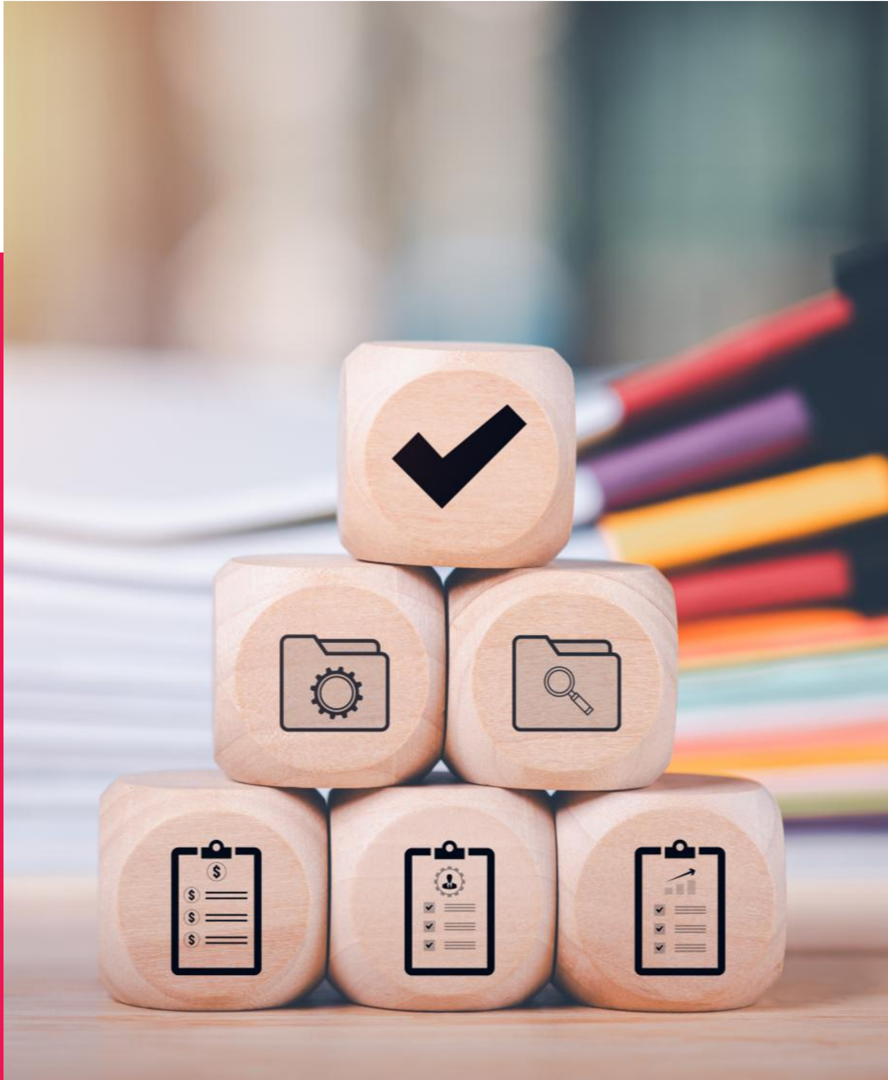
Checklists



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

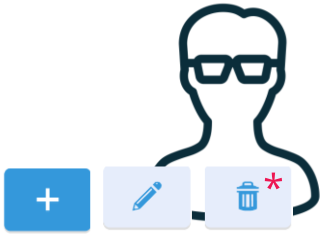
Checklists

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.

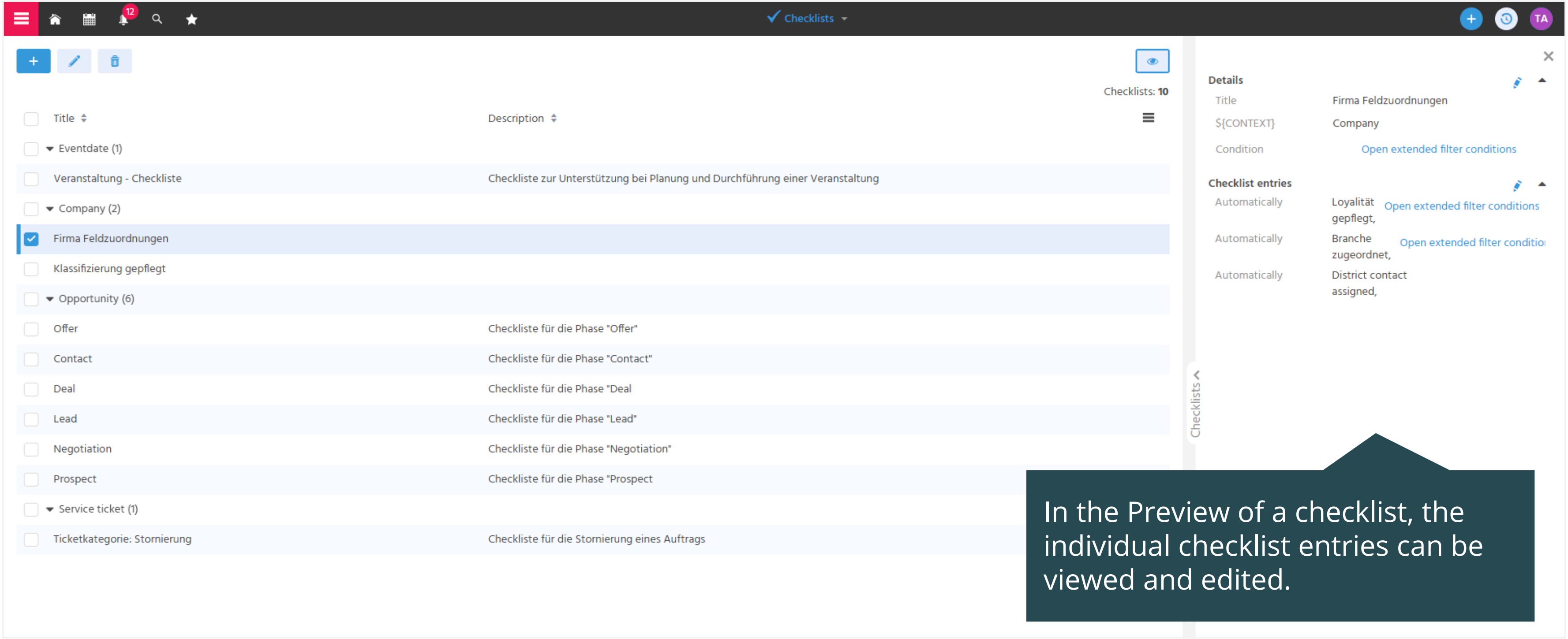
The flexible checklist logic can be integrated in any Contexts.
In the xRM, it is available in the Opportunity, Company, Eventdates, Service Ticket and in the Projectticket.



* Also if in use.

Checklists

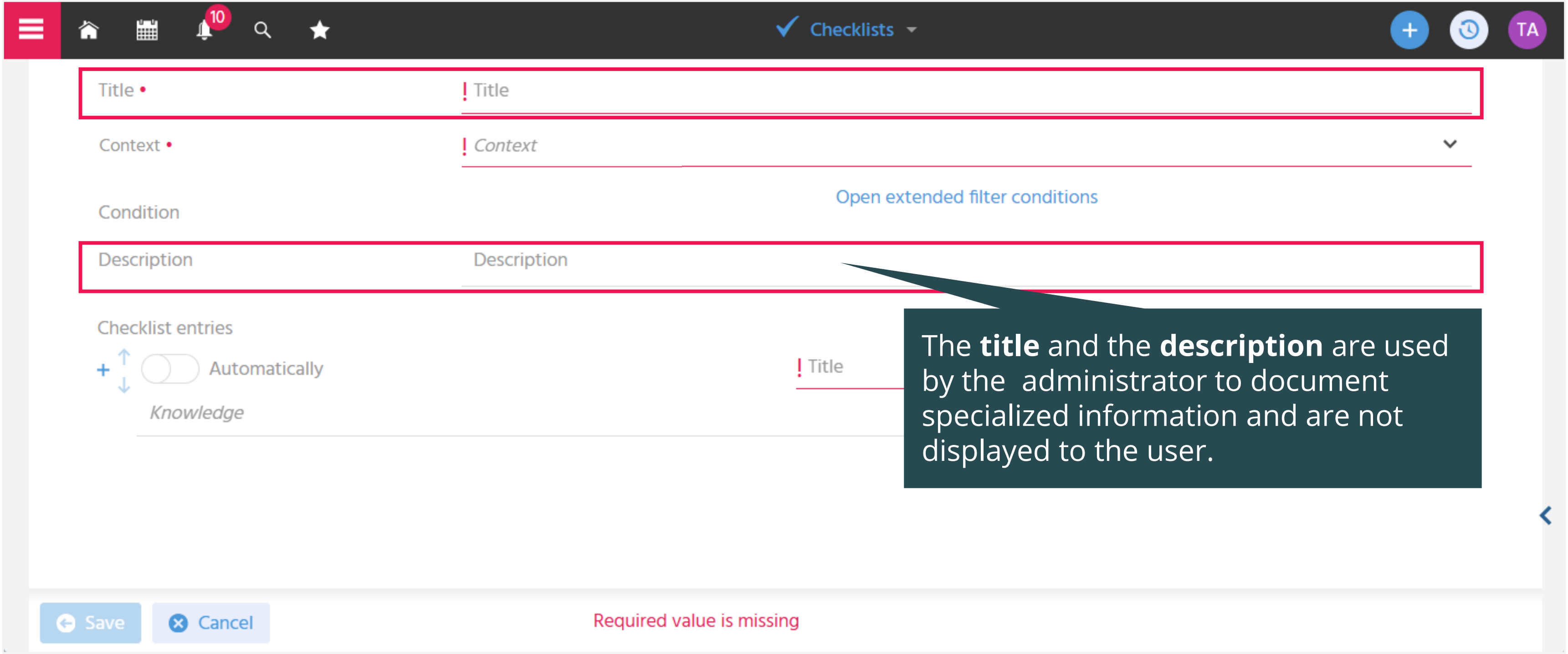
Overview of all checklists in the system



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

Creating a checklist

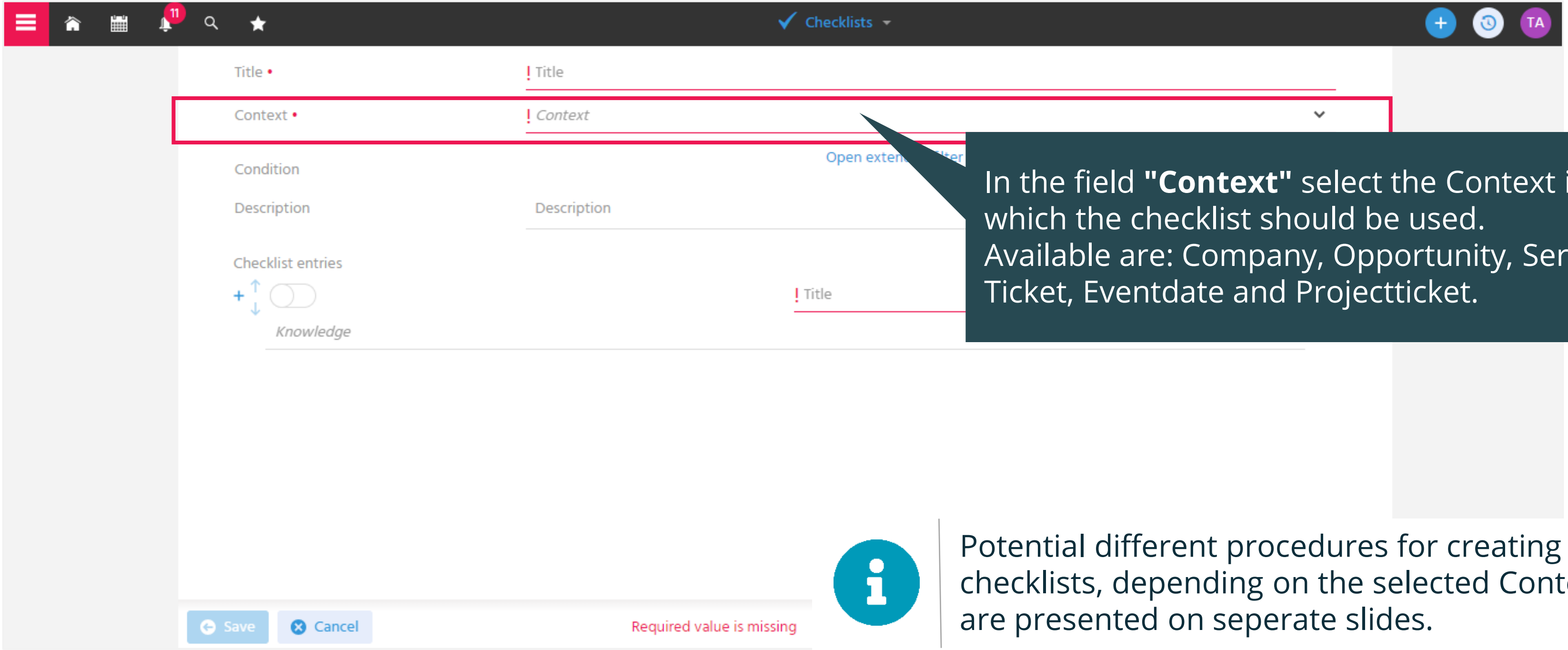
Title and description



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?

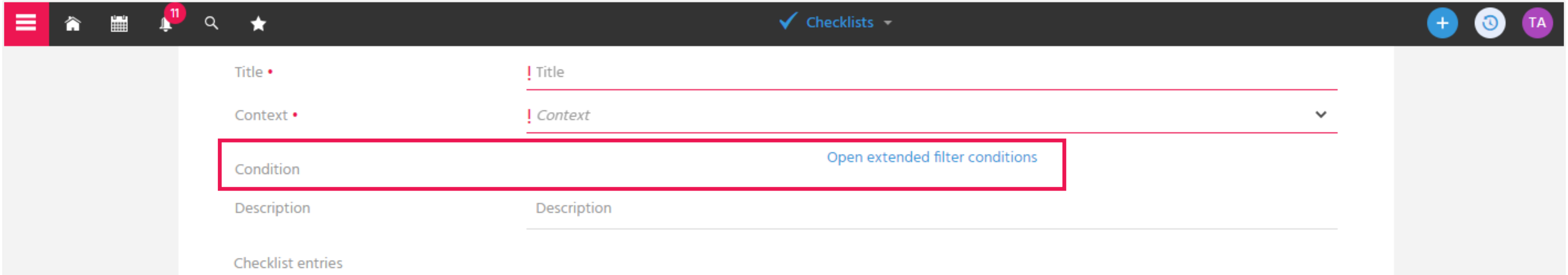


In the field **"Context"** select the Context in which the checklist should be used. Available are: Company, Opportunity, Service Ticket, Eventdate and Projectticket.

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

Creating a checklist

When is the checklist displayed?



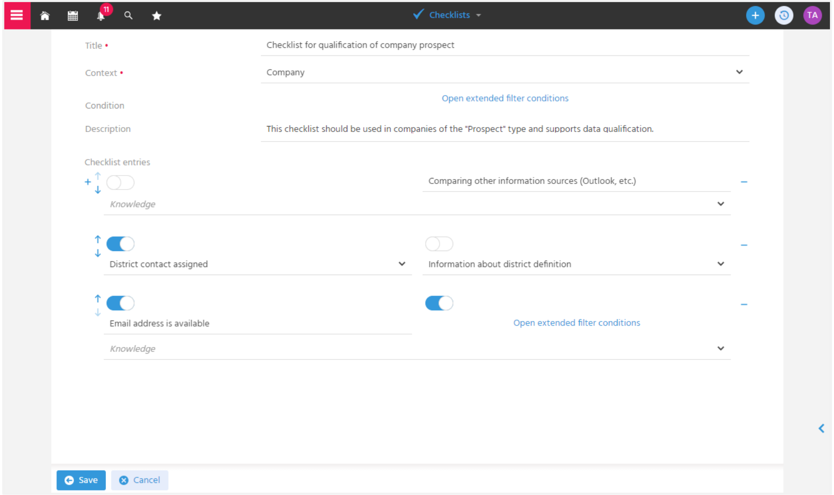
In the field **"Condition"**, you can enter the condition by using a filter. If this condition is fulfilled, the checklist is displayed in the respective datasets.

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



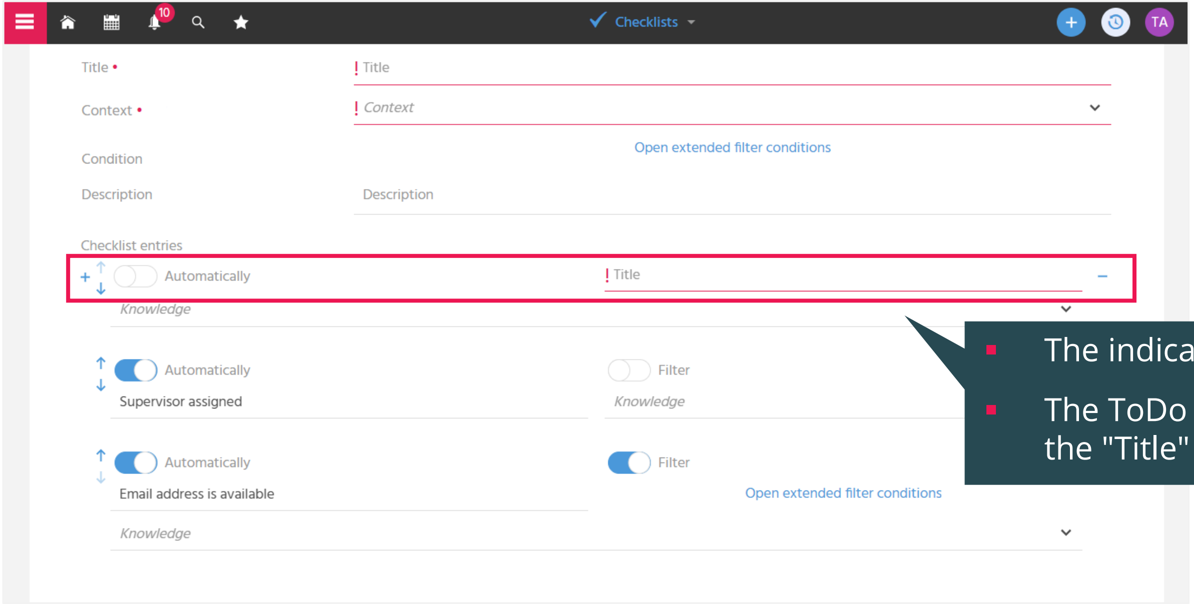
For a checklist, **any number of checklist entries** can be created +.

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

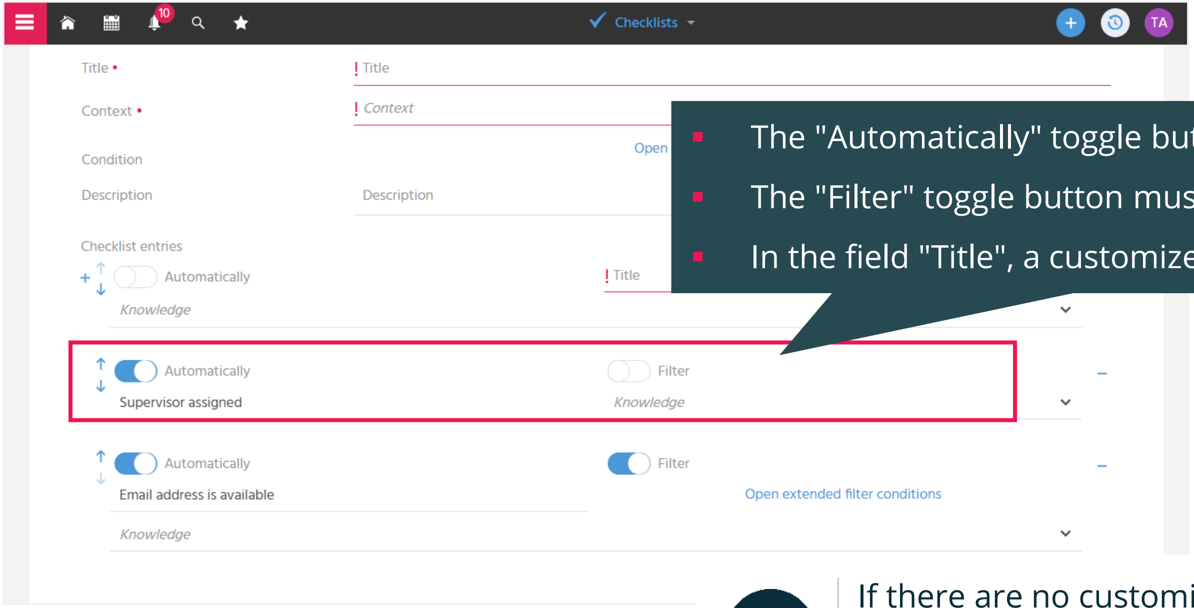
How are manual checklist entries created?



- 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?

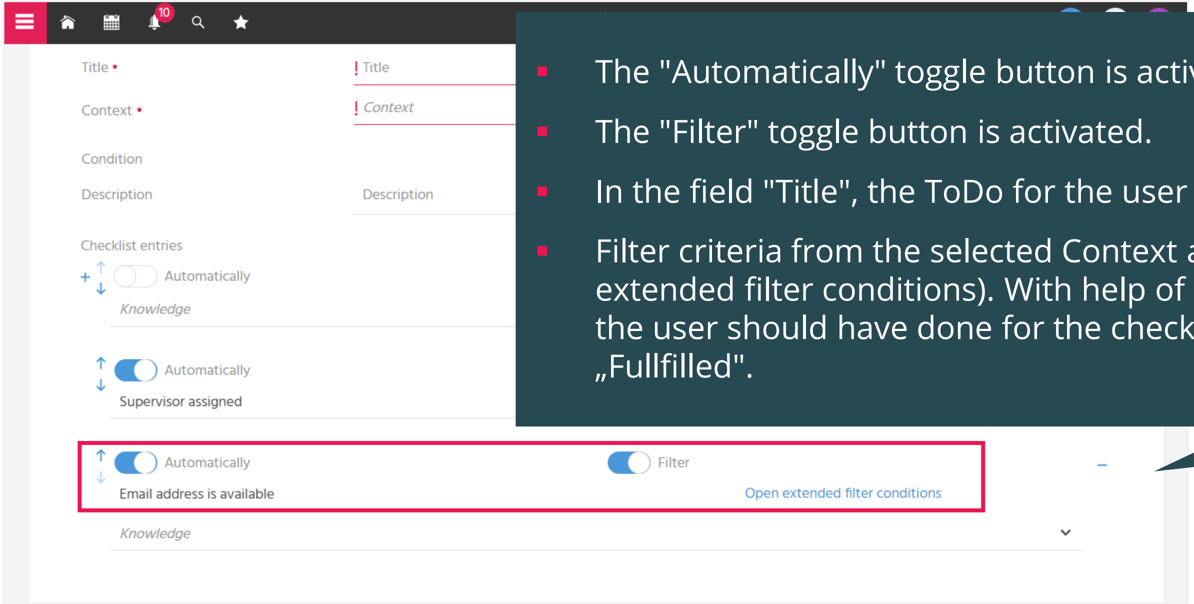


- The "Automatically" toggle button is activated.
- The "Filter" toggle button must be deactivated.
- In the field "Title", a customized entry has to be selected.

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?

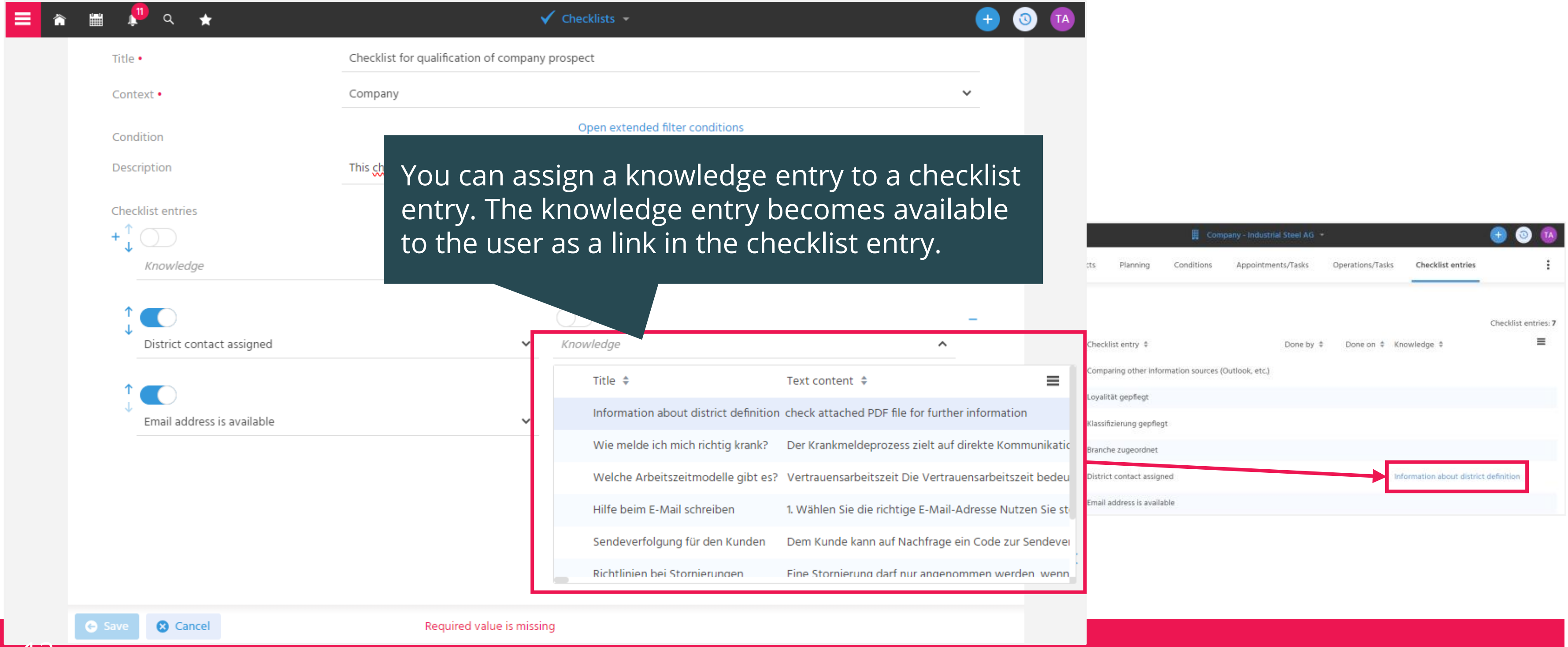


- The "Automatically" toggle button is activated.
- The "Filter" toggle button is activated.
- In the field "Title", the ToDo for the user is entered as a free text.
- Filter criteria from the selected Context are displayed in the filter (open extended filter conditions). With help of the filter criteria, 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

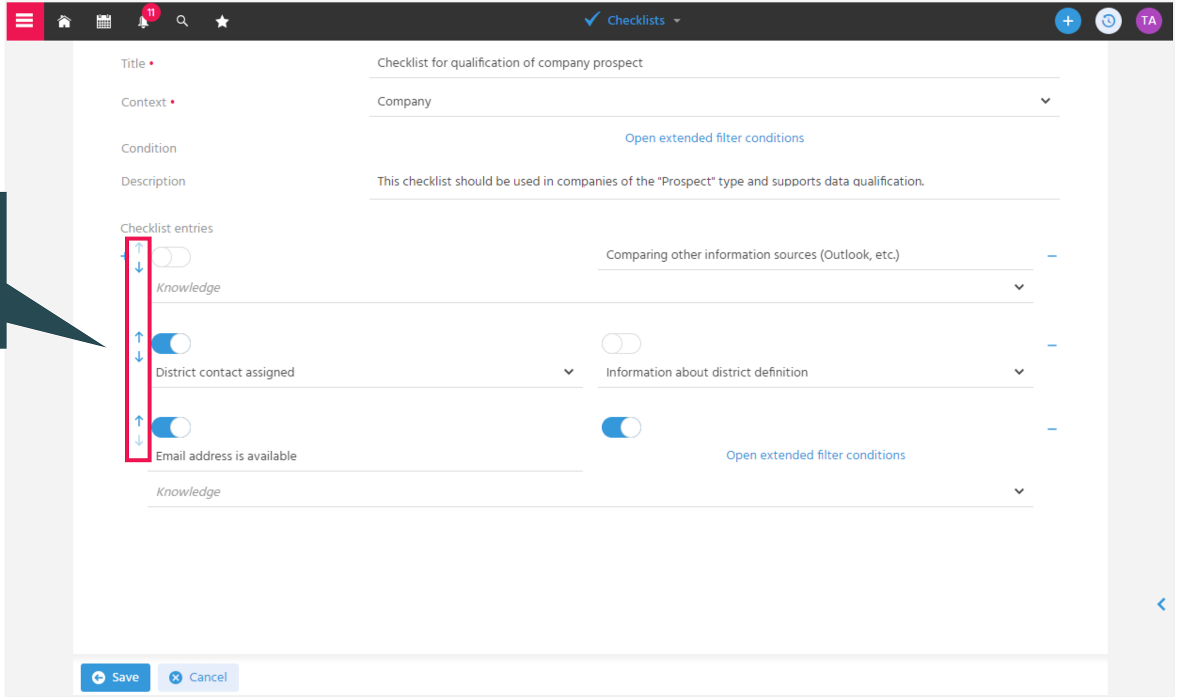
You can assign a knowledge entry to a checklist entry. The knowledge entry becomes available to the user as a link in the checklist entry.



Creating checklist entries

How are checklist entries sorted?

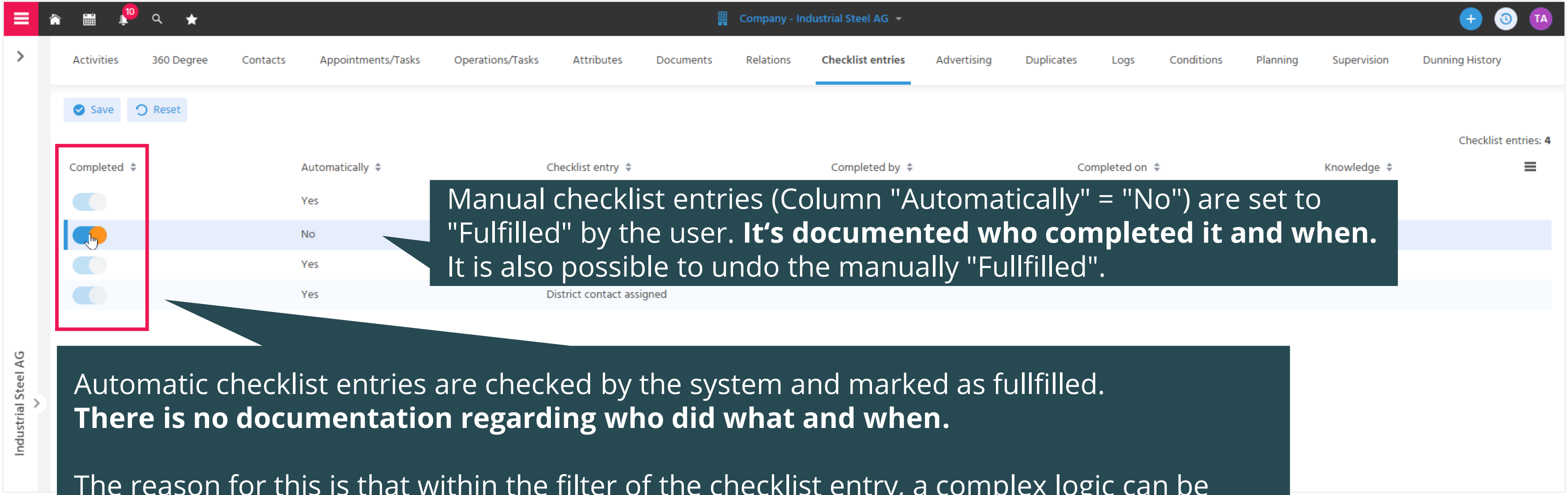
With the arrow buttons, you can customize the sorting that is presented to the user.



Checklists for: Companies

Company checklist

User view



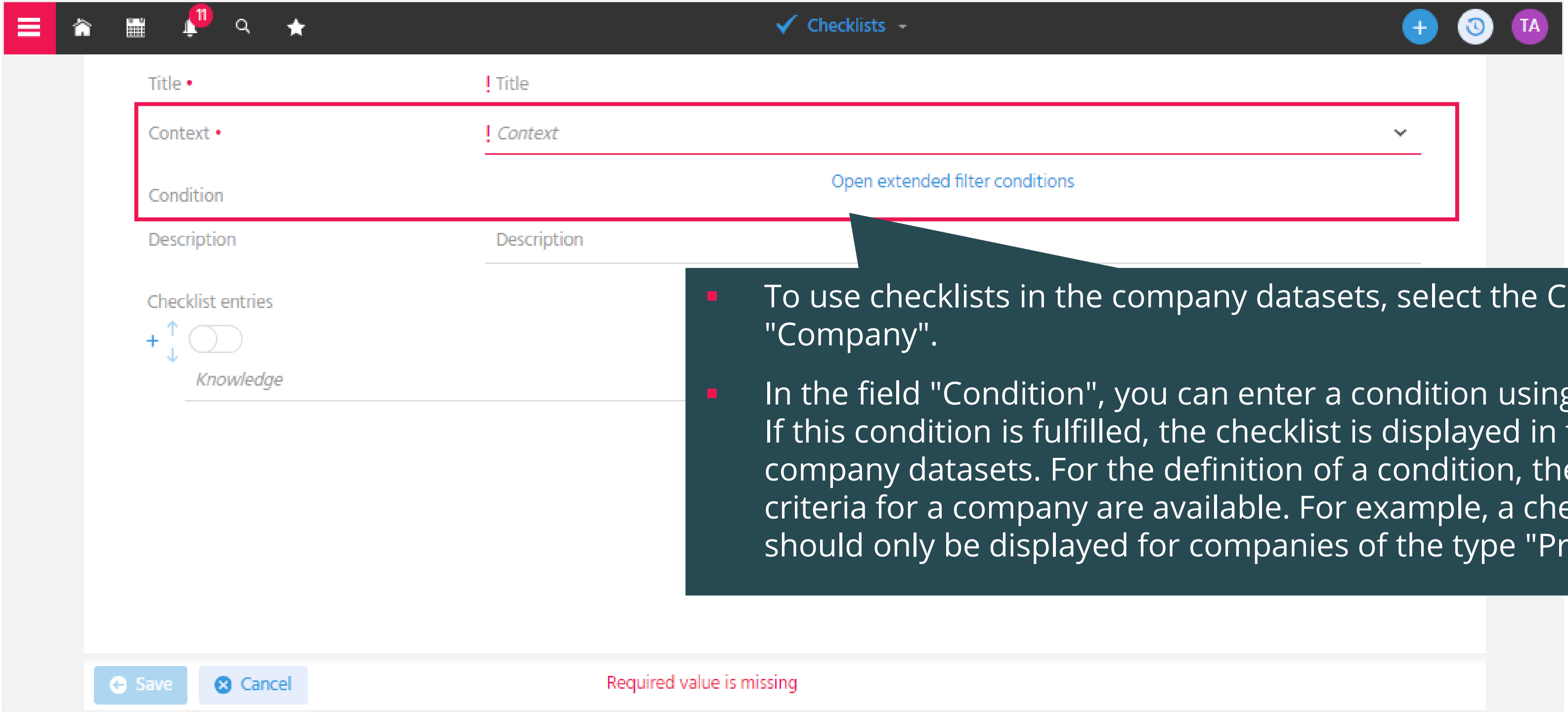
Manual checklist entries (Column "Automatically" = "No") are set to "Fulfilled" by the user. **It's documented who completed it and when.** It is also possible to undo the manually "Fullfilled".

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

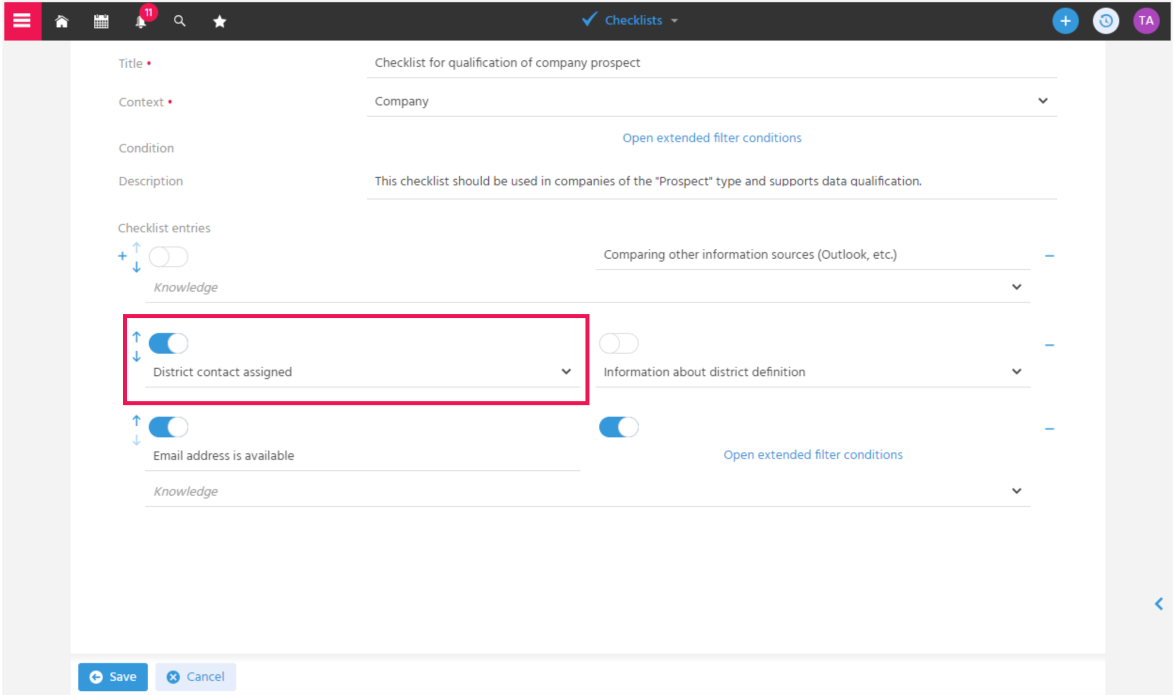
Create new



- 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.

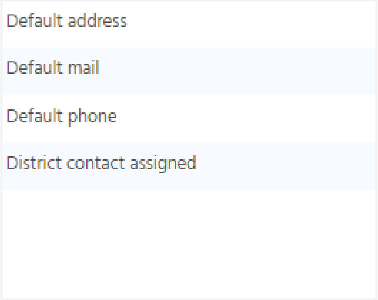
Company checklist

Create new



The general procedure for creating checklist entries can be found here.

Customized, automatic checklist entries for company checklists:



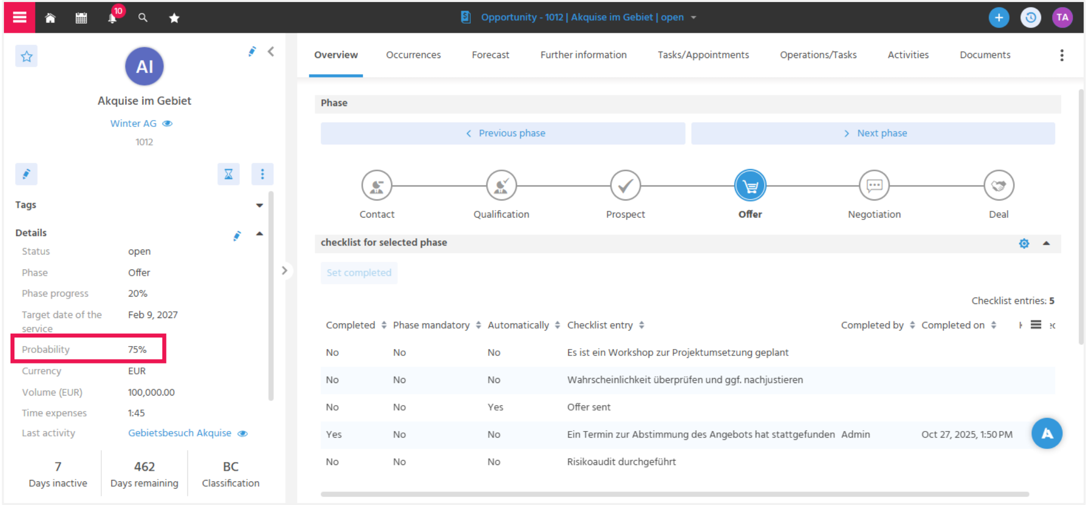
Checklists for: Opportunity phases

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.



Opportunity phases

Definition of the phases

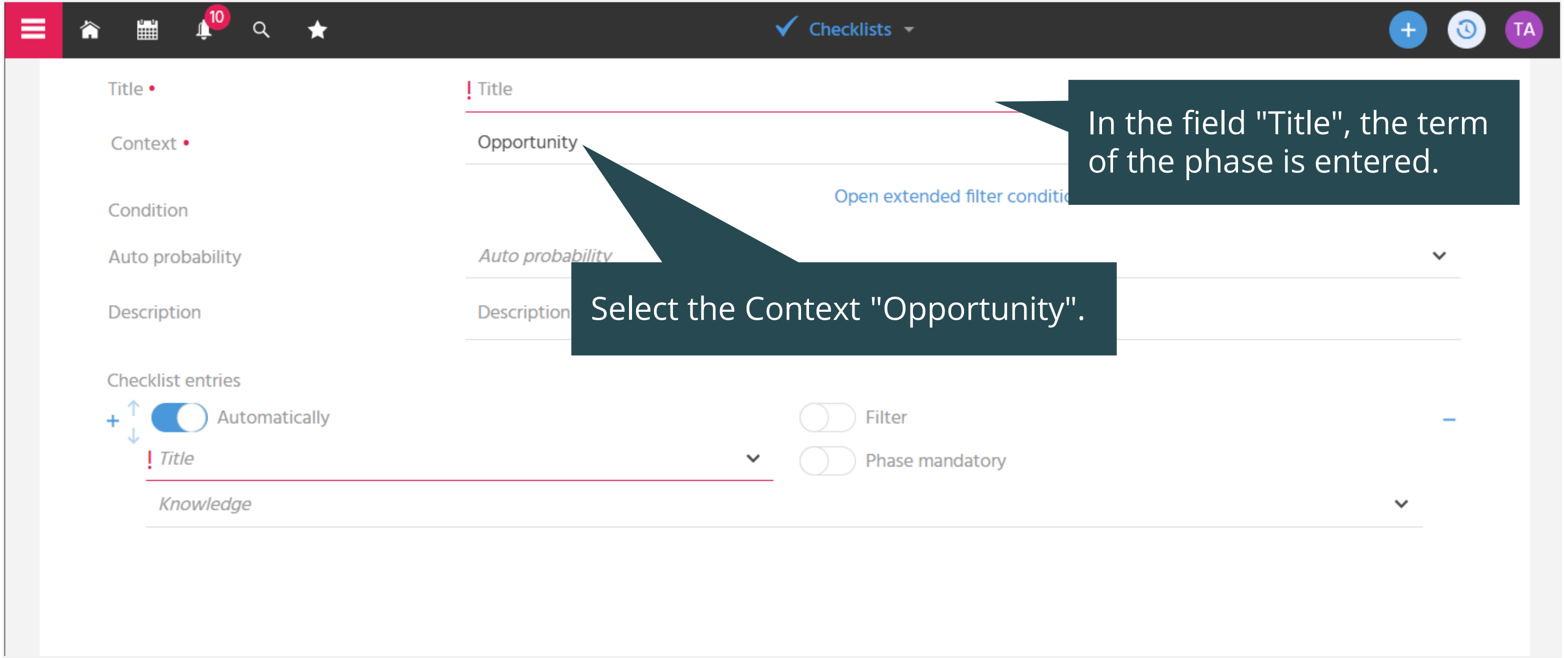
The phases can be added with the **Keyword SALESPROJECTPHASE**.

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.

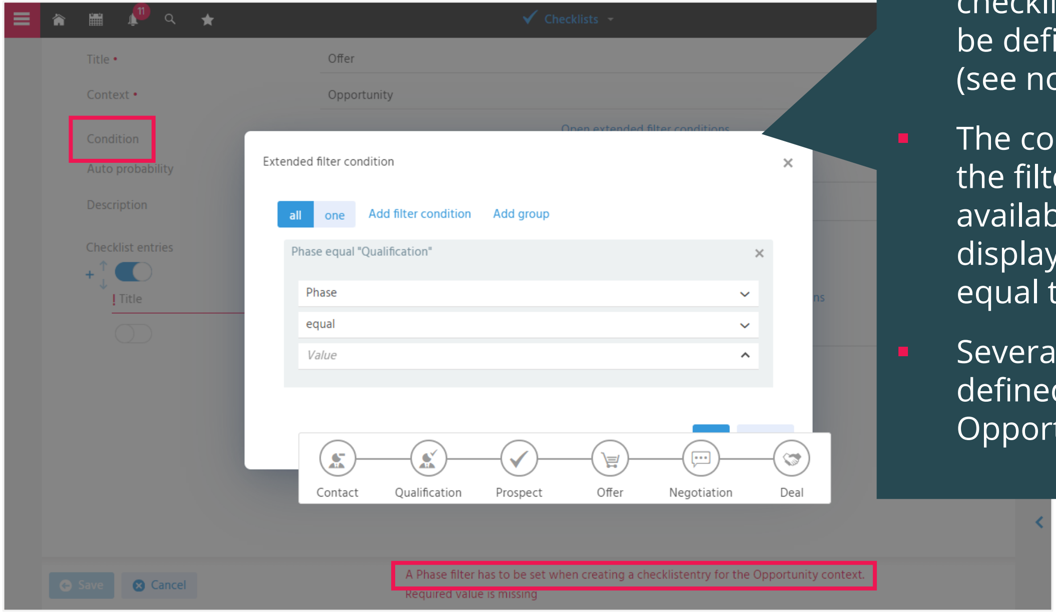
Opportunity checklist

Create new



Opportunity checklist

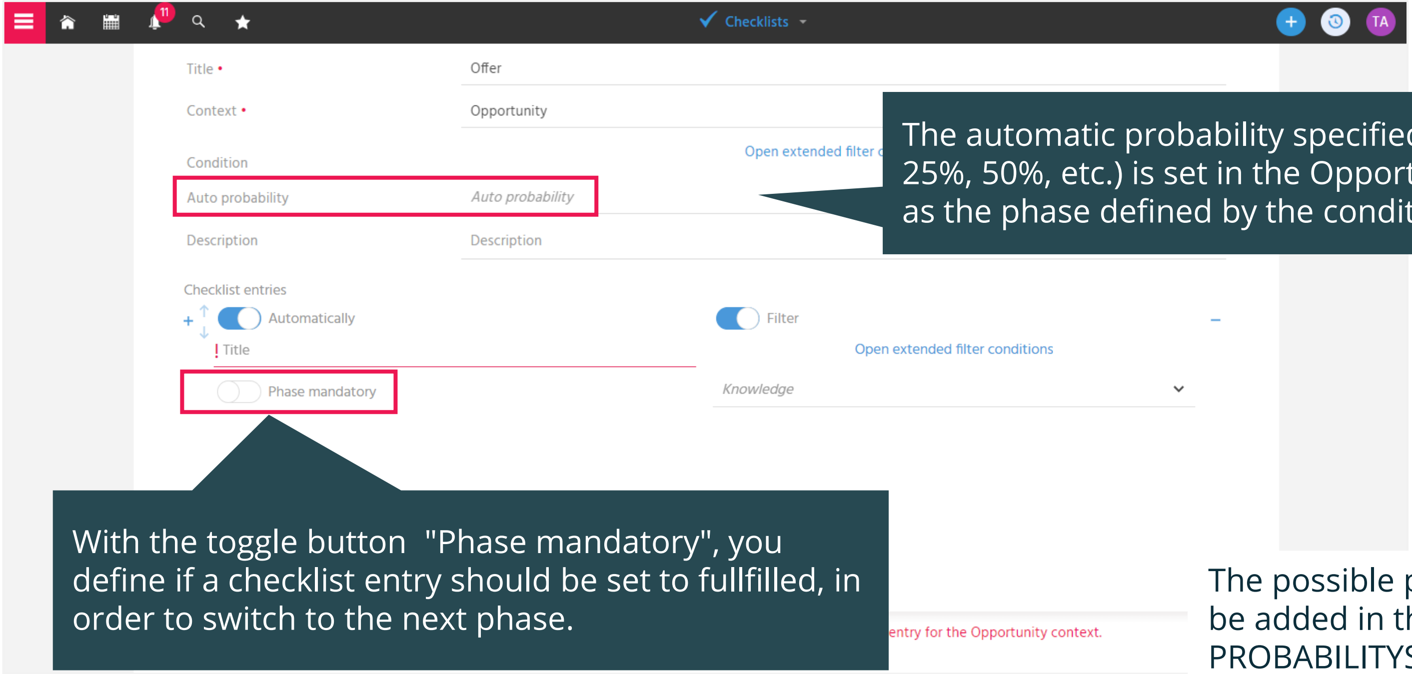
Create new



- 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



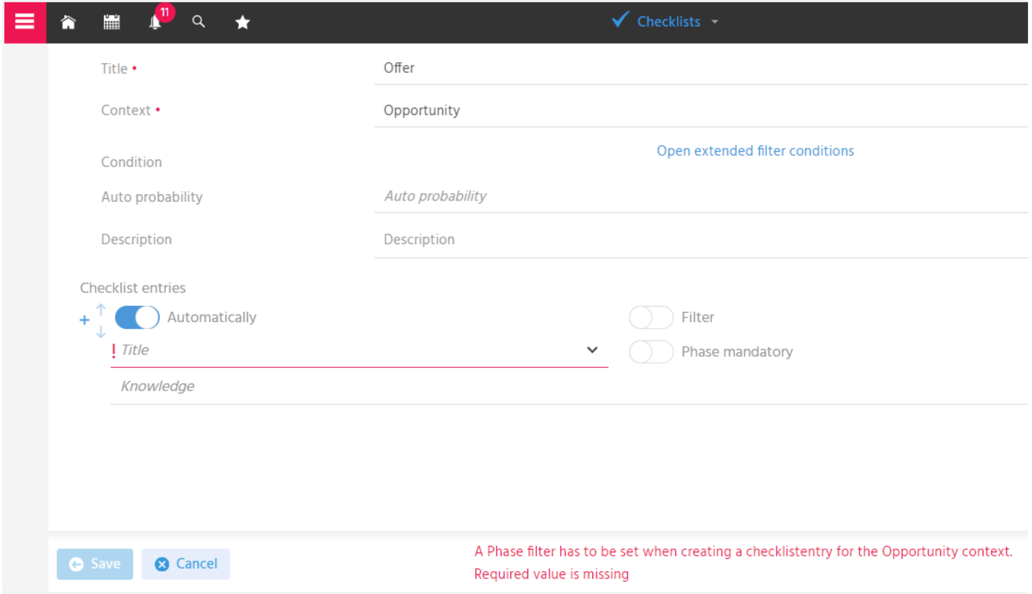
The automatic probability specified here (0%, 25%, 50%, etc.) is set in the Opportunity as soon as the phase defined by the condition is reached.

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

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

Opportunity checklist

Create new



The general procedure for creating checklist entries can be found here.

Customized, automatic checklist entries for opportunity phases:

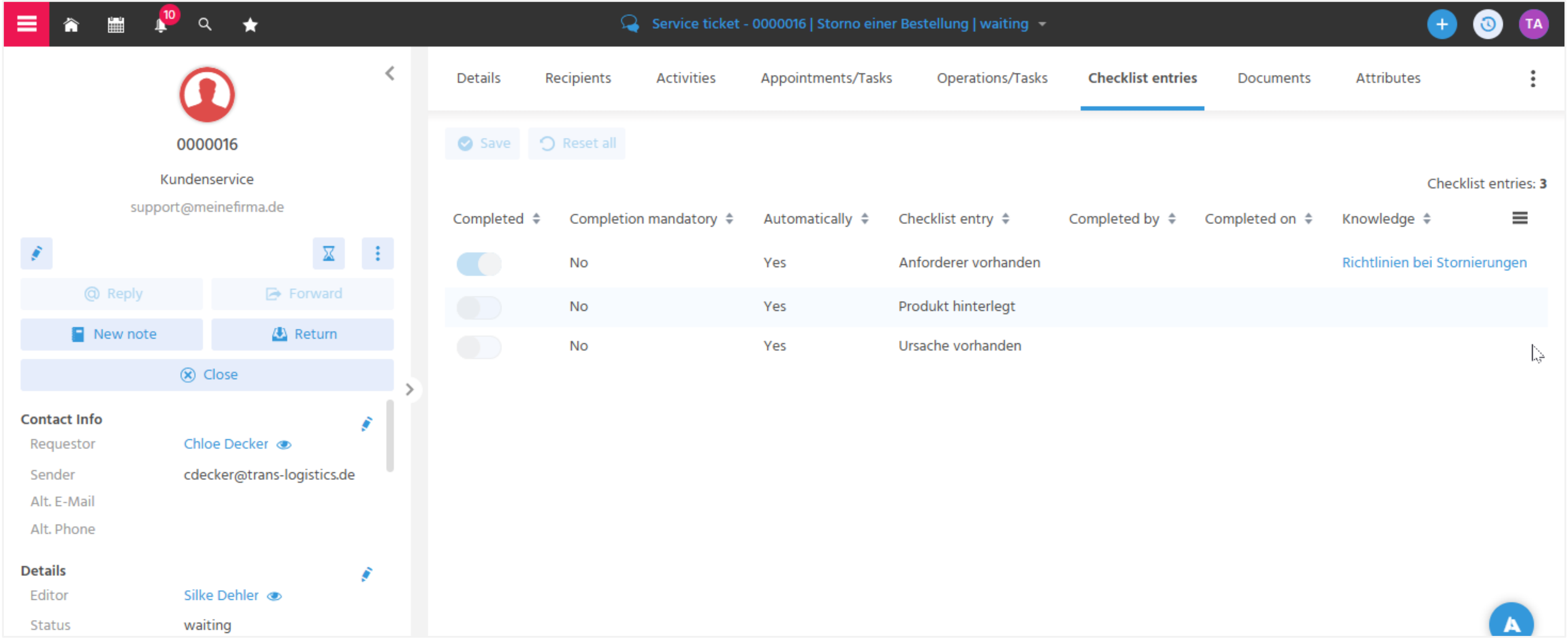
- Project team: "Project manager"
- Contact point
- Volume
- Project start
- Classification fields
- Project team: "Internal sales "
- Project team roles
- Offer exists
- Project start within the next 12 months
- Offer sent out

- Probability 100%
- Status: "won"
- Contract
- Project team
- Further customer meetings
- Prioritization based on segmentation discussion
- First customer meeting
- Source/origin of contact generation
- Opportunity/responsible person set

Checklists for: Service ticket

Checklists in the service ticket

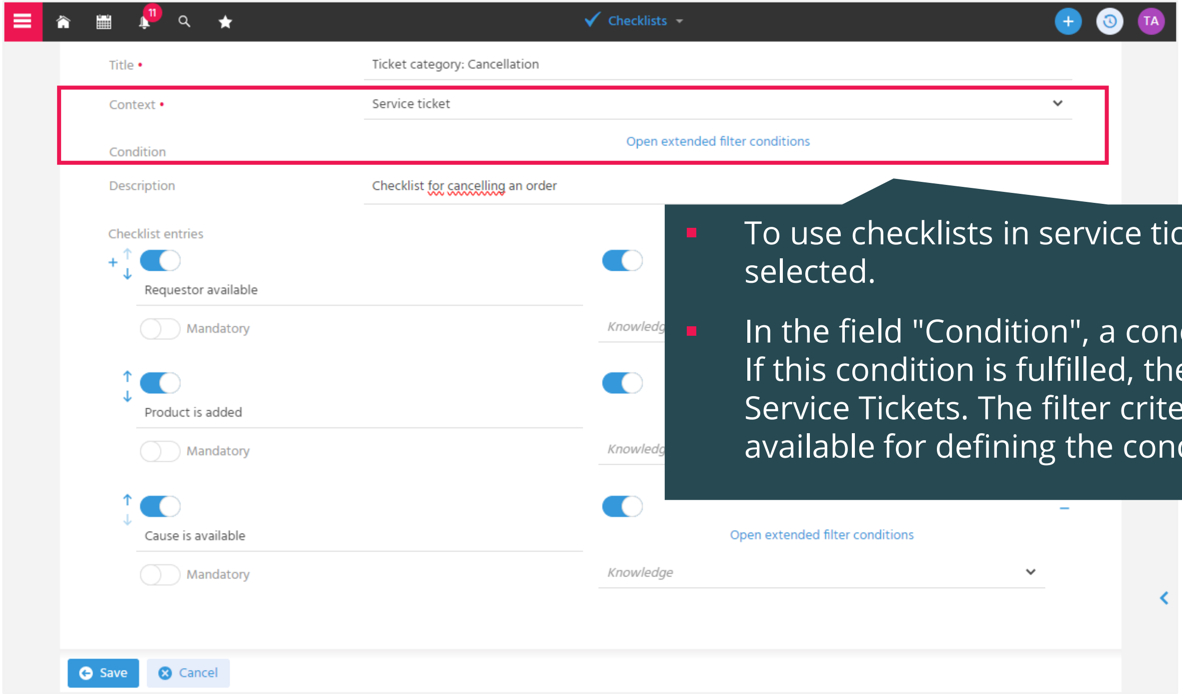
User view



Checklists in the service ticket

Create new

The general procedure for entering checklist entries can be found here.

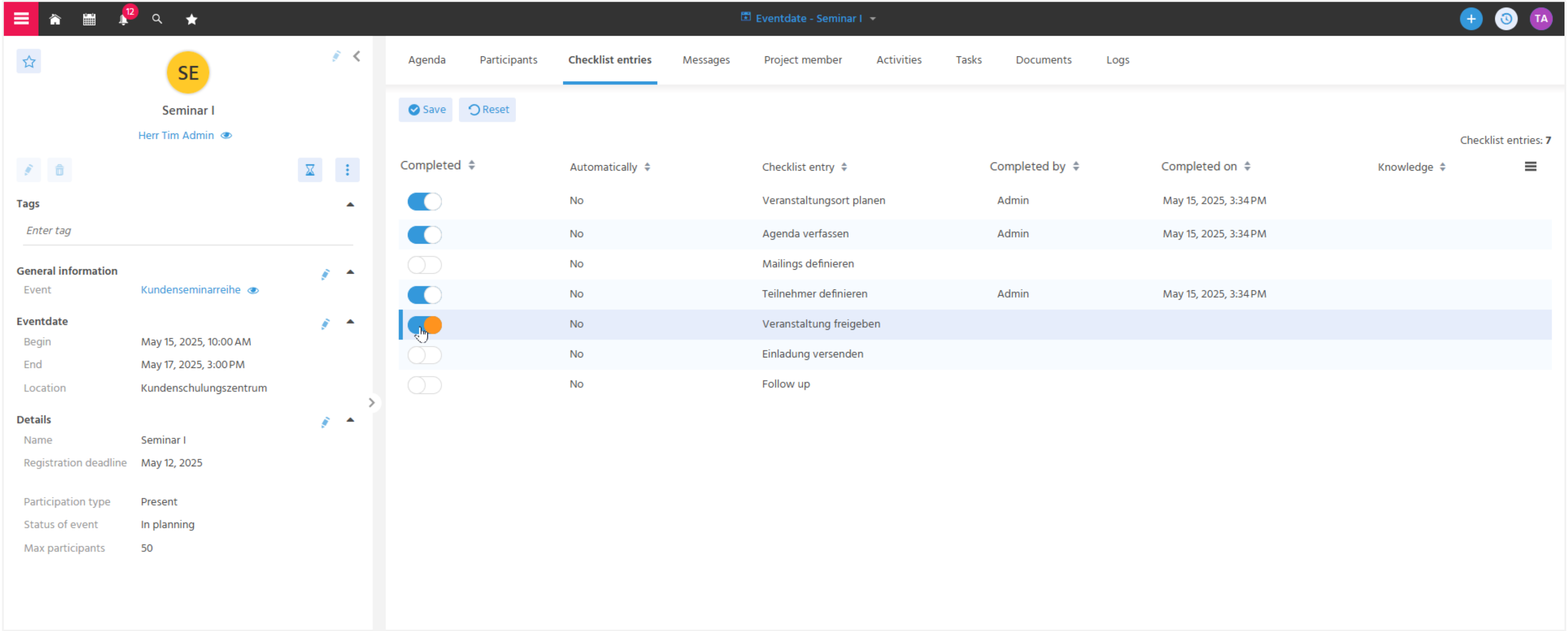


- To use checklists in service tickets, the Context "Service ticket" is selected.
- In the field "Condition", a condition can be entered using a filter. If this condition is fulfilled, the checklist is displayed in the Service Tickets. The filter criteria of the Service Tickets are available for defining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

Checklists for: Eventdates

Checklists in the event

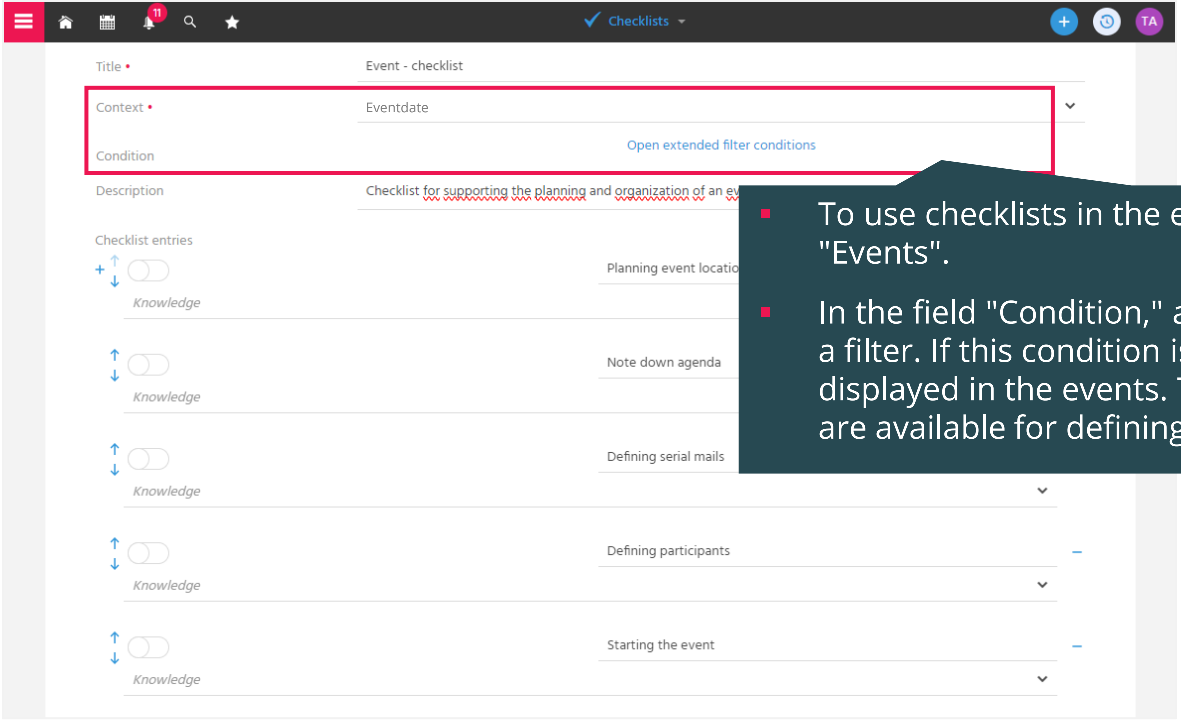
User view



Checklists in the event

Create new

The general procedure for entering checklist entries can be found here.

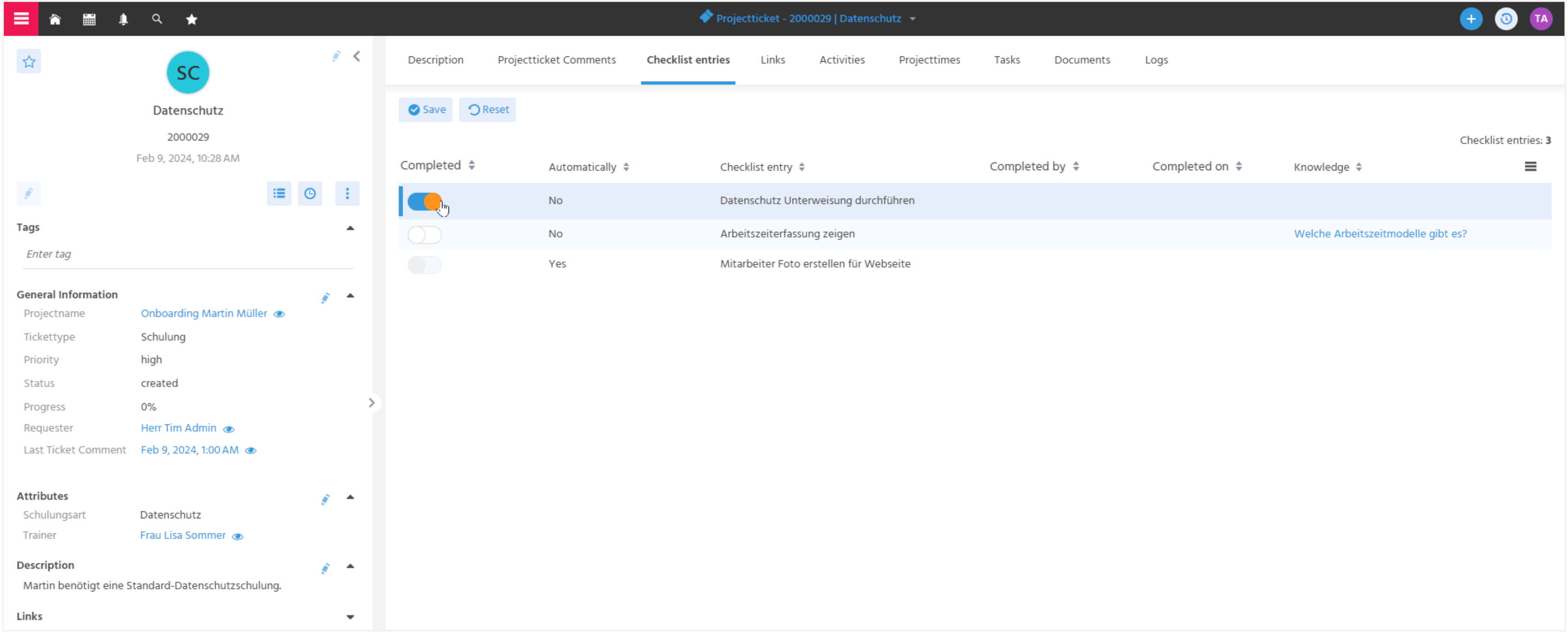


- To use checklists in the events, select the Context "Events".
- In the field "Condition," a condition can be entered using a filter. If this condition is fulfilled, the checklist will be displayed in the events. The filter criteria for the event are available for defining the condition.

Checklists for: Projecttickets

Checklists in the projectticket

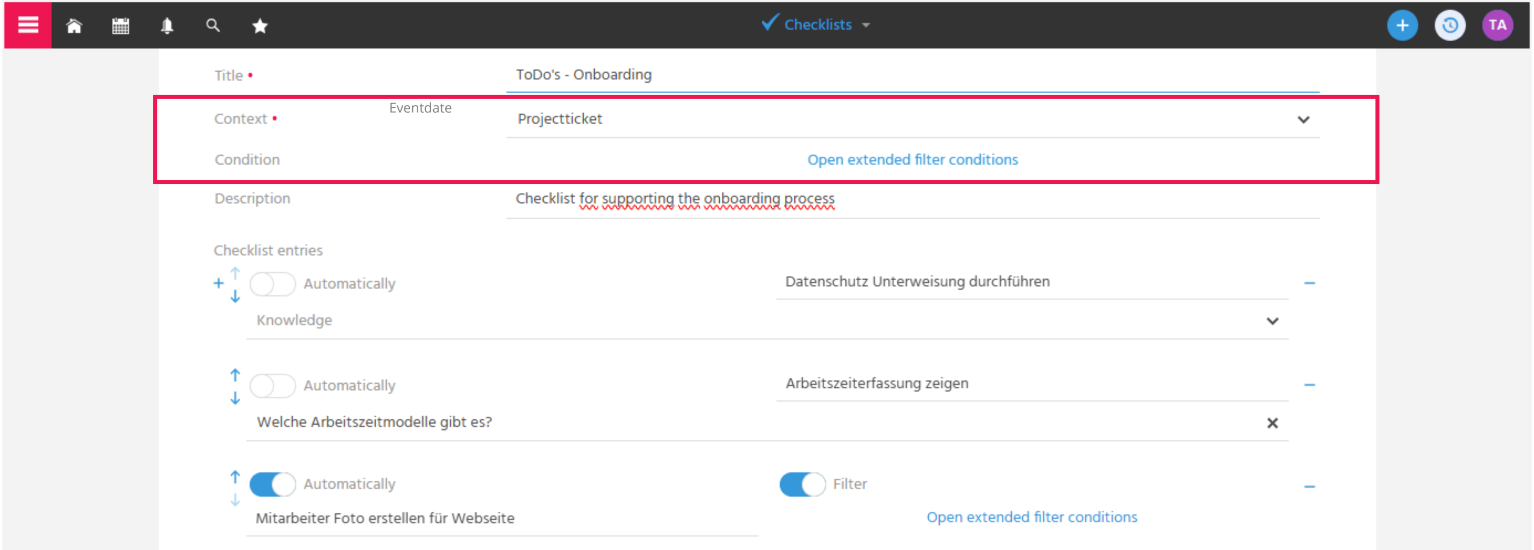
User view



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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