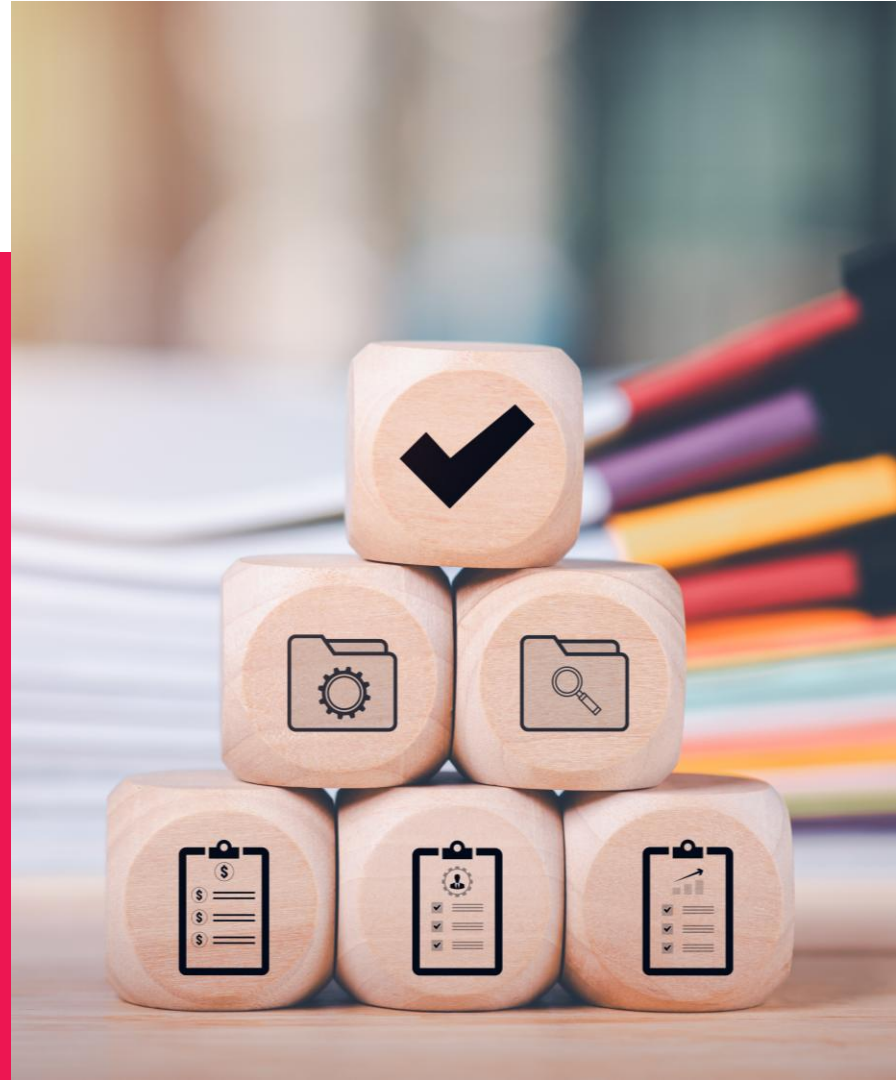




Checklists

ADITO Software GmbH

Version as of xRM 2025.9.1 | November 2025





Agenda

- [Overview](#)
- [Creating checklists](#)
- [Creating checklist entries](#)
- Specific process for
 - [Company checklists](#)
 - [Opportunity phases](#)
 - [Service tickets](#)
 - [Eventdates](#)
 - [Projecttickets](#)

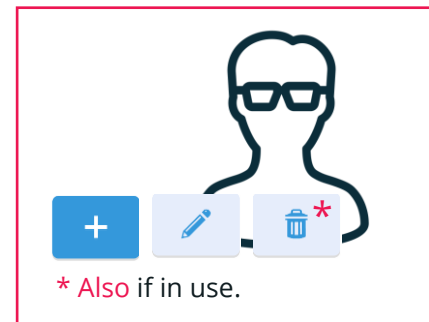
Checklists

Overview

Checklists can be used to map qualification measures, among other things.

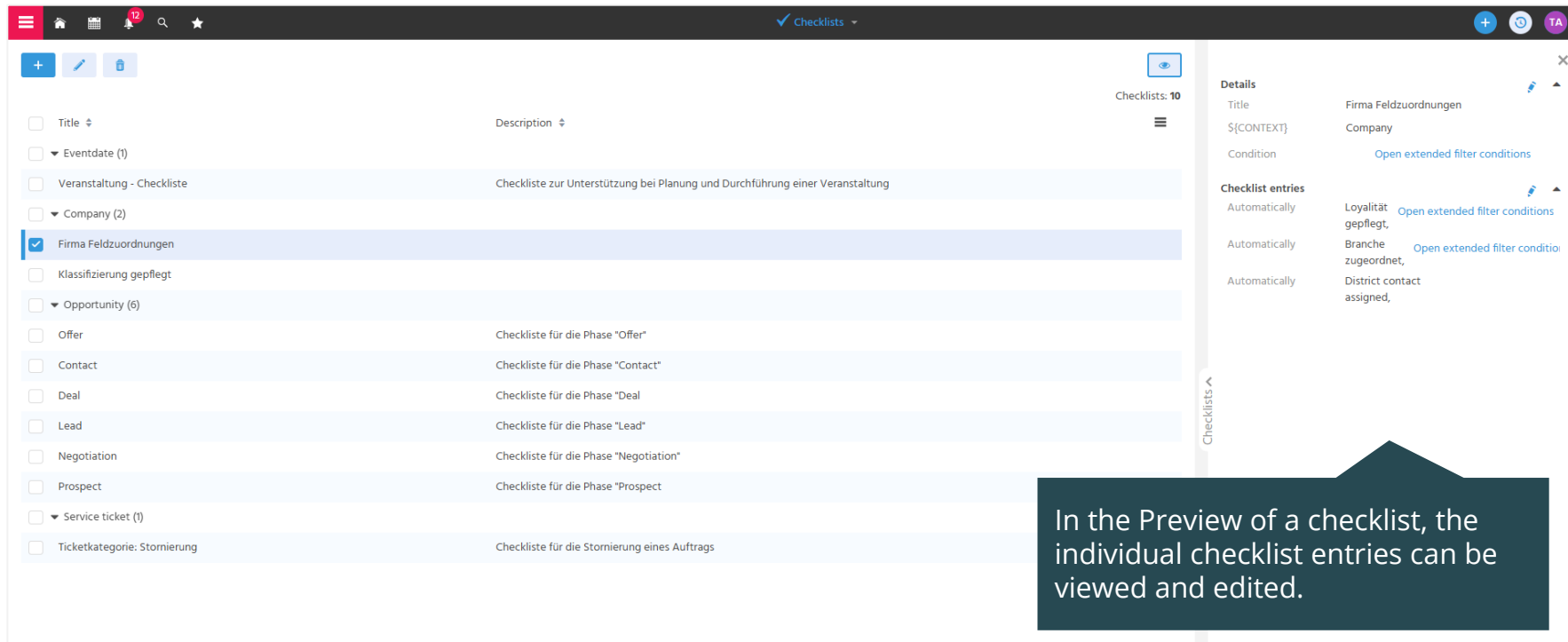
- Checklists can be linked to conditions, which refer to phases in the opportunity or to filterable conditions within the company.
- Checklists consist of **automatic and/or manual entries**, that means
 - Automatic entries are checked automatically by the system and
 - Manual entries must be marked as completed by the user.
- Automatic checklist entries can be mapped using filters or in Customizing.

The flexible checklist logic can be integrated in any Contexts.
In the xRM, it is available in the Opportunity, Company, Eventdates, Service Ticket and in the Projectticket.



Checklists

Overview of all checklists in the system



Checklists: 10

Title	Description
▼ Eventdate (1)	
Veranstaltung - Checkliste	Checkliste zur Unterstützung bei Planung und Durchführung einer Veranstaltung
▼ Company (2)	
☒ Firma Feldzuordnungen	
Klassifizierung gepflegt	
▼ Opportunity (6)	
Offer	Checkliste für die Phase "Offer"
Contact	Checkliste für die Phase "Contact"
Deal	Checkliste für die Phase "Deal"
Lead	Checkliste für die Phase "Lead"
Negotiation	Checkliste für die Phase "Negotiation"
Prospect	Checkliste für die Phase "Prospect"
▼ Service ticket (1)	
Ticketkategorie: Stornierung	Checkliste für die Stornierung eines Auftrags

Details

Title: \${CONTEXT}

Condition: [Open extended filter conditions](#)

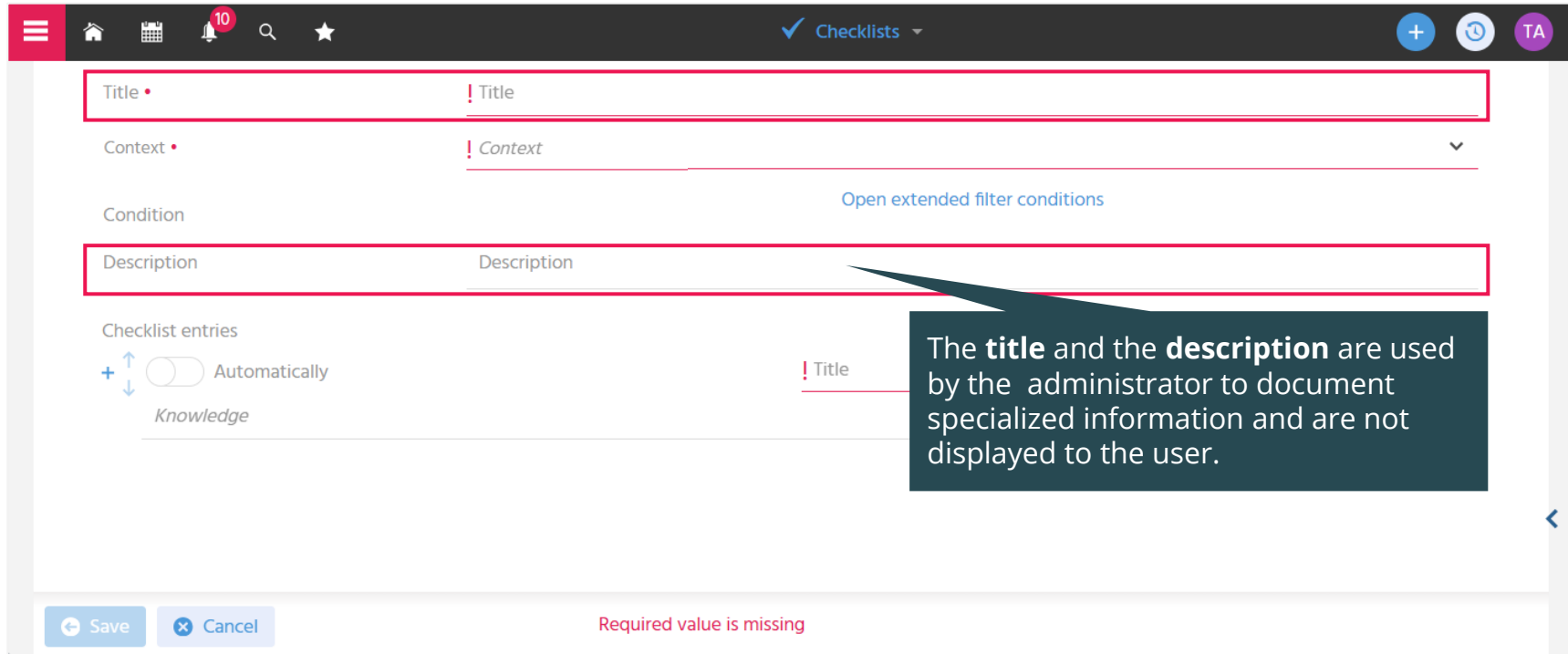
Checklist entries

Automatically	Details
Automatically	Loyalität gepflegt, Open extended filter conditions
Automatically	Branche zugeordnet, Open extended filter conditions
Automatically	District contact assigned,

In the Preview of a checklist, the individual checklist entries can be viewed and edited.

Creating a checklist

Title and description



The screenshot shows the ADITO interface for creating a checklist. The top navigation bar includes a menu icon, home, calendar, notifications (10), search, and star icons. The main header shows a checkmark icon, 'Checklists', and user profile icons (+, TA). The form fields are:

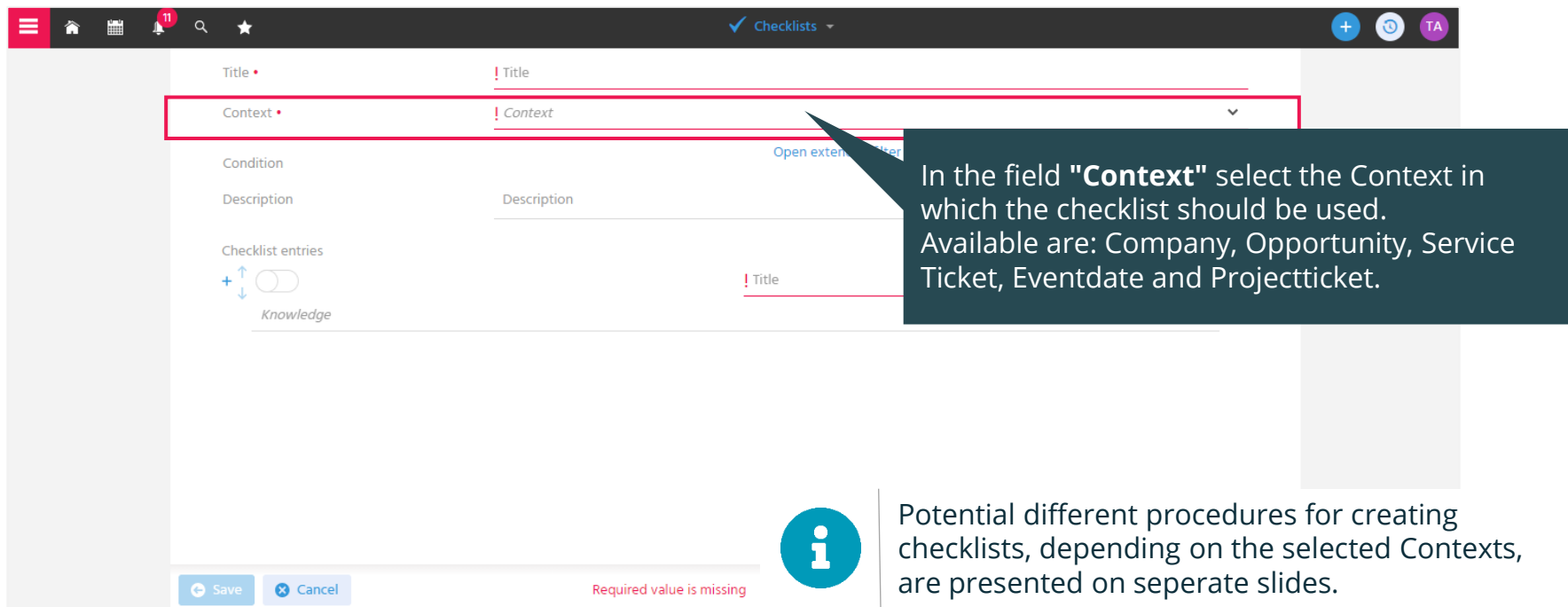
- Title**: A text input field with a red error message '!' Title.
- Context**: A dropdown menu with a red error message '!' Context.
- Condition**: A text input field with a link 'Open extended filter conditions'.
- Description**: A text input field with a red error message '!' Title.

Below the form, there are 'Checklist entries' with a toggle for 'Automatically' and a 'Knowledge' section. At the bottom, there are 'Save' and 'Cancel' buttons, and a red error message 'Required value is missing'.

The **title** and the **description** are used by the administrator to document specialized information and are not displayed to the user.

Creating a checklist

In which Context is the checklist displayed?

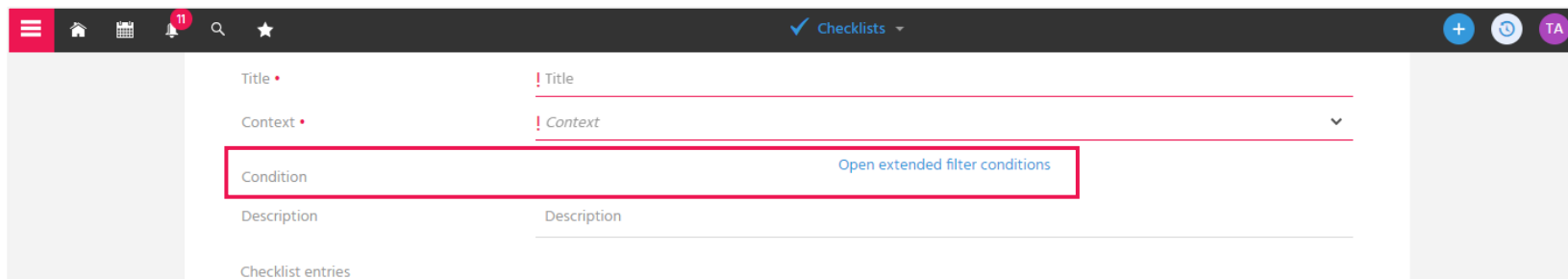


In the field "**Context**" select the Context in which the checklist should be used. Available are: Company, Opportunity, Service Ticket, Eventdate and Projectticket.

Potential different procedures for creating checklists, depending on the selected Contexts, are presented on separate slides.

Creating a checklist

When is the checklist displayed?



The screenshot shows the ADITO interface for creating a checklist. The top navigation bar includes a menu icon, home, calendar, notifications (11), search, and a star icon. The 'Checklists' section is active, indicated by a checkmark and a dropdown arrow. On the right, there are buttons for adding (+), refreshing, and a user profile (TA). The form fields are as follows:

- Title**: A text input field with a red exclamation mark icon.
- Context**: A dropdown menu with a red exclamation mark icon and a downward arrow.
- Condition**: A text input field, highlighted with a red box. To its right is a link that says "Open extended filter conditions".
- Description**: A text input field.

Below the form, there is a section labeled "Checklist entries".

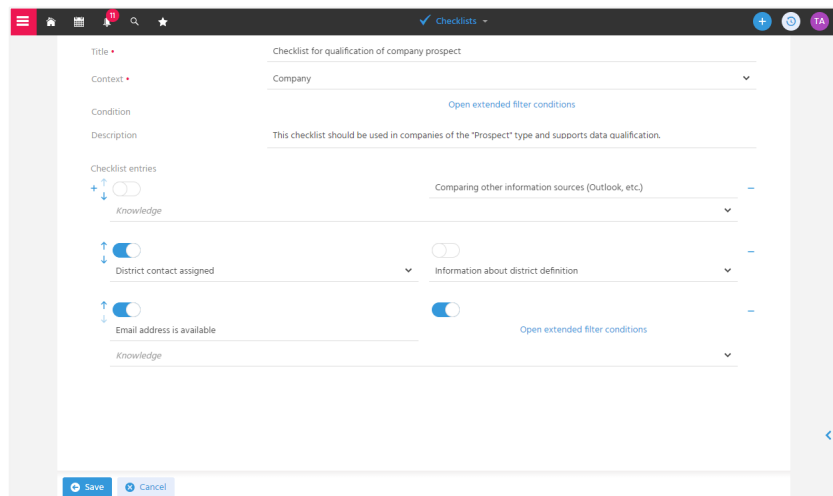
In the field "**Condition**", you can enter the condition by using a filter. If this condition is fulfilled, the checklist is displayed in the respective datasets.

For the **definition of a condition**, the **filter criteria of the Contexts** (Company, Opportunity, Service ticket or Event) are available.

Example: A checklist should only be displayed for companies of the type "Prospect," so the user is presented with the necessary steps for qualifying a company.

Creating checklist entries

Creating checklist entries for a checklist



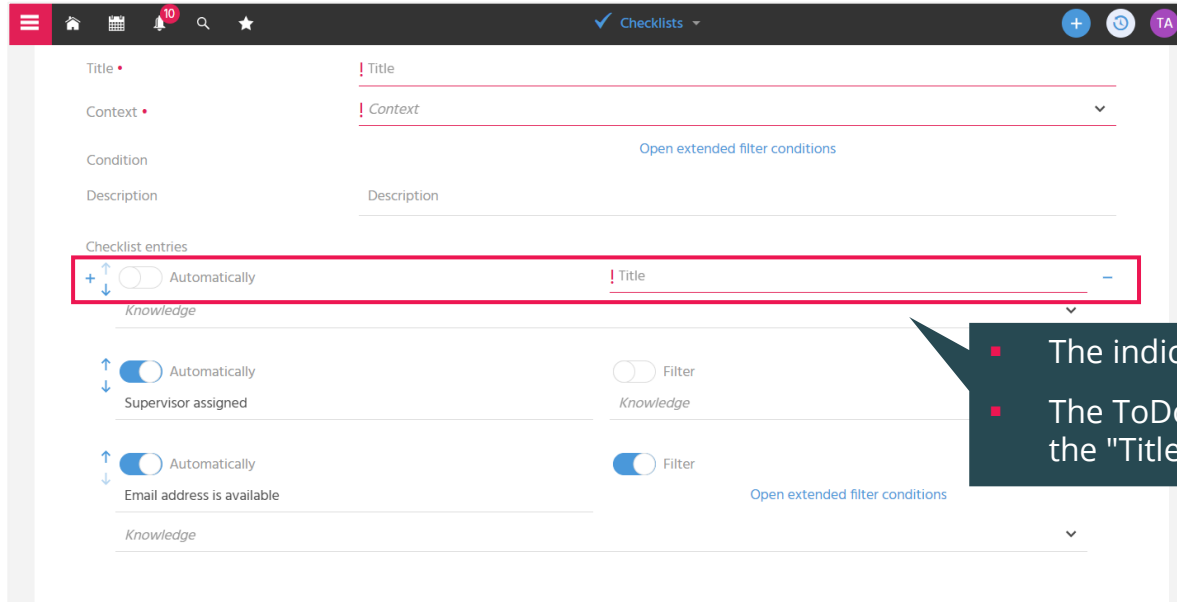
For a checklist, **any number of checklist entries** can be created +.

Two kinds of checklist entries can be defined.

- **"Manual checklist entries"**, which are checked and set to „fullfilled“ by a user.
- **"Automatic checklist entries"**, which are checked and set to „fullfilled“ by the system. These can either be defined by **Customizing** and made available for selection or be defined using **filters**.

Creating manual checklist entries

How are manual checklist entries created?



- The indicator "Automatic" **must be inactive**.
- The ToDo for the user is entered as free text in the "Title" field.

Creating automatic checklist entries

How are automatically customized checklist entries created?

The screenshot shows the 'Checklists' interface. On the left, a sidebar lists fields: Title, Context, Condition, Description, and Checklist entries. The 'Checklist entries' section shows a list of entries. The first entry, 'Supervisor assigned', is highlighted with a red box. This entry has an 'Automatically' toggle (checked) and a 'Filter' toggle (unchecked). A red box also highlights the 'Title' field of this entry, which contains a red exclamation mark. A dark blue callout box points to the 'Title' field with the following text:

- The "Automatically" toggle button is activated.
- The "Filter" toggle button must be deactivated.
- In the field "Title", a customized entry has to be selected.

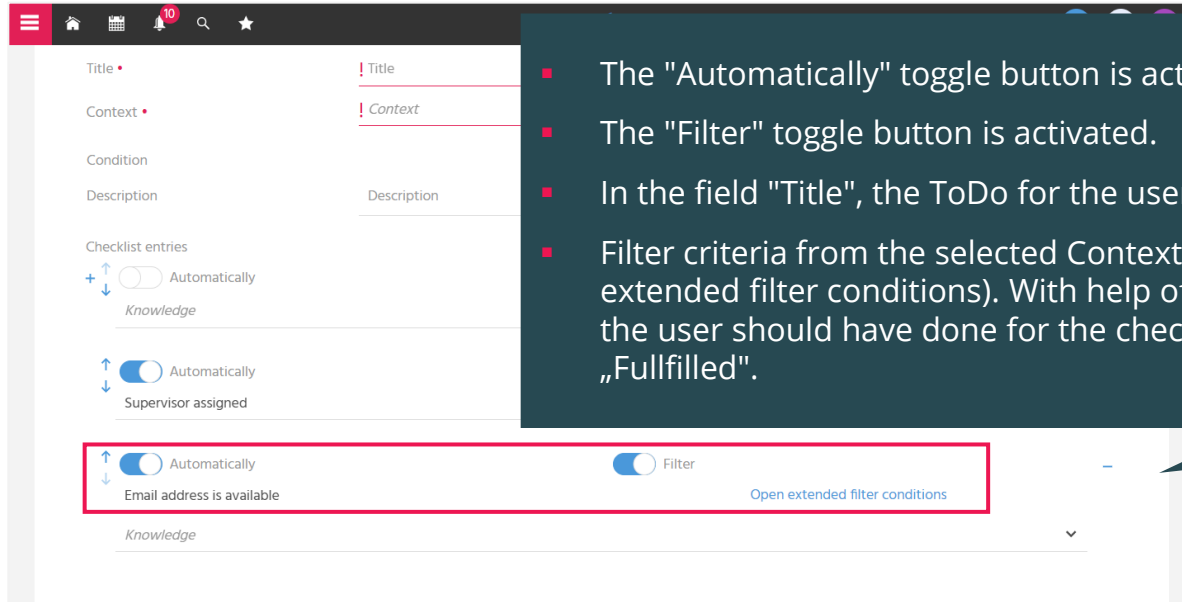
Below the highlighted entry, another entry 'Email address is available' is shown with both 'Automatically' and 'Filter' toggles activated.



If there are no customized checklist entries for a context, the filter toggle is automatically activated and only automatic checklist entries can be entered via filters (see next slide).

Creating automatic checklist entries

How are automated checklist entries created based on filter criteria?



The screenshot shows a software interface with a sidebar on the left containing a menu, home icon, calendar, notifications (10), search, and star icons. The main area displays a checklist with the following items:

- Title: ! Title
- Context: ! Context
- Condition
- Description: Description
- Checklist entries:
 - Automatically (toggle off) Knowledge
 - Supervisor assigned (toggle on) Knowledge
 - Email address is available (toggle on) Knowledge

A red box highlights the "Email address is available" entry, which includes a "Filter" toggle (on) and a link "Open extended filter conditions".

- The "Automatically" toggle button is activated.
- The "Filter" toggle button is activated.
- In the field "Title", the ToDo for the user is entered as a free text.
- Filter criteria from the selected Context are displayed in the filter (open extended filter conditions). With help of the filter criteria, you can define what the user should have done for the checklist entry to be automatically set to „Fullfilled“.

Creating checklist entries

Assign a knowledge entry

The screenshot displays a software interface for creating checklist entries. The main form on the left includes fields for Title, Context, Condition, and Description. Below these are checkboxes for 'Knowledge' and 'District contact assigned', each with a toggle switch. A red error message at the bottom states 'Required value is missing'. A dark blue callout box with white text explains: 'You can assign a knowledge entry to a checklist entry. The knowledge entry becomes available to the user as a link in the checklist entry.' A red-bordered inset shows a 'Knowledge' dropdown menu with a table of entries. The first entry, 'Information about district definition', is highlighted. A red arrow points from this entry to the 'Information about district definition' link within a checklist entry in a secondary window on the right.

Title • Checklist for qualification of company prospect

Context • Company

Condition

Description This ch

Checklist entries

Knowledge

District contact assigned

Email address is available

Required value is missing

You can assign a knowledge entry to a checklist entry. The knowledge entry becomes available to the user as a link in the checklist entry.

Title	Text content
Information about district definition	check attached PDF file for further information
Wie melde ich mich richtig krank?	Der Krankmeldeprozess zielt auf direkte Kommunikati
Welche Arbeitszeitmodelle gibt es?	Vertrauensarbeitszeit Die Vertrauensarbeitszeit bedeu
Hilfe beim E-Mail schreiben	1. Wählen Sie die richtige E-Mail-Adresse Nutzen Sie st
Sendeverfolgung für den Kunden	Dem Kunde kann auf Nachfrage ein Code zur Sendevei
Richtlinien bei Stornierungen	Fine Stornierung darf nur angenommen werden wenn

Company - Industrial Steel AG

Checklist entries

Checklist entry

Done by

Done on

Knowledge

Comparing other information sources (Outlook, etc.)

Loyalität gepflegt

Klassifizierung gepflegt

Branche zugeordnet

District contact assigned

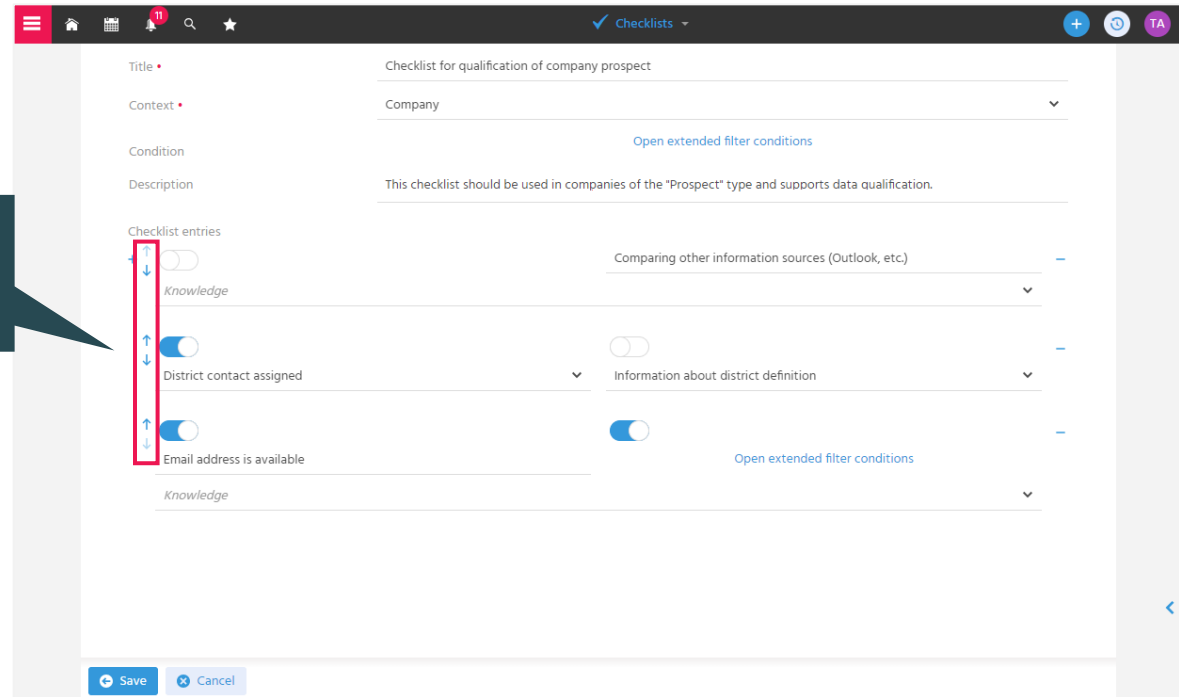
Email address is available

Information about district definition

Creating checklist entries

How are checklist entries sorted?

With the arrow buttons, you can customize the sorting that is presented to the user.



The screenshot shows the ADITO interface for creating a checklist. The top bar includes navigation icons and a 'Checklists' dropdown. The main form has fields for Title, Context, Condition, and Description. Below these is a 'Checklist entries' section with a list of items. Each item has a toggle switch and a dropdown menu. A red box highlights the arrow buttons (up and down) next to the toggle switches, indicating they are used for customizing the sorting of the entries. The bottom of the form has 'Save' and 'Cancel' buttons.

Item	Toggle	Dropdown
Comparing other information sources (Outlook, etc.)	Off	Knowledge
District contact assigned	On	Information about district definition
Email address is available	On	Open extended filter conditions

Checklists for: Companies



Company checklist

User view

Completed ▾

Automatically ▾

Checklist entry ▾

Completed by ▾

Completed on ▾

Knowledge ▾

Checklist entries: 4

Save Reset

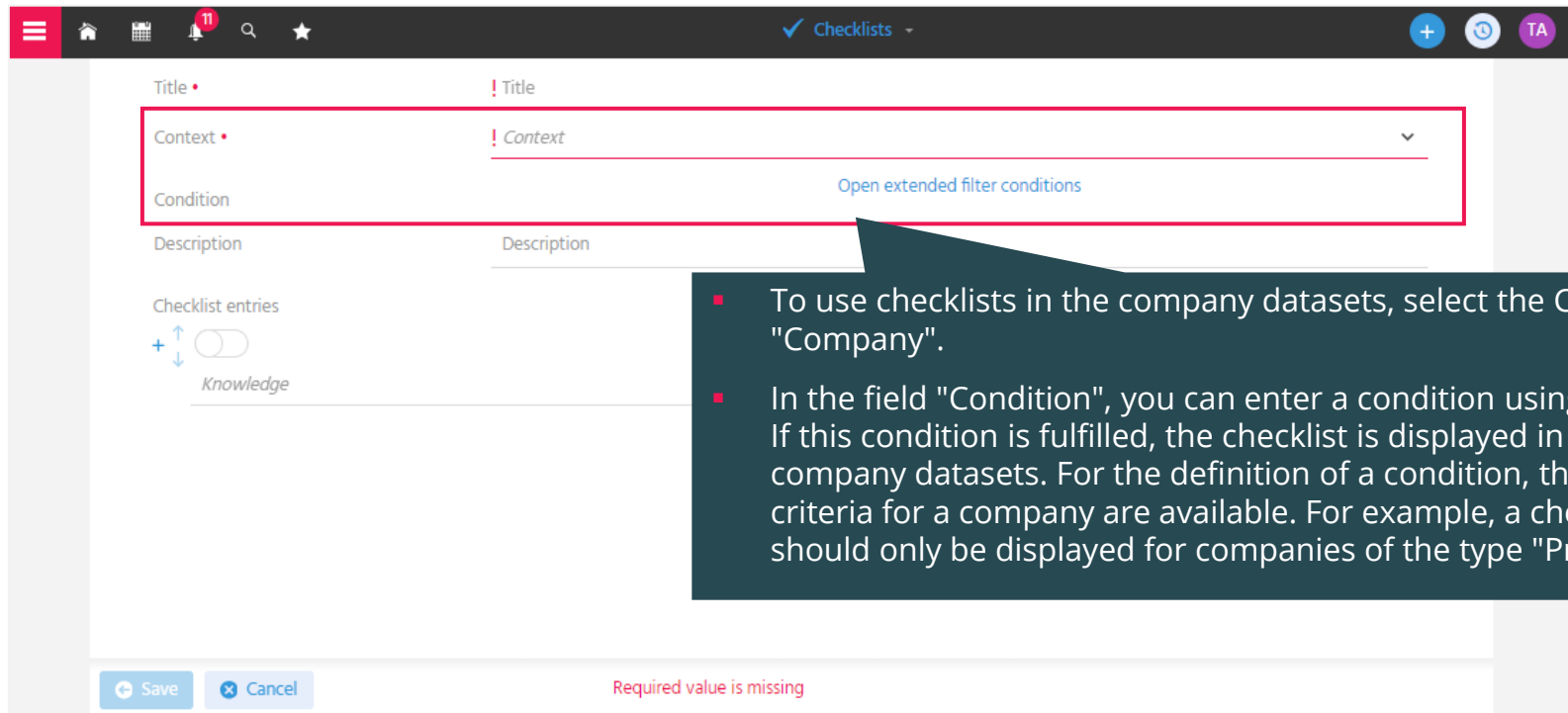
Manual checklist entries (Column "Automatically" = "No") are set to "Fulfilled" by the user. **It's documented who completed it and when.** It is also possible to undo the manually "Fullfilled".

Automatic checklist entries are checked by the system and marked as fullfilled. **There is no documentation regarding who did what and when.**

The reason for this is that within the filter of the checklist entry, a complex logic can be mapped (e.g. 3 fields have to be entered). Therefore, it's not possible to trace the checklist entries back to a specific date.

Company checklist

Create new



Title • ! Title

Context • ! Context

Condition [Open extended filter conditions](#)

Description Description

Checklist entries

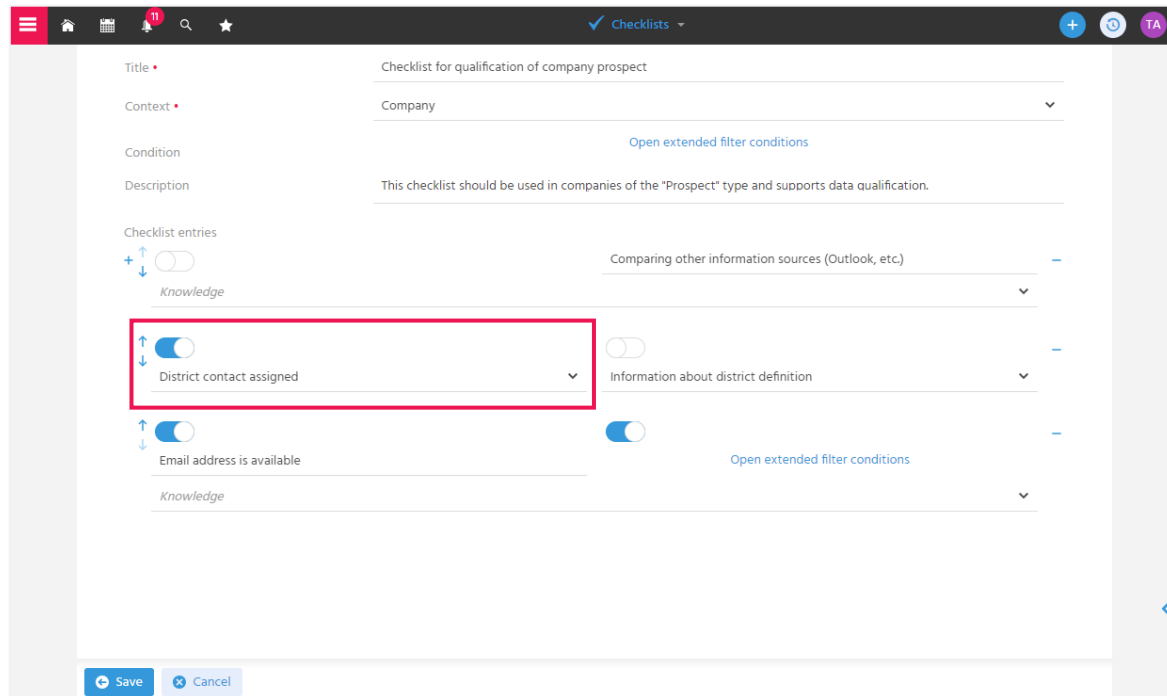
+ ↑ ○
- ↓ Knowledge

[Save](#) [Cancel](#) Required value is missing

- To use checklists in the company datasets, select the Context "Company".
- In the field "Condition", you can enter a condition using a filter. If this condition is fulfilled, the checklist is displayed in the company datasets. For the definition of a condition, the filter criteria for a company are available. For example, a checklist should only be displayed for companies of the type "Prospect".

Company checklist

Create new



The general procedure for creating checklist entries can be found [here](#).

Customized, automatic checklist entries for company checklists:

- Default address
- Default mail
- Default phone
- District contact assigned

Checklists for: Opportunity phases

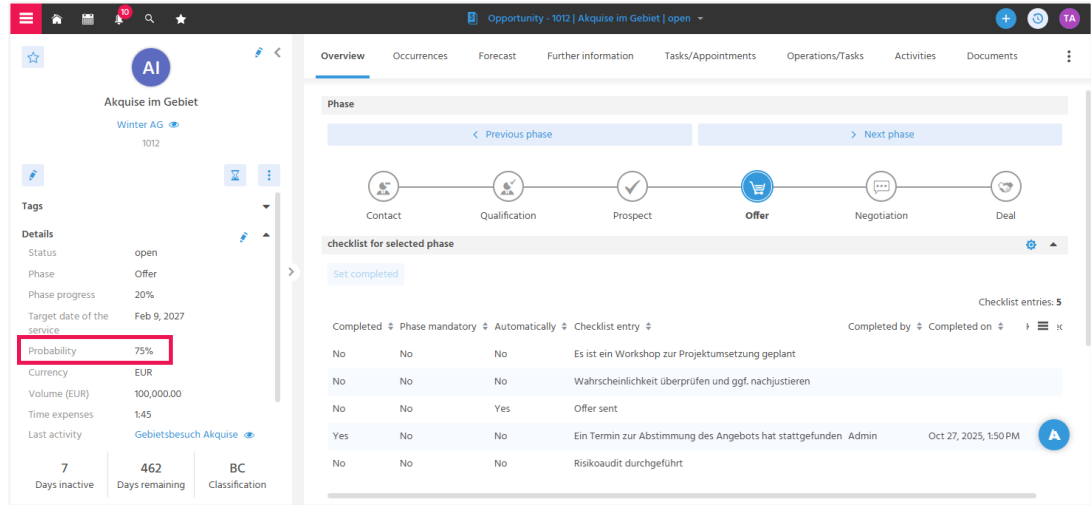


Opportunity checklist

User view

An opportunity can go through different phases.

- A checklist can be defined for each phase, with the entries **automatically** checked by the system or completed **manually** by the user.
- Per checklist entry, it can be defined whether this must be fulfilled in order to switch to the next phase.
- A **probability** can be entered for each phase, which is displayed in the opportunity preview when switching to the respective phase.



The screenshot displays the ADITO user interface for an opportunity named "Akquise im Gebiet" (1012). The left sidebar shows details such as Status (open), Phase (Offer), Phase progress (20%), Target date of the service (Feb 9, 2027), and Probability (75%, highlighted with a red box). The main area shows the "Overview" tab with a phase progression diagram: Contact, Qualification, Prospect, Offer (current phase), Negotiation, and Deal. Below the diagram, a "checklist for selected phase" is shown with a table of checklist entries.

Completed	Phase mandatory	Automatically	Checklist entry	Completed by	Completed on
No	No	No	Es ist ein Workshop zur Projektumsetzung geplant		
No	No	No	Wahrscheinlichkeit überprüfen und ggf. nachjustieren		
No	No	Yes	Offer sent		
Yes	No	No	Ein Termin zur Abstimmung des Angebots hat stattgefunden	Admin	Oct 27, 2025, 1:50 PM
No	No	No	Risikoaudit durchgeführt		

Opportunity phases

Definition of the phases

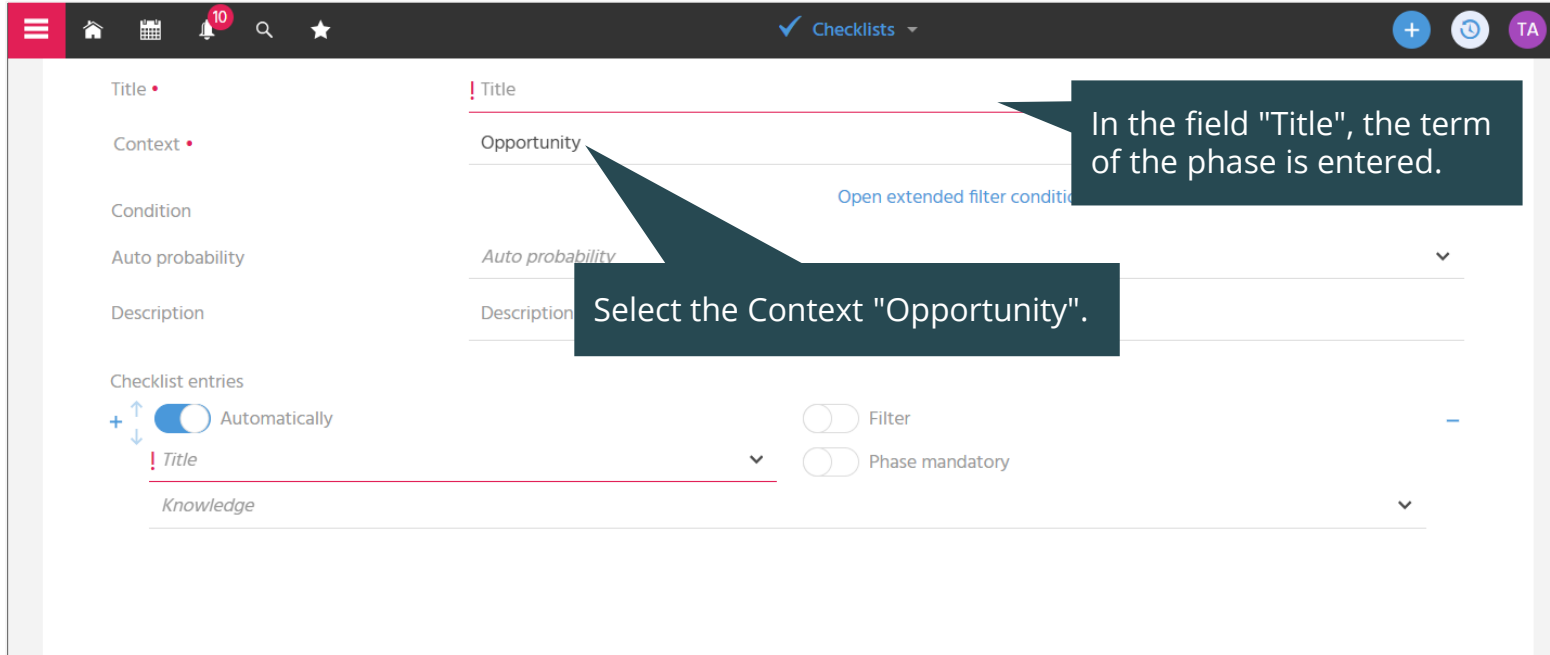
The phases can be added with the **Keyword SALESPROJECTPHASE**.

Therefore... :

- **You can add new phases** by entering a Keyword Entry.
- You can **set** existing phases to **inactive** or **delete** them.
- The **name of the phases** are entered with technical placeholders.
Therefore, the same term is displayed in both DE and EN. To do this, the respective expression for the placeholder must be entered in the ADITO Designer in both translation files.
- The **order of the phases** can be adjusted in the settings for the Keyword Category.
- With the keyword attribute, the **icons of the phases** in the stepper component are controlled.

Opportunity checklist

Create new



The screenshot shows the 'Create new' checklist form in the ADITO application. The form is titled 'Opportunity' and includes several fields: Title, Context, Condition, Auto probability, and Description. The 'Context' field is set to 'Opportunity'. The 'Title' field is highlighted with a red border and a red exclamation mark icon, indicating a required field. A callout box points to the 'Title' field with the text: 'In the field "Title", the term of the phase is entered.' Another callout box points to the 'Context' field with the text: 'Select the Context "Opportunity".' The 'Condition' field is set to 'Open extended filter condition'. The 'Auto probability' field is set to 'Auto probability'. The 'Description' field is set to 'Description'. The 'Checklist entries' section includes a toggle for 'Automatically' (checked) and a list of entries: 'Title' (with a red exclamation mark icon) and 'Knowledge'. The 'Filter' and 'Phase mandatory' checkboxes are also visible.

! Title

Opportunity

Open extended filter condition

Auto probability

Description

Checklist entries

+ ↑ ↓ Automatically

! Title

Knowledge

Filter

Phase mandatory

In the field "Title", the term of the phase is entered.

Select the Context "Opportunity".

Opportunity checklist

Create new

Extended filter condition

all one Add filter condition Add group

Phase equal *Qualification

Phase
equal
Value

Contact Qualification Prospect Offer Negotiation Deal

A Phase filter has to be set when creating a checklist entry for the Opportunity context.
Required value is missing

- In the field "Condition", the phase in which the checklist is to be displayed in the opportunity must be defined using the "Phase equal..." filter condition (see note at the bottom of the screenshot).
- The condition can consist of several filters. Therefore, the filter criteria of the Context "Opportunity" are available. For example, the checklist should only be displayed, when the status of the opportunity is equal to "Partially won".
- Several checklists with different conditions can be defined for each phase. These are displayed in the Opportunity based on their condition.

Opportunity checklist



Create new

The automatic probability specified (e.g., 25%, 50%, etc.) is set in the Opportunity context as the phase defined by the condition.

With the toggle button "Phase mandatory", you define if a checklist entry should be set to fulfilled, in order to switch to the next phase.

The possible phases can be added in the **PROBABILITY** section.

The automatic probability specified here (0%, 25%, 50%, etc.) is set in the Opportunity as soon as the phase defined by the condition is reached.

The possible probability values can be added in the Keyword Category PROBABILITYSALESPROJECT.



Opportunity checklist



Create new

Checklists

Title • Offer

Context • Opportunity

Condition [Open extended filter conditions](#)

Auto probability *Auto probability*

Description Description

Checklist entries

+ ↑ ☒ Automatically

! Title

Knowledge

☐ Filter

☐ Phase mandatory

A Phase filter has to be set when creating a checklistentry for the Opportunity context.
Required value is missing

The general procedure for creating checklist entries can be found [here](#).

Customized, automatic checklist entries for opportunity phases:

Project team: "Project manager"	Probability 100%
Contact point	Status: "won"
Volume	Contract
Project start	Project team
Classification fields	Further customer meetings
Project team: "Internal sales "	Prioritization based on segmentation discussion
Project team roles	First customer meeting
Offer exists	Source/origin of contact generation
Project start within the next 12 months	Opportunity/responsible person set
Offer sent out	

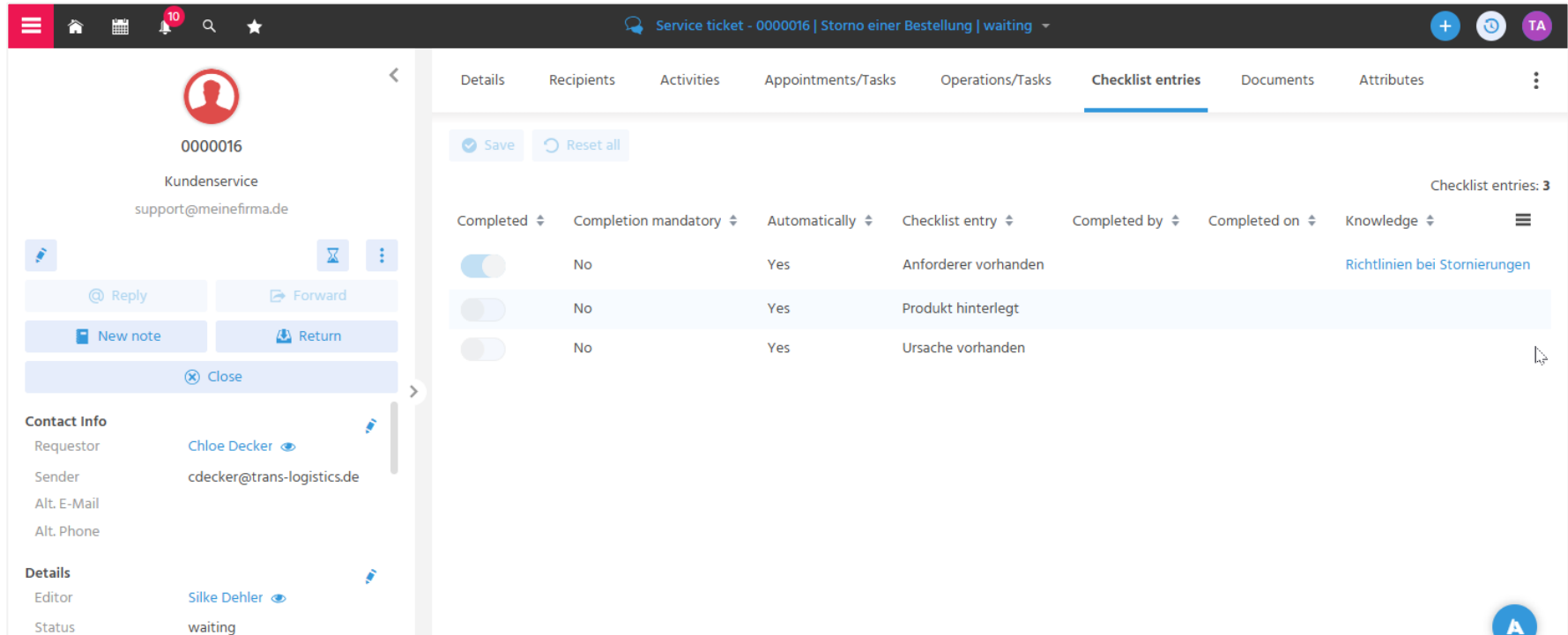


Checklists for: Service ticket



Checklists in the service ticket

User view



The screenshot displays the ADITO user interface for a service ticket. The top navigation bar shows the ticket ID '0000016' and its status 'Storno einer Bestellung | waiting'. The left sidebar contains user information for 'Kundenservice' and action buttons like 'Reply', 'Forward', 'New note', 'Return', and 'Close'. The main content area is divided into tabs: 'Details', 'Recipients', 'Activities', 'Appointments/Tasks', 'Operations/Tasks', 'Checklist entries' (selected), 'Documents', and 'Attributes'. The 'Checklist entries' tab shows a table with three entries, each with a 'Completed' toggle, 'Completion mandatory' status, 'Automatically' status, and a description. A 'Save' button and a 'Reset all' button are at the top of the table. A 'Knowledge' dropdown menu is also visible.

Service ticket - 0000016 | Storno einer Bestellung | waiting

Details Recipients Activities Appointments/Tasks Operations/Tasks **Checklist entries** Documents Attributes

Save Reset all

Checklist entries: 3

Completed	Completion mandatory	Automatically	Checklist entry	Completed by	Completed on	Knowledge
☒	No	Yes	Anforderer vorhanden			Richtlinien bei Stornierungen
☐	No	Yes	Produkt hinterlegt			
☐	No	Yes	Ursache vorhanden			

Contact Info

Requestor: Chloe Decker
Sender: cdecker@trans-logistics.de
Alt. E-Mail:
Alt. Phone:

Details

Editor: Silke Dehler
Status: waiting

Checklists in the service ticket



Create new

The general procedure for entering checklist entries can be found [here](#).

Title • Ticket category: Cancellation

Context • Service ticket

Condition [Open extended filter conditions](#)

Description Checklist for cancelling an order

Checklist entries

- ☒ Requestor available ☐ Mandatory Knowledge
- ☒ Product is added ☐ Mandatory Knowledge
- ☒ Cause is available ☐ Mandatory Knowledge

[Open extended filter conditions](#)

[Save](#) [Cancel](#)

- To use checklists in service tickets, the Context "Service ticket" is selected.
- In the field "Condition", a condition can be entered using a filter. If this condition is fulfilled, the checklist is displayed in the Service Tickets. The filter criteria of the Service Tickets are available for defining the condition.

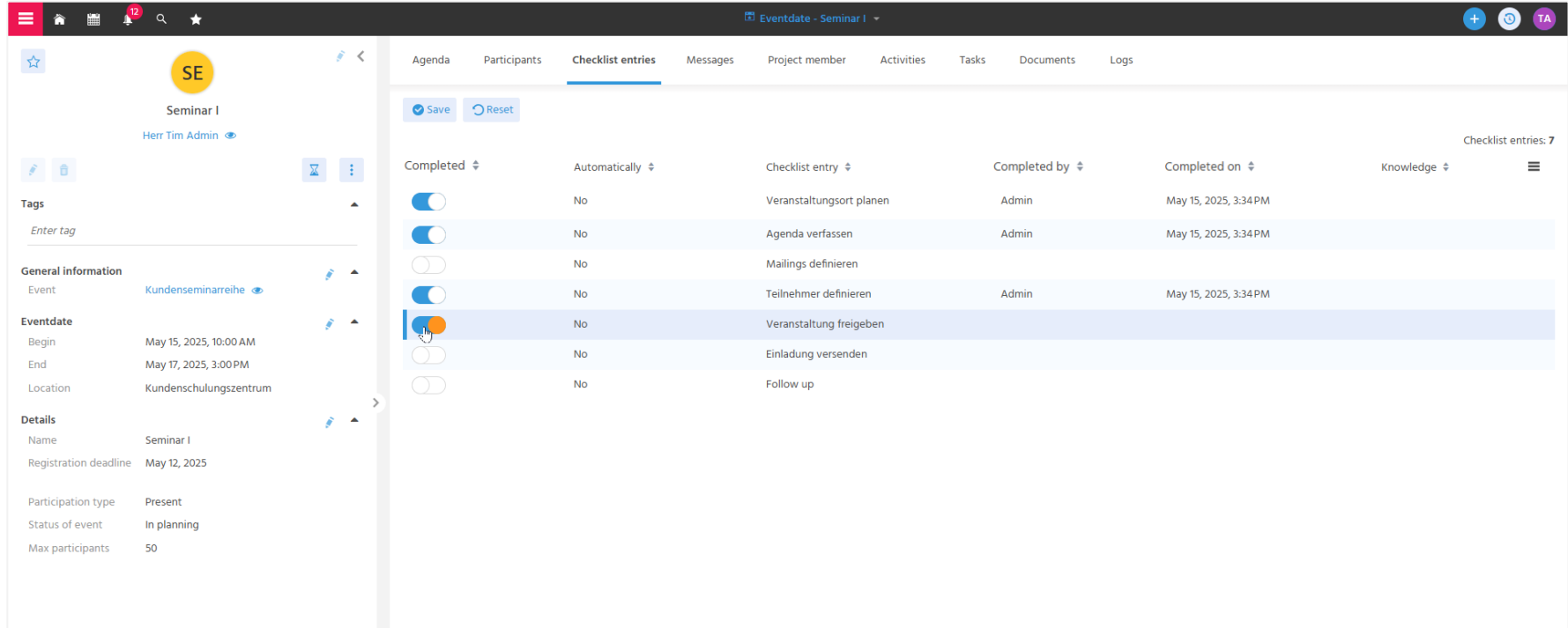


Checklists for: Eventdates



Checklists in the event

User view



The screenshot displays the ADITO user interface for managing an event. The left sidebar shows the event details for 'Seminar I' by 'Herr Tim Admin'. The main area is titled 'Eventdate - Seminar I' and contains a 'Checklist entries' section. This section includes a table with 7 entries, each with a 'Completed' toggle, an 'Automatically' checkbox, a 'Checklist entry' description, a 'Completed by' user, and a 'Completed on' date. The entry 'Veranstaltung freigeben' is currently selected and highlighted in blue.

Completed	Automatically	Checklist entry	Completed by	Completed on
☒	No	Veranstaltungsort planen	Admin	May 15, 2025, 3:34 PM
☒	No	Agenda verfassen	Admin	May 15, 2025, 3:34 PM
☐	No	Mailings definieren		
☒	No	Teilnehmer definieren	Admin	May 15, 2025, 3:34 PM
☒	No	Veranstaltung freigeben		
☐	No	Einladung versenden		
☐	No	Follow up		

Checklists in the event



Create new

The general procedure for entering checklist entries can be found [here](#).

- To use checklists in the events, select the Context "Events".
- In the field "Condition," a condition can be entered using a filter. If this condition is fulfilled, the checklist will be displayed in the events. The filter criteria for the event are available for defining the condition.

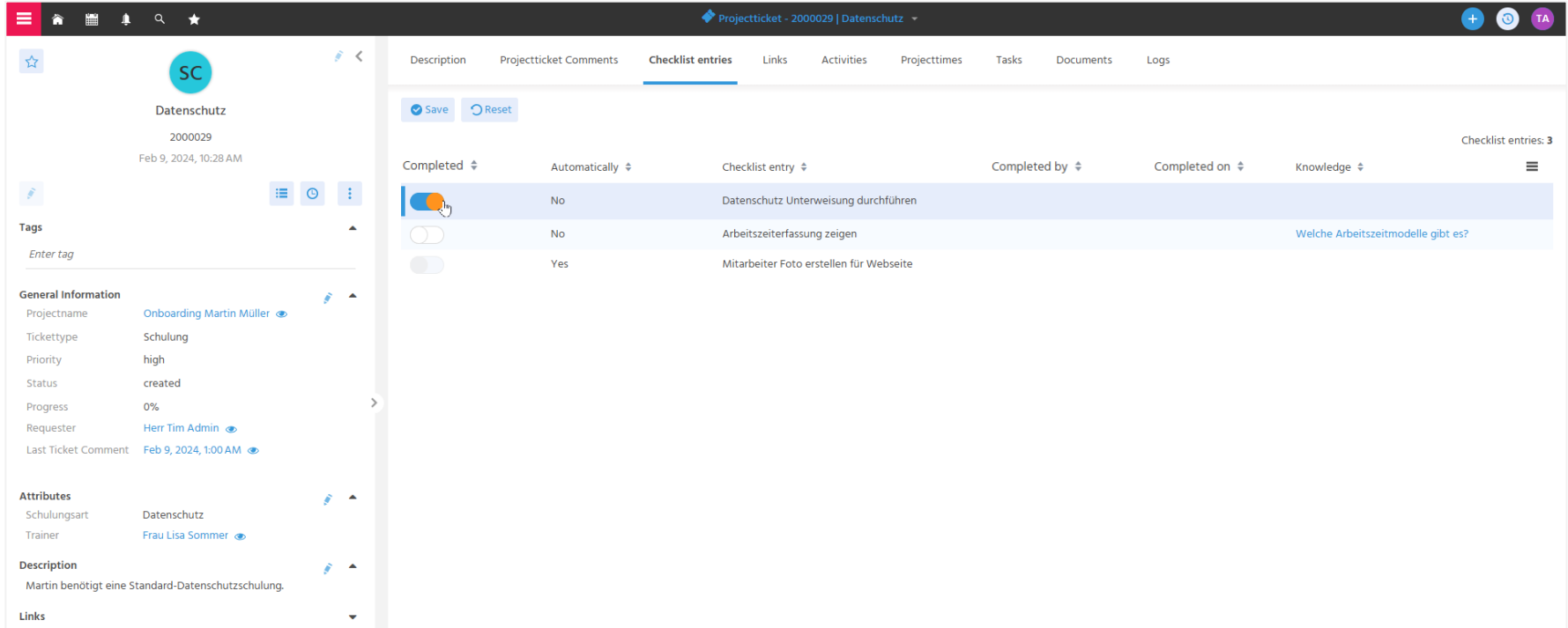


Checklists for: Projecttickets



Checklists in the projectticket

User view



The screenshot displays the 'Projectticket - 2000029 | Datenschutz' interface. The left sidebar shows the ticket details for 'Datenschutz', including the date 'Feb 9, 2024, 10:28 AM' and various sections like 'General Information', 'Attributes', and 'Description'. The main area is the 'Checklist entries' tab, which contains a table with three entries. The first entry, 'Datenschutz Unterweisung durchführen', is highlighted with a blue background and has a toggle switch turned on. The second entry, 'Arbeitszeiterfassung zeigen', has a toggle switch turned off. The third entry, 'Mitarbeiter Foto erstellen für Webseite', has a toggle switch turned off. The table has columns for 'Completed', 'Automatically', 'Checklist entry', 'Completed by', 'Completed on', and 'Knowledge'. The 'Completed' column has a dropdown menu with options 'No' and 'Yes'. The 'Automatically' column has a dropdown menu with options 'No' and 'Yes'. The 'Checklist entry' column contains the task names. The 'Completed by' column is empty. The 'Completed on' column is empty. The 'Knowledge' column contains a link 'Welche Arbeitszeitmodelle gibt es?'. The top right of the interface shows the user's profile and the ticket title.

Completed	Automatically	Checklist entry	Completed by	Completed on	Knowledge
☒	No	Datenschutz Unterweisung durchführen			
☐	No	Arbeitszeiterfassung zeigen			Welche Arbeitszeitmodelle gibt es?
☐	Yes	Mitarbeiter Foto erstellen für Webseite			

Checklists in the projectticket



Create new

The general procedure for entering checklist entries can be found [here](#).

- To use checklists in the projecttickets, select the Context „Projectticket“.
- In the field "Condition," a condition can be entered using a filter. If this condition is fulfilled, the checklist will be displayed in the projecttickets. The filter criteria for the projecttickets are available for defining the condition.



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