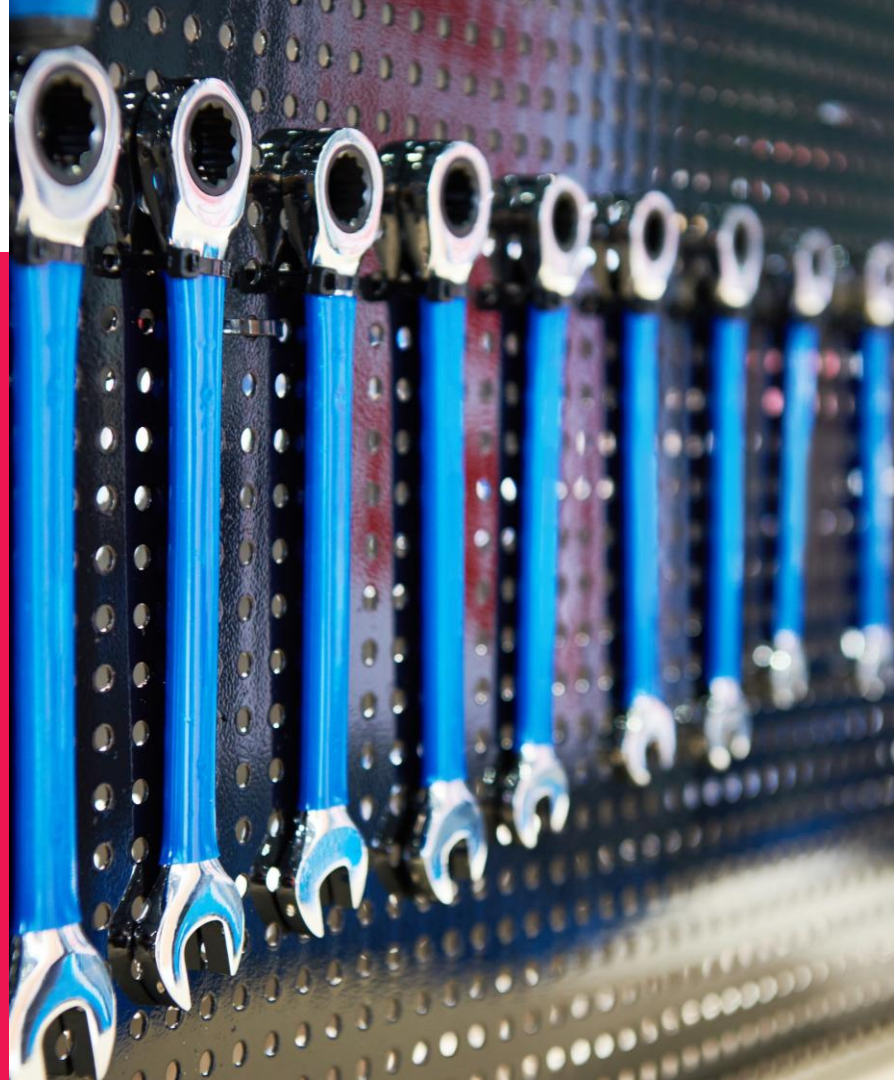




Administration

ADITO Software GmbH

From version xRM 2026.4.0 | April 2026





Screenshots

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



Agenda



- [Keyword maintenance](#)
 - Adding and sorting keyword entries
 - Usage keyword attribute
 - Create new, set inactive or delete keyword
 - Detecting system relevant keywords
- [Keyword attribute: Use cases](#)
 - Controlling icons/avatars
 - Restricting usage in Contexts
 - Communication data
- [Attributes maintenance](#)
 - Adding/creating attributes
 - Attribute types
 - Usage of attributes
 - Attribute “Departments”
- [Sensitive attributes](#)
- [Maintain relationship types](#)

Click on the ADITO A in the document to return to the agenda.





Keyword Category

Keyword Entry

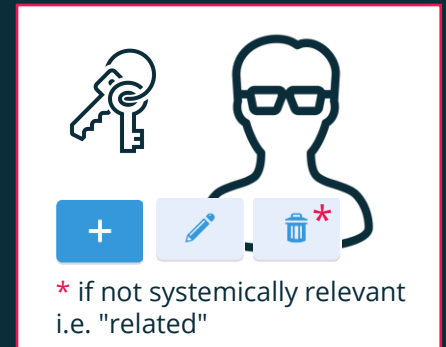
Keyword Attribute





Keyword

- What are keywords used for?
- How are keywords structured?
- How can keywords be extended?
- Which keywords are system relevant?
- Function of keyword attributes
- How to disable or delete keywords?
- How can new keywords be created?



Keyword

Overview

- What are keywords used for?
Keywords are usually used to manage the selection options for dropdown menus.
- How are keywords constructed?

Keyword Category = key ring

n Keyword Entries = n keys

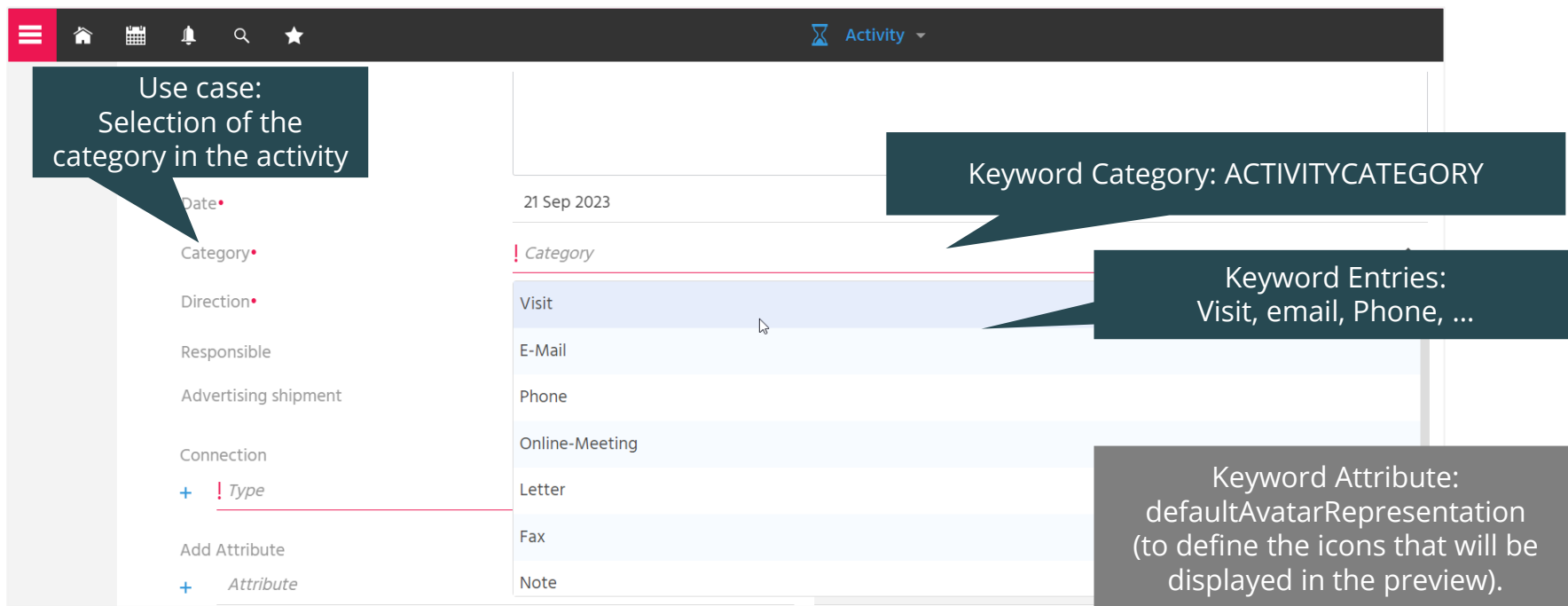


Thus, in the keyword category the assignment of the entries and their sorting takes place

Per keyword category there can be **keyword attributes** that map various additional functions.

Keyword

Keywords are usually used to manage the selection options for dropdown menus.



The screenshot shows the ADITO interface for configuring a keyword. The top navigation bar includes a menu icon, home, calendar, notifications, search, and a star icon. The main header displays 'Activity' with a dropdown arrow. The left sidebar contains a list of attributes: Date, Category, Direction, Responsible, Advertising shipment, Connection, and a section for adding new attributes labeled '+ ! Type' and '+ Attribute'. The main content area shows a date '21 Sep 2023' and a dropdown menu for 'Category' with the following options: Visit, E-Mail, Phone, Online-Meeting, Letter, Fax, and Note. Four callout boxes provide additional information: 'Use case: Selection of the category in the activity' points to the 'Category' attribute; 'Keyword Category: ACTIVITYCATEGORY' points to the 'Category' dropdown; 'Keyword Entries: Visit, email, Phone, ...' points to the list of options; and 'Keyword Attribute: defaultAvatarRepresentation (to define the icons that will be displayed in the preview)' points to the 'Add Attribute' section.

Use case:
Selection of the
category in the activity

21 Sep 2023

! Category

Visit

E-Mail

Phone

Online-Meeting

Letter

Fax

Note

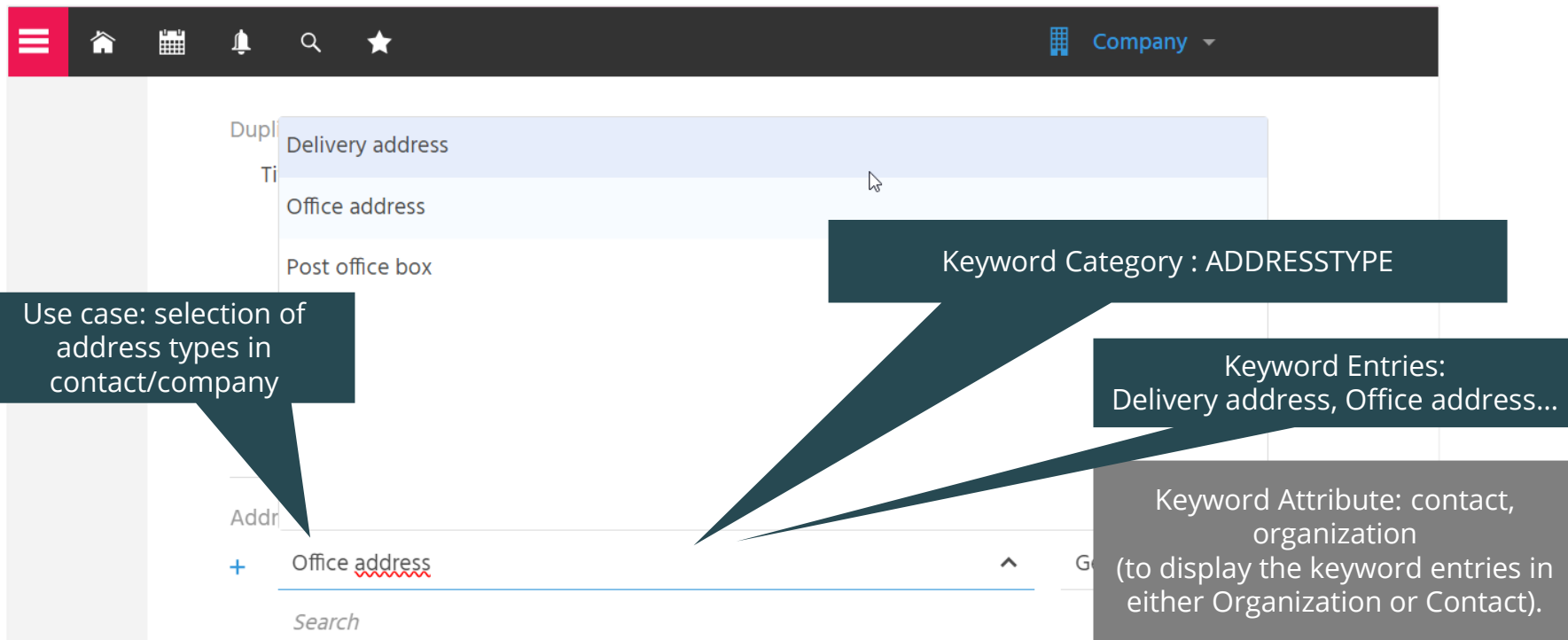
Keyword Category: ACTIVITYCATEGORY

Keyword Entries:
Visit, email, Phone, ...

Keyword Attribute:
defaultAvatarRepresentation
(to define the icons that will be
displayed in the preview).

Keyword

Keywords are usually used to manage the selection options for dropdown menus.



Use case: selection of address types in contact/company

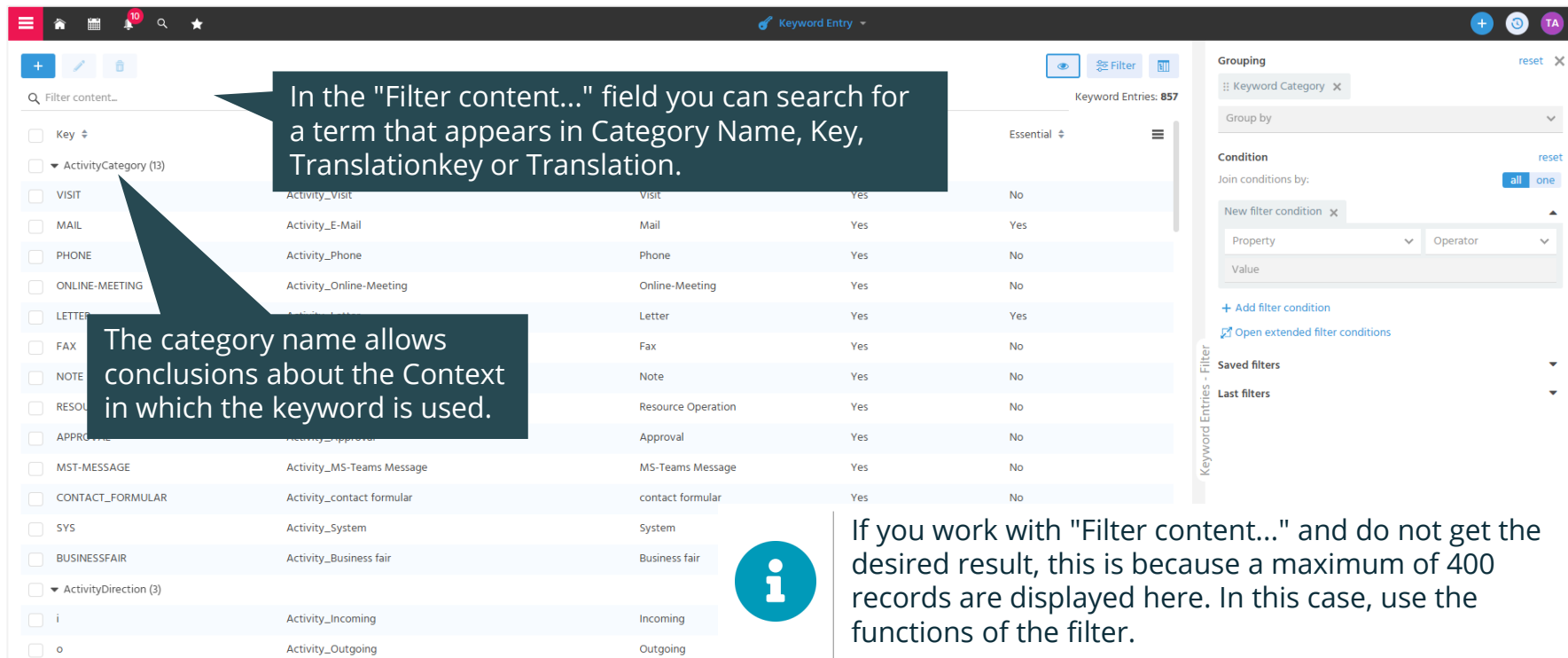
Keyword Category : ADDRESSTYPE

Keyword Entries: Delivery address, Office address...

Keyword Attribute: contact, organization
(to display the keyword entries in either Organization or Contact).

Keyword

Where are the keyword entries?



The screenshot shows the ADITO Keyword Entry interface. A dark blue callout box points to the 'Filter content...' search field, stating: 'In the "Filter content..." field you can search for a term that appears in Category Name, Key, Translationkey or Translation.' Another dark blue callout box points to the 'ActivityCategory' dropdown menu, stating: 'The category name allows conclusions about the Context in which the keyword is used.'

The interface displays a table of keyword entries with columns for selection, category, key, translation, and essential status. The table shows 13 entries under the 'ActivityCategory' filter.

	Category	Key	Translation	Essential
☐	Key			
☐	ActivityCategory (13)			
☐	VISIT	Activity_Visit	Visit	Yes
☐	MAIL	Activity_E-Mail	Mail	Yes
☐	PHONE	Activity_Phone	Phone	Yes
☐	ONLINE-MEETING	Activity_Online-Meeting	Online-Meeting	Yes
☐	LETTER	Activity_Letter	Letter	Yes
☐	FAX	Activity_Fax	Fax	Yes
☐	NOTE	Activity_Note	Note	Yes
☐	RESOURCE OPERATION	Activity_Resource Operation	Resource Operation	Yes
☐	APPROVAL	Activity_Approval	Approval	Yes
☐	MST-MESSAGE	Activity_MS-Teams Message	MS-Teams Message	Yes
☐	CONTACT_FORMULAR	Activity_contact formular	contact formular	Yes
☐	SYS	Activity_System	System	
☐	BUSINESSFAIR	Activity_Business fair	Business fair	
☐	ActivityDirection (3)			
☐	i	Activity_Incoming	Incoming	
☐	o	Activity_Outgoing	Outgoing	

On the right side of the interface, there is a 'Filter' panel with options for 'Grouping' (Keyword Category), 'Condition' (Join conditions by: all, one), and 'New filter condition' (Property, Operator, Value). Below this, there are sections for 'Saved filters' and 'Last filters'.

A blue circular icon with a white 'i' is located at the bottom center of the interface.

If you work with "Filter content..." and do not get the desired result, this is because a maximum of 400 records are displayed here. In this case, use the functions of the filter.

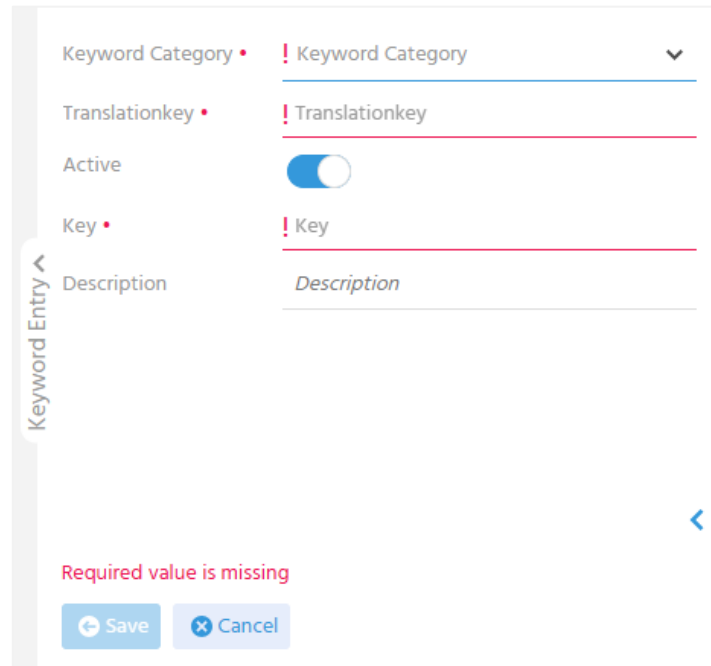
Keyword

How to add keyword entries

In the EditView

- the **keyword category** is selected
- the **translationkey** is entered
(for more information, see the next slide)
- The **key** is assigned manually as a unique designation.
It is important to ensure that the key is used only once within a category. (max. 36 characters)
- the description is entered

After saving, maintain keyword attributes if necessary.



The screenshot shows the 'Keyword Entry' form in the ADITO application. The form has a vertical label 'Keyword Entry' on the left. The fields are: 'Keyword Category' with a dropdown menu showing 'Keyword Category' and a red exclamation mark icon; 'Translationkey' with a text input field containing 'Translationkey' and a red exclamation mark icon; 'Active' with a toggle switch that is currently turned on; 'Key' with a text input field containing 'Key' and a red exclamation mark icon; and 'Description' with a text input field containing 'Description'. At the bottom, there is a red error message 'Required value is missing' and two buttons: 'Save' and 'Cancel'.

Details in the field “Translationkey”

1. The **translationkey** is made up of “**ModuleName_Title**”.
The title is entered in English. The translation is then carried out **in the Designer**.
> The term is displayed to the user in the respective client language.
2. The translation key is entered with a **technical placeholder** instead of the title, e.g. **Opportunity_\${SALESPROJECT_CONTACT}**.
A translation is created here in the Designer for both English and German. This is required in order to translate terms differently depending on the context.



To sort the keyword entries, use "Sort by: Translation" to sort the terms in the client language selected by the user.

The translation key is entered without the module name in any language and is not translated in the Designer.
> This procedure should be avoided!
> The term is displayed in the specified language, regardless of the client language.
> If the terms have been entered in different languages, it is difficult to sort them properly.

Keyword

Set keyword entry as **inactive**

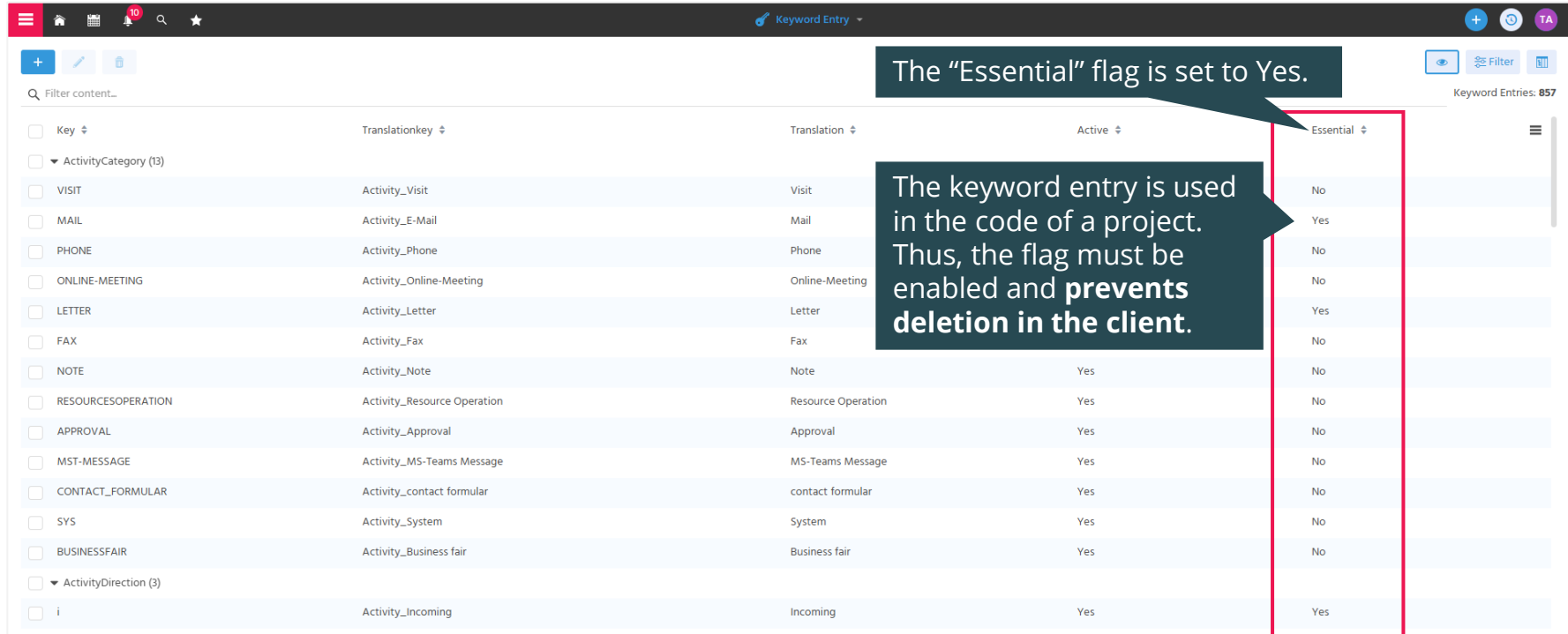
- The entry is no longer present in the selection lists, but can easily be set active again.

Delete keyword entry

- The keyword entry is no longer present in the selection lists.
- Keyword entries can be deleted even though they are in use.
- System-relevant keyword entries cannot be deleted.

- No new data records can be created that contain this keyword entry.
- Former data records can be filtered using the exclusion principle.

Which keyword entries are system relevant?



The "Essential" flag is set to Yes.

The keyword entry is used in the code of a project. Thus, the flag must be enabled and **prevents deletion in the client.**

☐	Key	Translationkey	Translation	Active	Essential
☐	▼ ActivityCategory (13)				
☐	VISIT	Activity_Visit	Visit		No
☐	MAIL	Activity_E-Mail	Mail		Yes
☐	PHONE	Activity_Phone	Phone		No
☐	ONLINE-MEETING	Activity_Online-Meeting	Online-Meeting		No
☐	LETTER	Activity_Letter	Letter		Yes
☐	FAX	Activity_Fax	Fax		No
☐	NOTE	Activity_Note	Note	Yes	No
☐	RESOURCESOPERATION	Activity_Resource Operation	Resource Operation	Yes	No
☐	APPROVAL	Activity_Approval	Approval	Yes	No
☐	MST-MESSAGE	Activity_MS-Teams Message	MS-Teams Message	Yes	No
☐	CONTACT_FORMULAR	Activity_contact formular	contact formular	Yes	No
☐	SYS	Activity_System	System	Yes	No
☐	BUSINESSFAIR	Activity_Business fair	Business fair	Yes	No
☐	▼ ActivityDirection (3)				
☐	i	Activity_Incoming	Incoming	Yes	Yes

Keyword Category

- **New creation** of a keyword category
- **Sorting** of keyword entries
Possibilities of use:
 - a) *Manually* + arrow buttons
 - b) *Translationkey* + *ascending/descending*
=> The titles following the module name are sorted
 - c) *Translation* + *ascending/descending*
=> The translated terms are displayed sorted in the respective client language



Deleting a category in the client is possible, but should only be applied if it has been ensured that it is no longer needed.

Category Name • ActivityCategory

Sorting by • manually ▾

Sorting direction • ascending ▾

Description • !

↑ ↓	VISIT	Activity_Visit	—
	Visit		
↑ ↓	MAIL	Activity_E-Mail	
	E-Mail		
↑ ↓	PHONE	Activity_Phone	—
	Phone		
↑ ↓	ONLINE-MEETING	Activity_Online-Meeting	—
	Online-Meeting		
↑ ↓	LETTER	Activity_Letter	
	Letter		
↑ ↓	FAX	Activity_Fax	—
↑ ↓			

Keyword Category ^

Adding and deleting keyword entries is done exclusively in the standalone context.

Required value is missing

Save Cancel

Keyword

Creating a new Keyword

Creating a "completely new" keyword:

Creating a new **Keyword category**:

- Enter the name of the new category (max. 80 characters).
- Select sort order

Creating a new **Keyword entry**:

- Select newly created category
- Enter translationkey and key of the first new value

If necessary, define new keyword attributes for the category



In order to be able to call this keyword in the desired Context, a system customization through the Designer is usually necessary.

Unless the keyword is opened through an attribute of the type keyword.

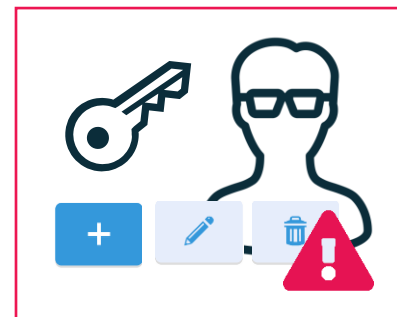
Keyword Attributes

Create specific attributes of keywords.

- The Context "Keyword Attribute" serves you as an overview page. This helps with understanding which keyword attributes are available in the system.
- Which keyword attribute can be used in which keyword is assigned by the category.
- Creating keyword attributes is possible in the client, **but customizing is necessary**, and thus only relevant in connection with changes in the designer to the JDito code.



Deleting a keyword attribute in the client is not possible.



What are keyword attributes used for?

Control icons/avatars

Use case: Activity

Icons/Avatar,
i.e. the keyword
is displayed with
an icon.

Activity_Visit
ActivityCategory
VISIT

Keyword Entry

Details

Active	Yes
Essential	No
Sorting	0

Keyword Attribute Values

defaultAvatarRepre...	VAADIN:CAR
-----------------------	------------

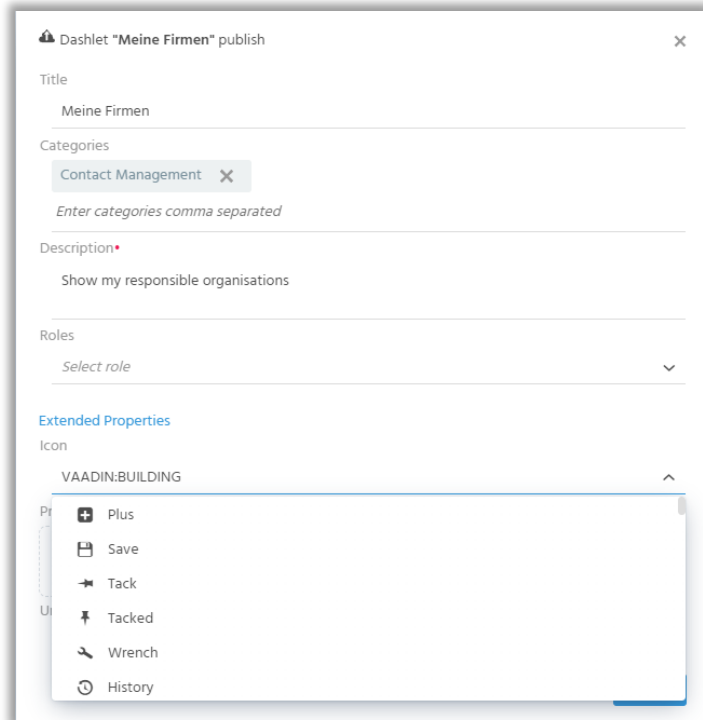
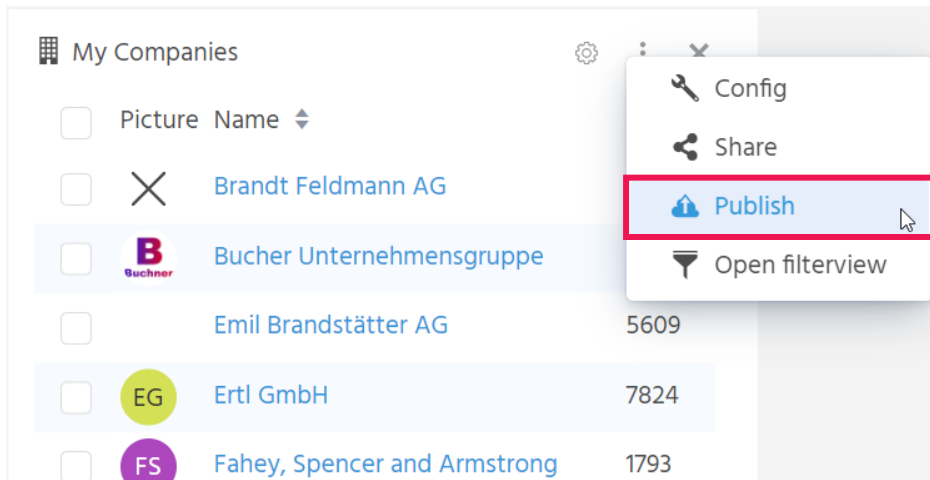
Keyword Category Description

Date	Responsible	Subject
3 Nov 2023	Herr Tim Admin	Campaignstep changed
3 Nov 2023	Herr Tim Admin	Campaignstep changed
3 Nov 2023	Frau Lisa Sommer	Klärung der technischen Voraus
2 Nov 2023	Herr Tim Admin	Kundenbesuch
2 Nov 2023	Herr Jan Froberg	Anruf Kunde

Keyword Attributes

Which icons can be used with keyword attributes?

As a DashletStoreAdministrator, you can publish Dashlets. In there you will find a selection list of possible icons and their names.



Keyword attributes

Which icons can be used with keyword attributes?

For example, to store other icons in the defaultAvatarRepresentation keyword attribute, the icon is stored in the Keyword attribute area. To do this, select the keyword attribute and use the notation "VAADIN:DESCRIPTION_ICONS".

Here you will find a small selection of possible icons and their names, which originate from the Vaadin font.

	ACADEMY_CAP		ENVELOPES
	ALARM		FILE_TREE_SMALL
	ASTERISK		FILE_TREE
	BUSS		FILE_TREE_SUB
	CECK_CIRCLE_O		GROUP
	CECK_CIRCLE		HOURLASS_END
	CLOSE_CIRCLE		TACKED
	CLIPBOARD_TEXT		THUMBS_DOWN_O
	CLIPBOARD		THUMBS_UP_O



You can use characters from the NeonIconFont and Vaadin fonts (<https://vaadin.com/components/vaadin-icons/java-examples>).

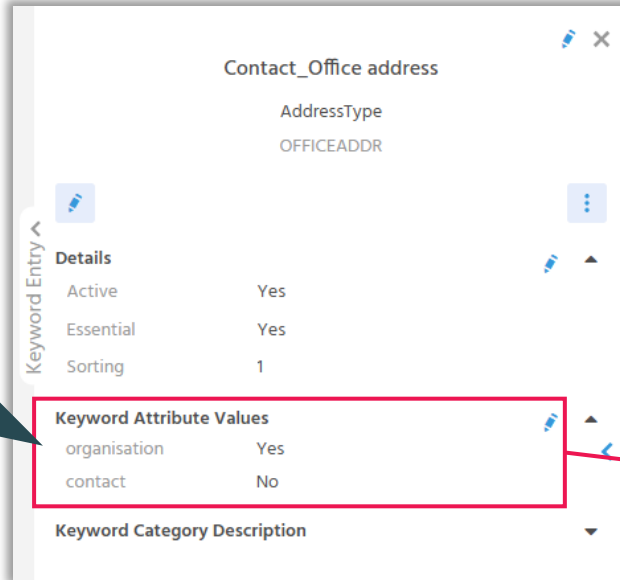
Since not all characters may be used by ADITO, we recommend that you consult your ADITO project manager.

What are keyword attributes used for?

Restriction for use in the Contexts

Use case: Contact/**Company**

Usage, i.e. the keyword can only be used in the defined Context.



Keyword Entry ^

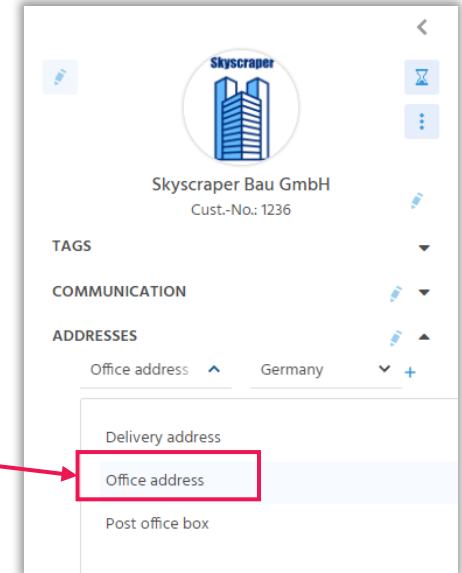
Details

Active	Yes
Essential	Yes
Sorting	1

Keyword Attribute Values

organisation	Yes
contact	No

Keyword Category Description



Skyscraper

Skyscraper Bau GmbH
Cust.-No.: 1236

TAGS

COMMUNICATION

ADDRESSES

Office address ^ Germany v +

Delivery address

Office address

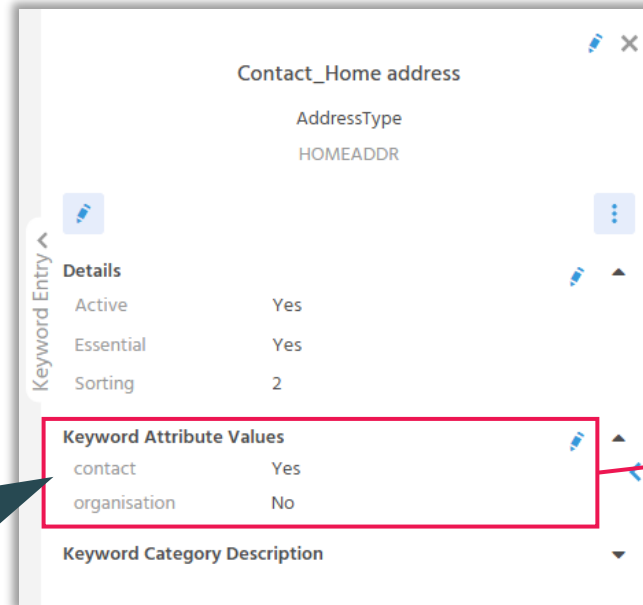
Post office box

What are keyword attributes used for?

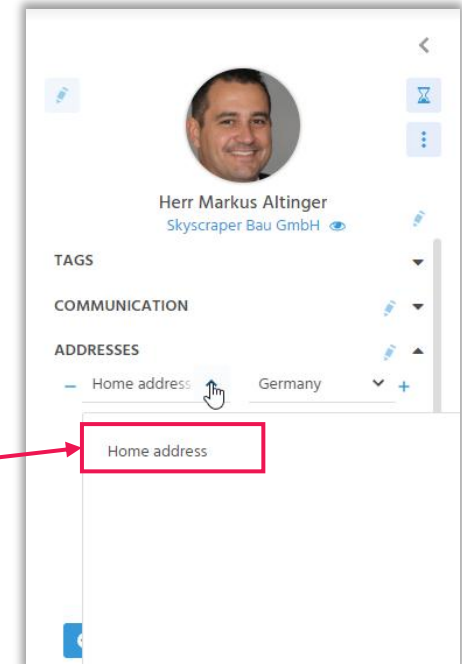
Restriction for use in the Contexts

Use case:
Contact/Company

Usage, i.e. the keyword can only be used in the defined Context.



Keyword Attribute Values	
contact	Yes
organisation	No

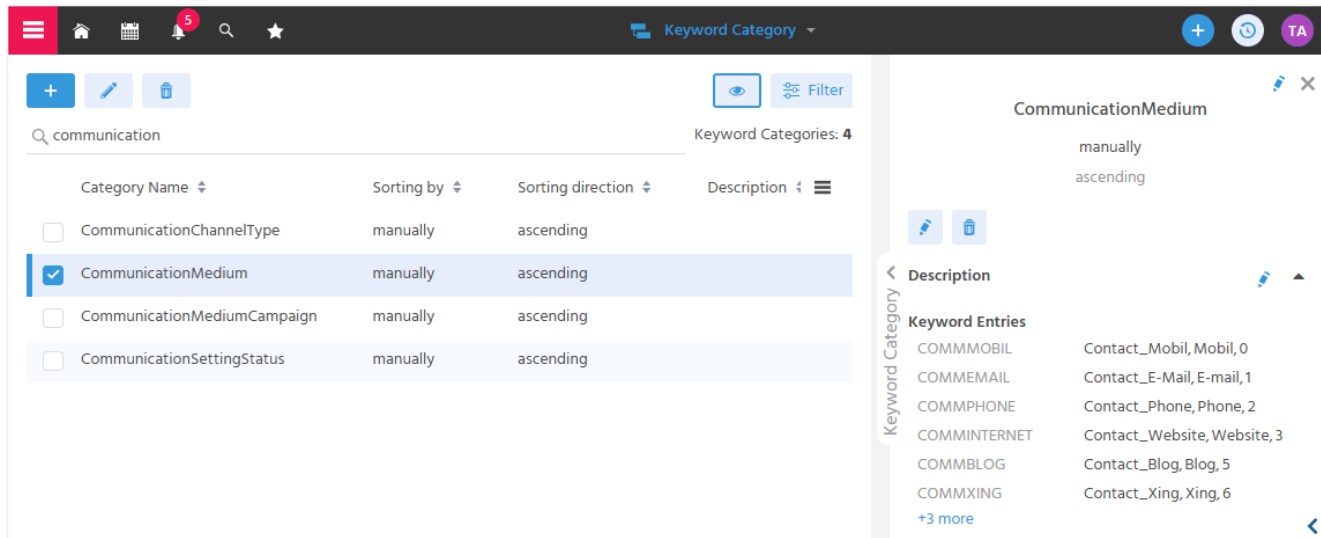


Home address Germany

Keyword Attributes

for the Keyword Category „CommunicationMedium“

- The **communication data** (phone, mobile, email, websites, etc.) for contact or company are mapped via the keyword category „CommunicationMedium“
- There are three keyword attributes for this, which are shown in the next slides



The screenshot displays the ADITO interface for managing keyword categories. The main table lists four categories, with 'CommunicationMedium' selected. The right sidebar shows the details for 'CommunicationMedium', including its description and a list of keyword entries.

Category Name	Sorting by	Sorting direction	Description
☐ CommunicationChannelType	manually	ascending	
☒ CommunicationMedium	manually	ascending	
☐ CommunicationMediumCampaign	manually	ascending	
☐ CommunicationSettingStatus	manually	ascending	

CommunicationMedium

manually
ascending

Description

Keyword Entries

- COMMMOBIL Contact_Mobil, Mobil, 0
- COMMEMAIL Contact_E-Mail, E-mail, 1
- COMMPHONE Contact_Phone, Phone, 2
- COMMINTERNET Contact_Website, Website, 3
- COMMBLOG Contact_Blog, Blog, 5
- COMMXXING Contact_Xing, Xing, 6
- +3 more

Keyword Attribute

for the keyword category „CommunicationMedium“: „contentType“

- The keyword attribute “contentType” specifies what can be used as input and how it is displayed (validation of the input).
- This keyword attribute is also used to assign the filter criteria (e.g. communication: telephone). If the user uses this filter criterion, they receive the hits from all communication media, each of which uses the same type.
- To distinguish the three types, the following keyword attribute values are available:
 - **TELEPHONE**, for telephone, mobile etc. Validation checks whether the entered value corresponds to the structure of a valid phone number. The country code is set.
 - **EMAIL**, for email addresses, validation checks whether the entered value corresponds to the structure of a valid mail address.
 - **LINK**, for websites, blog, Xing, LinkedIn etc. Validation checks whether the entered value corresponds to the structure of a valid URL.



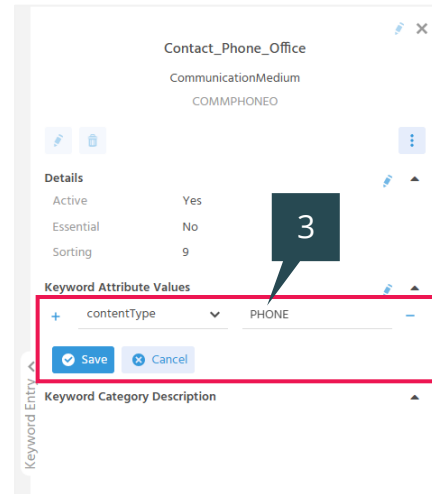
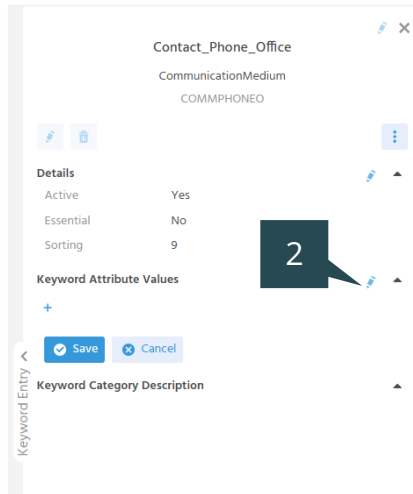
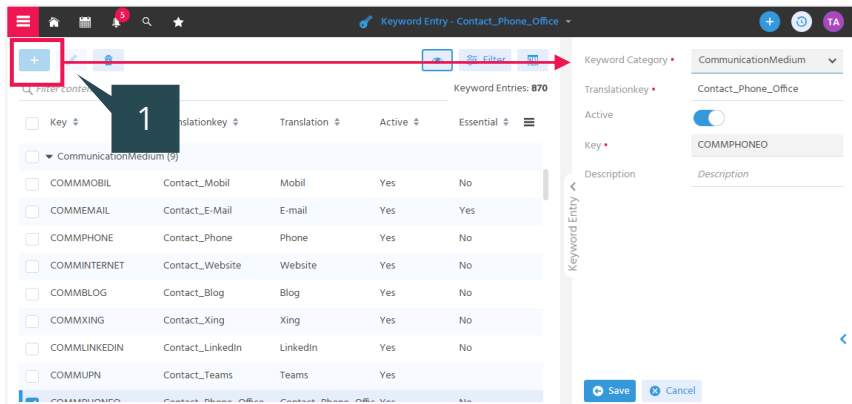
The keyword property value must be entered in **capital letters** in each case.

Keyword Attribute

Administrative steps to add the keyword attribute "contentType".

Creating a new keyword entry „Phone Office“

The Keyword Attribute Value "contentType" "PHONE" has to be entered:

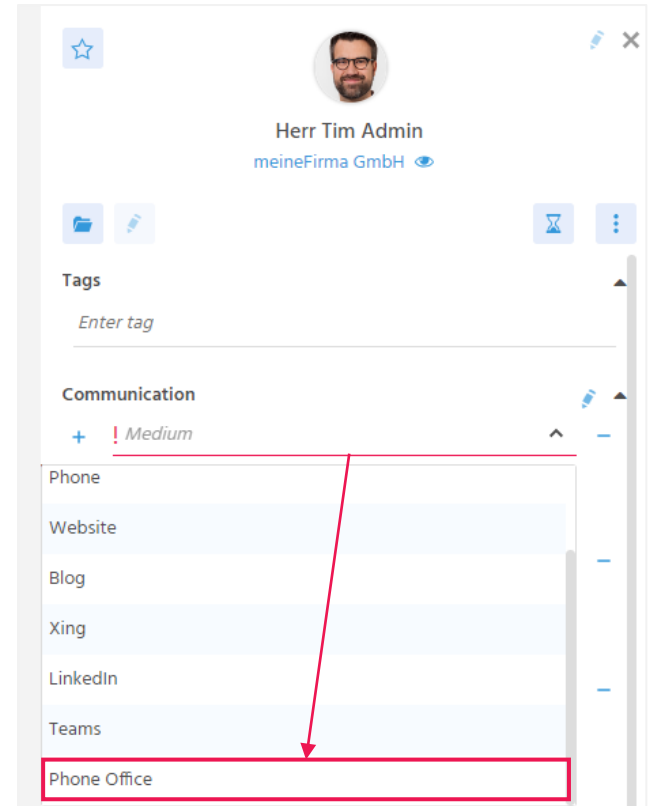


Keyword Attribute

Userperspective

Entering the new communication medium in the contact.

First, the translation must be maintained – see slide “[Entries in the 'Translation key' field.](#)”



Keyword Attribute

for the keyword category "CommunicationMedium": "category"

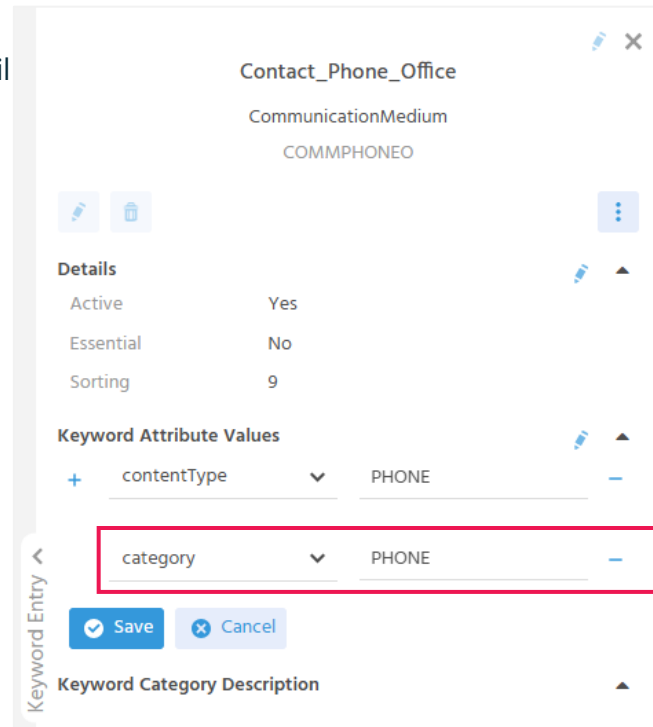
- The values PHONE, EMAIL, OTHER can be used for the keyword attribute "category". This defines that only one telephone number and only one email address can be set as the default. This means that you can, for example, enter mobile phone, private phone or company phone numbers and set one of them as the default.



The keyword attribute value must be entered in capital letters.

Administrative steps to add the keyword attribute "category"

- The keyword entry "Phone Office" was added to the keyword category "CommunicationMedium". In order to be able to set this as the default, "PHONE" must be entered in the keyword attribute values for "category".



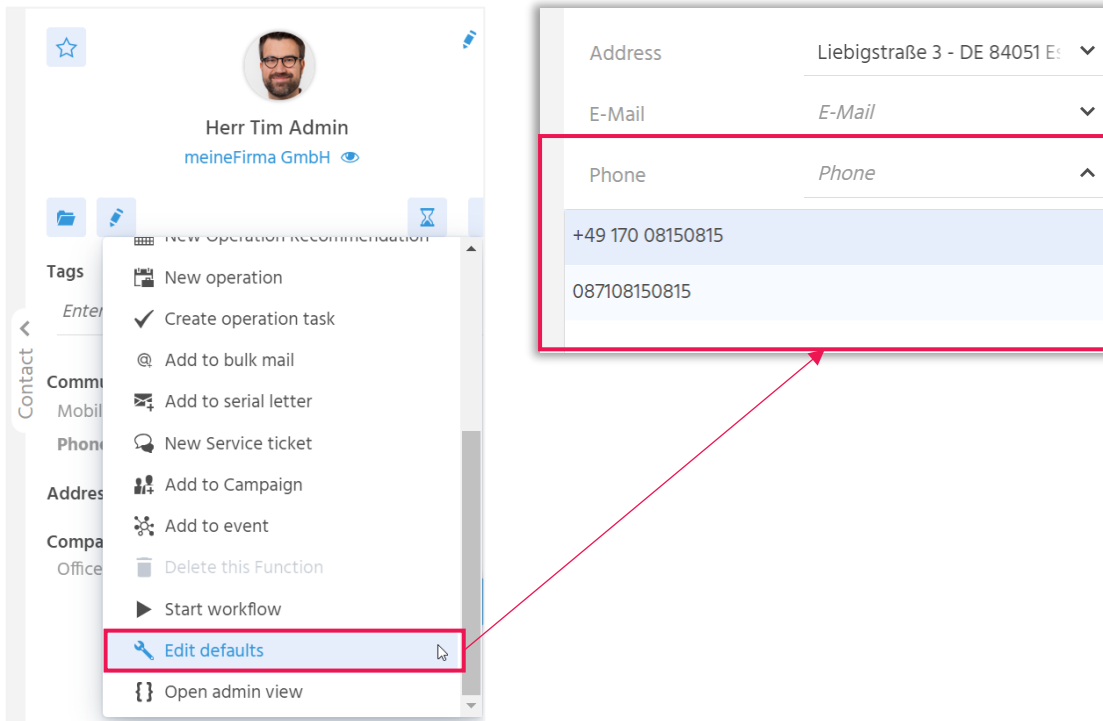
The screenshot shows the ADITO interface for configuring a keyword attribute. The main heading is "Contact_Phone_Office". Below it, the keyword category is "CommunicationMedium" and the attribute is "COMMPHONEO". There are icons for editing and deleting the attribute. The "Details" section shows: Active (Yes), Essential (No), and Sorting (9). The "Keyword Attribute Values" section shows a table with two rows: "contentType" with value "PHONE" and "category" with value "PHONE". The "category" row is highlighted with a red box. At the bottom, there are "Save" and "Cancel" buttons, and a "Keyword Category Description" section.

Keyword Attribute Values	
contentType	PHONE
category	PHONE

Keyword Attribute

Userperspective

- The action "Edit defaults" can be found in the preview (Contact/Company).
- It opens the EditView on the right side, where you can adjust the respective standards for address, email and phone.



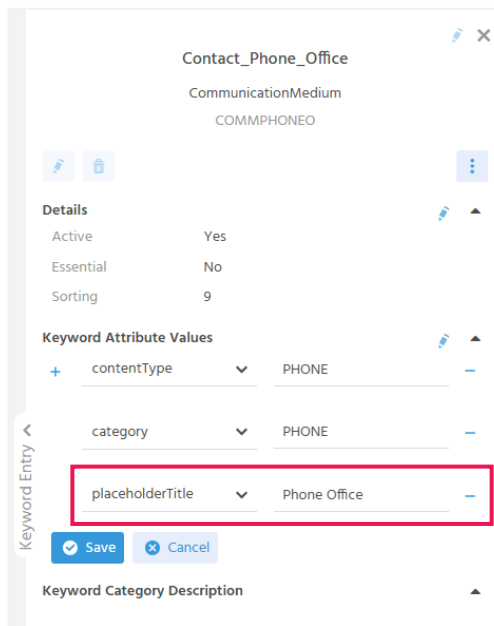
Keyword Attributes

for the keyword category "CommunicationMedium"

- The keyword attribute "placeholderTitle" specifies the placeholder text that is displayed to the user in the respective input field.
- In order for this term to be translated, it must be entered in English.

Administrative steps to add the keyword attribute "placeholderTitel":

- In the example keyword entry "telephone office", "placeholderTitle" can be set as the last keyword attribute.

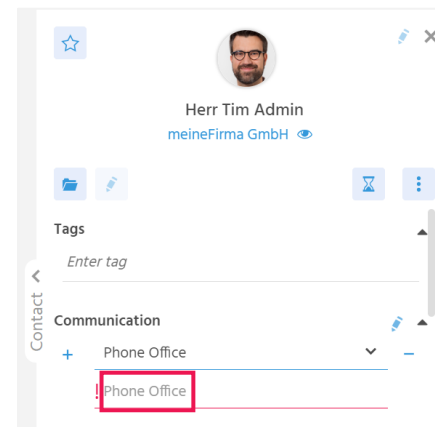


The screenshot shows the administrative interface for adding a keyword attribute. The main title is "Contact_Phone_Office" with the category "CommunicationMedium" and the code "COMMPHONEO". Below this, there are sections for "Details" (Active: Yes, Essential: No, Sorting: 9) and "Keyword Attribute Values". The "Keyword Attribute Values" section has a table with three rows: "contentType" (PHONE), "category" (PHONE), and "placeholderTitle" (Phone Office). The "placeholderTitle" row is highlighted with a red box. At the bottom, there are "Save" and "Cancel" buttons, and a "Keyword Category Description" field.

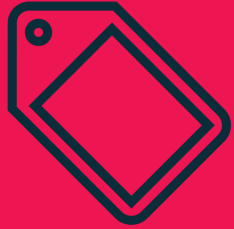
Details	
Active	Yes
Essential	No
Sorting	9

Keyword Attribute Values	
contentType	PHONE
category	PHONE
placeholderTitle	Phone Office

Userperspective



The screenshot shows the user perspective interface. At the top, there is a user profile for "Herr Tim Admin" from "meineFirma GmbH". Below this, there is a "Tags" section with a search bar "Enter tag". Under the "Communication" section, there is a list of tags. The tag "Phone Office" is highlighted with a red box, indicating it is the selected or active tag.



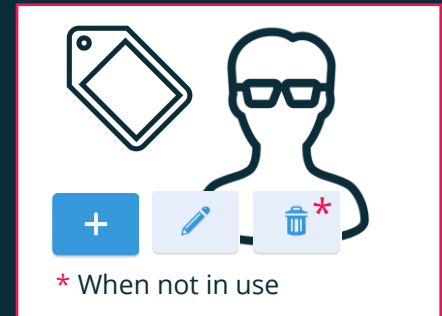
Attribute





Attribute

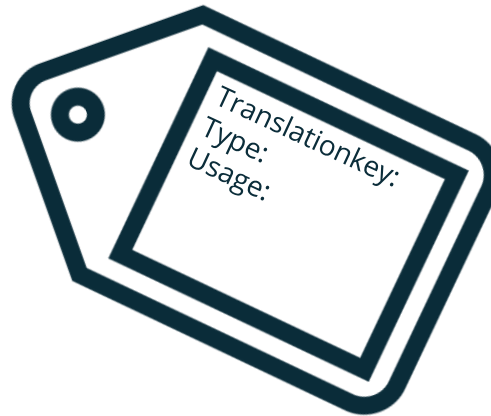
- What are attributes used for?
- How can attributes
 - be built/structured?
 - be extended/changed?
 - be used in one or more Contexts?
 - be set as a "mandatory attribute"?
 - be newly created?
 - be set to inactive/deleted?
 - be filtered?



Attributes

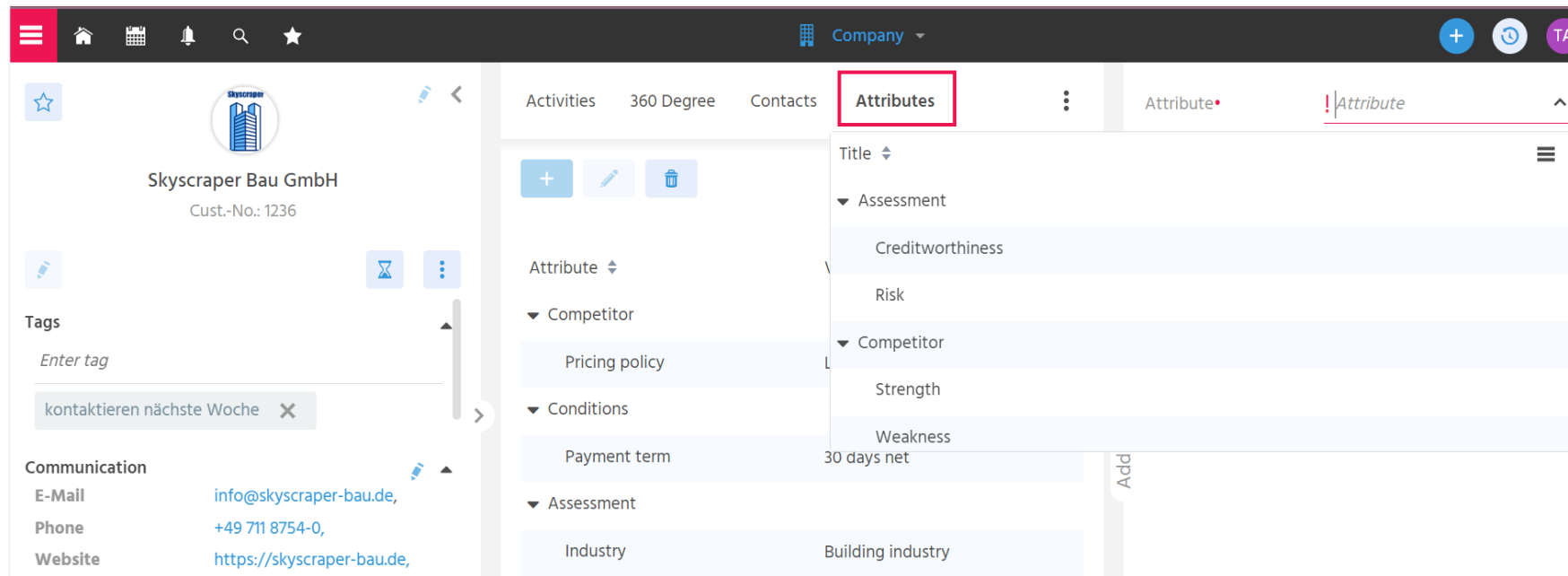
Overview

- What are attributes used for?
 - With attributes records are further qualified - "described in more detail".
 - For "almost every" Context in the xRM, attributes can be created by the admin and entered by the user on the data set and used for filtering.
- How are attributes constructed?



Attributes

Tab “Attributes” in the mainview



The screenshot displays the ADITO mainview for the company 'Skyscraper Bau GmbH' (Cust.-No.: 1236). The 'Attributes' tab is selected and highlighted with a red box. The left sidebar shows the company profile, including a logo, name, customer number, and communication details (E-Mail, Phone, Website). The main content area shows a list of attributes with a dropdown menu open, displaying options like 'Assessment', 'Competitor', and 'Conditions'. The 'Assessment' dropdown is expanded, showing 'Creditworthiness', 'Risk', 'Strength', and 'Weakness'. The 'Conditions' dropdown is also expanded, showing 'Payment term' (30 days net) and 'Assessment'.

Skyscraper Bau GmbH
Cust.-No.: 1236

Tags
Enter tag
kontaktieren nächste Woche X

Communication
E-Mail: info@skyscraper-bau.de,
Phone: +49 711 8754-0,
Website: <https://skyscraper-bau.de>

Activities 360 Degree Contacts **Attributes**

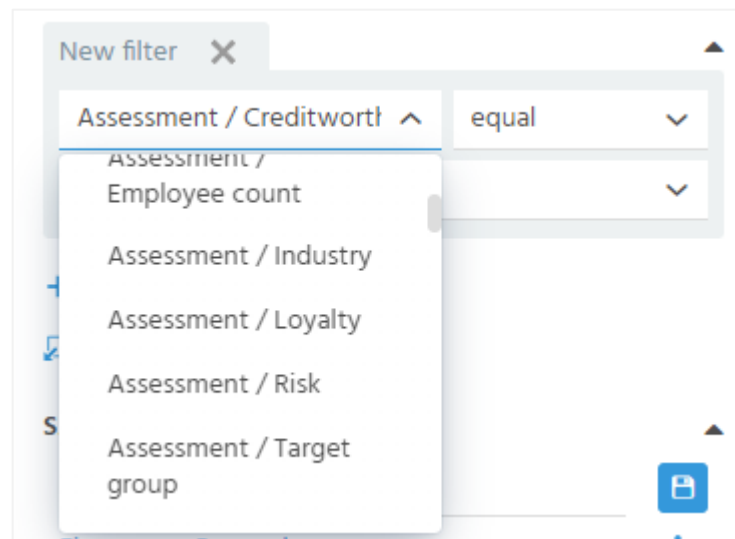
Attribute ▾

- ▼ Assessment
 - Creditworthiness
 - Risk
- ▼ Competitor
 - Strength
 - Weakness
- ▼ Conditions
 - Payment term: 30 days net
 - Assessment
- Industry: Building industry

Attributes

Filter attributes

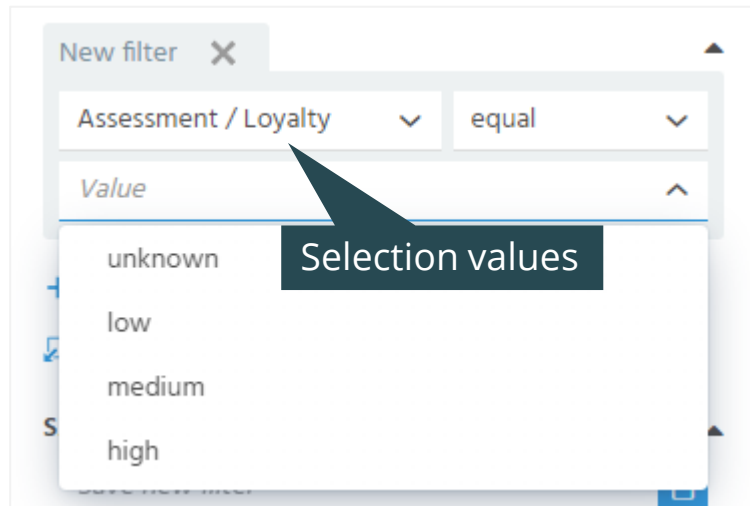
- Attributes can be selected directly after creation in the filter.
- Multi-level attributes can be recognized by the notation (/).



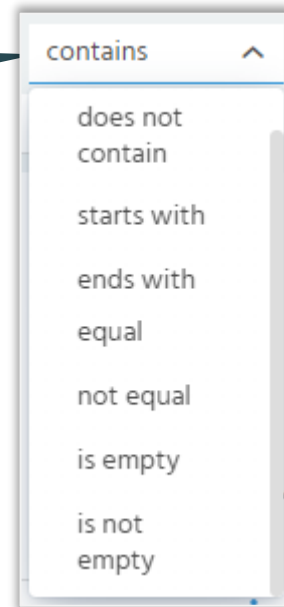
Attributes

Filter attributes

- Depending on the type, the operator must be selected.

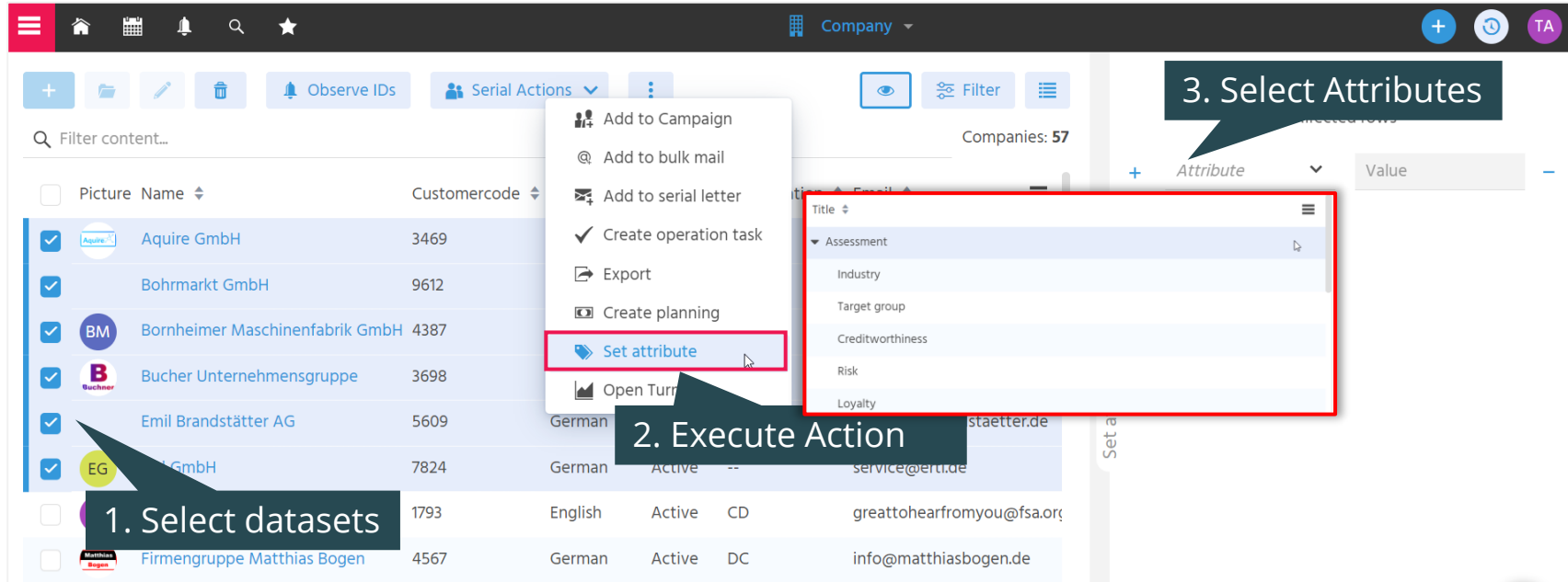


Free text



Attributes

Insert attributes using serial Actions



The screenshot shows the ADITO interface with a table of datasets. A context menu is open over the table, and a dropdown menu is open for the 'Set attribute' action. Three numbered callouts highlight the steps: 1. Select datasets, 2. Execute Action, and 3. Select Attributes.

1. Select datasets

Picture	Name	Customercode
☒	Aquire GmbH	3469
☒	Bohrmarkt GmbH	9612
☒	Bornheimer Maschinenfabrik GmbH	4387
☒	Bucher Unternehmensgruppe	3698
☒	Emil Brandstätter AG	5609
☒	EG GmbH	7824
☐	Firmengruppe Matthias Bogen	4567

2. Execute Action

- Add to Campaign
- Add to bulk mail
- Add to serial letter
- Create operation task
- Export
- Create planning
- Set attribute**
- Open Turn

3. Select Attributes

- Title
- Assessment
- Industry
- Target group
- Creditworthiness
- Risk
- Loyalty

Attributes

How can attributes be structured? - Examples:

1-Level

- Company: Attribute "Delivery block" > Yes /No,

2-level and multi-level tree structures with parent/subordinate attributes

- Attribute "Size" > company size, body size, product size

☐	Translationkey ↕	Translation ↕	Type ↕	Usage ↕
☐	 Contact_Assessment	Assessment	Group	Employee, Contact, Company
☐	 Contact_Industry	Industry	Selection	Company, Import Template
☐	 Contact_Target group	Target group	Selection	Opportunity, Company, Contact
☐	 Contact_Creditworthiness	Creditworthiness	Selection	Company
☐	 Contact_Risk	Risk	Selection	Company
☐	☒ Contact_Payment problem customer	Payment problem customer	Selection value	
☐	☒ Contact_Dumping price competition	Dumping price competition	Selection value	
☐	☒ Contact_Project shift customer	Project shift customer	Selection value	
☐	☒ Contact_Quality problem customer	Quality problem customer	Selection value	
☐	☒ Contact_Decision-maker changed	Decision-maker changed	Selection value	
☐	☒ Contact_No risk	No risk	Selection value	

logical
relationships

thematic
relationships

Attribute-Type

Type	Icon	Use case
Text		If you want to enter a text line for this attribute.
Memo		If you want to enter a text field for this attribute.
Date		If you want to enter a date for this attribute.
Number		If you want to enter a numerical value (floating point number) for this attribute.
Integer		If you want to enter a numerical value (integer) for this attribute.
Boolean value		If you want to query the value YES or NO for this attribute.



The possible attribute types are created in the ATTRIBUTETYPE keyword. Since this is a system-relevant keyword, it is maintained in the Designer.

Attribute-Type

Type	Icon	Use case
Selection Selection value		If you provide multiple values to choose from for this attribute.
Group		If you want to build a multi-level structure, as root or node points.
Tag		If you want to create multiple indicators as a attribute.
Object selection		If you want to select a record from a Context using Lookup.
Keyword		If you want to select the values of the keyword for this attribute.
Keyword multiselection		Possibility to select multiple keywords.



The possible attribute types are created in the ATTRIBUTETYPE keyword. Since this is a system-relevant keyword, it is maintained in the Designer.

Attributes

Configure attributes in a structured way using attribute type

☐		Contact_Assessment	Assessment	Group	Employee, Contact, Company
☐		Contact_Industry	Industry	Selection	
☐		Contact_Target group	Target group	Selection	
☐	☒	Contact_Custom		Selection value	
☐	☒	Contact_Interes		Selection value	
☐	☒	Contact_Manufa		Selection value	
☐	☒	Contact_Compe		Selection value	
☐	☒	Contact_Partner	Partner	Selection value	
☐		Contact_Creditworthiness	Creditworthiness	Selection	Company
☐		Contact_Risk	Risk	Selection	Company
☐	☒	Contact_Payment problem customer	Payment problem customer	Selection value	
☐	☒	Contact_Dumping price competition	Dumping price competition	Selection value	
☐	☒	Contact_Project shift customer	Project :		
☐	☒	Contact_Quality problem customer	Quality :		
☐	☒	Contact_Decision-maker changed	Decision :		
☐	☒	Contact_No risk	No risk		

The type "Selection" can be used for 2-level as root and within multi-level ones as a child attribute. Likewise the type "Object selection"

The type "Group" can be used as root and within arbitrarily deep trees. This also applies to the type "Tag".



All other types can be used as a 1-level attribute or as a child attribute.

"Keyword" type attribute vs. "Selection" type attribute

With a attribute of the type "Keyword" or of the type "Selection" you virtually always map a attribute with several entries. The question is when to use which type.

- Use the type "Keyword" if
 - you want to use the selection entries in other places as well, e.g. payment condition as a field in the offer and attribute in the company.
 - you want to be able to easily adjust the sorting of the selection values.
- You use the type "Selection" if
 - you want to use the selection entries exclusively for this attribute and no dependencies (authorization, index, etc.) exist.



Please note the project specific implementation which type was used or should be used.

Please check this with your ADITO project manager.

Further information can be found in the Customizing Manual.

Attributes



How can attributes be used in one or more Contexts?

Usage of the attributes (without subordinate attributes)

At the attribute it can be defined in which Context the user can capture this attribute, i.e. can use it.

The **usage can be created multiple times**, thus a attribute can be used in different Contexts.

Example: Attributes are to be maintained in the contact. Contacts are to be imported with attributes during a lead import. Thus, "Contact" and "Lead import" are stored as usage for these attributes.



How can attributes be used in one or more Contexts?

Usage for multi-level attributes (with child attributes)

- Usage can be passed from parent attribute to child attributes.

Procedure:

Create attributes with planned structure and finally specify the usage in the parent attribute. This means that the usage context is also stored in the child attributes.

If the usage context is subsequently edited and changed in the parent attribute (attribute type: group or selection), this is also transferred to the child attributes.

- The usage can be maintained individually in the child attribute.

Attributes

Mandatory attributes

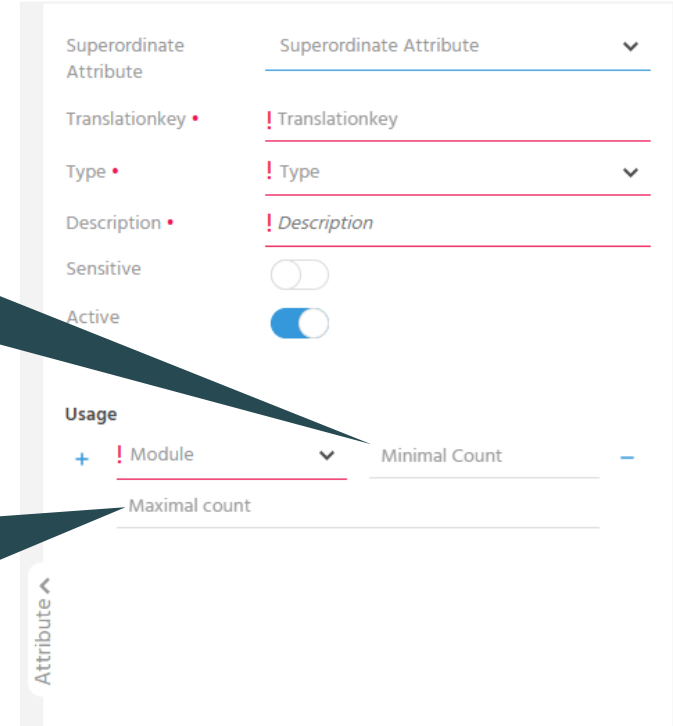
In addition to the usage, it is possible to specify how often a attribute can be captured on a record.

The attribute can be defined as a mandatory attribute via the **minimum**.

- This attribute must then be entered by the user in the data set when creating a new one.

The **maximum** can be assigned to limit how often the attribute can be captured.

- For attributes that are mapped via checkboxes, the value is automatically preset to 1.



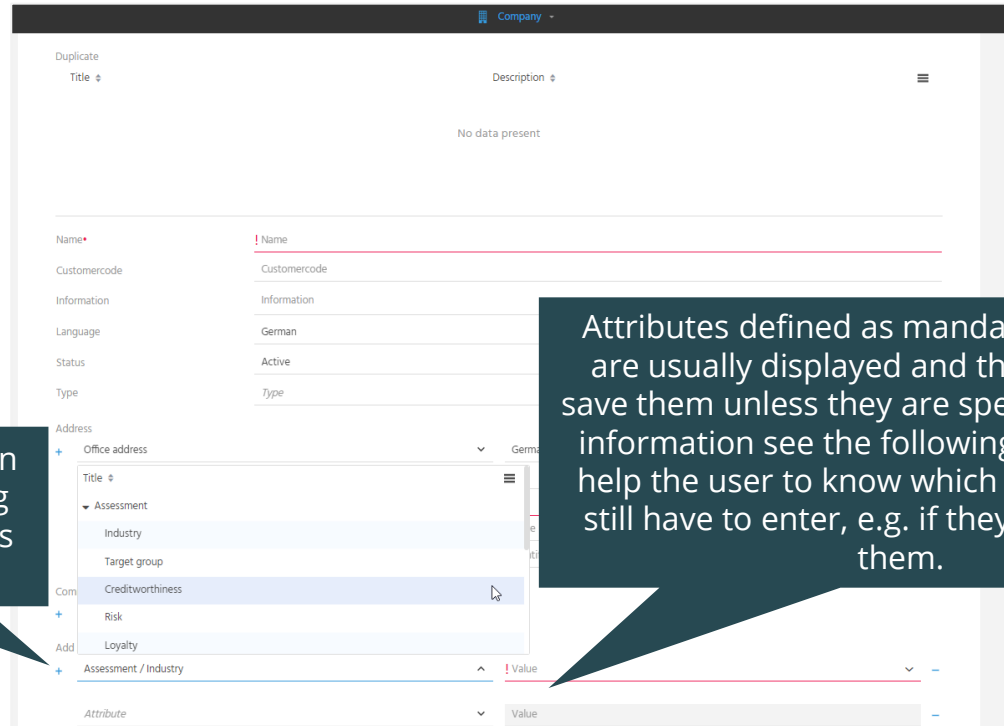
The screenshot shows the configuration interface for an attribute in the ADITO system. The interface is divided into several sections:

- Superordinate Attribute:** A dropdown menu showing "Superordinate Attribute".
- Translationkey:** A field with a red exclamation mark icon and the text "Translationkey".
- Type:** A dropdown menu with a red exclamation mark icon and the text "Type".
- Description:** A field with a red exclamation mark icon and the text "Description".
- Sensitive:** A toggle switch currently in the "off" position.
- Active:** A toggle switch currently in the "on" position.
- Usage:** A section containing:
 - A dropdown menu with a red exclamation mark icon and the text "Module".
 - A field labeled "Minimal Count" with a minus sign icon on the right.
 - A field labeled "Maximal count" with a plus sign icon on the left.

On the left side of the interface, there is a vertical label "Attribute" with a downward arrow.

Attributes

Mandatory attributes: Behavior of attributes in the editview



Company

Duplicate

Title

Description

No data present

Name

Customercode

Information

Language

Status

Type

Address

Office address

Assessment

Industry

Target group

Creditworthiness

Risk

Loyalty

Assessment / Industry

Value

Attribute

All other attributes can be added by inserting further attribute fields with the plus button.

Attributes defined as mandatory attributes are usually displayed and the user cannot save them unless they are specified (for more information see the following slides). Notes help the user to know which attributes they still have to enter, e.g. if they had removed them.

Attributes

Behavior of the attribute types in the edit view after defining the min and max values

Type	Min	Behavior	Max	Behavior	Note
Text	1	Attribute is displayed in the edit view	✓	Note if the maximum number is reached.	Optional: Specification of a regular expression. Note "Invalid value" if the input does not correspond to the "Regular expression".
Memo	1	Attribute is displayed in the edit view.	✓	Note if the maximum number is reached.	
Date	1	Attribute is displayed in the edit view.	✓	Note if the maximum number is reached.	Input facilitation by means of calendar button
Number, Integer	1	Attribute is displayed in the edit view.	✓	Note if the maximum number is reached.	Optional: specify a minimum or maximum value.
Boolean Value	1	Attribute is displayed in the edit view.	1	Max = 1 is set automatically	

Behavior of the attribute types in the edit view after defining the min and max values

Type	Min	Behavior	Max	Behavior	Note
Selection	1	Attribute is displayed in the edit view.	✓	Note if the maximum number is reached.	
Group	1	Note that at least one value from the attribute group must be used.	✓	Note that a maximum of x values from the attribute group can be used.	This type can be used to define attribute trees of any depth.
Tag	⊘	Cannot be set as a mandatory attribute. But e.g. be subordinated to a group, which is marked as a mandatory attribute.	1	Max = 1 is set automatically Note that a maximum of x values from the attribute group can be used.	
Object selection	1	Attribute is displayed in the edit view.	✓	Note if the maximum number is reached.	Selection of the Context from which the objects are selected. A filter can be used to restrict which objects are used.

Attributes

Behavior of the attribute types in the edit view after defining the min and max values

Type	Min	Behavior	Max	Behavior	Note
Keyword	1	Attribute is displayed in the edit view.	✓	Note if the maximum number is reached.	
Keyword multiselection	1	Attribute is displayed in the edit view.	1	Max = 1 is set automatically. The use of attributes with multiple selection only makes sense if they are used once.	Selection of several values possible (minimum of 1 value must be selected to save. A maximum of 10 values can be selected)

Attributes

Mandatory attributes: Add subsequently

It may be the case that a mandatory attribute was not recorded on a record when it was created because:

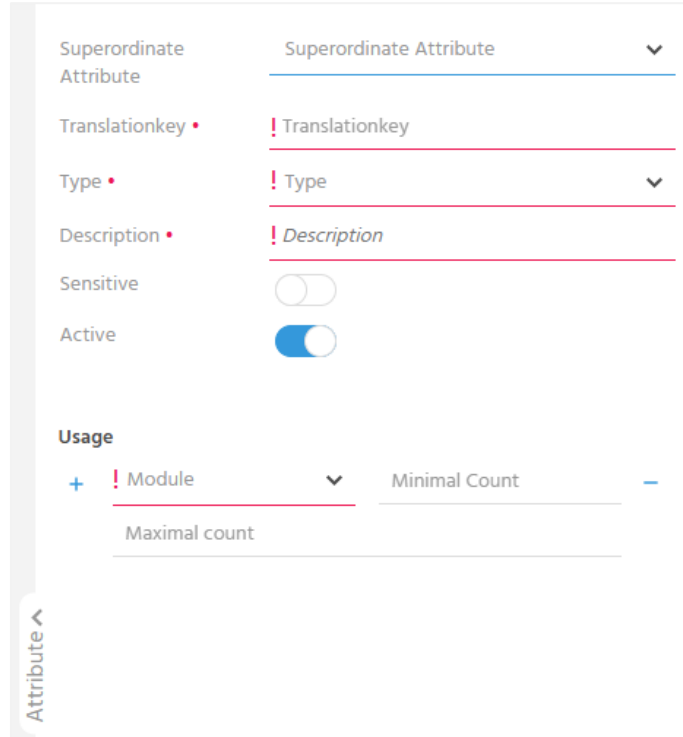
- the mandatory attribute was introduced at a later point in time.
- the data records were created by a process in the system and the information could not be transferred.

If an existing data record is now edited, the mandatory field is queried and requested (note is displayed) so that the users can complete the mandatory fields bit by bit.

Attributes

Edit afterwards

- Define **structure** of attributes
- Enter **translationkey** of the attribute (ModuleName_Title)
- Select **type**
- Define **usage**
 - In which Context
 - Inheritance of the usage
- **Frequency** of use
 - Mandatory attribute: Min. number = 1
 - Max number

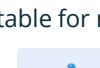


The screenshot shows the 'Attribute' configuration form in ADITO. The form is divided into several sections:

- Superordinate Attribute:** A dropdown menu currently set to 'Superordinate Attribute'.
- Translationkey:** A text input field containing '! Translationkey'.
- Type:** A dropdown menu currently set to 'Type'.
- Description:** A text input field containing '! Description'.
- Sensitive:** A toggle switch currently turned off.
- Active:** A toggle switch currently turned on.
- Usage:** A section with a table for defining usage rules.

	Usage	Minimal Count	Maximal Count
+	! Module		

At the bottom left of the form, there is a vertical label 'Attribute' with a downward arrow.



* when not in use

* when in use

Attributes

Set attributes **inactive**

- The attribute is no longer present in the selection lists, but can easily be set active again.

➤ No new records can be created that contain this attribute.

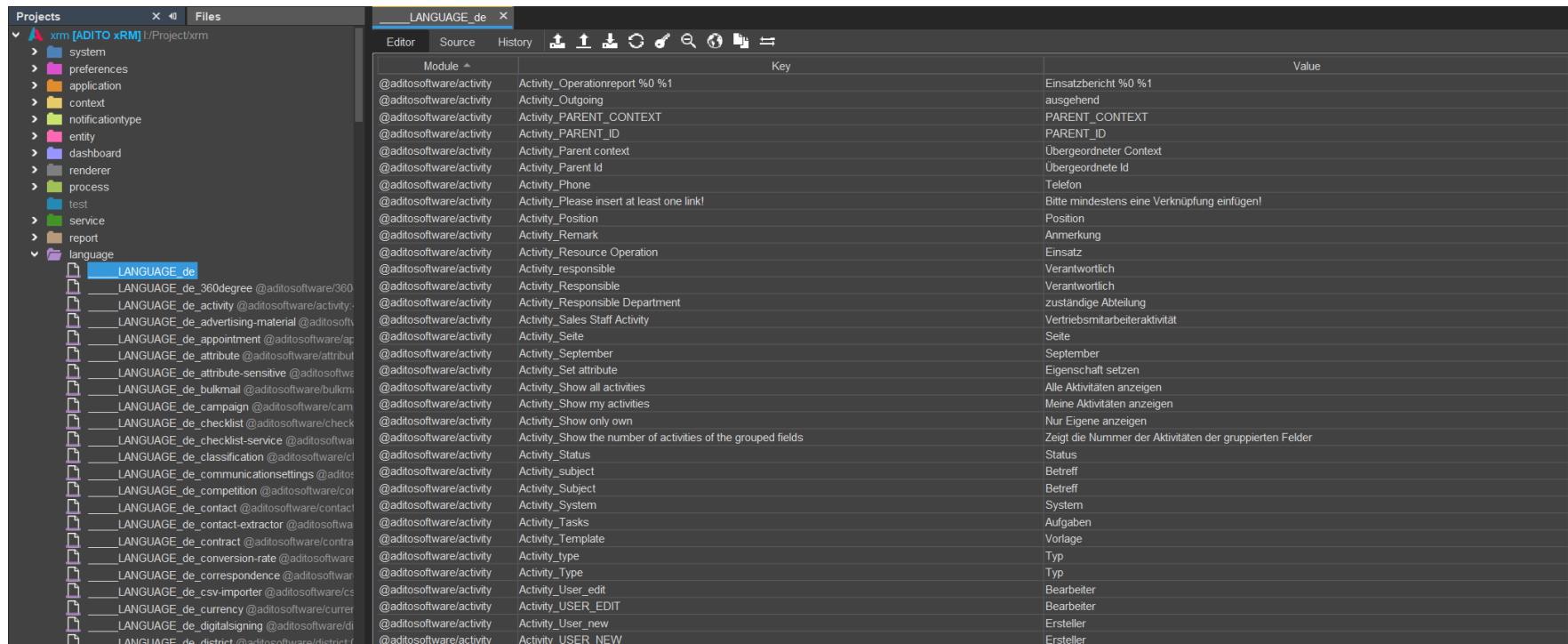
Delete attributes

- The attribute is no longer present in the selection lists.
- Attributes cannot be deleted if they are in use.

➤ No new records can be created that contain this attribute.

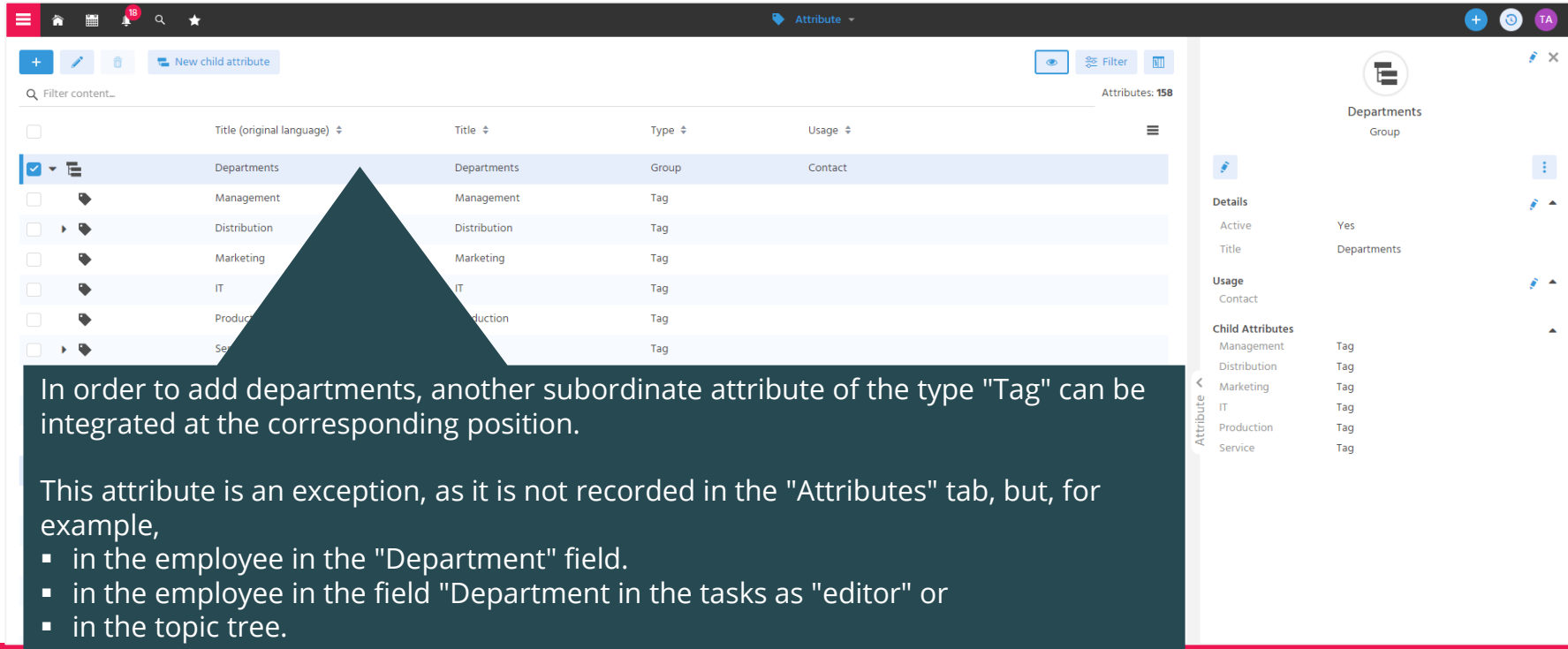
➤ Old records can be filtered partly by means of exclusion principle, this depends on whether the attribute was subordinated in a structure.

Translation tables in ADITO Designer



Module	Key	Value
@aditosoftware/activity	Activity_Operationreport %0 %1	Einsatzbericht %0 %1
@aditosoftware/activity	Activity_Outgoing	ausgehend
@aditosoftware/activity	Activity_PARENT_CONTEXT	PARENT_CONTEXT
@aditosoftware/activity	Activity_PARENT_ID	PARENT_ID
@aditosoftware/activity	Activity_Parent context	Übergeordneter Context
@aditosoftware/activity	Activity_Parent Id	Übergeordnete Id
@aditosoftware/activity	Activity_Phone	Telefon
@aditosoftware/activity	Activity_Please insert at least one link!	Bitte mindestens eine Verknüpfung einfügen!
@aditosoftware/activity	Activity_Position	Position
@aditosoftware/activity	Activity_Remark	Anmerkung
@aditosoftware/activity	Activity_Resource Operation	Einsatz
@aditosoftware/activity	Activity_responsible	Verantwortlich
@aditosoftware/activity	Activity_Responsibile	Verantwortlich
@aditosoftware/activity	Activity_Responsibile Department	zuständige Abteilung
@aditosoftware/activity	Activity_Sales Staff Activity	Vertriebsmitarbeiteraktivität
@aditosoftware/activity	Activity_Seite	Seite
@aditosoftware/activity	Activity_September	September
@aditosoftware/activity	Activity_Set attribute	Eigenschaft setzen
@aditosoftware/activity	Activity_Show all activities	Alle Aktivitäten anzeigen
@aditosoftware/activity	Activity_Show my activities	Meine Aktivitäten anzeigen
@aditosoftware/activity	Activity_Show only own	Nur Eigene anzeigen
@aditosoftware/activity	Activity_Show the number of activities of the grouped fields	Zeigt die Nummer der Aktivitäten der gruppierten Felder
@aditosoftware/activity	Activity_Status	Status
@aditosoftware/activity	Activity_subject	Betreff
@aditosoftware/activity	Activity_Subject	Betreff
@aditosoftware/activity	Activity_System	System
@aditosoftware/activity	Activity_Tasks	Aufgaben
@aditosoftware/activity	Activity_Template	Vorlage
@aditosoftware/activity	Activity_type	Typ
@aditosoftware/activity	Activity_Type	Typ
@aditosoftware/activity	Activity_User_edit	Bearbeiter
@aditosoftware/activity	Activity_USER_EDIT	Bearbeiter
@aditosoftware/activity	Activity_User_new	Ersteller
@aditosoftware/activity	Activity_USER_NEW	Ersteller

„Departments“

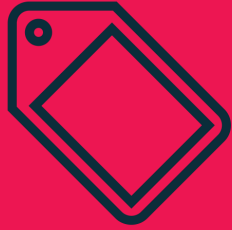


	Title (original language)	Title	Type	Usage
☒	Departments	Departments	Group	Contact
☐	Management	Management	Tag	
☐	Distribution	Distribution	Tag	
☐	Marketing	Marketing	Tag	
☐	IT	IT	Tag	
☐	Production	Production	Tag	
☐	Service	Service	Tag	

In order to add departments, another subordinate attribute of the type "Tag" can be integrated at the corresponding position.

This attribute is an exception, as it is not recorded in the "Attributes" tab, but, for example,

- in the employee in the "Department" field.
- in the employee in the field "Department in the tasks as "editor" or
- in the topic tree.



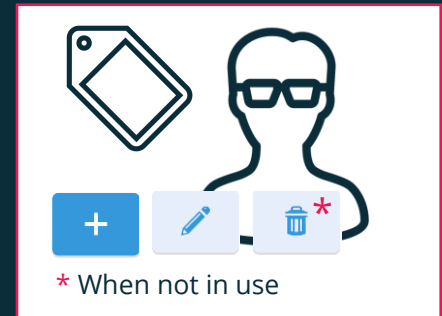
Sensitive Attributes





Sensitive attributes

- What are attributes used for?
- How can attributes
 - be newly created?
 - be built/structured?
 - be extended/changed?
 - be filtered?
 - be authorized?



Sensitive attributes

Overview

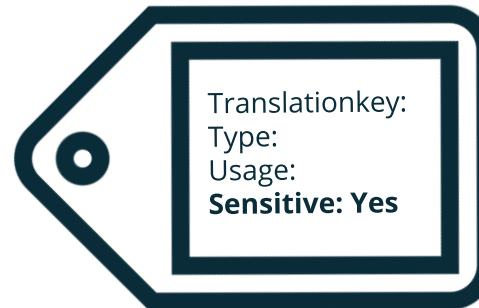
- What are sensitive attributes used for?

To map sensitive information using attributes,

- which may only be visible to a restricted group of participants.
- which may only be maintained by a restricted group of participants.

The "restricted group of participants" can be defined in such a way that different departments use different sensitive attributes and do not have mutual access to them.

- How are sensitive attributes structured?



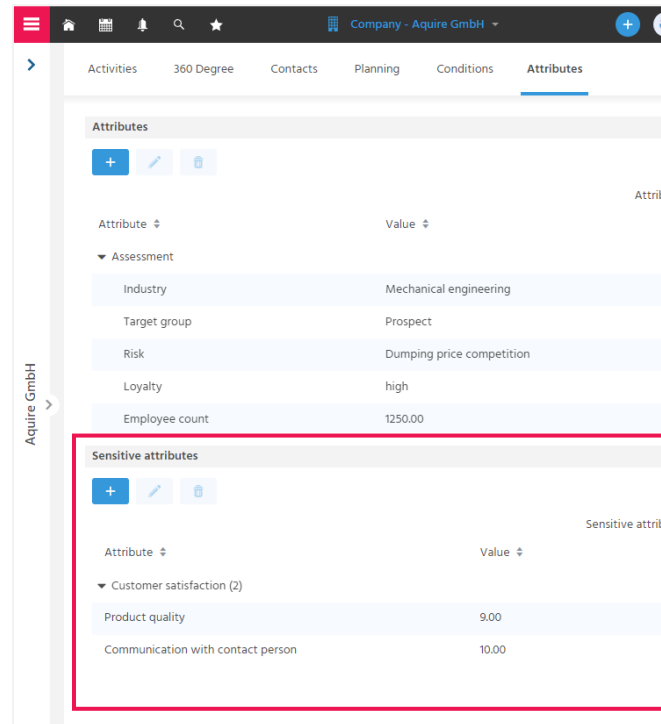
Sensitive attributes

Where are sensitive attributes maintained by the user?

- Sensitive attributes cannot be mixed with "normal" attributes, as they are shown in two tables in the "Attributes" tab.
- The authorization of a user can be
 - They can see the "Sensitive attributes" table.
 - They can view, add, edit or delete sensitive attributes.
 - They can only maintain certain sensitive attributes.
 - They can use the sensitive attributes for filtering in the filter view of the context (e.g. company).



Please note the project-specific implementation in which contexts the use of sensitive attributes is possible.
Please check this with your ADITO project manager.



The screenshot shows the ADITO interface for the 'Acquire GmbH' context. The 'Attributes' tab is active, displaying a table of attributes. Below this, a section titled 'Sensitive attributes' is highlighted with a red box, showing a table of sensitive attributes. The 'Sensitive attributes' table has columns for 'Attribute' and 'Value'.

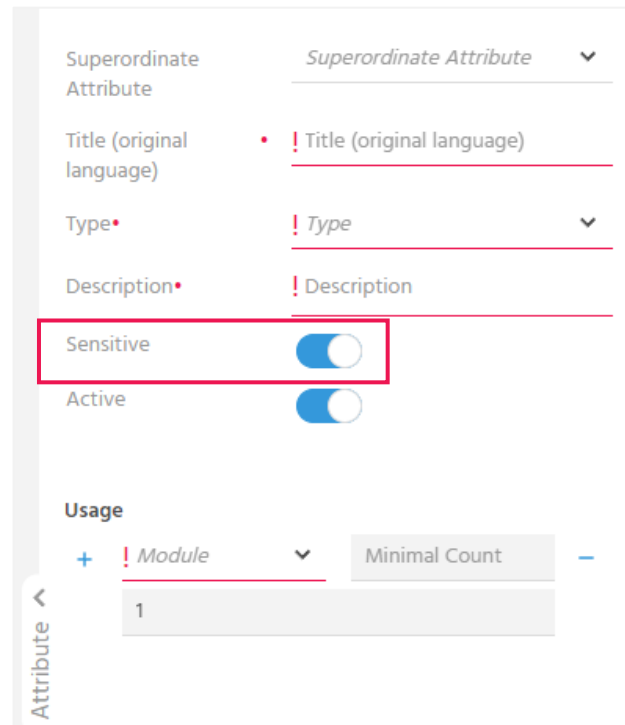
Attribute	Value
Industry	Mechanical engineering
Target group	Prospect
Risk	Dumping price competition
Loyalty	high
Employee count	1250.00

Attribute	Value
Product quality	9.00
Communication with contact person	10.00

Sensitive attributes

Create sensitive attributes

- The "Sensitive" indicator can only be activated when a new attribute is created.
- It cannot be added or deleted at a later date.
- Sensitive attributes can only be created at two levels.
- The indicator must initially be activated at the higher level. Subordinate attributes are automatically labelled as "sensitive".
- Sensitive attributes must not have any values in the "Min/max number" fields (must not be defined as a mandatory field or entered multiple times) so that data creation is possible for unauthorized users.



The screenshot shows the configuration interface for a new attribute in ADITO. The interface includes the following elements:

- Superordinate Attribute:** A dropdown menu currently showing "Superordinate Attribute".
- Title (original language):** A text field containing "Title (original language)".
- Type:** A dropdown menu currently showing "Type".
- Description:** A text field containing "Description".
- Sensitive:** A toggle switch that is currently turned on (blue). This element is highlighted with a red rectangular box.
- Active:** A toggle switch that is currently turned on (blue).
- Usage:** A section containing a dropdown menu showing "Module" and a "Minimal Count" field with the value "1".

On the left side of the form, there is a vertical label "Attribute" with a downward-pointing arrow.

Sensitive attributes



Find sensitive attributes quickly in the administration

The screenshot shows the ADITO administration interface. At the top, there's a dark navigation bar with icons for home, calendar, notifications, search, and favorites. Below this is a header bar with a '+', edit, and delete icons, and a 'New child attribute' button. The main area displays a table of attributes with columns for selection, title, original title, type, and usage. The table lists four attributes: 'Title (original language)', 'Customer satisfaction', 'Product quality', and 'Communication with contact person'. The 'Product quality' attribute is highlighted. On the right, a sidebar shows the 'Filter' section with 'Attributes: 3'. The 'Condition' section is expanded, showing 'Sensitive equal "Yes"' with a dropdown menu set to 'Sensitive' and a value of 'Yes'. The 'Join conditions by' section is set to 'all'.

	Title (original language)	Title	Type	Usage
☐	Customer satisfaction	Customer satisfaction	Group	Company
☒	Product quality	Product quality	Number	Company
☐	Communication with contact person	Communication with contact person	Number	Company

To quickly find sensitive attributes in the administration, use the "Sensitive equals Yes" filter.

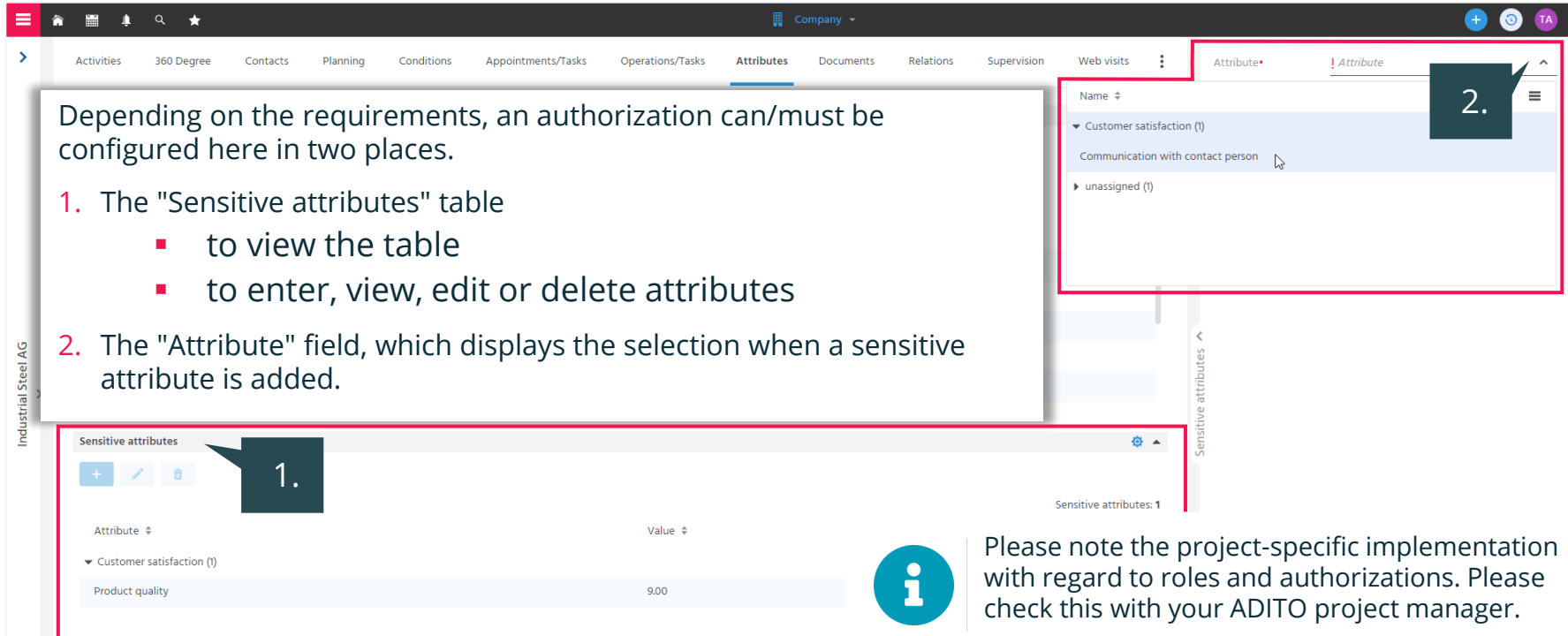


Sensitive attributes

Define authorization

Depending on the requirements, an authorization can/must be configured here in two places.

1. The "Sensitive attributes" table
 - to view the table
 - to enter, view, edit or delete attributes
2. The "Attribute" field, which displays the selection when a sensitive attribute is added.



The screenshot displays the ADITO web application interface. The top navigation bar includes a hamburger menu, a home icon, a calendar icon, a notification bell, a search icon, and a star icon. The main navigation bar lists various modules: Activities, 360 Degree, Contacts, Planning, Conditions, Appointments/Tasks, Operations/Tasks, Attributes (highlighted), Documents, Relations, Supervision, Web visits, and a dropdown menu. The 'Attributes' module is active, showing a list of attributes. A red box highlights the 'Attribute' field, which displays a selection of attributes. A callout box with the number '2.' points to this field. Below the 'Attribute' field, a table titled 'Sensitive attributes' is visible. A red box highlights this table, and a callout box with the number '1.' points to it. The table has columns for 'Attribute' and 'Value'. The first row shows 'Product quality' with a value of '9.00'. A red box also highlights the 'Attribute' field in the table, which displays a selection of attributes. A callout box with the number '2.' points to this field. The table is titled 'Sensitive attributes' and has a status bar at the bottom indicating 'Sensitive attributes: 1'.

Industrial Steel AG

Sensitive attributes

Sensitive attributes: 1

Attribute

Value

Product quality 9.00

Customer satisfaction (1)

Communication with contact person

unassigned (1)

2.

1.



Please note the project-specific implementation with regard to roles and authorizations. Please check this with your ADITO project manager.

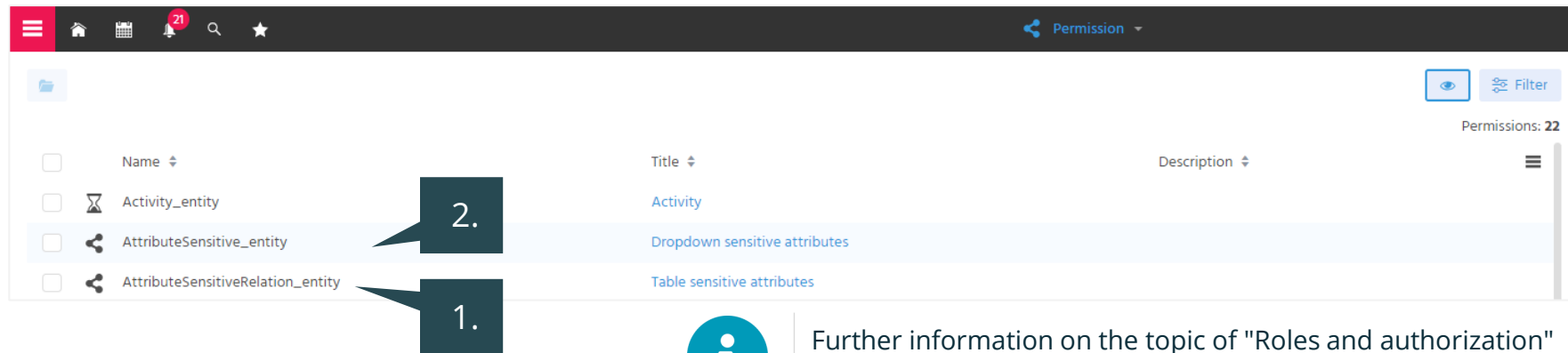
Sensitive attributes

Define authorization

Depending on the requirements, an authorization can/must be configured here in two places.

1. The sensitive attributes table: AttributeSensitiveRelation_entity
2. The dropdown of sensitive attributes: AttributeSensitive_entity

The administrator can authorize these two entities for the respective role:



Name	Title	Description
Activity_entity	Activity	
AttributeSensitive_entity	Dropdown sensitive attributes	
AttributeSensitiveRelation_entity	Table sensitive attributes	



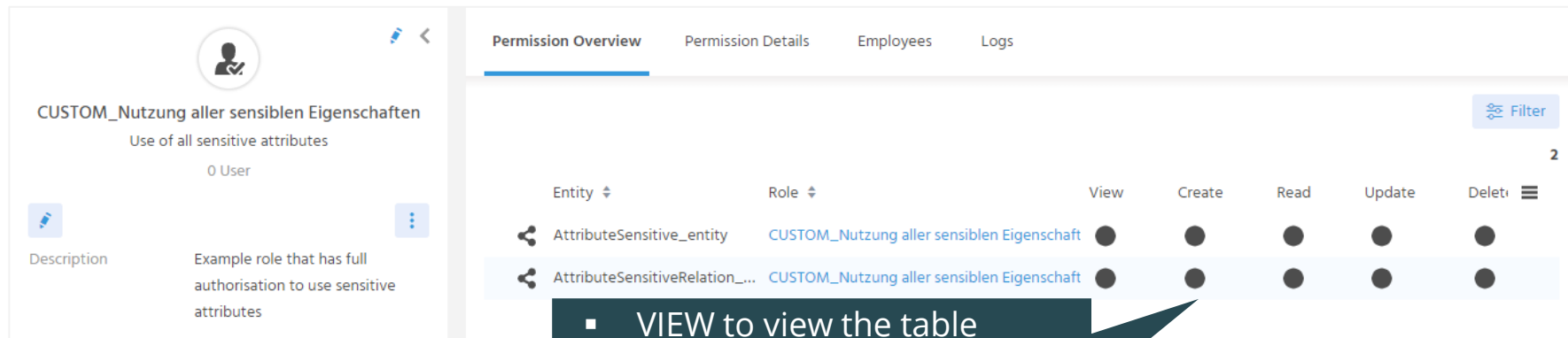
Further information on the topic of "Roles and authorization" can be found in the separate documentation.

Sensitive attributes

Define authorization

Use case A: There is **only one user group** that uses sensitive attributes. This means that all authorized users can see the "sensitive attributes" table and maintain all sensitive attributes there.

Administrative procedure: Create role and assign full authorization to AttributeSensitiveRelation_entity and "AttributeSensitive_entity".



The screenshot displays the ADITO administrative interface. On the left, a sidebar shows a role named "CUSTOM_Nutzung aller sensiblen Eigenschaften" (Use of all sensitive attributes) with 0 users. The main panel is titled "Permission Overview" and contains a table of permissions. The table has columns for Entity, Role, View, Create, Read, Update, and Delete. Two rows are listed, both assigned to the role "CUSTOM_Nutzung aller sensiblen Eigenschaften".

Entity	Role	View	Create	Read	Update	Delete
AttributeSensitive_entity	CUSTOM_Nutzung aller sensiblen Eigenschaft	●	●	●	●	●
AttributeSensitiveRelation_...	CUSTOM_Nutzung aller sensiblen Eigenschaft	●	●	●	●	●

- VIEW to view the table
- CREATE to create attributes
- READ to view them
- UPDATE to edit them
- DELETE to delete them

Sensitive attributes

Define conditional authorization

Use case B: *There are **several user groups** that use different sensitive attributes. This means that all authorized users see the "sensitive attributes" table and can maintain the respective sensitive attributes according to their authorization.*

Administrative procedure:

- Create roles
- Assign authorization for AttributeSensitiveRelation_entity
 - Mandatory VIEW to display the table
 - CREATE to enter sensitive attributes
 - READ to view them - Enter condition¹ here, which attribute may be displayed
 - UPDATE to edit these - Enter condition¹ here if necessary, if different from READ
 - DELETE to delete it - Enter condition¹ here if necessary, if different from READ or UPDATE
- Assign authorization for "AttributeSensitive_entity".
 - Mandatory VIEW to display the selection
 - Under READ, use condition² to define which attributes are available in the selection.

^{1, 2} For further information see next slide

Sensitive attributes

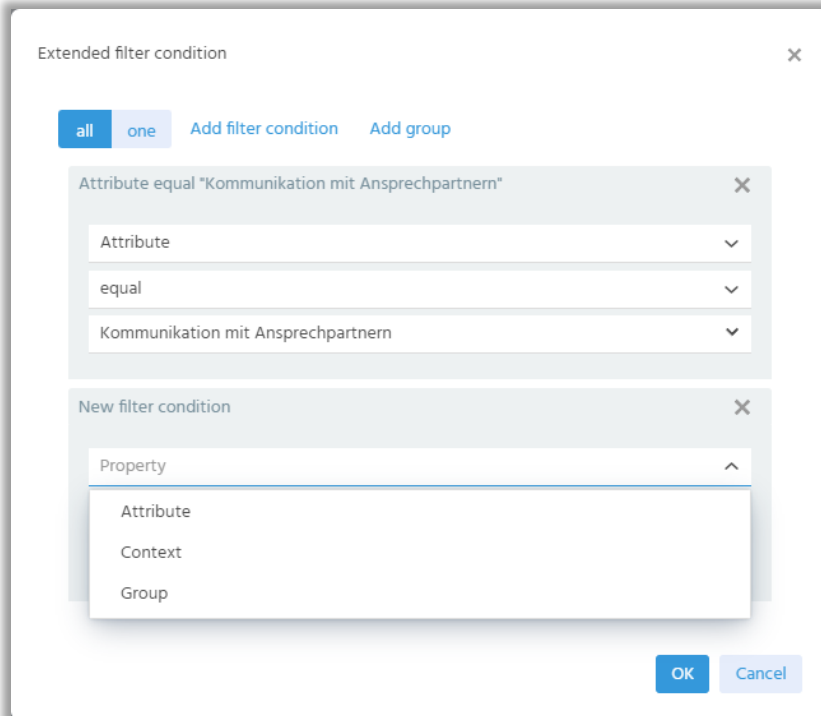
Define condition for authorization

The condition can be defined in such a way that

- Individual sensitive **attributes** are accessed
- the **group**, i.e. the top level of a sensitive attribute, is accessed and therefore the subordinate attributes are also authorized.
- To all attributes that are available for a **context**

¹ For the AttributeSensitiveRelation_entity, filters can be used to define who can see, edit or delete which attributes for the READ, UPDATE and DELETE rights.

² For the "AttributeSensitive_entity", the filter that controls the display of the attributes in the selection is defined for READ.



Extended filter condition

all one Add filter condition Add group

Attribute equal "Kommunikation mit Ansprechpartnern"

Attribute
equal
Kommunikation mit Ansprechpartnern

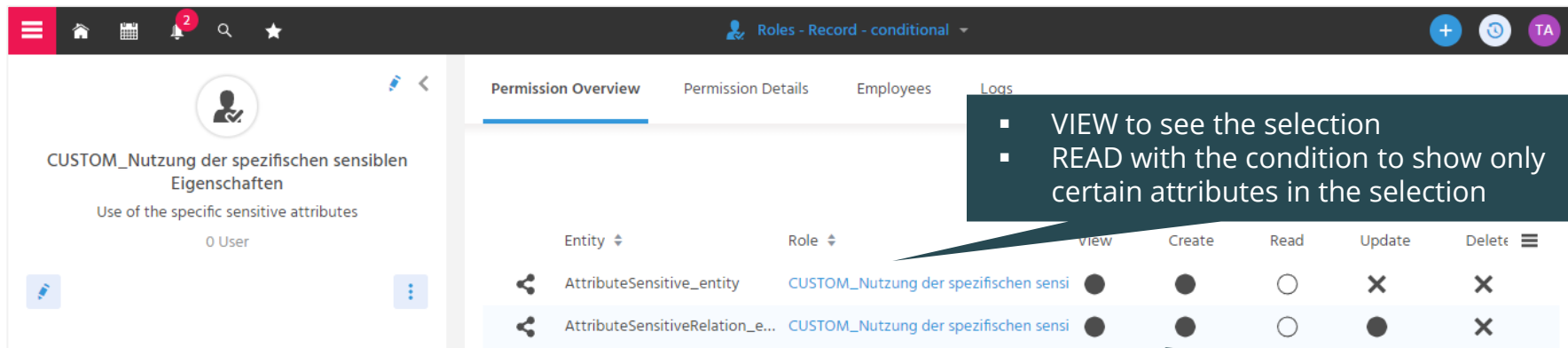
New filter condition

Property
Attribute
Context
Group

OK Cancel

Sensitive attributes

Define conditional authorization



Roles - Record - conditional

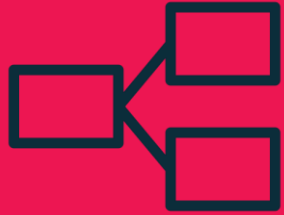
Permission Overview | Permission Details | Employees | Logs

CUSTOM_Nutzung der spezifischen sensiblen Eigenschaften
Use of the specific sensitive attributes
0 User

Entity	Role	View	Create	Read	Update	Delete
AttributeSensitive_entity	CUSTOM_Nutzung der spezifischen sensi	●	●	○	✕	✕
AttributeSensitiveRelation_e...	CUSTOM_Nutzung der spezifischen sensi	●	●	○	●	✕

- VIEW to see the selection
- READ with the condition to show only certain attributes in the selection

- VIEW to view the table
- CREATE to create attributes
- READ with the condition to see only certain attributes
- UPDATE to edit them (since only those that are seen can be edited, the condition can be omitted here)
- DELETE to delete them (cannot be deleted in the example)



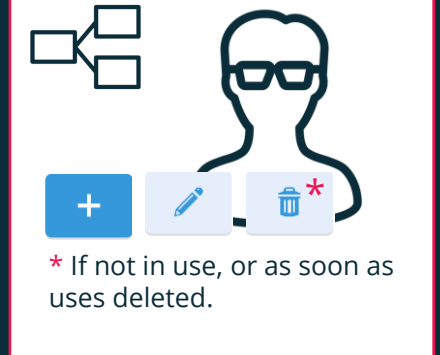
Relation Type





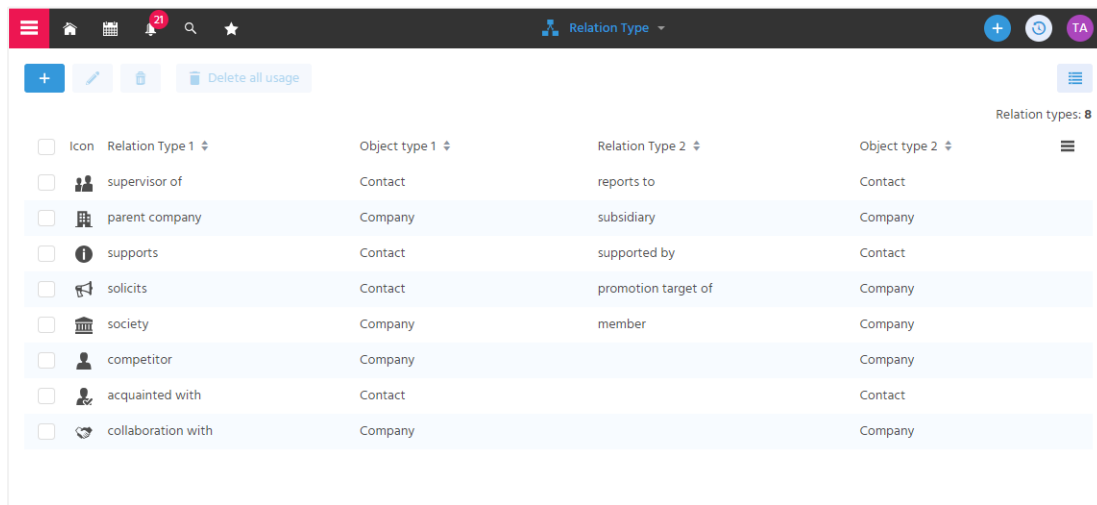
Relation Type

- What are the types of relationships?
 - Relationship without direction
 - Relationship with direction
 - Hierarchical relationships
- How are new relationship types created?
- How are relationship types adjusted?



Relation Type

Overview



☐ Icon	Relation Type 1	Object type 1	Relation Type 2	Object type 2
☐ 	supervisor of	Contact	reports to	Contact
☐ 	parent company	Company	subsidiary	Company
☐ 	supports	Contact	supported by	Contact
☐ 	solicits	Contact	promotion target of	Company
☐ 	society	Company	member	Company
☐ 	competitor	Company		Company
☐ 	acquainted with	Contact		Contact
☐ 	collaboration with	Company		Company

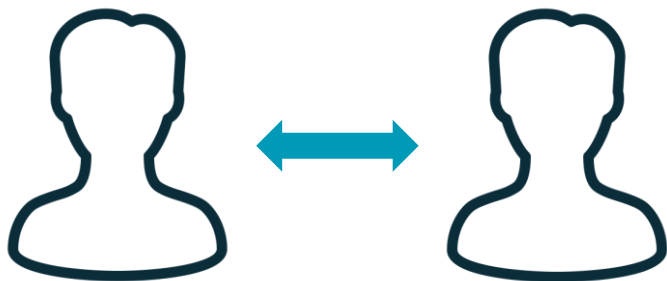
The Context "Relationship type" allows you to map relationships between data records of the same or different Contexts.

Thus, relationships between the object types contact and company can be mapped.

In the respective data record of the company or contact, the respective relationships are entered in the tab "Relations".

Relation Type

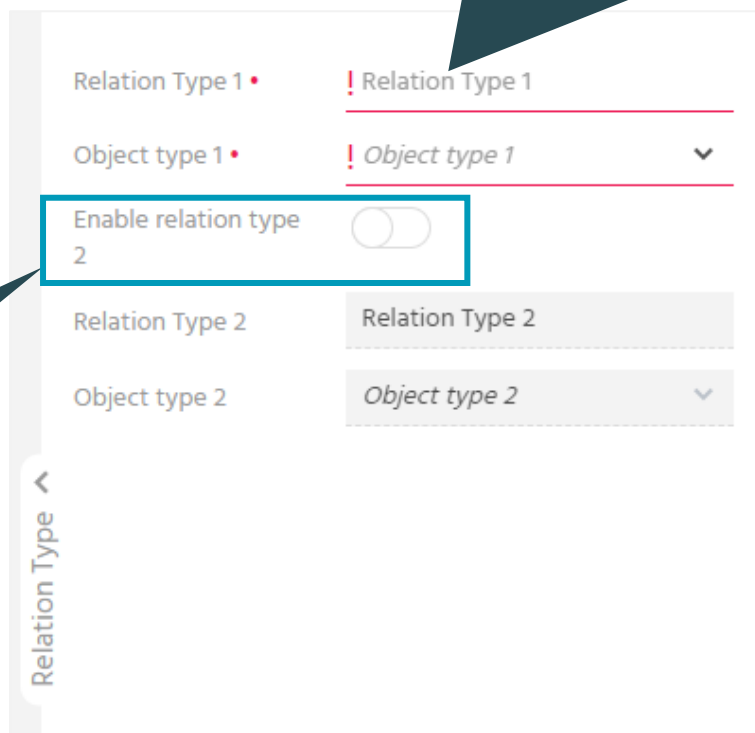
Relate objects **without** direction.



„collaboration with“

If the contents of the fields Relationship type 1 and 2 and Object type 1 and 2 are **identical**, the system automatically sets the "Relationship type 2 active" flag to inactive.

Enter the name in English in the "Relationship type" field. These must then be translated in a further step in the Designer so that they are available in the various client languages.



Relation Type 1 • ! Relation Type 1

Object type 1 • ! Object type 1 ▼

Enable relation type 2 ☐

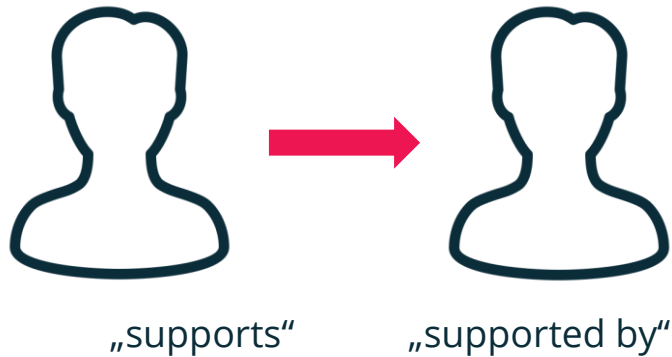
Relation Type 2 Relation Type 2

Object type 2 Object type 2 ▼

Relation Type <

Relation Type

Relate objects **with** direction.



Relation Type 1 • ! Relation Type 1

Object type 1 • ! Object type 1 ▼

Enable relation type 2 ☒

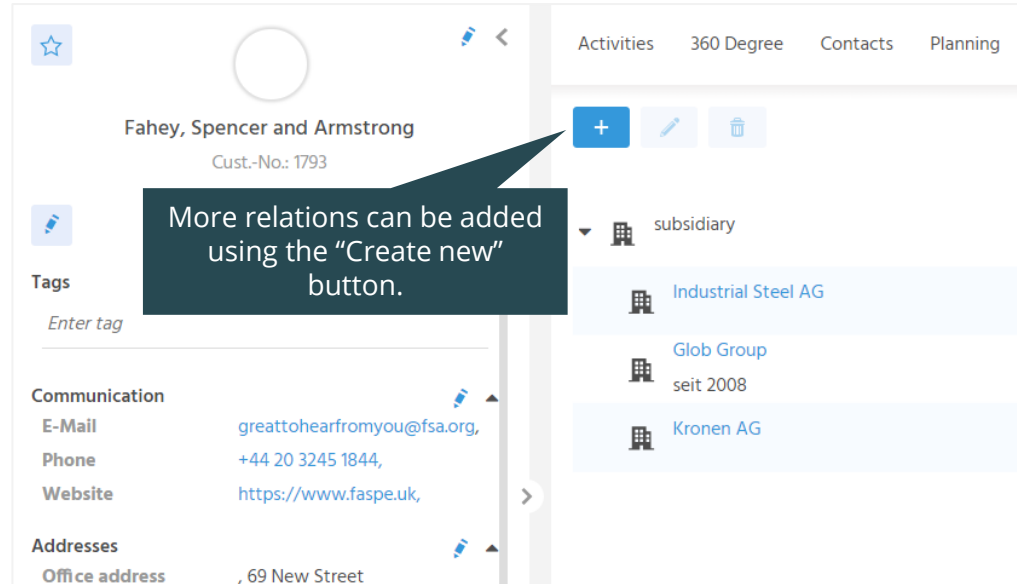
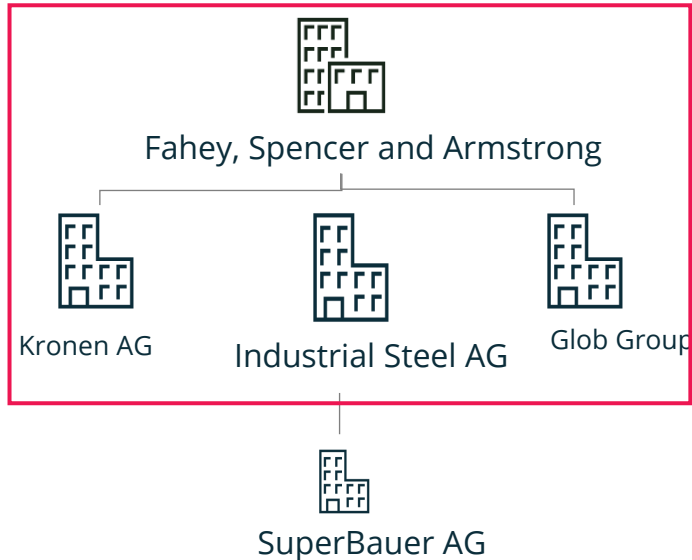
Relation Type 2 • ! Relation Type 2

Object type 2 • ! Object type 2 ▼

Relation Type <

Relation Type – Company

Example: parent company - subsidiaries



Activities 360 Degree Contacts Planning

Fahey, Spencer and Armstrong
Cust.-No.: 1793

+ Create new

Tags

Enter tag

Communication

E-Mail greattohearfromyou@fsa.org

Phone +44 20 3245 1844

Website <https://www.faspe.uk>

Addresses

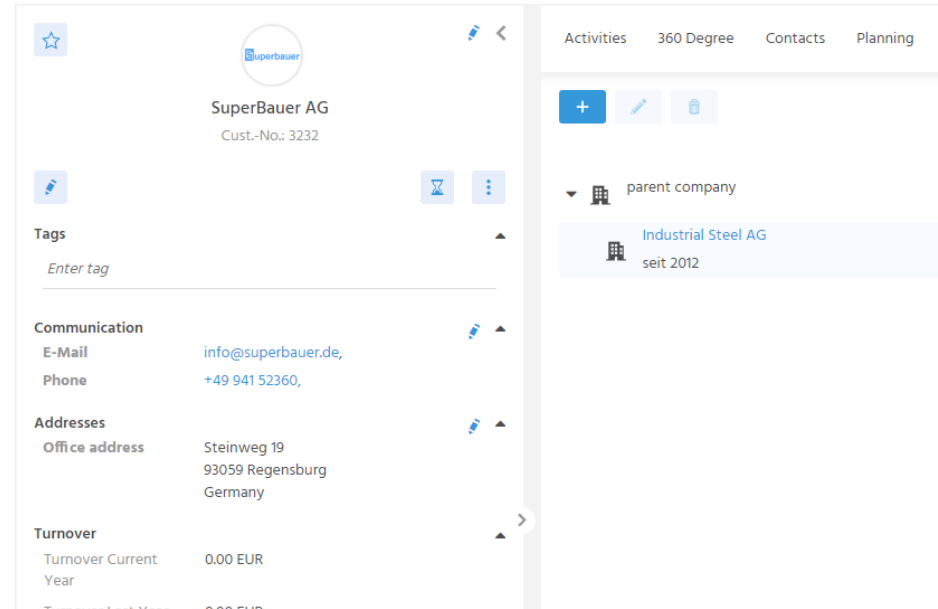
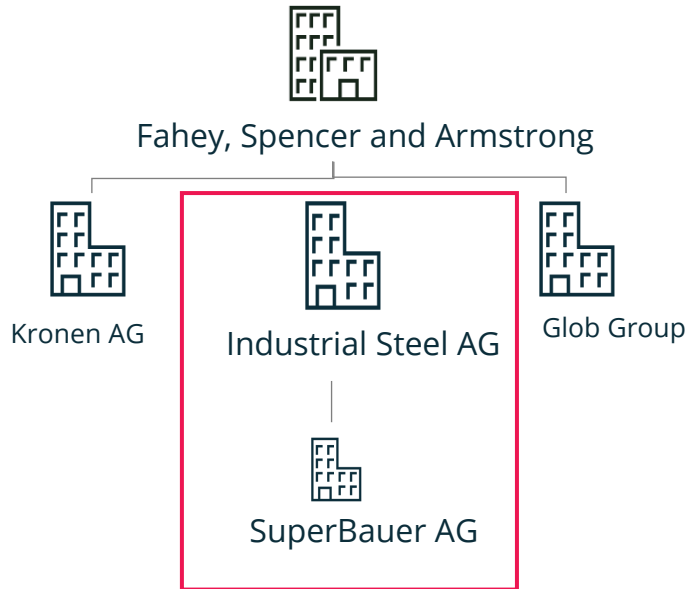
Office address , 69 New Street

subsidary

- Industrial Steel AG
- Glob Group
- seit 2008
- Kronen AG

Relation Type

Example: parent company - subsidiaries



Star icon

SuperBauer AG
Cust.-No.: 3232

Tags
Enter tag

Communication
E-Mail: info@superbauer.de
Phone: +49 941 52360

Addresses
Office address: Steinweg 19
93059 Regensburg
Germany

Turnover
Turnover Current: 0,00 EUR
Year: 0,00 EUR

Activities 360 Degree Contacts Planning

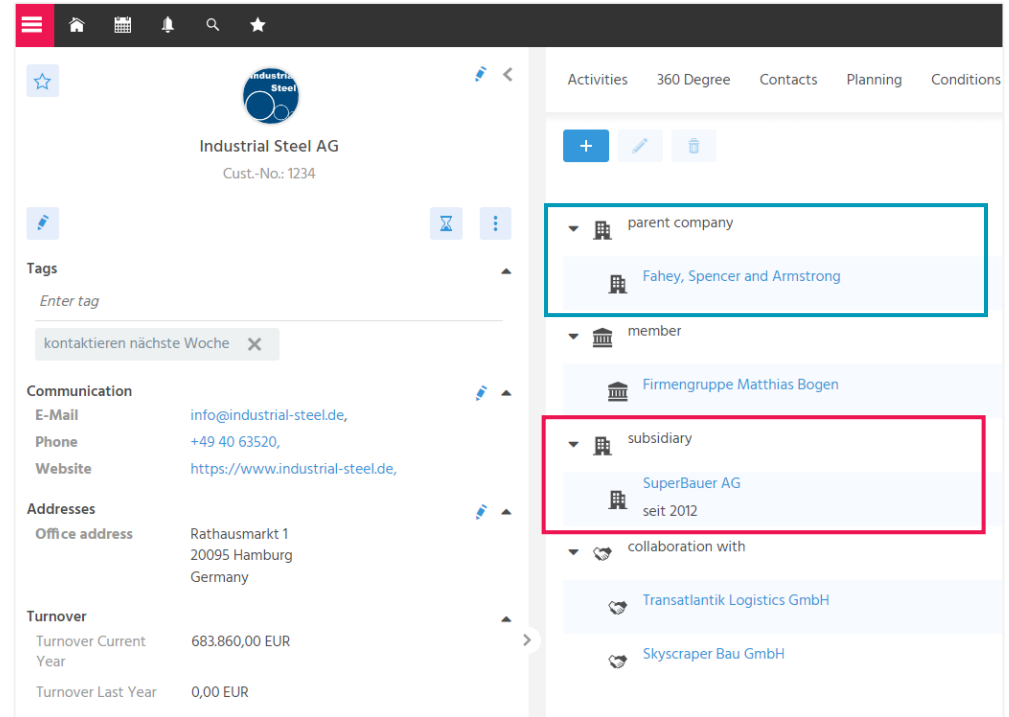
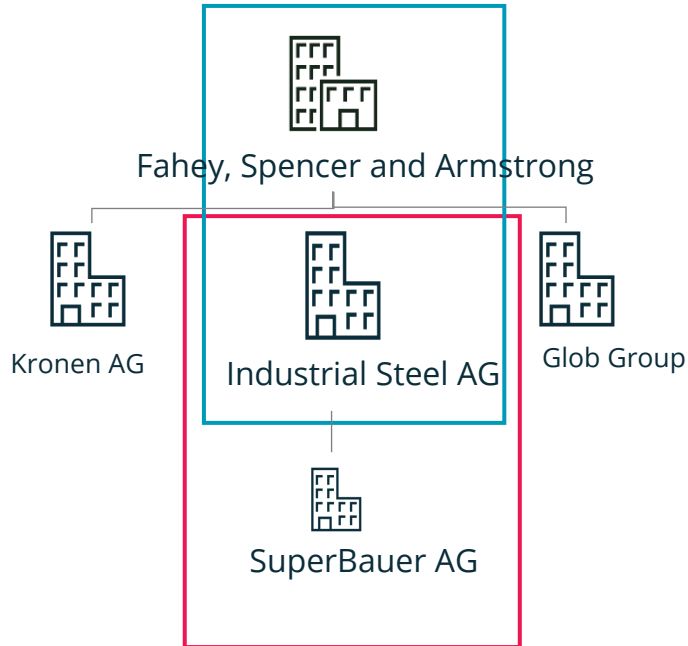
+ Edit Delete

parent company

Industrial Steel AG
seit 2012

Relation Type

Example: parent company - subsidiaries



Industrial Steel AG
Cust.-No.: 1234

parent company

- Fahey, Spencer and Armstrong

subsidiary

- SuperBauer AG seit 2012

Communication

E-Mail: info@industrial-steel.de
Phone: +49 40 63520,
Website: <https://www.industrial-steel.de>

Addresses

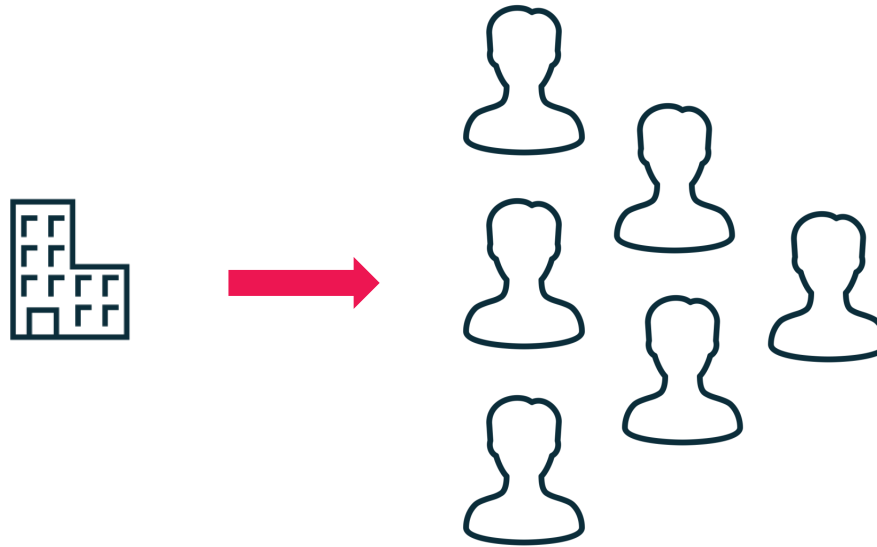
Office address: Rathausmarkt 1
20095 Hamburg
Germany

Turnover

Turnover Current Year: 683.860,00 EUR
Turnover Last Year: 0,00 EUR

Relation Type

Relationship between different object types: Advertises - advertising target group of

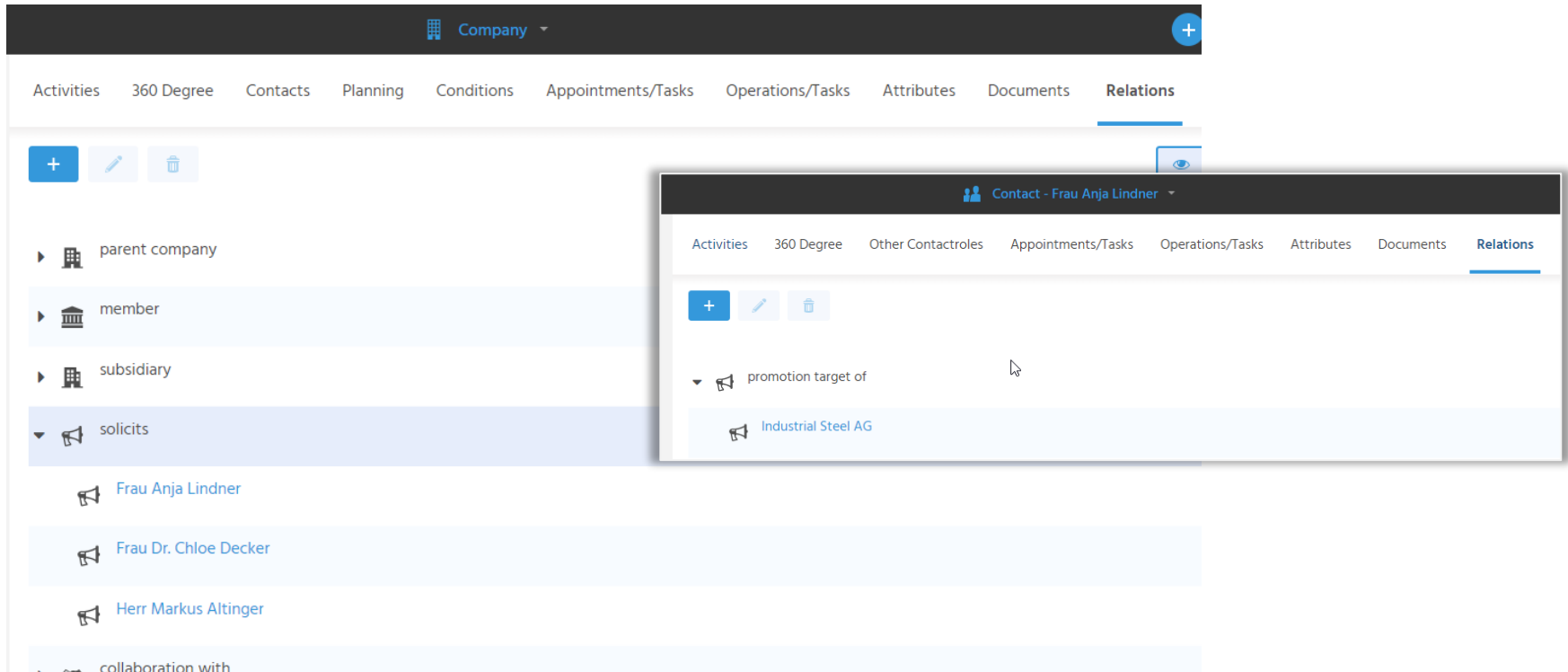


Advertises

advertising target group of

Relation Type

Relationship between different object types: Advertises - advertising target group of



The screenshot displays the ADITO software interface. At the top, a dark header bar shows 'Company' with a dropdown arrow and a blue '+' button. Below this is a navigation bar with tabs: Activities, 360 Degree, Contacts, Planning, Conditions, Appointments/Tasks, Operations/Tasks, Attributes, Documents, and Relations (which is currently selected). The main content area on the left shows a list of relationship types with icons: 'parent company' (building), 'member' (classroom), 'subsidiary' (building), 'solicits' (megaphone), and 'collaboration with' (two people). The 'solicits' relationship is highlighted in blue. A modal window is open over this relationship, showing a detailed view for 'Contact - Frau Anja Lindner'. This modal has its own navigation bar with tabs: Activities, 360 Degree, Other Contactroles, Appointments/Tasks, Operations/Tasks, Attributes, Documents, and Relations (selected). Inside the modal, there is a blue '+' button, a pencil icon, and a trash icon. Below these is a dropdown menu with a megaphone icon and the text 'promotion target of'. A list item 'Industrial Steel AG' with a megaphone icon is selected and highlighted in blue.

Relation Type

How can relationship types be customized?

RELATION TYPE ✕

RELATION TYPE 1 •
parent company

OBJECT TYPE 1 •
Company ▼

ENABLE RELATION TYPE 2
☒

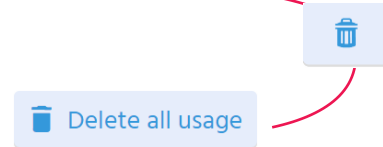
RELATION TYPE 2 •
subsidiary

OBJECT TYPE 2 •
Company ▼

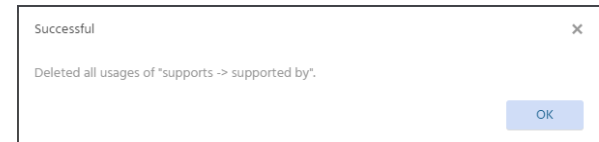


* When **not** in use

* when in use



**It will be deleted immediately.
No confirmation is requested.**



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Einzigartige Beziehungen