupplyChainTradeLineItem>
</rsm:SupplyChainTradeTransaction>
```

The marked lines can only be found in the XRechnung. They are not displayed in ZUGFeRD xml files.

Receipt

Send receipt by e-mail



Receipt Items Info

1052
Meister Messebau

Tags

Enter tag

Details

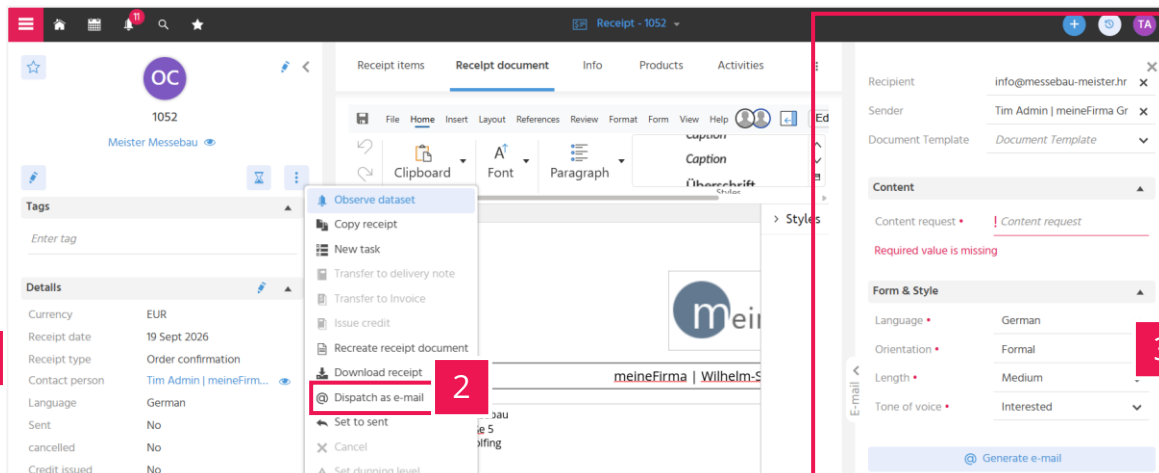
Currency EUR
Receipt date 19 Sept 2026
Receipt type Order confirmation
Contact person Tim Admin | meineFirma GmbH
Language German
Sent No
cancelled No
Credit issued No

Prices

Total net (EUR) 12.547,50
Discount in % 0.00%
Discount in (EUR) 0.00

Context menu options:

- Observe dataset
- Copy receipt
- New task
- Transfer to delivery note
- Transfer to invoice
- Issue credit
- Create receipt document** (1)
- Download receipt
- Dispatch as e-mail
- Set to sent
- Cancel
- Set dunning level
- Decrease dunning level
- Set paid amount
- Refresh EUR Values
- Open admin view



Receipt - 1052

Receipt Items Receipt document Info Products Activities

File Home Insert Layout References Review Format Form View Help

Clipboard Font Paragraph

meineFirma | Wilhelm-S

Context menu options:

- Observe dataset
- Copy receipt
- New task
- Transfer to delivery note
- Transfer to invoice
- Issue credit
- Recreate receipt document
- Download receipt
- Dispatch as e-mail** (2)
- Set to sent
- Cancel
- Set dunning level

Form & Style

Language German
Orientation Formal
Length Medium
Tone of voice Interested

Generate e-mail (3)

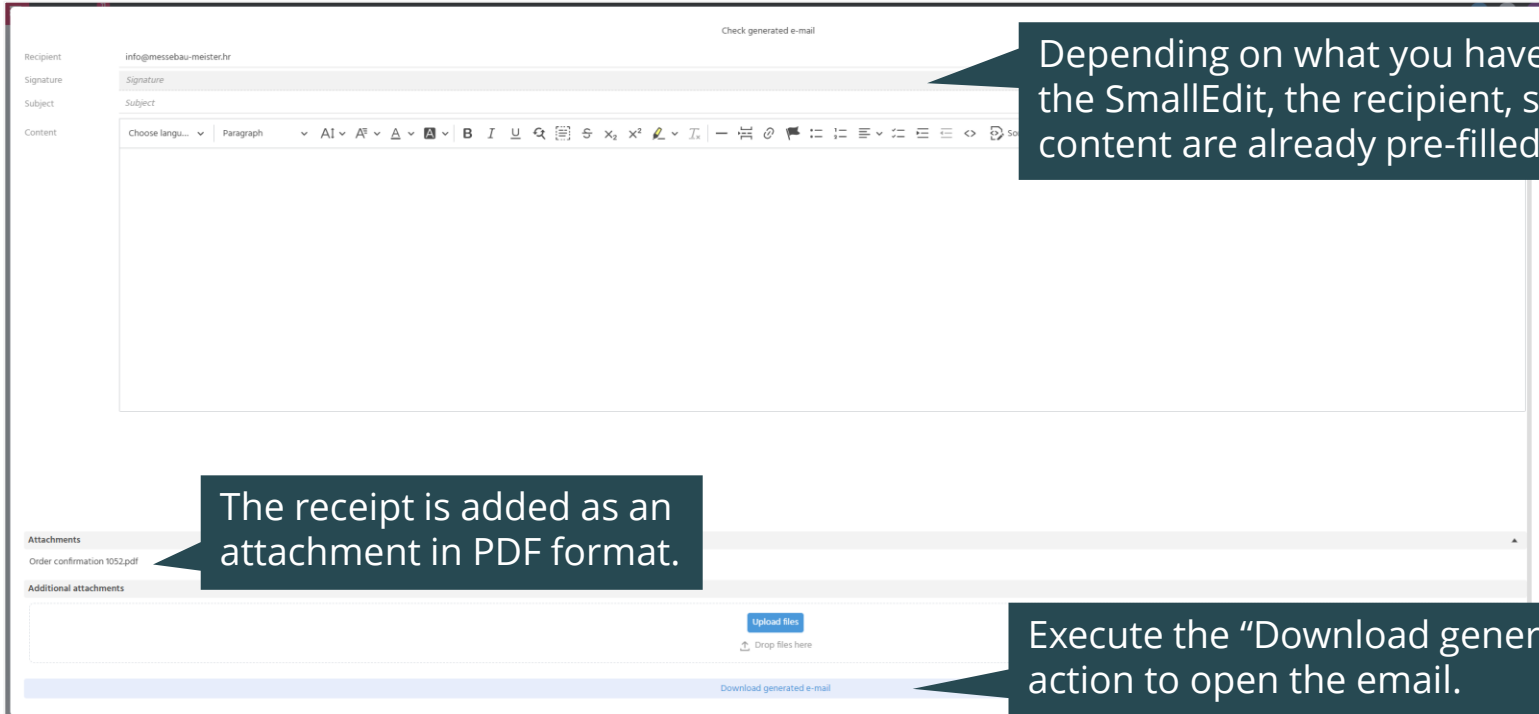


You can **use AI features when creating emails**. For more information, see the documentation “Document templates, writing letters & emails.”

- 1 Create the receipt document.
- 2 Click on “Dispatch as e-mail”. This opens a SmallEdit.
- 3 Select or enter the information needed to send the e-mail, and then click the “Generate e-mail” button.

Receipt

Send receipt by e-mail



Check generated e-mail

Recipient: info@messebau-meister.hr

Signature: Signature

Subject: Subject

Content: Choose langu... Paragraph AI A A B I U Q X₂ X² T_x - [Rich text editor toolbar]

Attachments: Order confirmation 1052.pdf

Additional attachments: Drop files here

Download generated e-mail

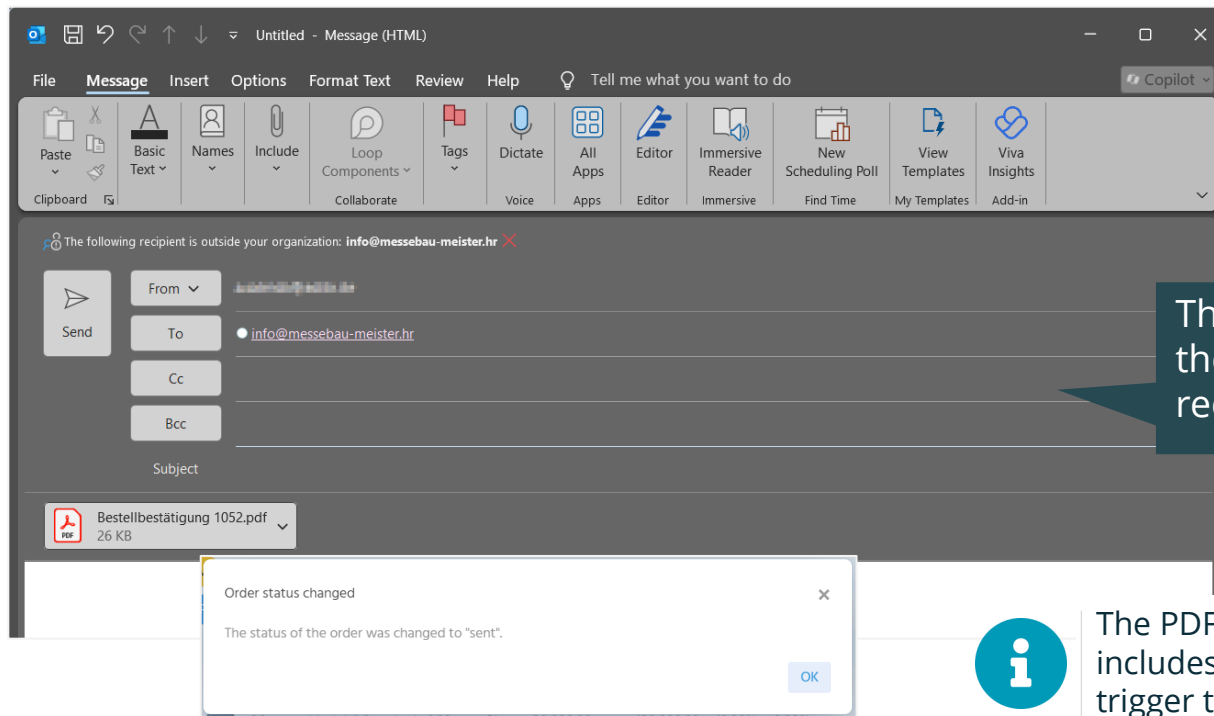
Depending on what you have defined in the SmallEdit, the recipient, subject, and content are already pre-filled here.

The receipt is added as an attachment in PDF format.

Execute the "Download generated e-mail" action to open the email.

Receipt

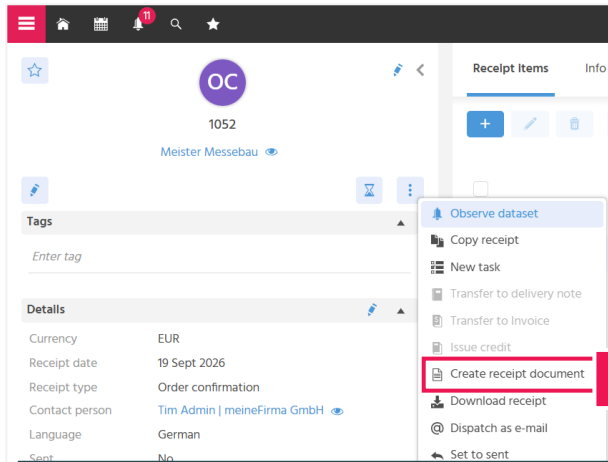
Send receipt by e-mail



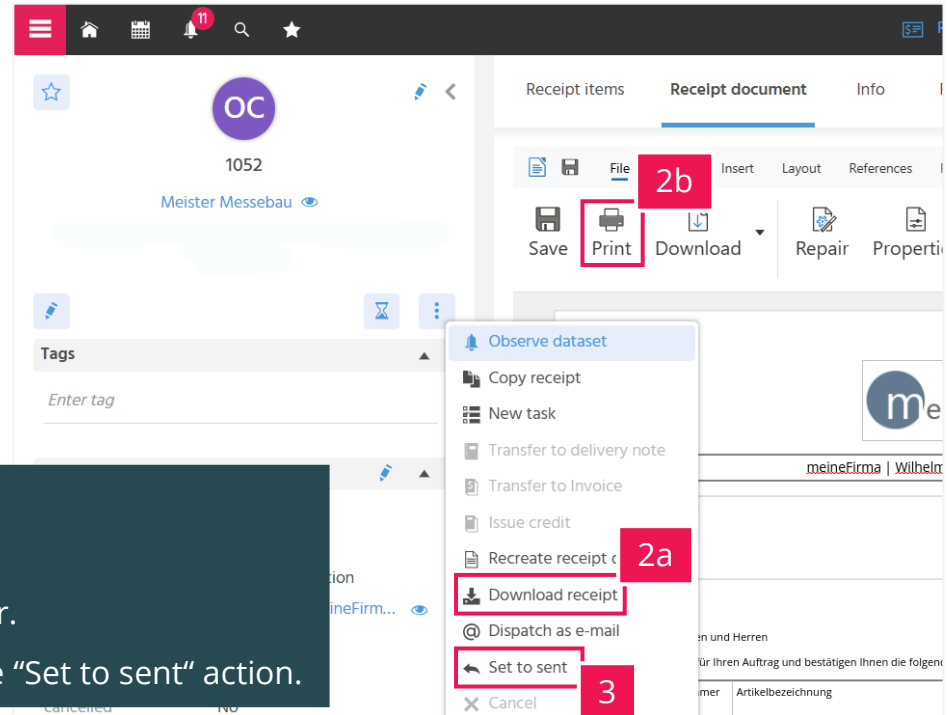
The PDF is automatically read-only and includes an attached XML file when you trigger the e-mail dispatch for a XRechnung.

Receipt

Send receipt by post

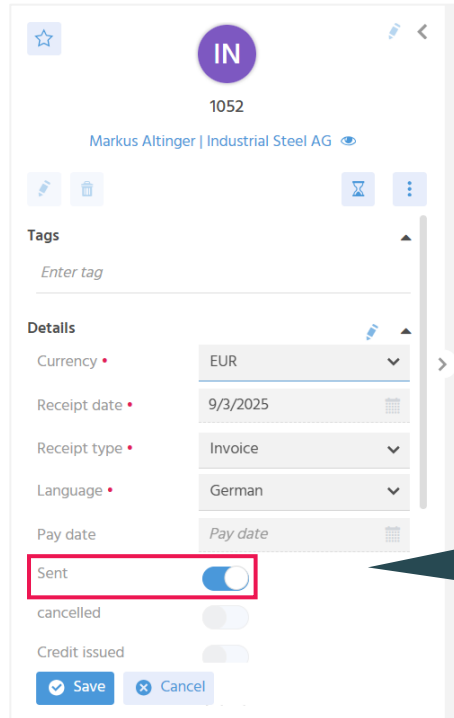


- 1** Create a receipt document.
- 2a** Download the receipt and print it out or
- 2b** Print the document using the document editor.
- 3** Set the status of the receipt to "sent" using the "Set to sent" action.



Receipt

Sent receipts



Star icon, Profile icon (IN), ID: 1052, Name: Markus Altinger | Industrial Steel AG

Tags: Enter tag

Details:

- Currency: EUR
- Receipt date: 9/3/2025
- Receipt type: Invoice
- Language: German
- Pay date: Pay date

Sent ☒

cancelled ☐

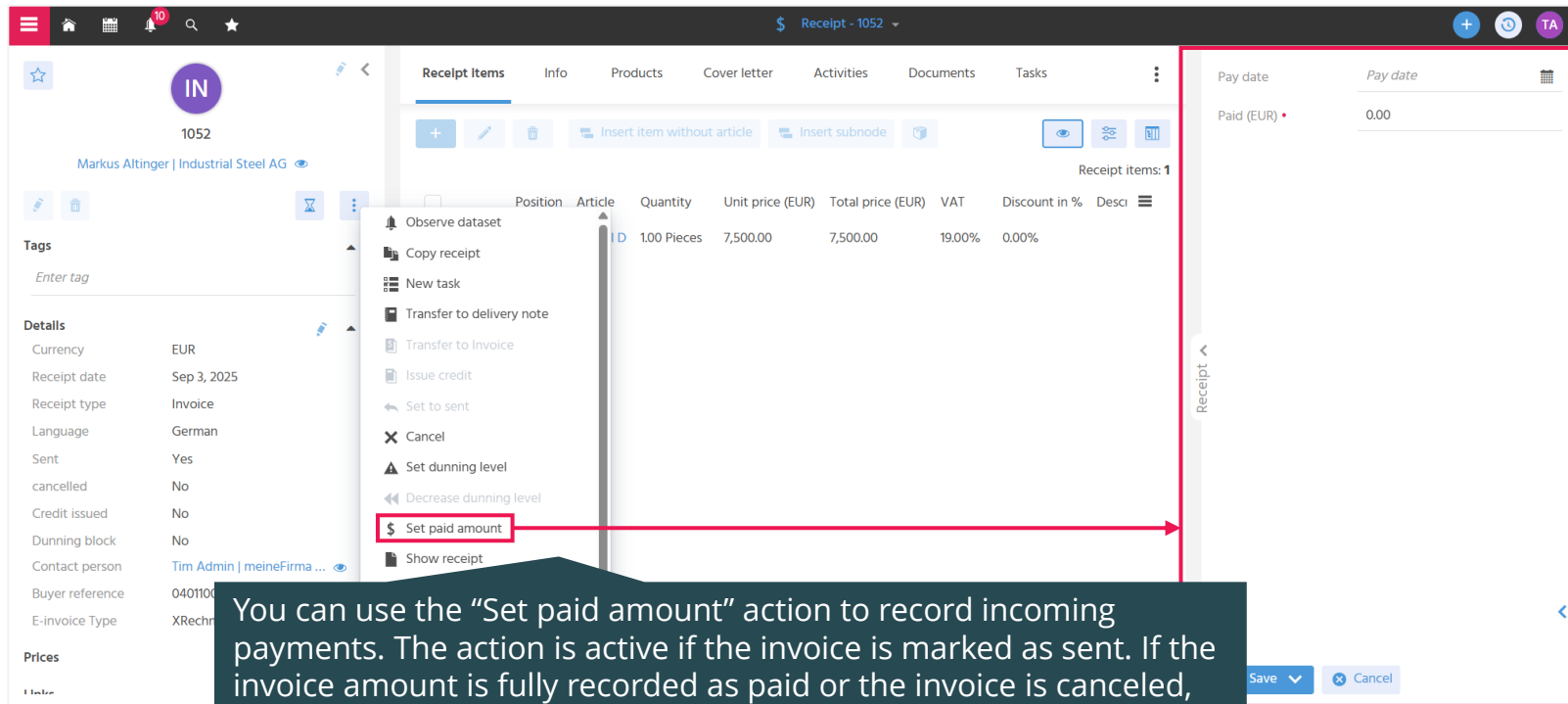
Credit issued ☐

Save Cancel

As soon as a receipt has been marked as "Sent", the data in the "Receipt items", "Receipt document" and "Info" tabs can no longer be changed. Users with the "Administrator" role can deactivate the "Sent" button so that changes are possible again.

Receipt

Set paid amount



The screenshot displays the ADITO Receipt interface for receipt 1052. The left sidebar shows details for Markus Altinger | Industrial Steel AG, including currency (EUR), receipt date (Sep 3, 2025), and receipt type (Invoice). The main area shows the 'Receipt Items' tab with a table containing one item: 1.00 Pieces at a unit price of 7,500.00 EUR, totaling 7,500.00 EUR with 19.00% VAT and a 0.00% discount. A context menu is open over the table, listing various actions. The 'Set paid amount' action, indicated by a dollar sign icon, is highlighted with a red box. A red arrow points from this action to the 'Paid (EUR)' field in the right sidebar, which currently shows 0.00. The right sidebar also includes fields for 'Pay date' and 'Save'/'Cancel' buttons at the bottom.

Position	Article	Quantity	Unit price (EUR)	Total price (EUR)	VAT	Discount in %	Descr
1	D	1.00 Pieces	7,500.00	7,500.00	19.00%	0.00%	

Receipt items: 1

Pay date: Pay date

Paid (EUR): 0.00

Save Cancel

You can use the "Set paid amount" action to record incoming payments. The action is active if the invoice is marked as sent. If the invoice amount is fully recorded as paid or the invoice is canceled, the action is greyed out.

Receipt

Cancellation and credit note

The screenshot shows the 'Receipt Items' interface for invoice 1052. The 'Details' section on the left lists the following information:

Field	Value
Currency	EUR
Receipt date	Sep 3, 2025
Receipt type	Invoice
Language	German
Sent	Yes
cancelled	No
Credit issued	No
Dunning block	No
Contact person	Tim Admin meineFirma...
Buyer reference	0401000-900X999-08
E-invoice Type	XRechnung

A context menu is open on the right, listing various actions. The 'Cancel' option, marked with an 'X' icon, is highlighted with a red box. A dark blue callout box with white text points to this option.

As soon as an invoice has been sent, the "Cancel" action becomes active.

Creating a credit note from an invoice is possible when

- the invoice has the status "Sent",
- a paid amount is deposited with the invoice and
- the invoice is cancelled.

The screenshot shows the 'Receipt Items' interface for invoice 1052. The 'Details' section on the left lists the following information:

Field	Value
Currency	EUR
Receipt date	Sep 3, 2025
Receipt type	Invoice
Language	German
Pay date	Sep 3, 2025
Sent	Yes
cancelled	Yes
Credit issued	No
Dunning block	No
Contact person	Tim Admin meineFirma...
Buyer reference	0401000-900X999-08
E-invoice Type	XRechnung

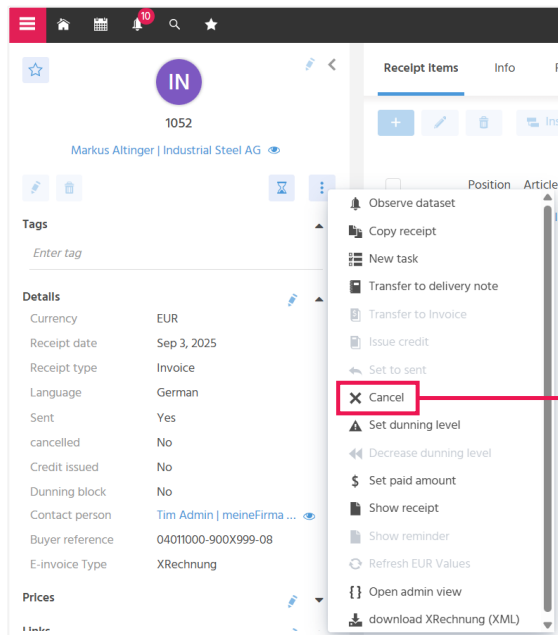
A context menu is open on the right, listing various actions. The 'Issue credit' option, marked with a credit note icon, is highlighted with a red box. A dark blue callout box with white text points to this option.

Prices

Field	Value
Total net (EUR)	7,500.00
Discount in %	0.00%
Discount in (EUR)	0.00
Discounted price net (EUR)	7,500.00
Total VAT (EUR)	1,425.00
Total gross (EUR)	8,925.00
Paid (EUR)	8,925.00

Receipt

Cancel XRechnung

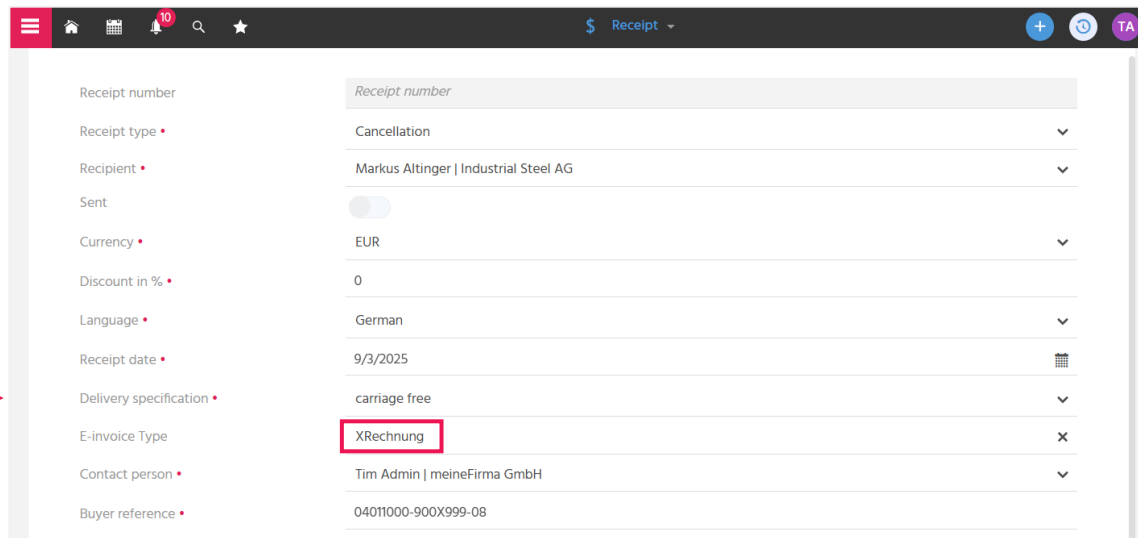


The screenshot shows the ADITO interface with a sidebar on the left and a main content area. The sidebar contains a 'Tags' section with a search bar and a 'Details' section with various fields. The main content area shows a 'Receipt Items' table with a context menu open. The 'Cancel' option is highlighted in the menu, and a red arrow points from it to the 'E-invoice Type' field in the main content area.

Tags	Details
Enter tag	Currency: EUR
	Receipt date: Sep 3, 2025
	Receipt type: Invoice
	Language: German
	Sent: Yes
	cancelled: No
	Credit issued: No
	Dunning block: No
	Contact person: Tim Admin meineFirma ...
	Buyer reference: 04011000-900X999-08
	E-invoice Type: XRechnung

Receipt Items
Position Article

- Observe dataset
- Copy receipt
- New task
- Transfer to delivery note
- Transfer to Invoice
- Issue credit
- Set to sent
- Cancel**
- Set dunning level
- Decrease dunning level
- Set paid amount
- Show receipt
- Show reminder
- Refresh EUR Values
- Open admin view
- download XRechnung (XML)



The screenshot shows the ADITO interface with a sidebar on the left and a main content area. The sidebar contains a 'Tags' section with a search bar and a 'Details' section with various fields. The main content area shows a 'Receipt' form with various fields. The 'E-invoice Type' field is highlighted, and 'XRechnung' is selected.

Receipt	
Receipt number	Receipt number
Receipt type	Cancellation
Recipient	Markus Altinger Industrial Steel AG
Sent	☐
Currency	EUR
Discount in %	0
Language	German
Receipt date	9/3/2025
Delivery specification	carriage free
E-invoice Type	XRechnung
Contact person	Tim Admin meineFirma GmbH
Buyer reference	04011000-900X999-08

If you want to send a cancellation receipt in XML format, select the E-invoice Type "XRechnung" here too. The buyer reference is automatically taken from the invoice.

Cancel XRechnung

Diese Datei verlangt Konformität mit dem PDF/A-Standard und wurde schreibgeschützt geöffnet, um Änderungen zu verhindern. Bearbeitung aktivieren

1	WG3_MD	Modul D	-1 Stück	73.100,00	19,00	-73.100,00
1.1	WG3003-SL	Produkt SL3	-1 Stück	73.000,00	19,00	-73.000,00
1.1.1	WG3_MC-C	Modul C Comfort	-1 Stück	33.000,00	19,00	-33.000,00
1.1.2	WG3_MA-S	Modul A Standard	-1 Stück	10.000,00	19,00	-10.000,00
1.1.3	WG3_MB-S	Modul B Standard	-2 Stück	15.000,00	19,00	-30.000,00
1.2	S001	Serviceeinsatz	-1 Stunden	100,00	19,00	-100,00
2	WG1003	Standardprodukt 3	-1 Stück	171.547,50	19,00	-171.547,50
2.1	ET1002	Ersatzteil 1.002	-1 Stück	47,50	19,00	-47,50
2.2	WG3001-SL	Produkt SL1	-1 Stück	171.500,00	19,00	-171.500,00
2.2.1	WG3_MD	Modul D	-1 Stück	7.500,00	19,00	-7.500,00
2.2.2	WG3_MA-C	Modul A Comfort	-1 Stück	13.000,00	19,00	-13.000,00
2.2.3	WG3_MB-C	Modul B Comfort	-1 Stück	18.000,00	19,00	-18.000,00
2.2.4	WG3_MC-C	Modul C Comfort	-1 Stück	33.000,00	19,00	-33.000,00
2.2.5	WG3_MC-S	Modul C Standard	-2 Stück	30.000,00	19,00	-60.000,00
2.2.6	WG3_MA-S	Modul A Standard	-1 Stück	10.000,00	19,00	-10.000,00
2.2.7	WG3_MB-S	Modul B Standard	-2 Stück	15.000,00	19,00	-30.000,00
Summe netto				-244.647,50		
Rabatt 10%				-24.464,75		
zzgl Summe USt				-41.834,72		
Summe brutto				-262.017,47		

In the cancellation receipt all amounts are displayed with a negative sign.

x Anlagen

Name	Beschreibung
xrechnung.xml	Invoice metadata

```
</ram:GuidelineSpecified>
</rsm:ExchangedDocument>
<rsm:ExchangedDocument>
  <ram:ID>1056</ram:ID>
  <ram:TypeCode>384</ram:TypeCode>
  <ram:IssueDateTime>
    <udt:DateTimeString format="102">20241128</udt:DateTimeString>
  </ram:IssueDateTime>
</rsm:ExchangedDocument>
```

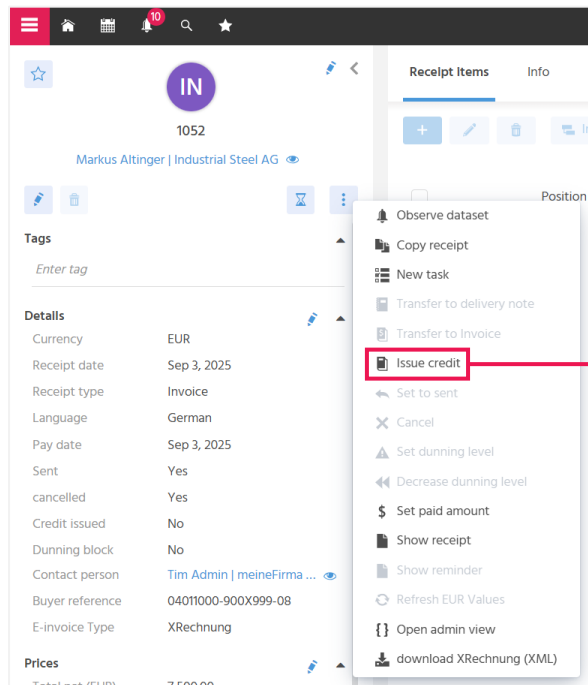
The TypeCode for the cancellation receipt is always "384".

```
<ram:SpecifiedTradeSettlementHeaderMonetarySummation>
  <ram:LineTotalAmount>-244647.50</ram:LineTotalAmount>
  <ram:ChargeTotalAmount>0.00</ram:ChargeTotalAmount>
  <ram:AllowanceTotalAmount>-24464.75</ram:AllowanceTotalAmount>
  <ram:TaxBasisTotalAmount>-220182.75</ram:TaxBasisTotalAmount>
  <ram:TaxTotalAmount currencyID="EUR">-41834.72</ram:TaxTotalAmount>
  <ram:GrandTotalAmount>-262017.47</ram:GrandTotalAmount>
  <ram:TotalPrepaidAmount>0.00</ram:TotalPrepaidAmount>
  <ram:DuePayableAmount>-262017.47</ram:DuePayableAmount>
</ram:SpecifiedTradeSettlementHeaderMonetarySummation>
```

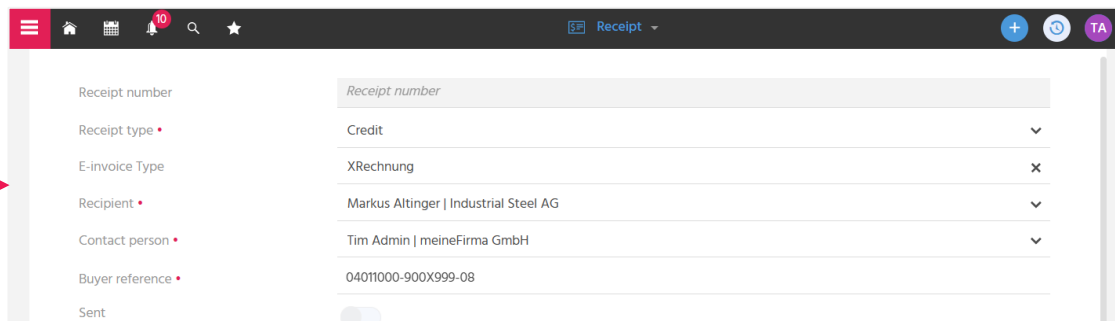
In the XML file the amounts are also transmitted with a negative sign.

Receipt

Create credit note with E-invoice Type "XRechnung"



The screenshot shows the ADITO interface for creating a credit note. On the left, there is a sidebar with a star icon, a purple circle with 'IN', the number '1052', and the text 'Markus Altinger | Industrial Steel AG'. Below this are 'Tags' and 'Details' sections. The 'Details' section lists various fields: Currency (EUR), Receipt date (Sep 3, 2025), Receipt type (Invoice), Language (German), Pay date (Sep 3, 2025), Sent (Yes), cancelled (Yes), Credit issued (No), Dunning block (No), Contact person (Tim Admin | meineFirma ...), Buyer reference (04011000-900X999-08), and E-invoice Type (XRechnung). A dropdown menu is open, showing options: Observe dataset, Copy receipt, New task, Transfer to delivery note, Transfer to Invoice, Issue credit (highlighted with a red box and an arrow pointing to the right), Set to sent, Cancel, Set dunning level, Decrease dunning level, Set paid amount, Show receipt, Show reminder, Refresh EUR Values, Open admin view, and download XRechnung (XML).



The screenshot shows the ADITO interface for creating a credit note. The 'Receipt' form is displayed with the following fields: Receipt number (Receipt number), Receipt type (Credit), E-invoice Type (XRechnung), Recipient (Markus Altinger | Industrial Steel AG), Contact person (Tim Admin | meineFirma GmbH), Buyer reference (04011000-900X999-08), and Sent (toggle switch).

If you want to send a credit note in XML format, select the E-invoice Type "XRechnung" here too. If you create the credit note from a XRechnung, the buyer reference is automatically taken from the invoice.

Receipt

Create credit note with E-invoice Type "XRechnung"

Diese Datei verlangt Konformität mit dem PDF/A-Standard und wurde schreibgeschützt geöffnet, um Änderungen zu verhindern. Bearbeitung aktivieren

meineFirma

meineFirma | Wilhelm-Str. 2 | DE 80807 München | DE123456789

Industrial Steel AG
Markus Altinger
Rathausmarkt 1
20095 Hamburg
DE

Gutschrift
Nummer 1057
Datum 28.11.2024

Sehr geehrter Herr Altinger,
Wir schreiben Ihnen die nachfolgenden Positionen gut:

Pos	Artikelnummer	Artikelbezeichnung	Menge	Einzelpreis EUR	USt %	Summe EUR
1	1051	Gutschrift für Rechnung 1051	1 Stück	262.017,47	0,00	262.017,47
Summe netto						262.017,47
Summe brutto						262.017,47

Zahlungsbedingungen: 30 Tage netto
Lieferbedingung: frei Haus

Wir entschuldigen uns für evtl. Unannehmlichkeiten und stehen für Rückfragen gerne zur Verfügung.

In the credit receipt all amounts are displayed with a positive sign.

Anlagen

Name: xrechnung.xml
Beschreibung: Invoice metadata

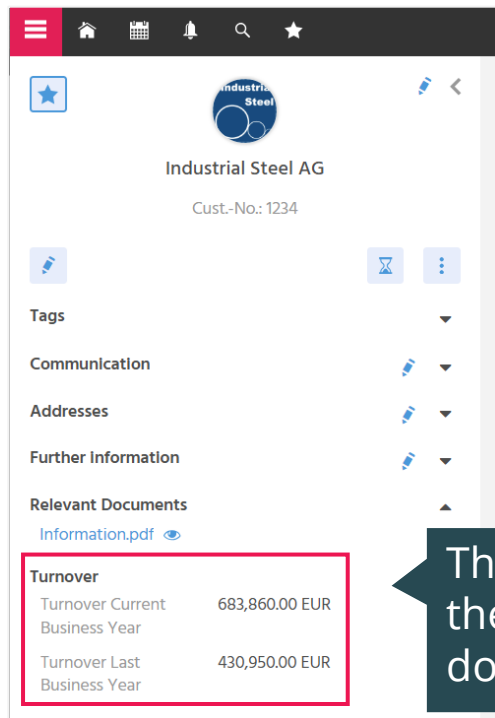
```
</rsm:ExchangedDocument>
  <rsm:ExchangedDocument>
    <ram:ID>1057</ram:ID>
    <ram:TypeCode>381</ram:TypeCode>
    <ram:IssueDateTime>
      <udt:DateTimeString format="102">20241128</udt:DateTimeString>
    </ram:IssueDateTime>
  </rsm:ExchangedDocument>
  <ram:SpecifiedTradeSettlementHeaderMonetarySummation>
    <ram:LineTotalAmount>262017.47</ram:LineTotalAmount>
    <ram:ChargeTotalAmount>0.00</ram:ChargeTotalAmount>
    <ram:AllowanceTotalAmount>0.00</ram:AllowanceTotalAmount>
    <ram:TaxBasisTotalAmount>262017.47</ram:TaxBasisTotalAmount>
    <ram:TaxTotalAmount currencyID="EUR">0.00</ram:TaxTotalAmount>
    <ram:GrandTotalAmount>262017.47</ram:GrandTotalAmount>
    <ram:TotalPrepaidAmount>0.00</ram:TotalPrepaidAmount>
    <ram:DuePayableAmount>262017.47</ram:DuePayableAmount>
  </ram:SpecifiedTradeSettlementHeaderMonetarySummation>
  <ram:InvoiceReferencedDocument>
```

The TypeCode for the credit receipt is always "381".

In the XML file the amounts are also transmitted with a positive sign.

Excursus into the company

“Turnover” area



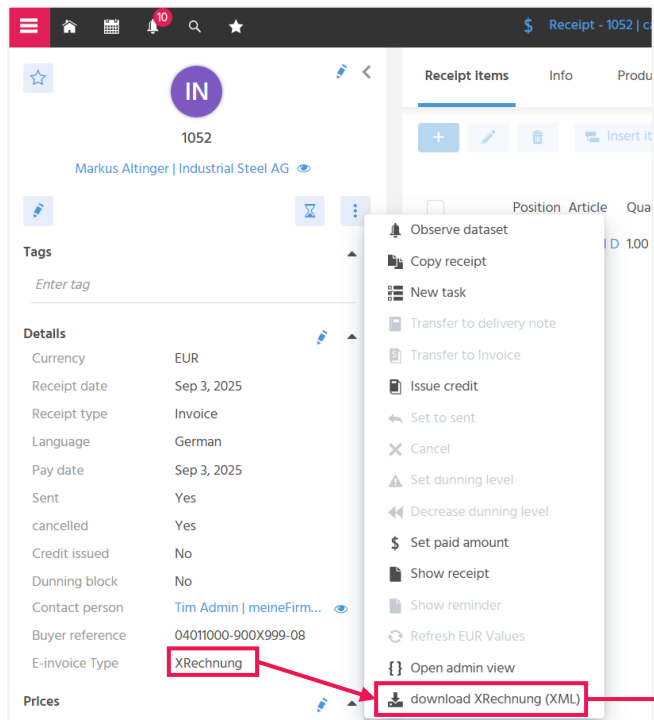
The screenshot shows the ADITO interface for a company profile. The company name is 'Industrial Steel AG' with a customer number 'Cust.-No.: 1234'. Below this, there are sections for 'Tags', 'Communication', 'Addresses', 'Further Information', and 'Relevant Documents'. The 'Relevant Documents' section lists 'Information.pdf'. A red box highlights the 'Turnover' section, which contains the following data:

Turnover	
Turnover Current Business Year	683,860.00 EUR
Turnover Last Business Year	430,950.00 EUR

The turnover is calculated from the sent, not cancelled invoice documents of the respective year.

Receipt

VAT-ID



Receipt - 1052 | c

1052

Markus Altinger | Industrial Steel AG

Tags

Enter tag

Details

Currency	EUR
Receipt date	Sep 3, 2025
Receipt type	Invoice
Language	German
Pay date	Sep 3, 2025
Sent	Yes
cancelled	Yes
Credit issued	No
Dunning block	No
Contact person	Tim Admin meineFirm...
Buyer reference	04011000-900X999-08
E-invoice Type	XRechnung

Prices

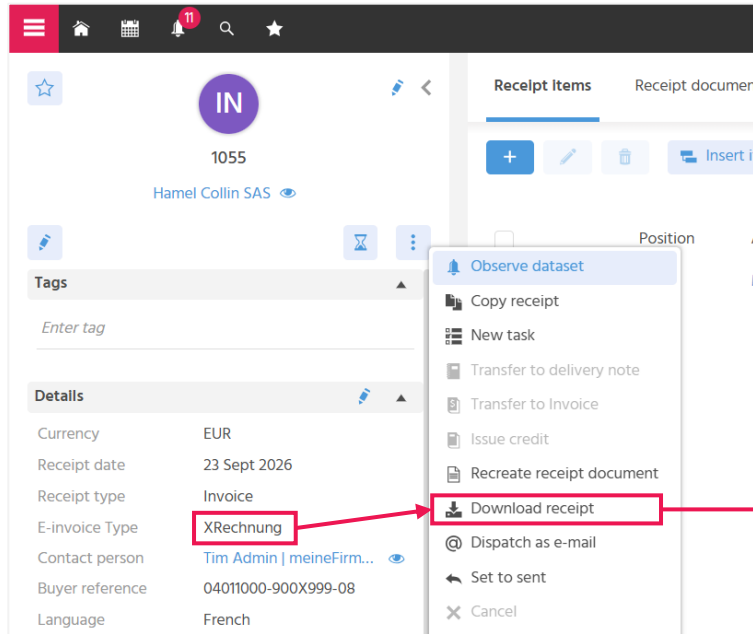
download XRechnung (XML)

The VAT ID of the invoice recipient is displayed in the XML in the "BuyerTradeParty" data if the VAT ID is stored as a attribute for the corresponding company.

```
<ram:BuyerTradeParty>
  <ram:Name>Hamel Collin SAS</ram:Name>
  <ram:PostalTradeAddress>
    <ram:PostcodeCode>68100</ram:PostcodeCode>
    <ram:LineOne>Passage de l'Hôtel de Ville 6</ram:LineOne>
    <ram:CityName>Mulhouse</ram:CityName>
    <ram:CountryID>FR</ram:CountryID>
  </ram:PostalTradeAddress>
  <ram:URIUniversalCommunication>
    <ram:URIID schemeID="EM">bertin@hamel.fr</ram:URIID>
  </ram:URIUniversalCommunication>
  <ram:SpecifiedTaxRegistration>
    <ram:ID schemeID="VA">FR87654321123</ram:ID>
  </ram:SpecifiedTaxRegistration>
</ram:BuyerTradeParty>
```

Receipt

VAT-ID



The screenshot shows the ADITO Receipt interface. The receipt is for Hamel Collin SAS (1055). The 'Details' section shows the following information:

Field	Value
Currency	EUR
Receipt date	23 Sept 2026
Receipt type	Invoice
E-invoice Type	XRechnung
Contact person	Tim Admin meineFirm...
Buyer reference	04011000-900X999-08
Language	French

A context menu is open over the receipt, showing the following options:

- Observe dataset
- Copy receipt
- New task
- Transfer to delivery note
- Transfer to Invoice
- Issue credit
- Recreate receipt document
- Download receipt
- Dispatch as e-mail
- Set to sent
- Cancel

If the recipient does not have a VAT ID, the message below will be displayed.

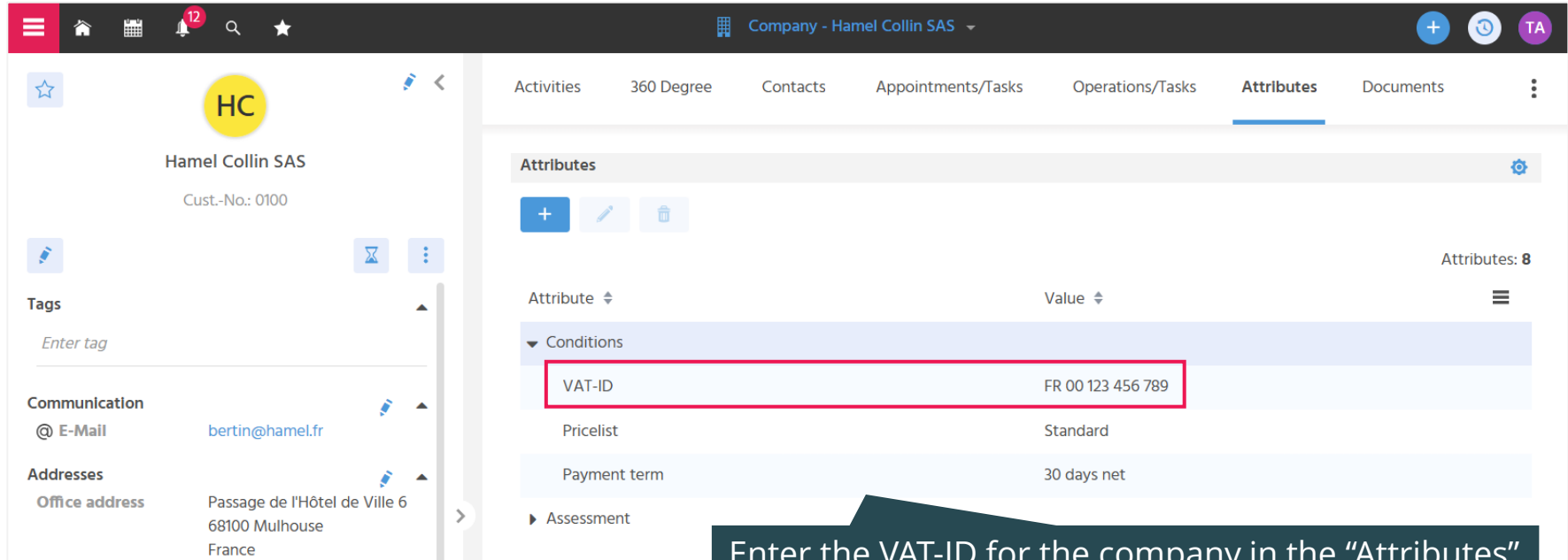
One or more mandatory fields for E-invoices are missing:
-Recipient: VAT ID is missing

The E-invoice will therefore not be attached to the receipt. However, the receipt will still be opened.

OK

Excursus into the company

VAT-ID



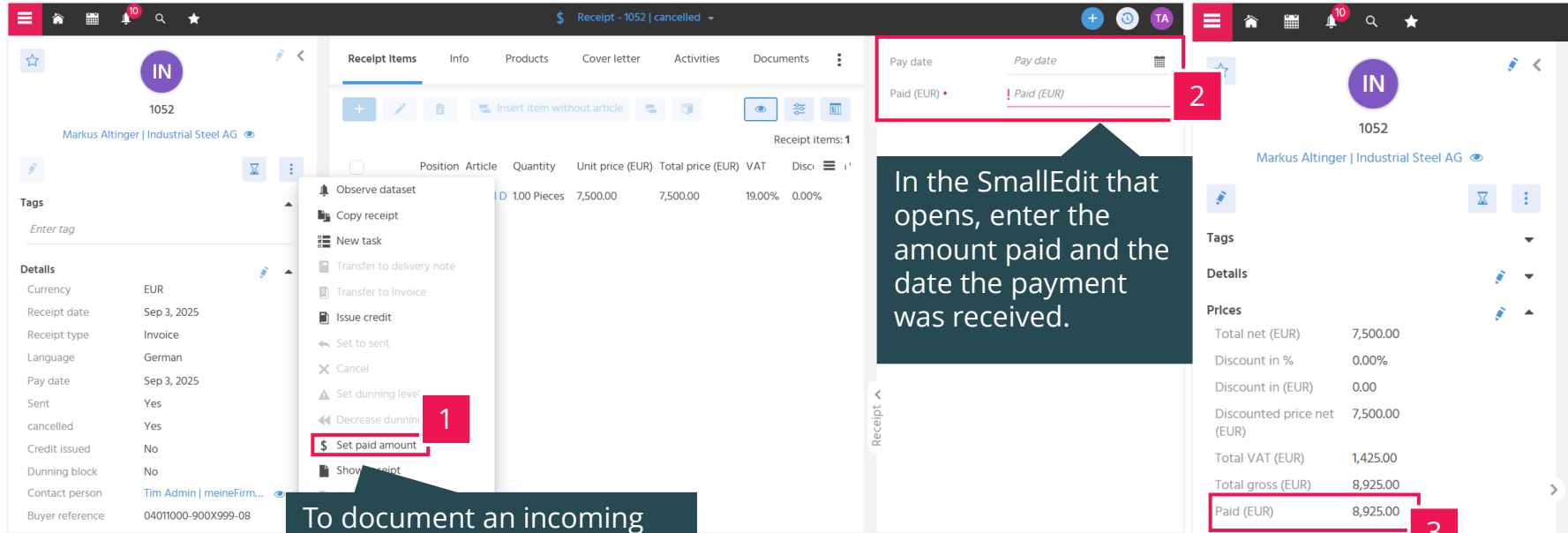
The screenshot shows the ADITO software interface. The top navigation bar includes a hamburger menu, home, calendar, notifications (12), search, and star icons. The main header displays 'Company - Hamel Collin SAS' and user avatars. The left sidebar shows the company profile for 'Hamel Collin SAS' with a yellow 'HC' logo, customer number '0100', and contact information. The main content area is divided into tabs: 'Activities', '360 Degree', 'Contacts', 'Appointments/Tasks', 'Operations/Tasks', 'Attributes' (selected), and 'Documents'. The 'Attributes' tab shows a table with columns 'Attribute' and 'Value'. Under the 'Conditions' parent property, the 'VAT-ID' attribute is highlighted with a red box, showing the value 'FR 00 123 456 789'. Other attributes listed include 'Pricelist' (Standard) and 'Payment term' (30 days net).

Attribute	Value
Conditions	
VAT-ID	FR 00 123 456 789
Pricelist	Standard
Payment term	30 days net
Assessment	

Enter the VAT-ID for the company in the "Attributes" tab under the parent property "Conditions".

Incoming payments/dunning

Incoming payments



Receipt - 1052 | cancelled

Pay date

Paid (EUR) • ! Paid (EUR)

2

In the SmallEdit that opens, enter the amount paid and the date the payment was received.

1

To document an incoming payment, execute the action "Set paid amount".

3

The amount paid is then displayed in the preview in the "Prices" area.

Position	Article	Quantity	Unit price (EUR)	Total price (EUR)	VAT	Disci
D	1.00 Pieces	7,500.00	7,500.00	19.00%	0.00%	

Receipt items: 1

Details

Currency: EUR

Receipt date: Sep 3, 2025

Receipt type: Invoice

Language: German

Pay date: Sep 3, 2025

Sent: Yes

cancelled: Yes

Credit issued: No

Dunning block: No

Contact person: Tim Admin | meineFirm...

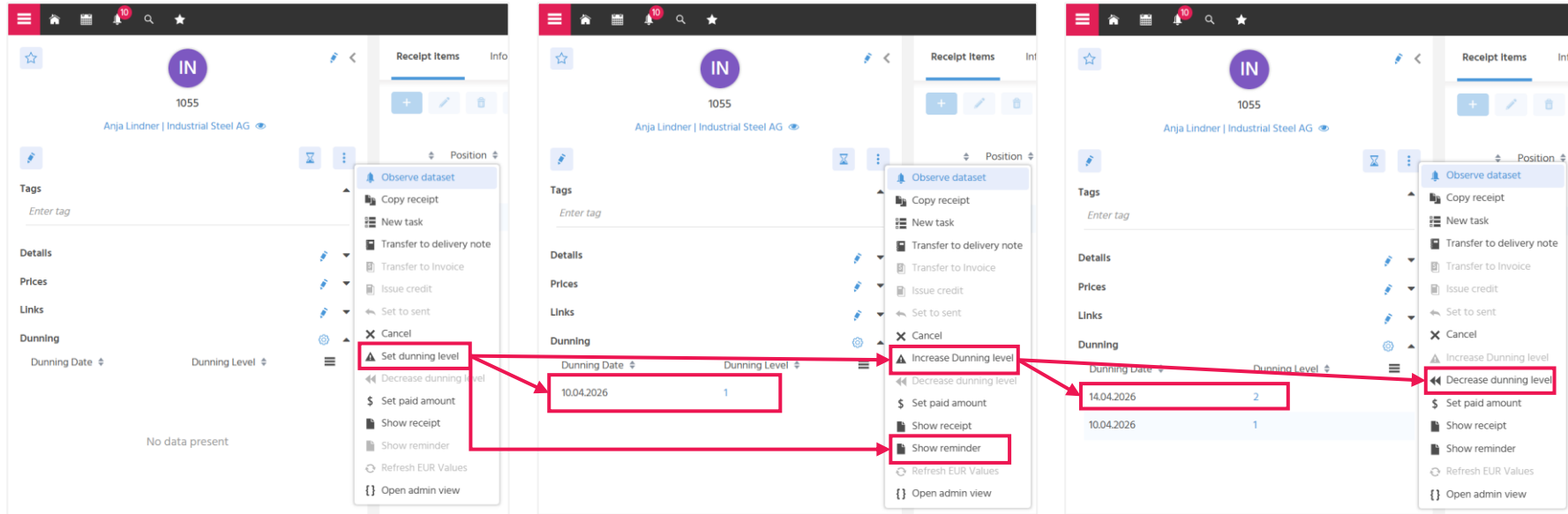
Buyer reference: 04011000-900X999-08

Prices

Total net (EUR)	7,500.00
Discount in %	0.00%
Discount in (EUR)	0.00
Discounted price net (EUR)	7,500.00
Total VAT (EUR)	1,425.00
Total gross (EUR)	8,925.00
Paid (EUR)	8,925.00

Dunning

Set, increase, decrease dunning levels manually - overview



The screenshots illustrate the manual adjustment of dunning levels for a receipt item (1055) belonging to Anja Lindner | Industrial Steel AG. The interface shows the 'Receipt Items' section with a list of items. The 'Dunning' section is expanded, showing the 'Dunning Date' and 'Dunning Level' for each item.

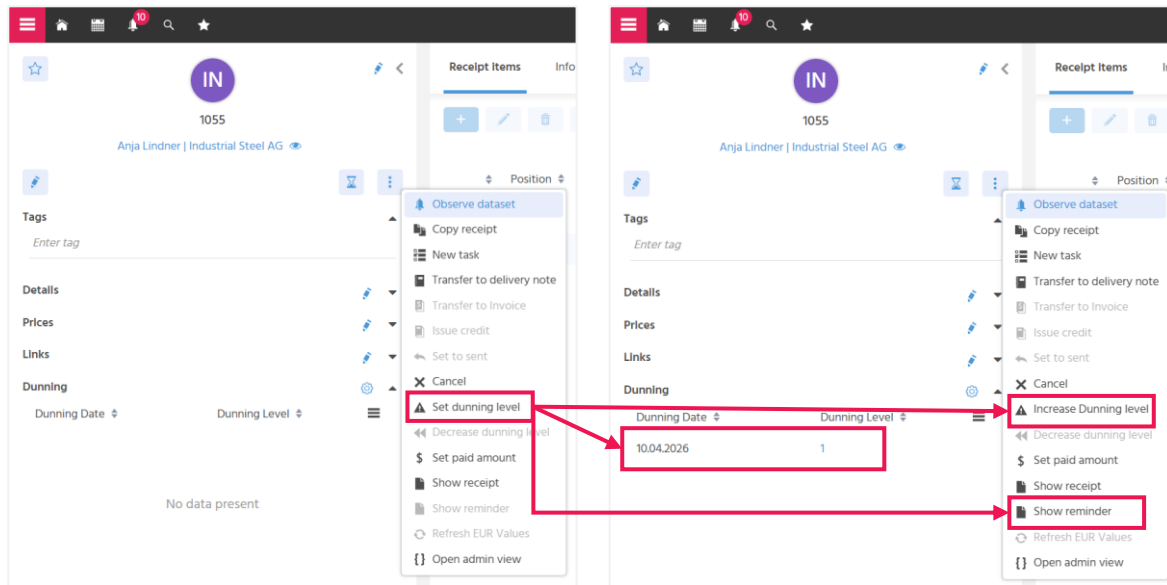
First Screenshot: The 'Set dunning level' option is selected in the context menu. The dunning level is currently 1.

Second Screenshot: The 'Increase Dunning level' option is selected in the context menu. The dunning level is increased to 2.

Third Screenshot: The 'Decrease dunning level' option is selected in the context menu. The dunning level is decreased back to 1.

Dunning

Set dunning



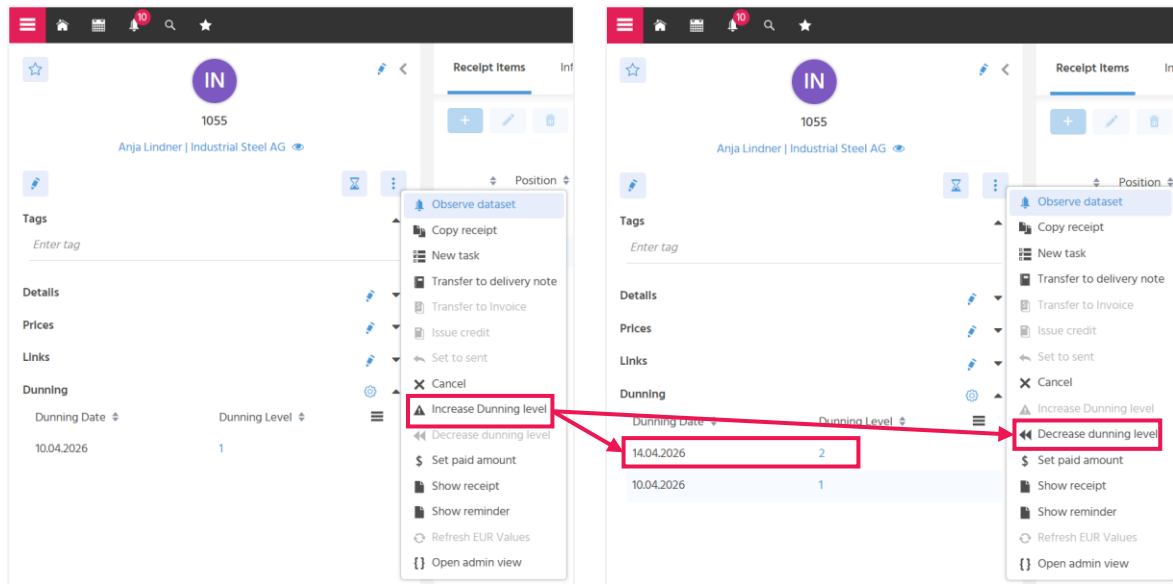
The “**Set dunning level**” action becomes **active** as soon as the **receipt is marked as “Sent”**. The action is **no longer active** if a **paid amount** is set that **matches the Total gross of the invoice**.

As soon as you execute the “Set dunning level” action,

- dunning level 1 is set on the receipt
- the “Show reminder” action becomes active
- you get the action “Increase Dunning level”.

Dunning

Increase, decrease dunning levels



Dunning Date	Dunning Level
10.04.2026	1
14.04.2026	2
10.04.2026	1

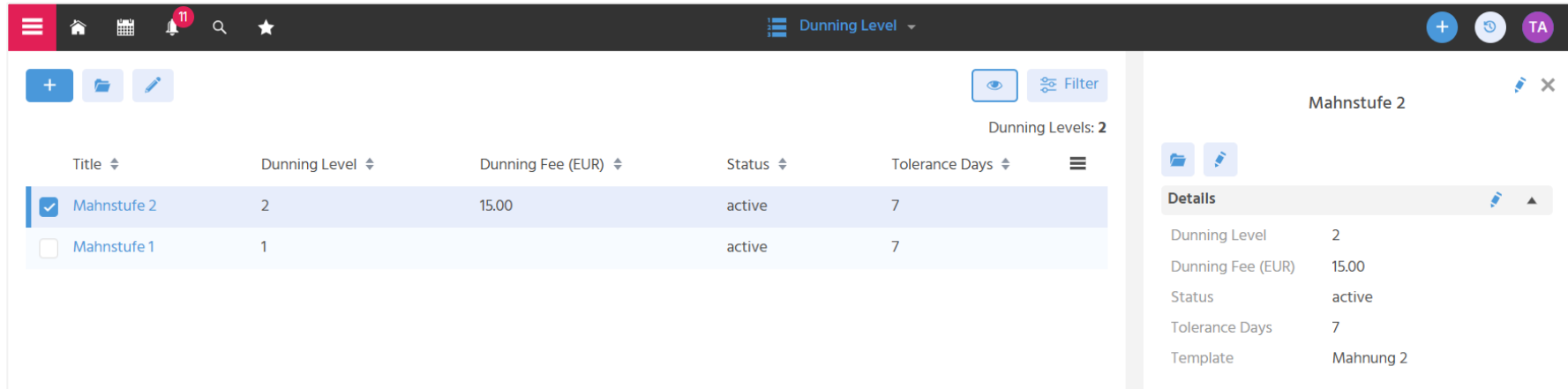
You can define **how many dunning levels** there should be in the Context **“Dunning level”** in the menu group **“Administration”**.

The **“Increase dunning level”** action is active as long as there is at least one dunning level that is higher than the dunning level entered in the receipt.

As soon as there is at least one dunning level that is lower than the dunning level entered in the receipt, the **“Decrease dunning level”** action becomes active.

Excursus Administration

Context “Dunning level”



Title	Dunning Level	Dunning Fee (EUR)	Status	Tolerance Days
☒ Mahnstufe 2	2	15.00	active	7
☐ Mahnstufe 1	1	15.00	active	7

Dunning Levels: 2

Mahnstufe 2

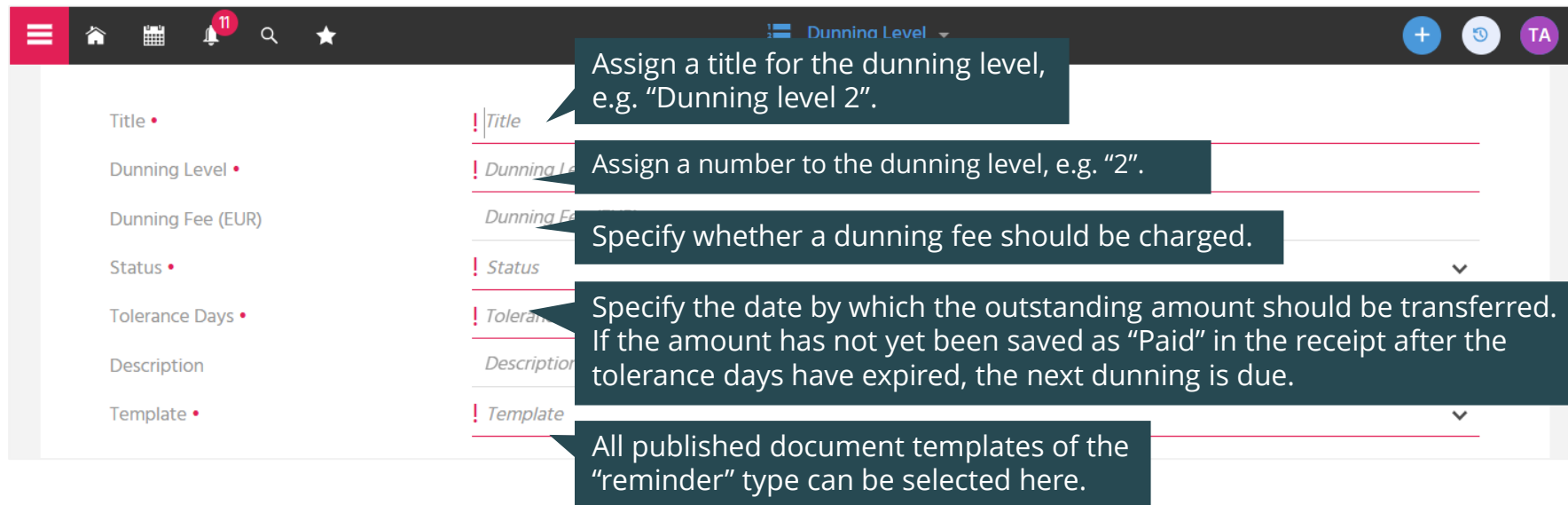
Details

- Dunning Level: 2
- Dunning Fee (EUR): 15.00
- Status: active
- Tolerance Days: 7
- Template: Mahnung 2

The “Dunning Level” Context specifies how many dunning levels there are.

Excursus Administration

Context “Dunning level”

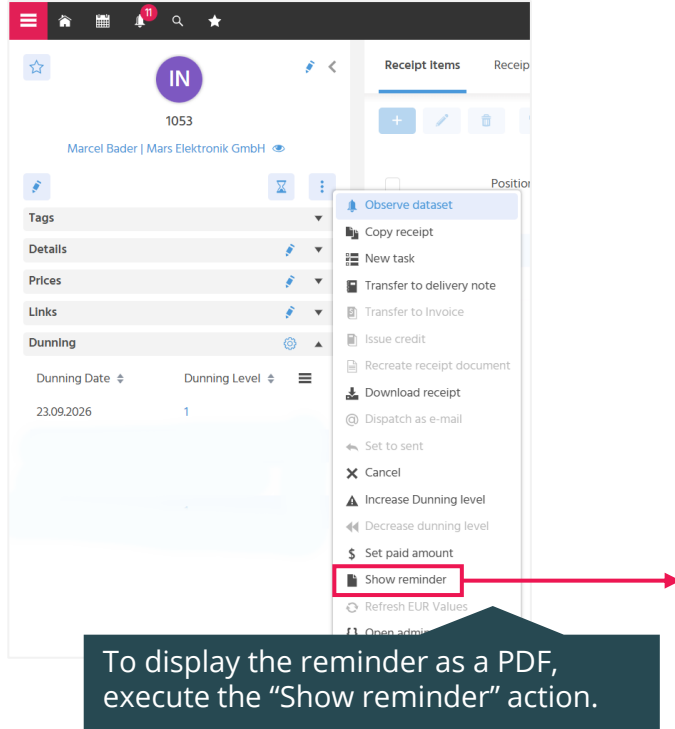


The screenshot shows the 'Dunning Level' configuration interface in the ADITO system. The left sidebar contains a list of fields: Title, Dunning Level, Dunning Fee (EUR), Status, Tolerance Days, Description, and Template. The main form area displays these fields with their respective input types and validation rules. Five callout boxes provide additional context for each field:

- Title:** Assign a title for the dunning level, e.g. “Dunning level 2”.
- Dunning Level:** Assign a number to the dunning level, e.g. “2”.
- Dunning Fee (EUR):** Specify whether a dunning fee should be charged.
- Status:** Specify the date by which the outstanding amount should be transferred. If the amount has not yet been saved as “Paid” in the receipt after the tolerance days have expired, the next dunning is due.
- Template:** All published document templates of the “reminder” type can be selected here.

Dunning

Show reminder



Observe dataset

Copy receipt

New task

Transfer to delivery note

Transfer to Invoice

Issue credit

Recreate receipt document

Download receipt

Dispatch as e-mail

Set to sent

Cancel

Increase Dunning level

Decrease dunning level

Set paid amount

Show reminder

Refresh EUR Values

Open admin

To display the reminder as a PDF, execute the "Show reminder" action.

Document

meineFirma

meineFirma | Wilhelm-Str. 2 | DE 80807 München

Glob Group
32-40 Blackfriars Road
SE1 8NW London
GB

Dear Sir or Madame

Für folgende Rechnung konnten wir in unserer Buchhaltung noch keinen Zahlungseingang feststellen:

Belegnummer	Belegdatum	Fälligkeitsdatum	Summe brutto EUR	Mahngebühr EUR	Offener Betrag EUR

Page 1 of 1 | 150 words, 1,069 characters | Read-only

Dunning

Send dunning

Document

Download File

Send e-mail

meineFirma | Wilhelm-Str. 2 | DE 80807 München

Industrial Steel AG
Rathausmarkt 1
20095 Hamburg

Sehr geehrte Damen und Herren

Für folgende Rechnung konnten wir in unserer Buchhaltung noch keinen Zahlungseingang feststellen:

Belegnummer	Belegdatum	Fälligkeitsdatum	Summe brutto EUR	Mahnggebühr EUR	Offener Betrag EUR
1041	11.11.2025	15.03.2026	377.230,00	0,00	377.230,00

Sicher haben Sie es nur vergessen, deshalb bitten wir Sie den offenen Betrag in Höhe von 377.230,00 EUR unter Angabe der Rechnungsnummer 1041 auf unser Konto bei der DEUTSCHE KREDITBANK BERLIN zu überweisen.

Page 1 of 1 | 149 words, 1,074 characters | Read-only

<

>

170%

+

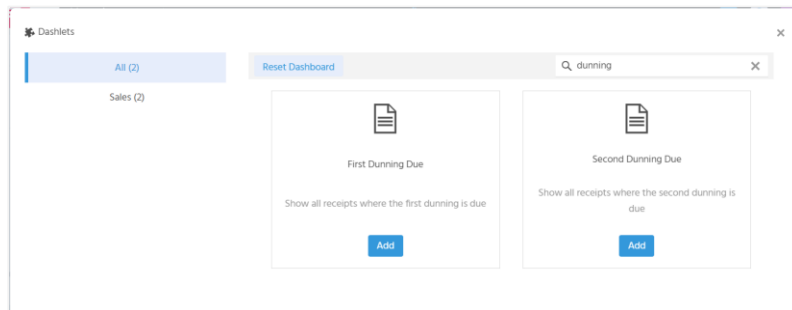
You can send the PDF as an e-mail or by post. The functionality is identical to sending receipts (slides "Send receipt by e-mail" and "Send receipt by post").

130

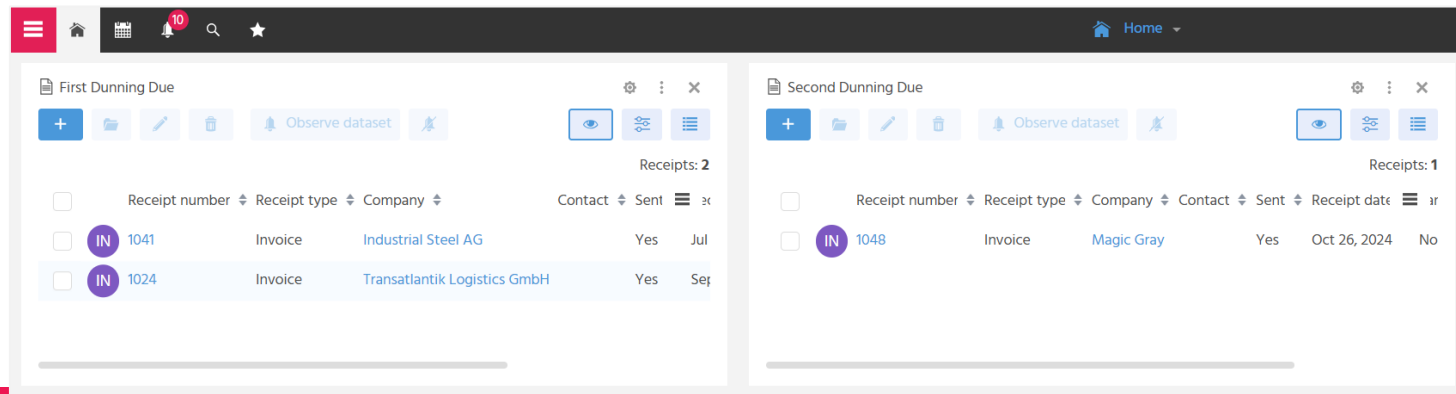


Dunning

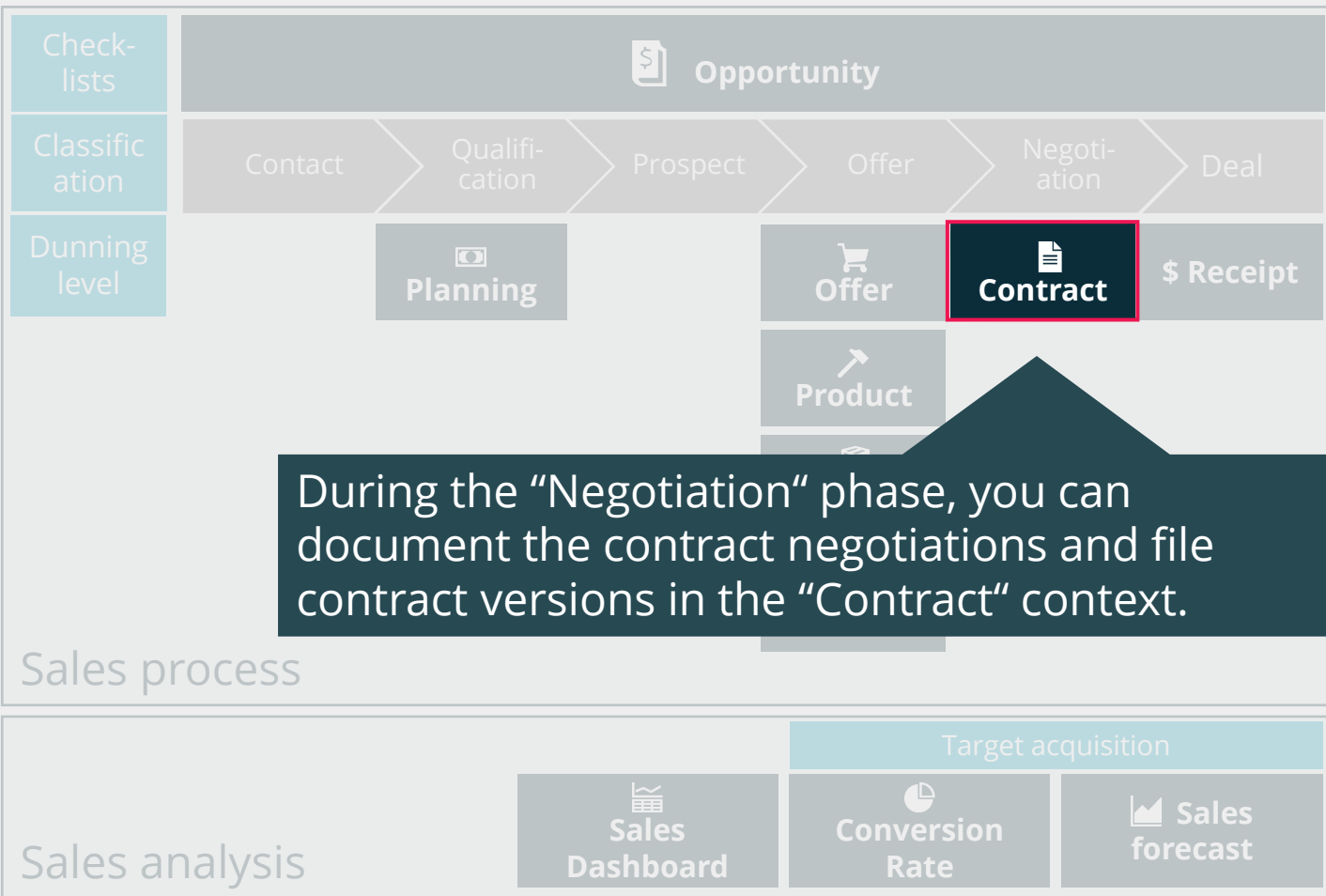
Dashlets



In the dashlet store, you will find the dashlets “First dunning due” and “Second dunning due”. There you will find receipts for which a dunning level must be set. The 1st dunning is due after “Receipt date + Tolerance days”. The 2nd dunning is due after “Receipt date + Tolerance days”.

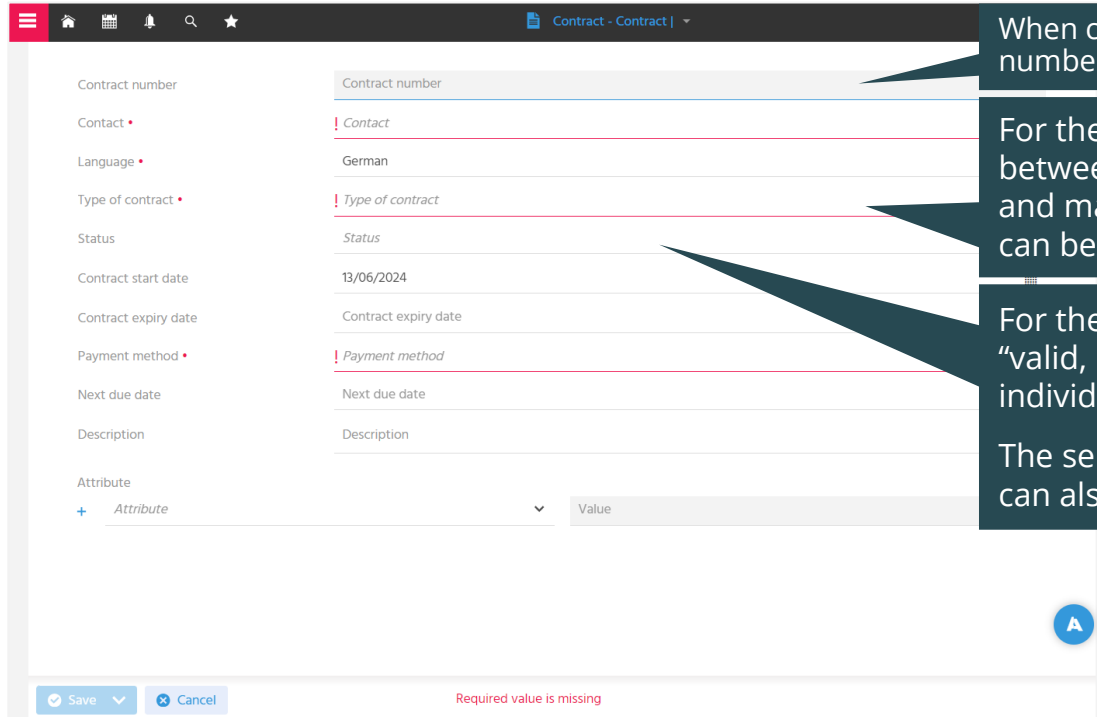


Contract



Contract

Documentation of the agreements



The screenshot shows the ADITO contract creation interface. It features a sidebar with navigation icons and a main form area. The form contains the following fields:

Field	Value
Contract number	Contract number
Contact	! Contact
Language	German
Type of contract	! Type of contract
Status	Status
Contract start date	13/06/2024
Contract expiry date	Contract expiry date
Payment method	! Payment method
Next due date	Next due date
Description	Description
Attribute	+ Attribute

At the bottom, there are buttons for "Save" and "Cancel", and a red error message: "Required value is missing".

When creating a new contract, the contract number is assigned systematically.

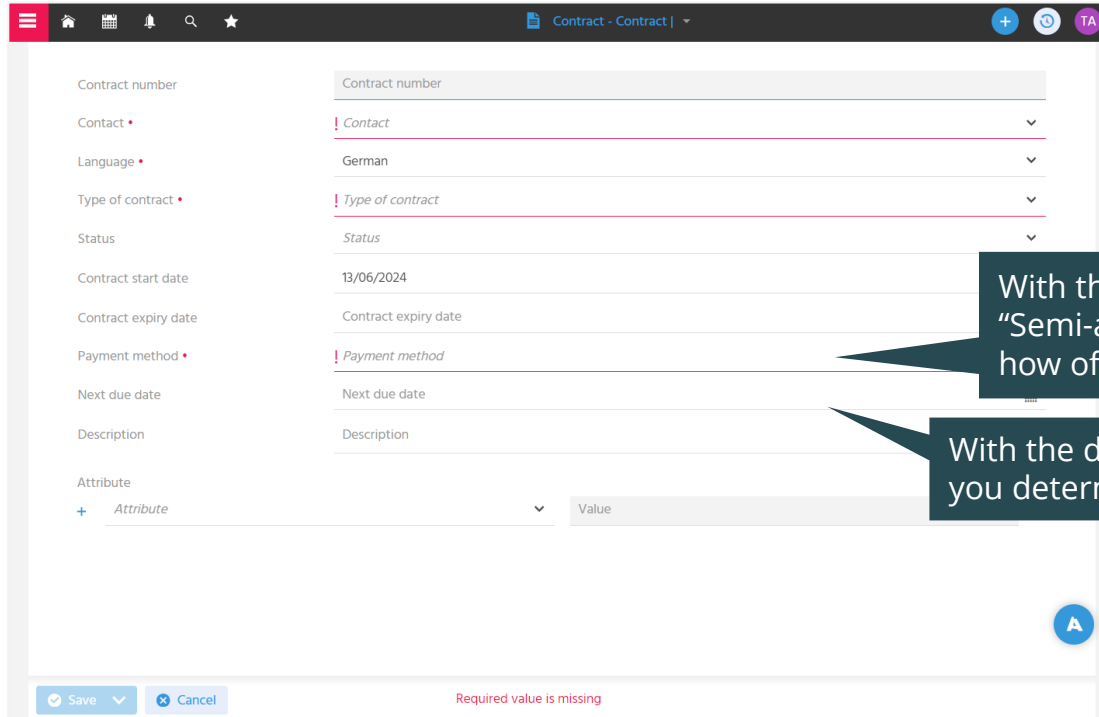
For the contract type, you have the choice between framework contract, service contract and maintenance contract. The contract types can be adapted by the administrator.

For the status you can select "valid, unlimited", "valid, limited", "not yet signed", "none, individual count", "resigned" or "refused".

The selection options for the contract status can also be adjusted by the administrator.

Contract

Documentation of the agreements



The screenshot shows a web application interface for documenting contracts. The top navigation bar includes a menu icon, home, calendar, notifications, search, and star icons, along with the text "Contract - Contract |". The main form area contains several fields:

- Contract number: A text input field.
- Contact: A dropdown menu with a red exclamation mark icon and a downward arrow.
- Language: A dropdown menu with "German" selected and a downward arrow.
- Type of contract: A dropdown menu with a red exclamation mark icon and a downward arrow.
- Status: A dropdown menu with a downward arrow.
- Contract start date: A text input field with the value "13/06/2024".
- Contract expiry date: A text input field.
- Payment method: A dropdown menu with a red exclamation mark icon and a downward arrow.
- Next due date: A text input field.
- Description: A text input field.
- Attribute: A section with a "+" icon, a dropdown menu, and a "Value" input field.

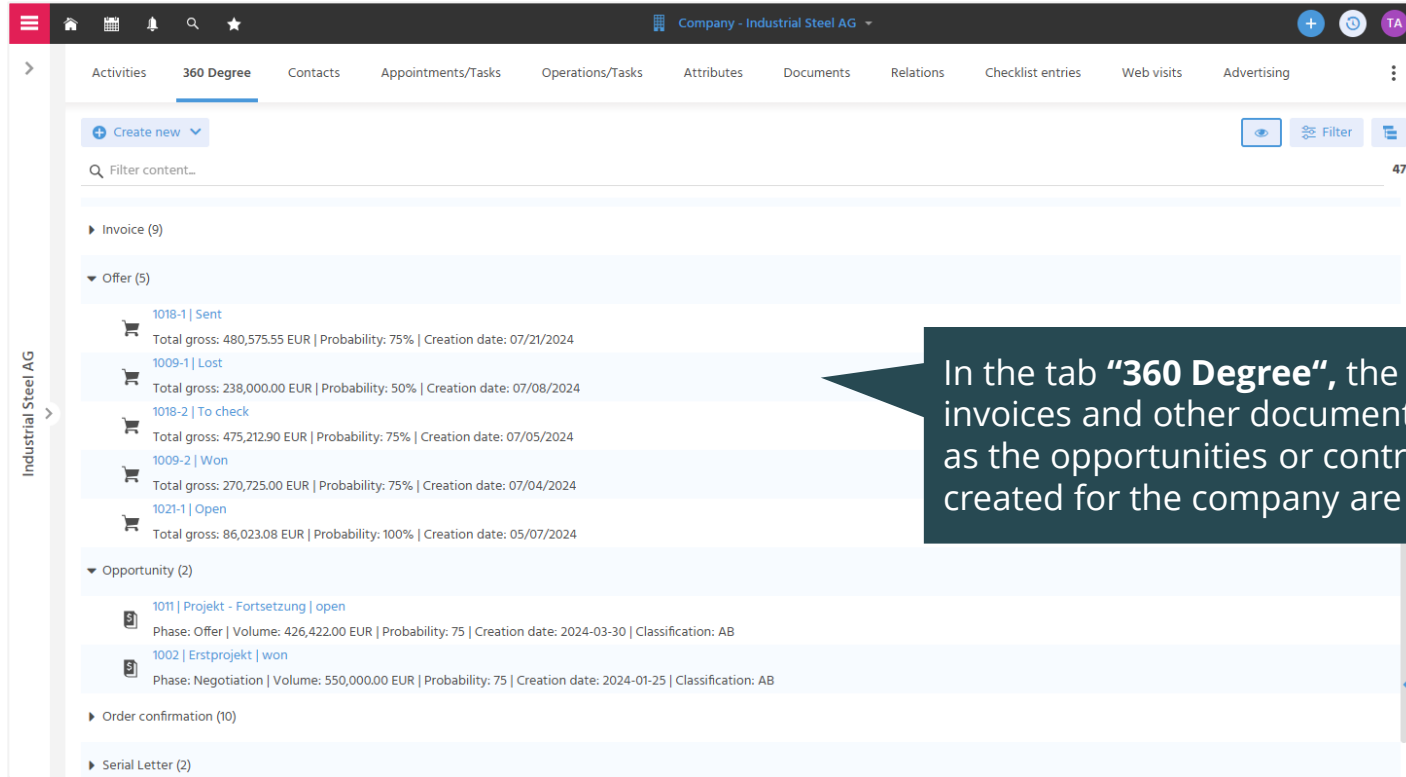
At the bottom of the form, there are "Save" and "Cancel" buttons. A red error message "Required value is missing" is displayed below the buttons. A blue circular button with the letter "A" is located in the bottom right corner of the form area.

With the payment method "Annually", "Semi-annually" or "Quarterly" you choose how often the agreed amount is due.

With the date you enter in the "next due date" field, you determine from when the payment routine starts.

Visibility of the sales process at the company

Tab "360 degrees"



Company - Industrial Steel AG

Activities **360 Degree** Contacts Appointments/Tasks Operations/Tasks Attributes Documents Relations Checklist entries Web visits Advertising

+ Create new

Filter content... 47

Invoice (9)

Offer (5)

- 1018-1 | Sent
Total gross: 480,575.55 EUR | Probability: 75% | Creation date: 07/21/2024
- 1009-1 | Lost
Total gross: 238,000.00 EUR | Probability: 50% | Creation date: 07/08/2024
- 1018-2 | To check
Total gross: 475,212.90 EUR | Probability: 75% | Creation date: 07/05/2024
- 1009-2 | Won
Total gross: 270,725.00 EUR | Probability: 75% | Creation date: 07/04/2024
- 1021-1 | Open
Total gross: 86,023.08 EUR | Probability: 100% | Creation date: 05/07/2024

Opportunity (2)

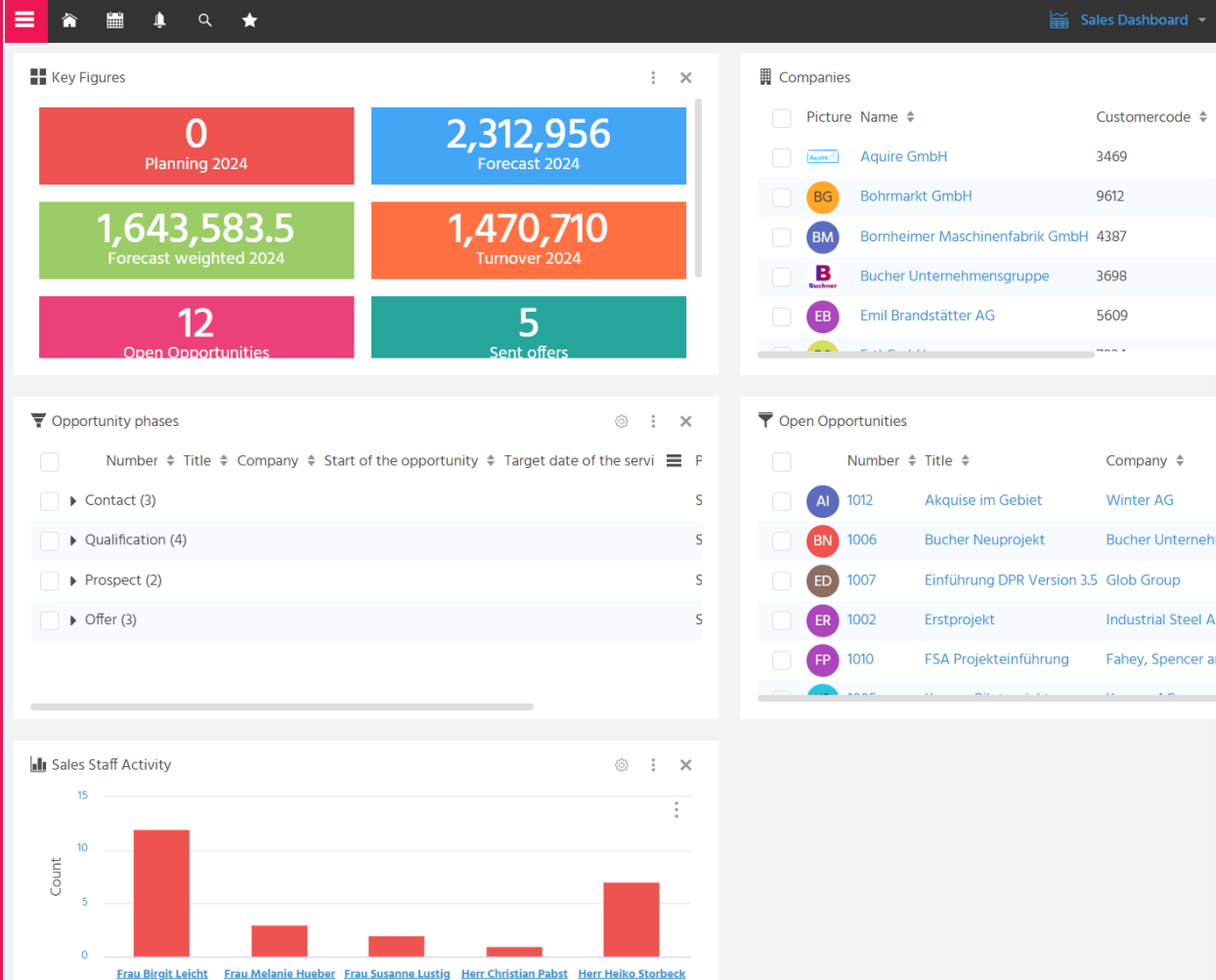
- 1011 | Projekt - Fortsetzung | open
Phase: Offer | Volume: 426,422.00 EUR | Probability: 75 | Creation date: 2024-03-30 | Classification: AB
- 1002 | Erstprojekt | won
Phase: Negotiation | Volume: 550,000.00 EUR | Probability: 75 | Creation date: 2024-01-25 | Classification: AB

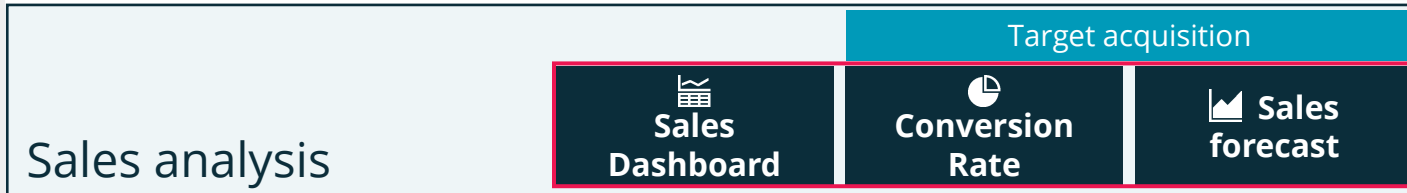
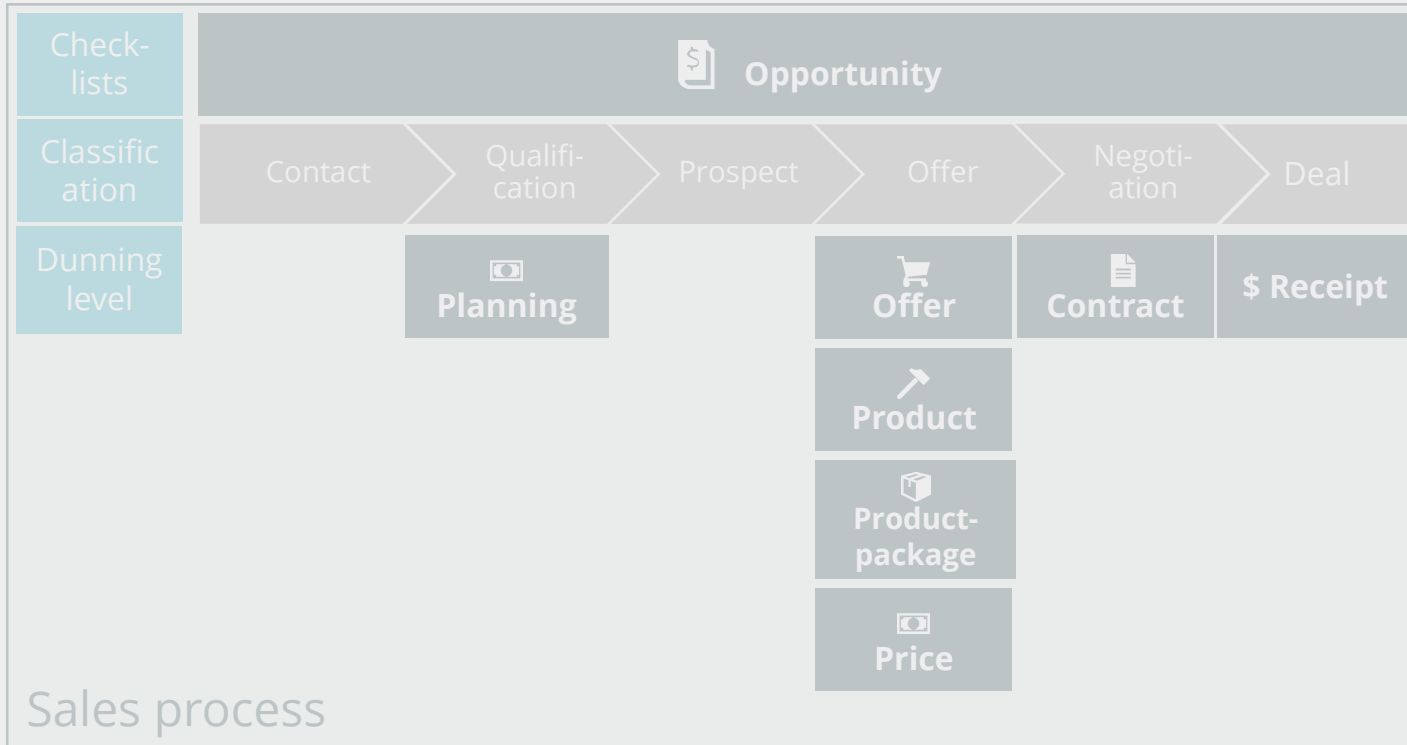
Order confirmation (10)

Serial Letter (2)

In the tab **"360 Degree"**, the offers, invoices and other documents, as well as the opportunities or contracts created for the company are linked.

Sales analysis





-  To be created in advance by the administrator
-  In use "daily" by end users

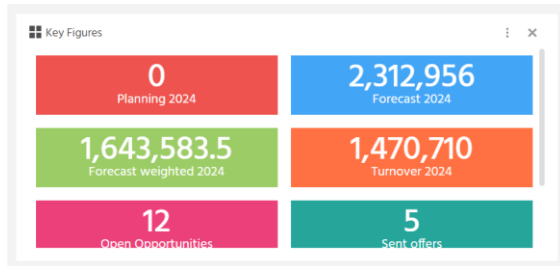
Sales Dashboard

Sales Dashboard

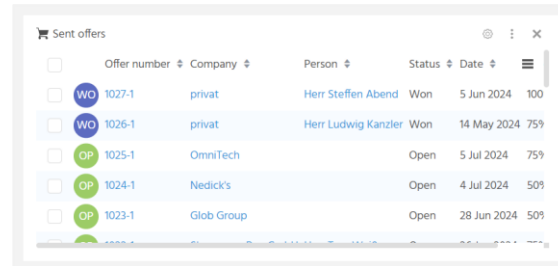
Dashlets

- Dashlets offer various functionalities to map the various professional requirements, to monitor sales key figures and their developments.
- You can specify that the dashlets of the Sales Dashboard can only be configured by the sales manager. "Normal" users will then not be able to add any further dashlets or delete dashlets.

Key Figures

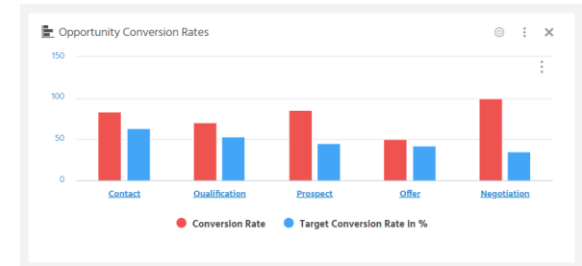


Filter views



	Offer number	Company	Person	Status	Date	
☐	WO 1027-1	privat	Herr Steffen Abend	Won	5 Jun 2024	100%
☐	WO 1026-1	privat	Herr Ludwig Kanzler	Won	14 May 2024	75%
☐	OP 1025-1	OmniTech		Open	5 Jul 2024	75%
☐	OP 1024-1	Nedick's		Open	4 Jul 2024	50%
☐	OP 1023-1	Glob Group		Open	28 Jun 2024	50%

Charts



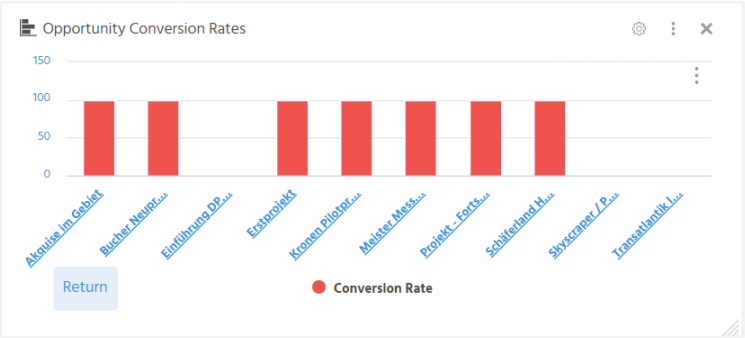
Sales Dashboard



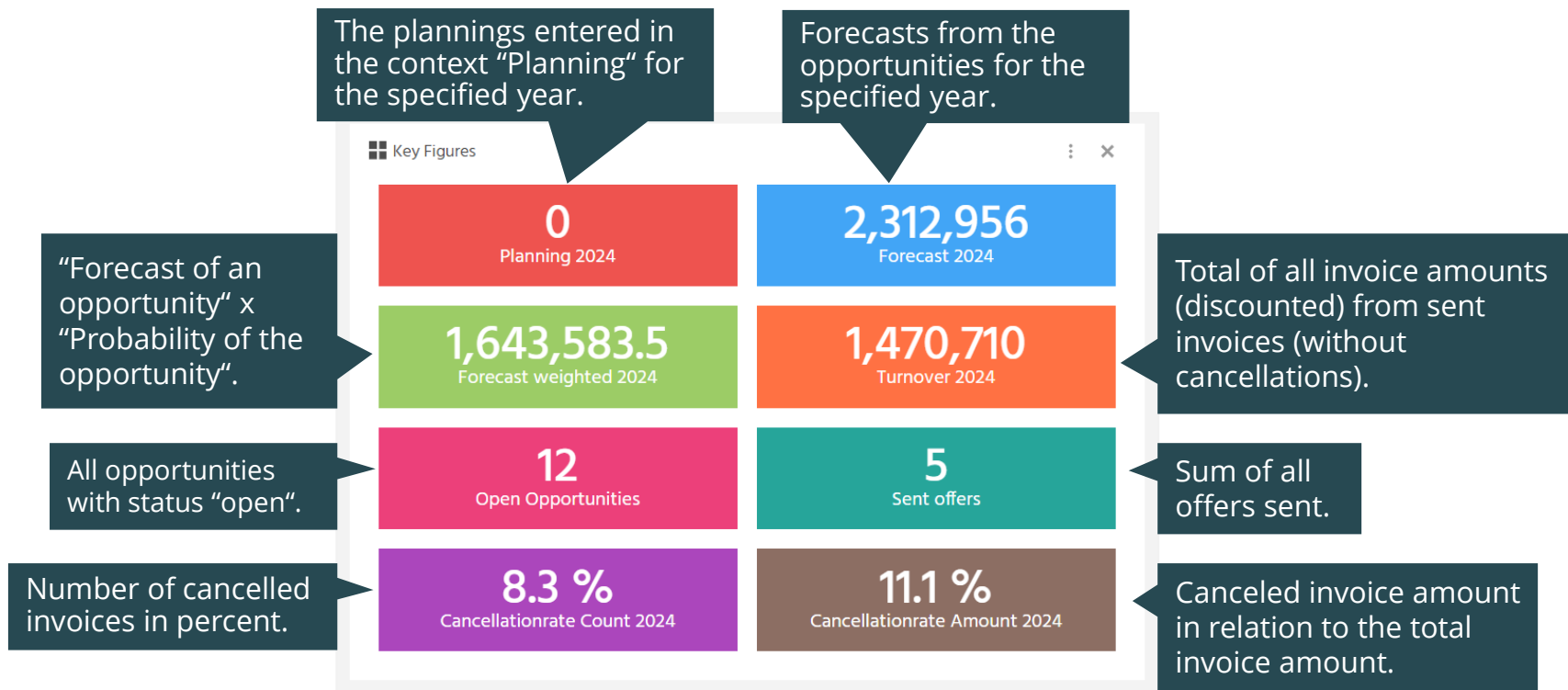
Interactive dashlet



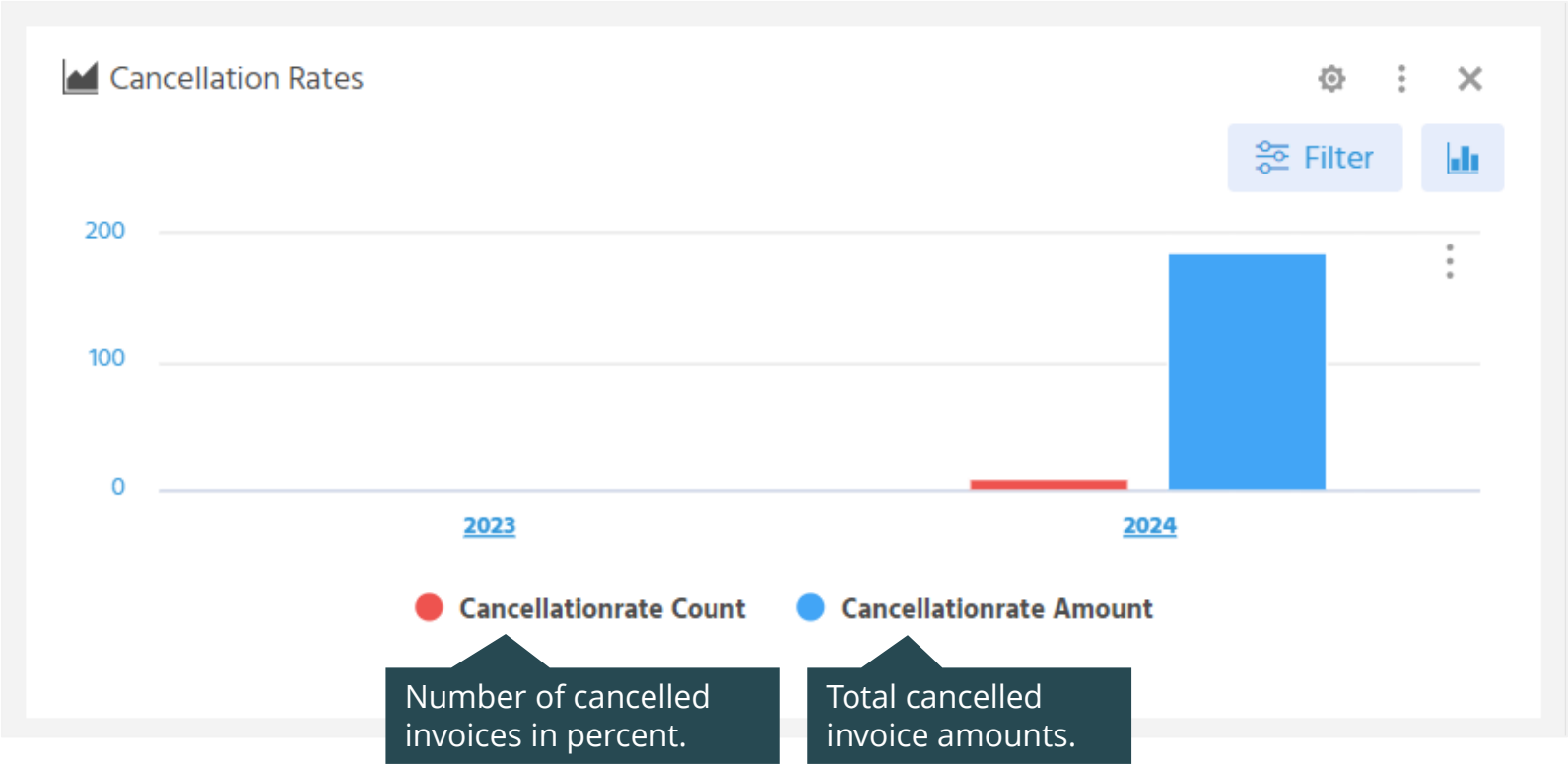
If you have selected several groupings in the filter, you can switch to the graphic of the underlying grouping in diagrams by clicking on a bar or a bar label.



Key figures dashlet



Dashlet cancellation rates



Conversion Rate

Conversion Rates



The conversion rate is available as a separate context in the Sales menu group or can be used as a dashlet. The dashlet is located in the DashletStore.

Upper area

The **red bars** show what percentage of the opportunities have developed out of the phase into one of the subsequent phases or have received the status "order" or "partial order". The **blue bars** show what percentage of the opportunities should develop out of the phase into a next phase or reach the status "order" or "partial order".

If an opportunity is set directly, e.g. in the "Prospect" phase to the "Deal" phase or "Order" status, then it is considered as if it had also passed through the intermediate phases and is counted in these.

Conversion Rate



Lower area

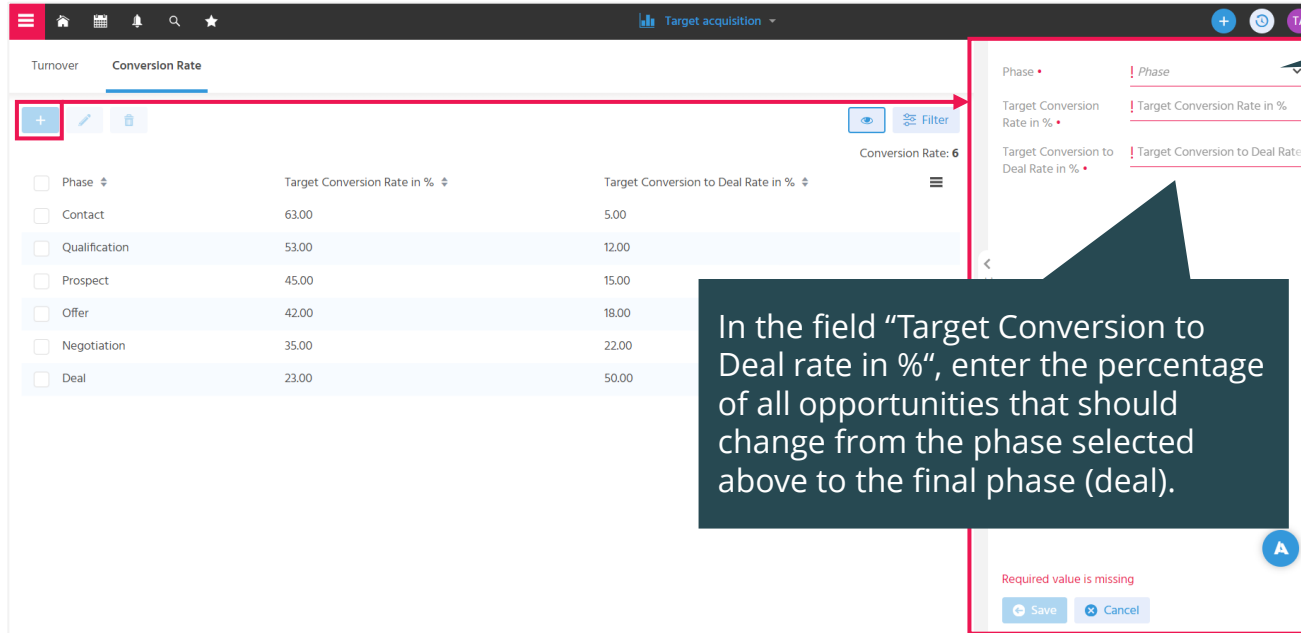
The **red bars** show how many projects from this phase have reached the Deal phase. The **blue bars** show how many projects from this phase are to reach the Deal phase.



The conversion rate is available as a separate context in the Sales menu group or can be used as a dashlet. The dashlet is located in the DashletStore.

Excursus into administration

Targeting Conversion Rate



Turnover Conversion Rate

Target acquisition

Conversion Rate: 6

Phase	Target Conversion Rate in %	Target Conversion to Deal Rate in %
Contact	63.00	5.00
Qualification	53.00	12.00
Prospect	45.00	15.00
Offer	42.00	18.00
Negotiation	35.00	22.00
Deal	23.00	50.00

Phase

Target Conversion Rate in %

Target Conversion to Deal Rate in %

Required value is missing

Save Cancel

Choose a phase of the opportunity.

In the field "Target Conversion rate in %", enter the percentage of all opportunities that should change from the phase selected above to the next phase.

In the field "Target Conversion to Deal rate in %", enter the percentage of all opportunities that should change from the phase selected above to the final phase (deal).

Turnover planning & forecast

Overview Turnover Planning and Forecast



Target turnover

You can enter a sales target for your business year and break this down into quarterly and monthly sales targets.

Planning

You can create plannings for companies, i.e. enter an amount that you expect as turnover with this company in a business year. You can also create a planning at product group level.

Forecast

In an opportunity, you can enter a forecast for the current project. You can also enter the forecasts at product group level. The forecast is also displayed weighted according to the probability stored in the opportunity.

Confirmation Volume

The confirmation volume is calculated from the net totals of order confirmations that have been sent and not canceled.

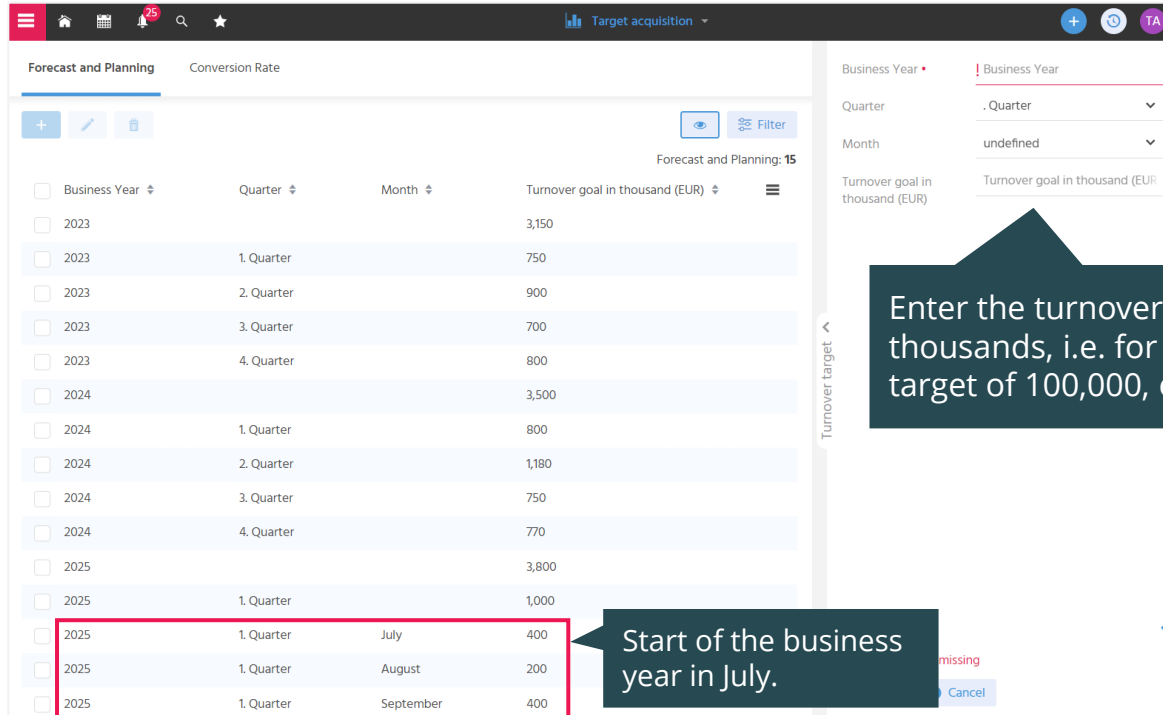
Turnover

The Turnover is calculated from the net totals of invoices that have been sent and not canceled. If you do not want to enter invoices in ADITO but would rather import them from a third-party system, you will find further information in the [readme file for the receipt module](#).



Excursus into administration

Target turnover



The screenshot shows the 'Forecast and Planning' interface in ADITO. The main table displays turnover goals in thousands of EUR for various years and quarters. The sidebar on the right allows for setting the business year, quarter, and month for the turnover goal.

Business Year	Quarter	Month	Turnover goal in thousand (EUR)
2023			3,150
2023	1. Quarter		750
2023	2. Quarter		900
2023	3. Quarter		700
2023	4. Quarter		800
2024			3,500
2024	1. Quarter		800
2024	2. Quarter		1,180
2024	3. Quarter		750
2024	4. Quarter		770
2025			3,800
2025	1. Quarter		1,000
2025	1. Quarter	July	400
2025	1. Quarter	August	200
2025	1. Quarter	September	400

Forecast and Planning: 15

Turnover target

Business Year: Business Year

Quarter: . Quarter

Month: undefined

Turnover goal in thousand (EUR): Turnover goal in thousand (EUR)

Enter the year in which your business year begins for which you want to enter a sales target.

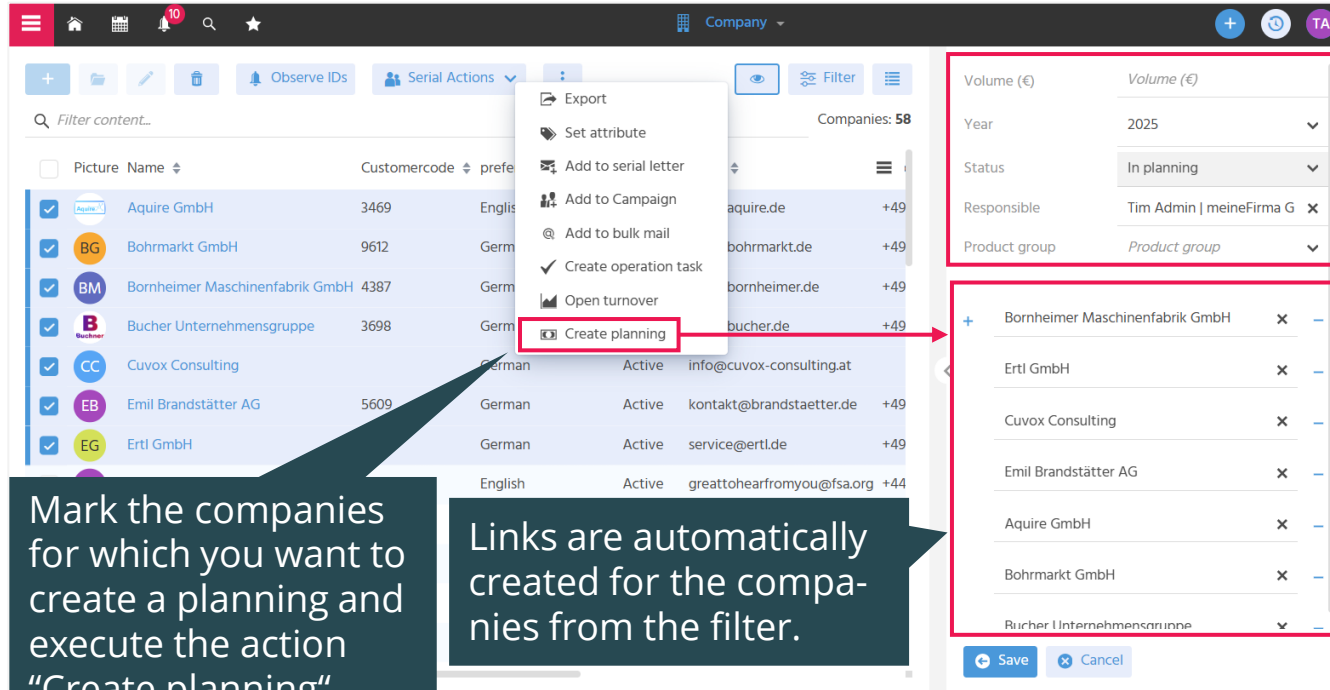
You can also set the quarter and month of the turnover goal.

Enter the turnover goal here in thousands, i.e. for a turnover target of 100,000, enter 100.

Start of the business year in July.

Turnover planning

Create planning



The screenshot shows the ADITO interface with a table of companies. A context menu is open over the table, and the 'Create planning' option is highlighted. A callout points to the 'Create planning' button in the bottom right of the table.

Picture	Name	Customercode	Language	Status	Contact	Phone
☒	Aquire GmbH	3469	English	Active	info@cuvox-consulting.at	+49
☒	Bohrmarkt GmbH	9612	German	Active	kontakt@brandstaetter.de	+49
☒	Bornheimer Maschinenfabrik GmbH	4387	German	Active	service@ertl.de	+49
☒	Bucher Unternehmensgruppe	3698	German	Active	greattohearfromyou@fsa.org	+44
☒	Cuvax Consulting		German	Active		
☒	Emil Brandstätter AG	5609	German	Active		
☒	Ertl GmbH		German	Active		

Volume (€)

Year: 2025

Status: In planning

Responsible: Tim Admin | meineFirma G

Product group: Product group

+ Bornheimer Maschinenfabrik GmbH x -

Ertl GmbH x -

Cuvax Consulting x -

Emil Brandstätter AG x -

Aquire GmbH x -

Bohrmarkt GmbH x -

Bucher Unternehmensgruppe x -

+ Save x Cancel

Enter the values as desired. The status is indicated with "In planning" and cannot be changed at this point.

Mark the companies for which you want to create a planning and execute the action "Create planning".

Links are automatically created for the companies from the filter.

Turnover planning

Create planning

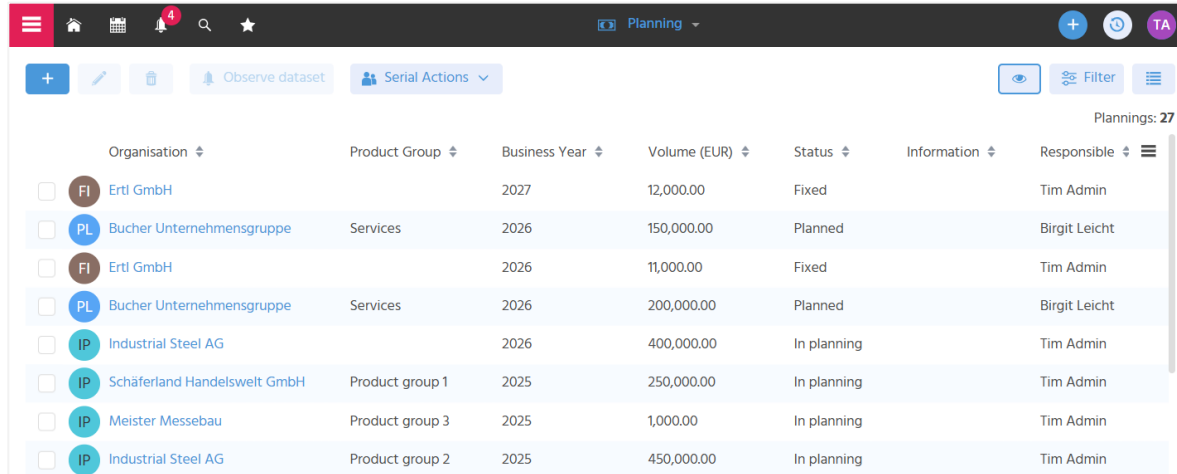
New created plan values						
Organisation	Product Group	Business Year	Volume (EUR)		Status	
IP Bohrmart GmbH		2025	- 1000	50,000.00	+ 1000	In planning
IP Emil Brandstätter AG		2025	- 1000	50,000.00	+ 1000	In planning
IP Bornheimer Maschinenfabrik GmbH		2025	- 1000	50,000.00	+ 1000	In planning
IP Bucher Unternehmensgruppe		2025	- 1000	50,000.00	+ 1000	In planning
IP Cuvox Consulting		2025	- 1000	50,000.00	+ 1000	In planning
IP ...		2025	- 1000	50,000.00	+ 1000	In planning

Unchanged plan values						
Organisation	Product Group	Business Year	Volume (EUR)		Status	Information
IP Ertl GmbH		2025	- 1000	4,000.00	+ 1000	In planning

After saving, an overlay appears. If a company already has a plan for the selected product group, it is not overwritten but displayed in the lower area. The volumes for the companies can be edited and saved separately in the upper as well as in the lower area.

Turnover planning

Context Planning



The screenshot shows the ADITO Planning interface. At the top, there is a navigation bar with icons for home, calendar, notifications (4), search, and star. The main header is 'Planning'. Below this, there are buttons for '+', edit, trash, 'Observe dataset', and 'Serial Actions'. On the right, there are icons for eye, filter, and list. The table below has columns: Organisation, Product Group, Business Year, Volume (EUR), Status, Information, and Responsible. The table contains 8 rows of data. The first row is for 'Ertl GmbH' with a status of 'Fixed'. The next two rows are for 'Bucher Unternehmensgruppe' with a status of 'Planned'. The next three rows are for 'Industrial Steel AG' and 'Schäferland Handelswelt GmbH' with a status of 'In planning'. The last row is for 'Meister Messebau' with a status of 'In planning'.

Organisation	Product Group	Business Year	Volume (EUR)	Status	Information	Responsible
FI Ertl GmbH		2027	12,000.00	Fixed		Tim Admin
PL Bucher Unternehmensgruppe	Services	2026	150,000.00	Planned		Birgit Leicht
FI Ertl GmbH		2026	11,000.00	Fixed		Tim Admin
PL Bucher Unternehmensgruppe	Services	2026	200,000.00	Planned		Birgit Leicht
IP Industrial Steel AG		2026	400,000.00	In planning		Tim Admin
IP Schäferland Handelswelt GmbH	Product group 1	2025	250,000.00	In planning		Tim Admin
IP Meister Messebau	Product group 3	2025	1,000.00	In planning		Tim Admin
IP Industrial Steel AG	Product group 2	2025	450,000.00	In planning		Tim Admin

In the context “Planning” you can see all the plannings that have ever been created.

With the help of the icons at the beginning of a data set, you can see at a glance what status a planning has.

IP = In planning

PL = Planned

FI = Fixed

Turnover planning

Context Planning

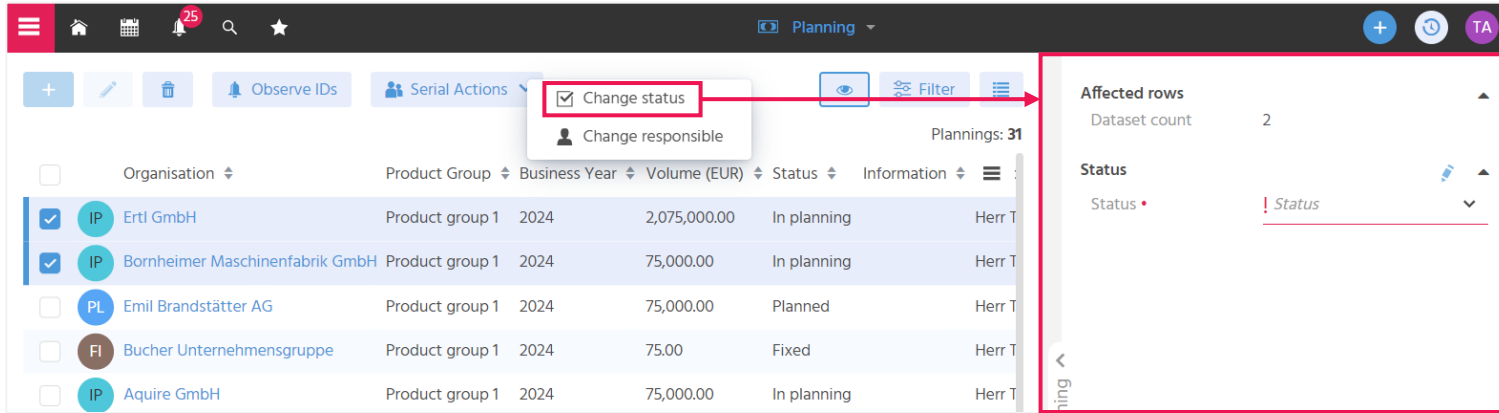
</

In the multiedit view, you can adjust the volumes and confirm them via the “Save” button. As long as a change is not yet saved, you can reset it to get back the original value.

You can no longer adjust the volume for plans with the status “Fixed”.

Turnover planning

Series Action - Change Status



The screenshot shows the ADITO Planning interface. A 'Serial Actions' dropdown menu is open, with 'Change status' selected. A red arrow points from this menu to a side panel titled 'Affected rows'. The side panel shows 'Dataset count' as 2 and 'Status' as 'In planning'. The main table lists planning data with columns: Organisation, Product Group, Business Year, Volume (EUR), Status, and Information. Two rows are highlighted with checkboxes: 'Ertl GmbH' and 'Bornheimer Maschinenfabrik GmbH', both with a status of 'In planning'.

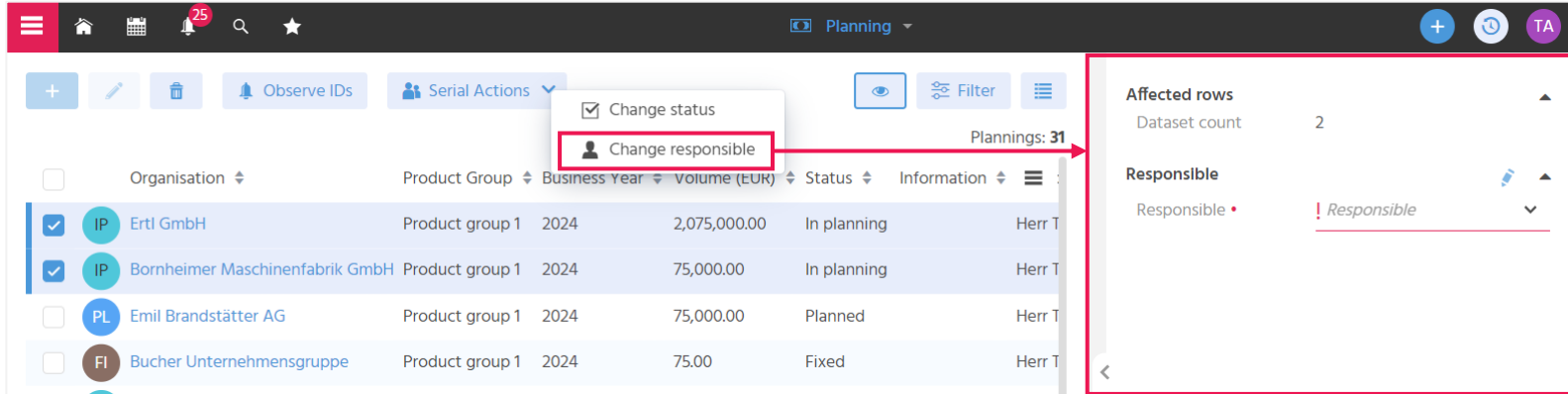
Organisation	Product Group	Business Year	Volume (EUR)	Status	Information
☒ IP Ertl GmbH	Product group 1	2024	2,075,000.00	In planning	Herr T
☒ IP Bornheimer Maschinenfabrik GmbH	Product group 1	2024	75,000.00	In planning	Herr T
☐ PL Emil Brandstätter AG	Product group 1	2024	75,000.00	Planned	Herr T
☐ FI Bucher Unternehmensgruppe	Product group 1	2024	75.00	Fixed	Herr T
☐ IP Aquire GmbH	Product group 1	2024	75,000.00	In planning	Herr T

Example:

The employee for Berlin would like to change all plannings from “In Planning” to “Planned” after adjusting and finalising all planning.

Turnover planning

Series action - change responsible person



The screenshot shows the ADITO Planning interface. A table lists planning entries with columns for Organisation, Product Group, Business Year, Volume (tEUR), Status, and Information. Two entries are highlighted: Ertl GmbH and Bornheimer Maschinenfabrik GmbH, both with a status of 'In planning'. A context menu is open over the 'In planning' status of the first entry, showing options 'Change status' and 'Change responsible'. The 'Change responsible' option is selected, and a red arrow points from it to a sidebar panel. The sidebar panel, titled 'Affected rows', shows a 'Dataset count' of 2. Below this, the 'Responsible' section shows a red exclamation mark and the text 'Responsible', indicating a change or warning.

Organisation	Product Group	Business Year	Volume (tEUR)	Status	Information
IP Ertl GmbH	Product group 1	2024	2,075,000.00	In planning	Herr T
IP Bornheimer Maschinenfabrik GmbH	Product group 1	2024	75,000.00	In planning	Herr T
PL Emil Brandstätter AG	Product group 1	2024	75,000.00	Planned	Herr T
FI Bucher Unternehmensgruppe	Product group 1	2024	75.00	Fixed	Herr T

Example 1:

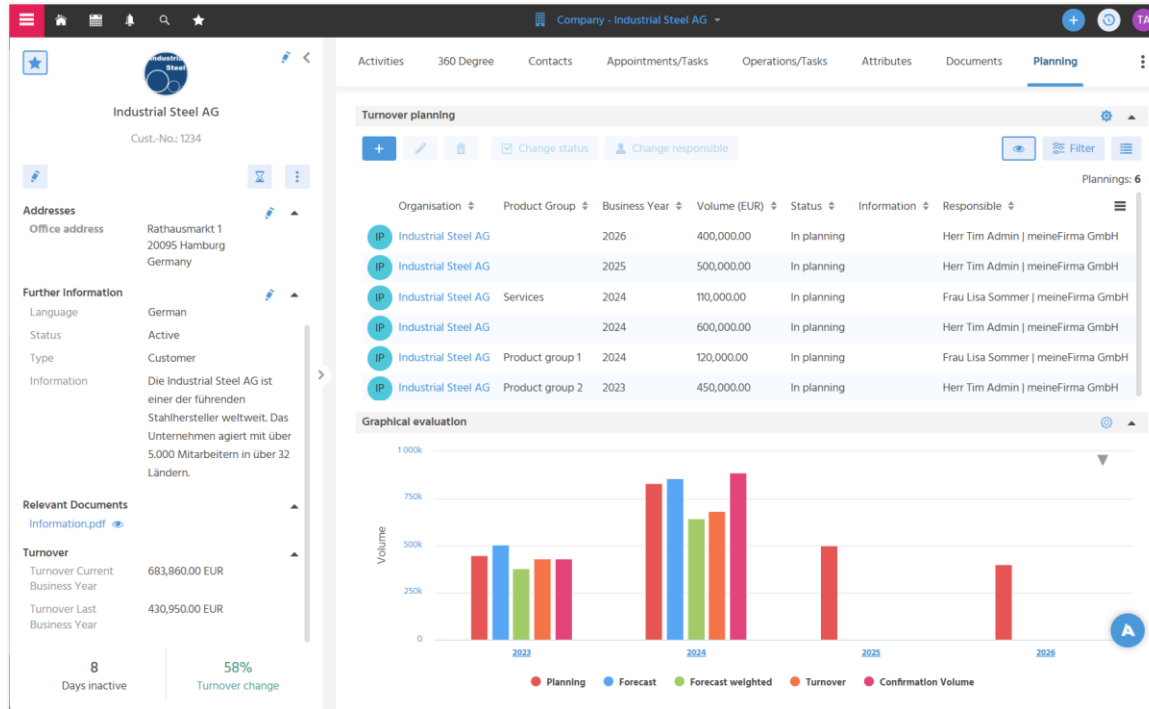
A position is newly filled and the new colleague is assigned all turnover plannings of his predecessor.

Example 2:

The area of Bavaria is divided into southern and northern Bavaria. Originally, one employee looked after all the companies in Bavaria, now there is another colleague to whom the corresponding planning is assigned.

Planning in the company

You can also see the plannings belonging to a company in the company in the “Planning” tab.

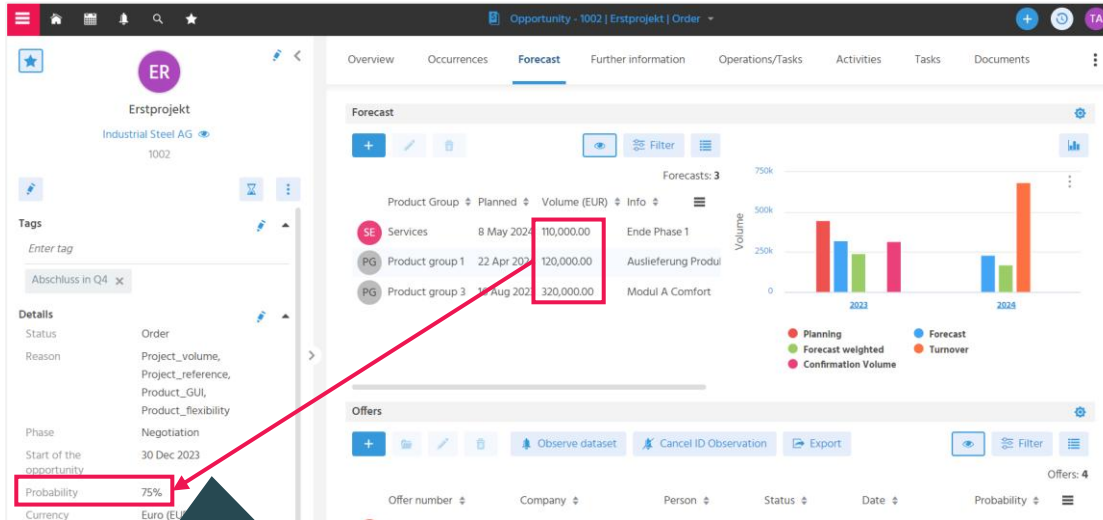


The following figures are used for the graph at company level:

- **planning.**
- the **forecast** recorded in the opportunities linked to the company.
- the **forecast weighted.** Here, the forecast is multiplied by the probability specified in the opportunity.
- **turnover** from invoices sent but not canceled (net total).
- **confirmation volume** from order confirmations sent but not canceled (net total).

Forecast

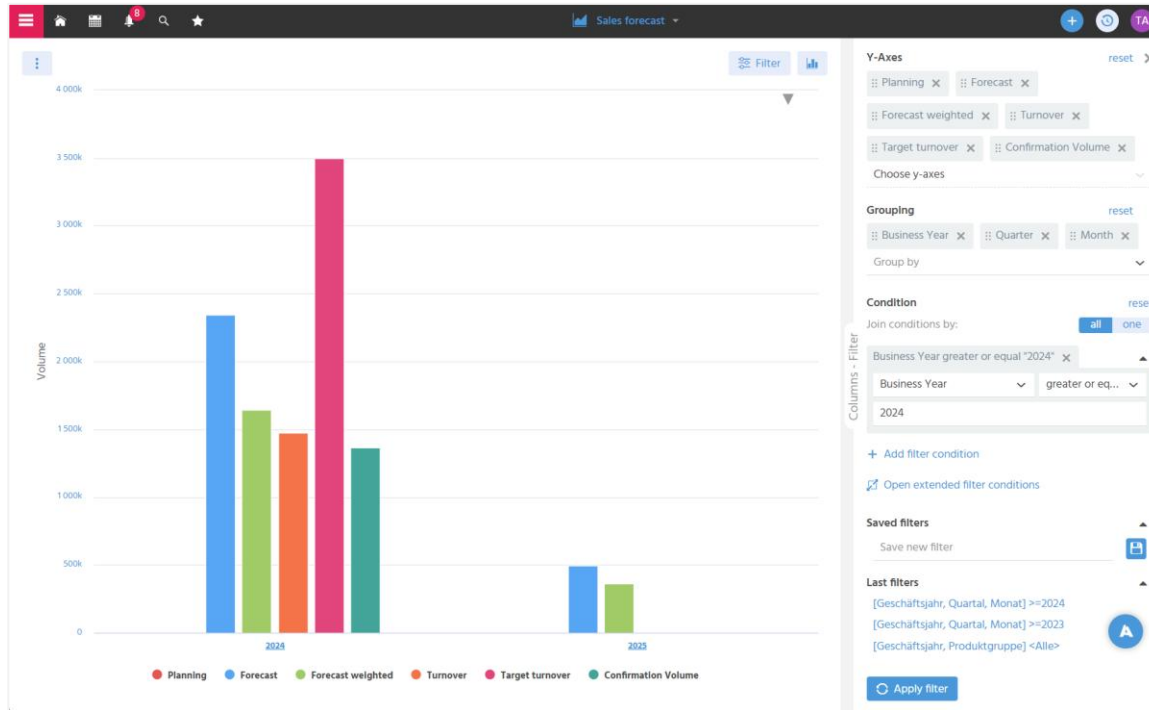
Excursus into the Opportunity



Forecasts are recorded in the opportunity. In this section as well, planning, forecast, weighted forecast, turnover, turnover target and confirmation volume are compared graphically.

Forecast weighted =
the sum of the individual forecast
values multiplied by the probability.

Sales forecast



When opening the context “Sales forecast”, the **values** stored in the system are **displayed cumulatively**.

With the help of the filter you can hide or show values, define groupings and create conditions.



Sales forecast from company filter



The screenshot shows the ADITO 'Company' view. A list of companies is displayed with columns for selection, picture, name, customer code, language, and status. Two companies are selected: 'Fahey, Spencer and Armstrong' and 'Industrial Steel AG'. A context menu is open over the first selected company, showing options like 'Export', 'Set attribute', 'Add to serial letter', 'Add to Campaign', 'Add to bulk mail', 'Create operation task', 'Open turnover', and 'Create planning'. The 'Open turnover' option is highlighted with a red box. The top right of the interface shows 'Companies: 56'.

	Picture	Name	Customercode	Language	Status	Phone	Address
☐		Fahey, Spencer and Armstrong	1793	English		+44 20 3245 1844	69 New Street - GB B2 4DU Birmingham
☐		Firmengruppe Matthias Bogen	4567	German		+49 421 98650	Pfeilstraße 7 - DE 28217 Bremen
☐		Fischer AG	1018	German		+49 6472 35000	Brenneckestraße 100 - DE 39116 Magdeburg
☐		Glob Group	1212	English		+44 20 1432 3000	32-40 Blackfriars Road - GB SE1 8NW London
☐		Grobbe-Werk GmbH	4758	German	Active	+49 841 32510	Regensburger Straße 65 - DE 85055 Ingolstadt
☐		Hamel Collin SAS	0100	French	Active		Passage de l'Hôtel de Ville 6 - FR 68100 Mulhouse
☐		Hochbau Berger	8364	German	Active	+49 16800536	Hauptstraße 39 - DE 10827 Berlin
☐		Holzurm Maschinen GmbH	5690	German	Active	+49 511 2098765	Isernhagener Straße 64 - DE 30163 Hannover
☐		Horn Schramm AG & Co. OHG	0200	German	Active		Basler Straße 143 - DE 79539 Lörrach
☒		Industrial Steel AG	1234	German	Active	+49 40 63520	Rathausmarkt 1 - DE 20095 Hamburg
☐		International Kältetechnik AG	6983	German	Active	+49 871 65320	Müller-Armack-Straße 5 - DE 84034 Landshut
☐		JPM Touristik GmbH	4545	German	Active	+49 8743 5690	Landshuter Straße 3 - DE 84144 Geisenhausen

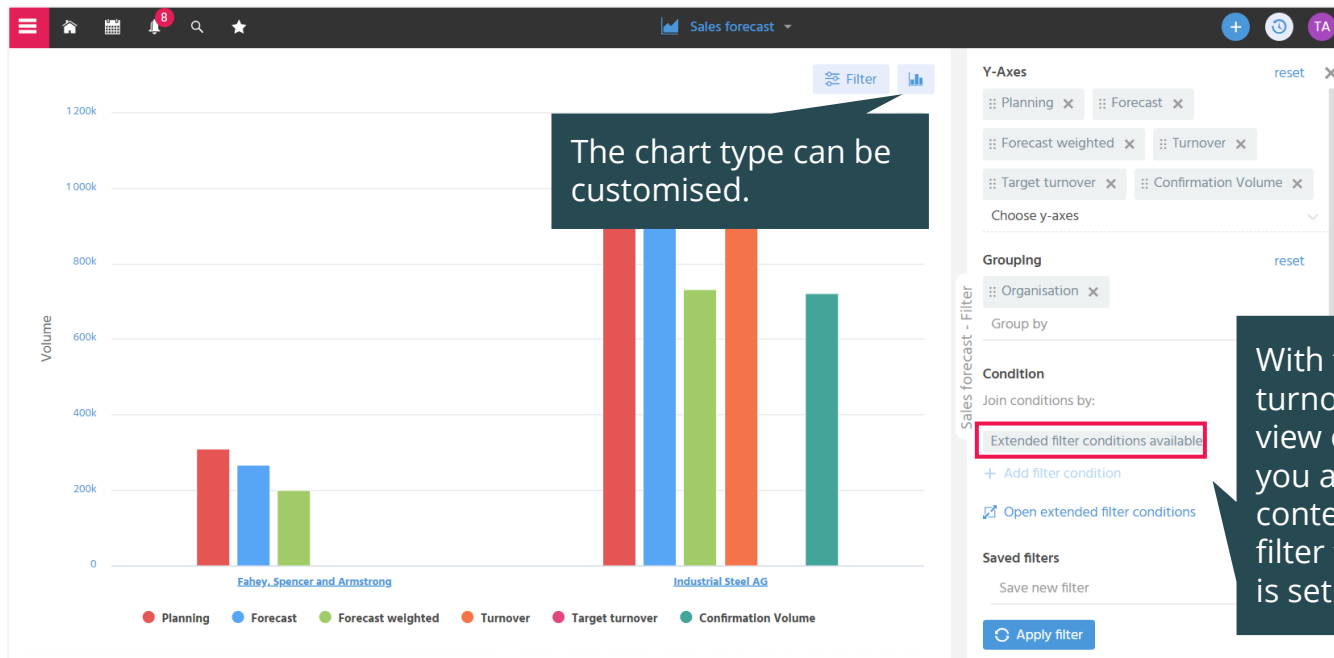
When you execute the series action "Open turnover", the context "Sales forecast" opens automatically. The selected companies are then already preset in the filter.



You can open the sales forecast for a maximum of 50 companies.



Turnover forecast



With the series action "Open turnover forecast" (in the filter view of the context "Company") you automatically reach the context "Turnover forecast". The filter for the selected companies is set automatically.



With the action "Open turnover forecast" no year filters are set. This means that all planning, forecast and turnover values maintained in the company are displayed cumulatively for all years in the diagram.

Order confirmation



Receipt							
Receipts: 44							
	Receipt number	Company	Contact	Sent	Receipt date	cancelled	Total net (EUR)
☐	Invoice (21)						1,925,160.00
☐	Order confirmation (15)						2,167,957.50
☐	OC 1050	Meister Messebau		No	19 Jan 2026	No	0.00
☐	OC 1049	privat	Ludwig Kanzler	Yes	18 Jun 2025	No	12,547.50
☐	OC 1047	Bucher Unternehmensgruppe		Yes	29 May 2025	No	640,000.00
☐	OC 1046	Bucher Unternehmensgruppe		No	1 Nov 2025	No	0.00
☐	OC 1045	Glob Group	Cameron Doyle	No	8 Jul 2025	No	90,250.00
☐	OC 1042	Industrial Steel AG		Yes	17 Apr 2025	No	366,860.00
☐	OC 1040	Industrial Steel AG		Yes	10 Jan 2025	No	317,000.00
☐	OC 1039	Industrial Steel AG		No	6 Oct 2024	No	73,000.00
☐	OC 1038	Industrial Steel AG		Yes	7 Jul 2025	No	223,000.00
☐	OC 1034	Meister Messebau GmbH	Gertraud Weingartner	No	5 Sept 2025	No	10,600.00
☐	OC 1031	Meister Messebau GmbH		Yes	24 May 2025	No	3,750.00
☐	OC 1006	Industrial Steel AG		Yes	10 May 2024	No	107,737.50
☐	OC 1004	Industrial Steel AG		Yes	6 Feb 2024	No	107,737.50
☐	OC 1002	Industrial Steel AG		Yes	8 Nov 2023	No	107,737.50
☐	OC 1000	Industrial Steel AG		Yes	25 Aug 2023	No	107,737.50

The confirmation volume is calculated from the net totals of order confirmations that have been sent and not canceled.



Turnover

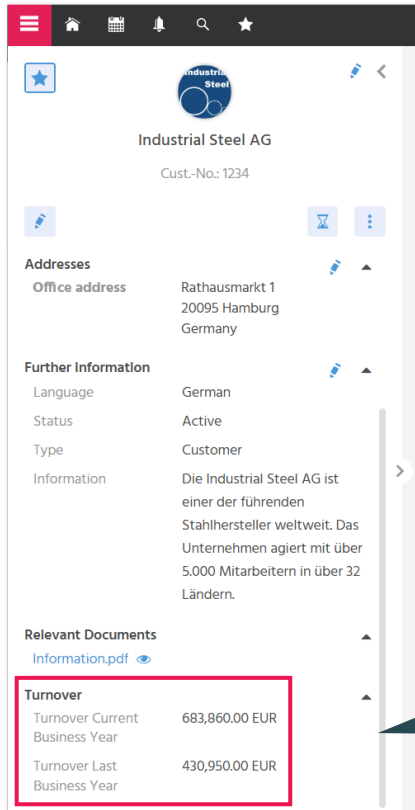


Receipt							
Receipts: 44							
	Receipt number	Company	Contact	Sent	Receipt date	cancelled	Total net (EUR)
☐	Invoice (21)						1,925,160.00
☐	IN 1052	Hamel Collin SAS		No	19 Jan 2026	No	7,500.00
☐	IN 1051	Fischer AG	Frank Baer	No	19 Jan 2026	No	0.00
☐	IN 1048	Magic Gray		Yes	1 Jun 2025	No	54,000.00
☐	IN 1044	Industrial Steel AG		Yes	31 May 2025	No	175,200.00
☐	IN 1043	Industrial Steel AG		Yes	19 May 2025	No	191,660.00
☐	IN 1041	Industrial Steel AG		Yes	13 Feb 2025	No	317,000.00
☐	IN 1037	Bucher Unternehmensgruppe	Wilhelm Kainz	Yes	26 May 2025	No	150,000.00
☐	IN 1036	Meister Messebau GmbH	Gertraud Weingartner	No	8 Sept 2025	No	10,600.00
☐	IN 1033	Meister Messebau GmbH		Yes	27 May 2025	Yes	3,750.00
☐	IN 1030	Bucher Unternehmensgruppe	Wilhelm Kainz	Yes	28 Apr 2025	No	135,000.00
☐	IN 1029	Transatlantik Logistics GmbH		Yes	21 Apr 2025	No	192,500.00
☐	IN 1028	Skyscraper Bau GmbH		Yes	25 May 2025	No	28,500.00
☐	IN 1024	Transatlantik Logistics GmbH		Yes	6 May 2025	Yes	175,000.00
☐	IN 1023	Skyscraper Bau GmbH		Yes	14 May 2025	No	53,500.00
☐	IN 1020	Skyscraper Bau GmbH	Tom Weiß	No	26 May 2025	No	0.00
☐	IN 1011	Glob Group		No	5 May 2025	No	0.00

The Turnover is calculated from the net totals of invoices that have been sent and not canceled. If you do not want to enter invoices in ADITO but would rather import them from a third-party system, you will find further information in the [readme file for the receipt module](#).



Turnover



Industrial Steel AG
Cust.-No.: 1234

Addresses
Office address: Rathausmarkt 1, 20095 Hamburg, Germany

Further Information
Language: German
Status: Active
Type: Customer
Information: Die Industrial Steel AG ist einer der führenden Stahlhersteller weltweit. Das Unternehmen agiert mit über 5.000 Mitarbeitern in über 32 Ländern.

Relevant Documents
[Information.pdf](#)

Turnover

Turnover Current Business Year	683,860.00 EUR
Turnover Last Business Year	430,950.00 EUR

In the company preview you will find the actual turnover for the current and previous business year.

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