



Classification

ADITO Software GmbH

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Agenda

- Term definition “Classification”
- Create classifications
 - Adjust rating of the classification
 - Recalculate classification
- Create and edit indicators
 - Creating indicator values
 - Properties/fields with selection values
 - Complex information with selection values
 - Properties/fields/complex information with numerical values
- Controlling the use of indicators
- Delete
- View of users

Defining classification in the system



Classification



Why classify?

You can use the classification to rate and cluster your database. The goal is to support your colleagues in Sales and Marketing, for example, by providing guidance on how to rate a company that is currently one of your customers:

- Sales can use this rating to decide the intensity with which a customer should be supported.
- Marketing can find this rating helpful for determining how to address a customer in the best way.



Classification

Overview – Part 1

- In xRM, you can add classifications for the Contexts “Company” and “Opportunity”.
- For these Contexts, you can add any number of classifications.
- You can use classifications to map thematic blocks. For the company, for example, hard factors, such as industry or number of employees, and soft factors, such as loyalty. You divide the classifications into classes, e.g. classes A, B, C and D. For example, one classification can be assigned class A and the other classification class C.

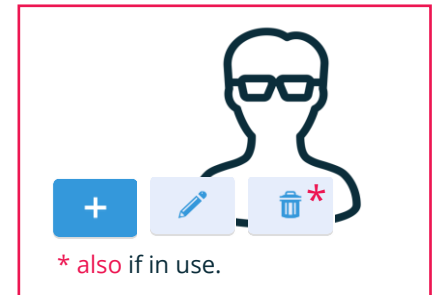


Next to the Contexts Company and Opportunity, it is possible to integrate the classification for other Contexts. This is possible through Customizing in the CRM.

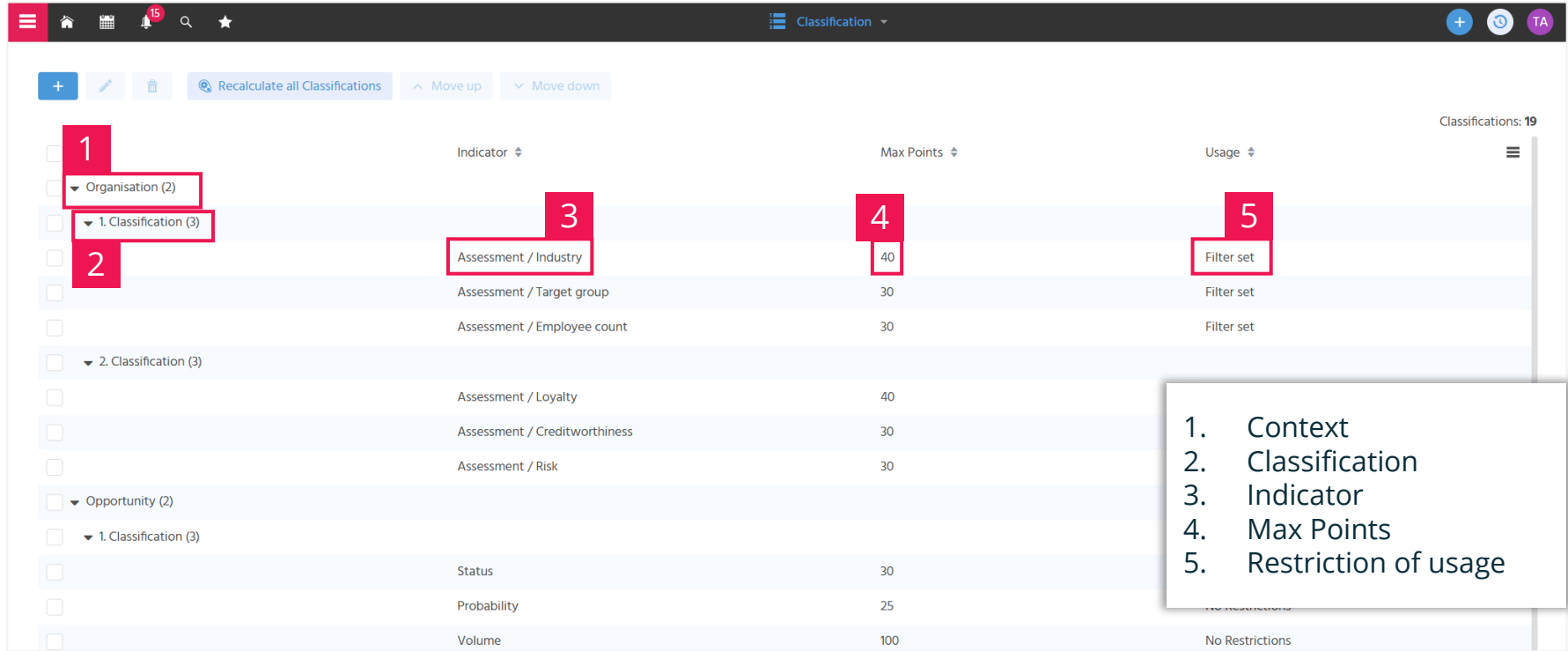
Classification

Overview – Part 2

- To be able to categorize the companies into the different classes, you add indicators to the classifications.
- For the individual indicators, you define rating systems. The values of all indicators of a classification results in the class.
- The indicators can be properties, fields or complex information from the Contexts, for which you have created a classification.
- For properties that can be set several times, the value with the highest rating is used in the classification.
- You can restrict the use of an indicator for the rating through a filter; e.g. if the indicator is not relevant for companies in a certain industry.



Classification



The screenshot shows the ADITO Classification interface. At the top, there is a navigation bar with icons for home, calendar, notifications (15), search, and star. The main header is 'Classification'. Below the header, there is a toolbar with a plus icon, a pencil icon, a trash icon, a button 'Recalculate all Classifications', and two buttons 'Move up' and 'Move down'. The main table has four columns: 'Indicator', 'Max Points', and 'Usage'. The first column contains a tree structure of classifications. The second column contains numerical values for 'Max Points'. The third column contains text for 'Usage'. The fourth column is empty. A legend box on the right side of the table lists the numbered callouts: 1. Context, 2. Classification, 3. Indicator, 4. Max Points, 5. Restriction of usage.

	Indicator	Max Points	Usage
1 2 3 4 5	Organisation (2)		
1 2 3 4 5	1. Classification (3)		
1 2 3 4 5	Assessment / Industry	40	Filter set
1 2 3 4 5	Assessment / Target group	30	Filter set
1 2 3 4 5	Assessment / Employee count	30	Filter set
1 2 3 4 5	2. Classification (3)		
1 2 3 4 5	Assessment / Loyalty	40	
1 2 3 4 5	Assessment / Creditworthiness	30	
1 2 3 4 5	Assessment / Risk	30	
1 2 3 4 5	Opportunity (2)		
1 2 3 4 5	1. Classification (3)		
1 2 3 4 5	Status	30	
1 2 3 4 5	Probability	25	
1 2 3 4 5	Volume	100	No Restrictions

Classification

Determine quantity and categorizing of classes before creating them in the system

Example for two different classifications

Classification 1		Classification 2	
Class	Categorization	Class	Categorization
A	76 – 100%	A	81 – 100%
B	51 – 75%	B	61 – 80%
C	26 – 50%	C	41 – 60%
D	0 – 25%	D	21 – 40%
		E	0 – 20%

Before you create classifications in the system, you should consider how many classifications are required and how the classes should be defined.

Classification

Defining scheme of classification before creating them in the system

Example classification with 3 indicators

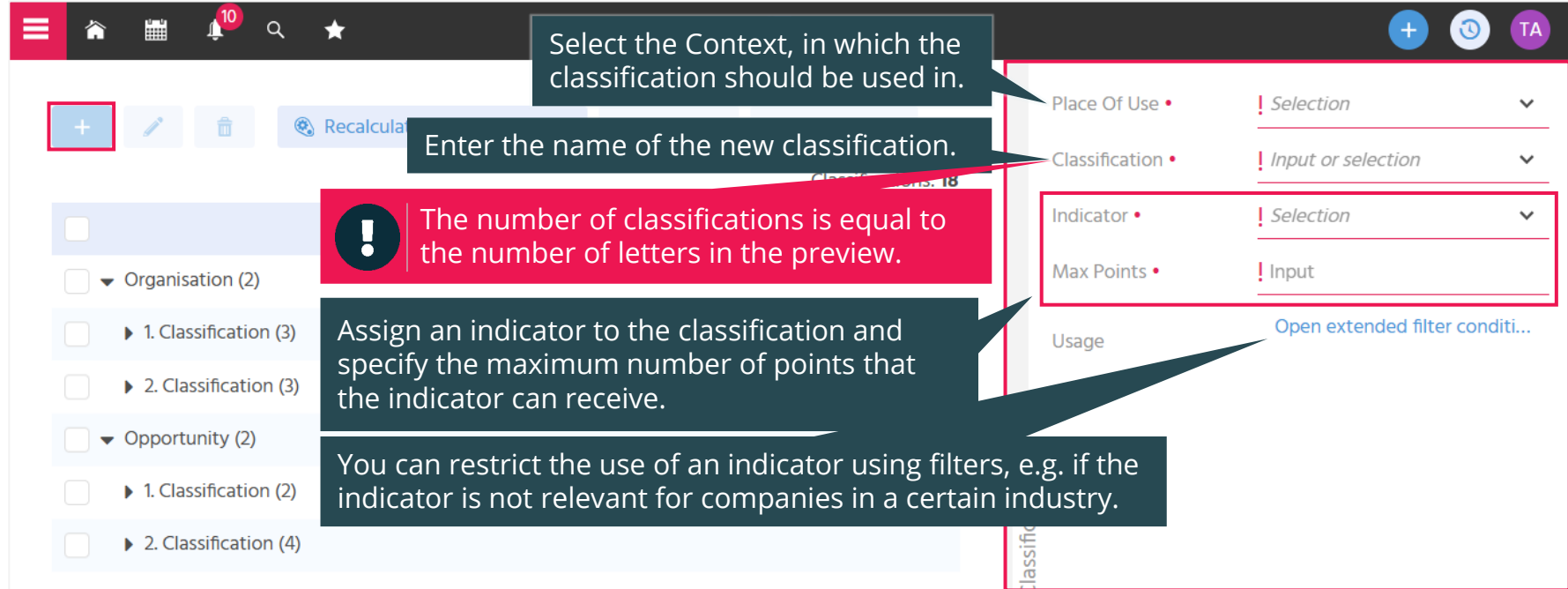
Industry (Max. 40 points)		Target group (Max. 30 points)		Employee count(Max. 30 points)	
Values	In % of max. points	Values	In % of max. points	Values	In % of max. points
Agency	80	Customer	100	7500	75
Financial services	80	Prospect	80	5000	50
Logistic	60	Competitor	80	3000	40
Trade	60	Partner	70	2500	35
Building industry	50	Manufacturer	50	1000	25
Engineering	50			500	15
NPO	40			100	10
Service	30			0	5

Before you create a classification in the system, you must define which indicators the classification contains, the maximum number of points a value assigned to this indicator can receive, and how many points are to be awarded for each value.

**Create a new
classification**



Creating a new classification



The screenshot shows the ADITO interface for creating a new classification. The left sidebar contains a tree view with categories like Organisation, Classification, and Opportunity. The main area has a form with fields for Place Of Use, Classification, Indicator, and Max Points. A callout box highlights the '+' button in the top left. Another callout points to the 'Classification' field. A red callout box with an exclamation mark icon contains a warning. A third callout points to the 'Indicator' and 'Max Points' fields. A fourth callout points to the 'Usage' section.

Select the Context, in which the classification should be used in.

Enter the name of the new classification.

! The number of classifications is equal to the number of letters in the preview.

Assign an indicator to the classification and specify the maximum number of points that the indicator can receive.

You can restrict the use of an indicator using filters, e.g. if the indicator is not relevant for companies in a certain industry.

Place Of Use • ! Selection

Classification • ! Input or selection

Indicator • ! Selection

Max Points • ! Input

Usage [Open extended filter condi...](#)

Preview of the classification



18

Classification

+

TA

Recalculate all Classifications

Move up

Move down

Classifications: 18

Indicator

Max Points

Usage

Organisation (2)

1. Classification (3)

2. Classification (3)

Opportunity (2)

1. Classification (2)

2. Classification (4)

Place Of Use

Classification

Sorting

Gradings In Percent

Organisation

1. Classification

1

A

75% - 100%

B

50% - 75%

C

25% - 50%

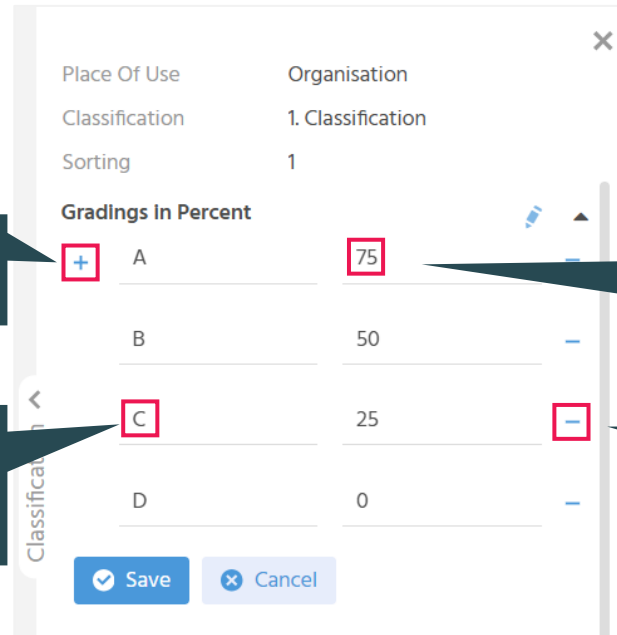
D

0% - 25%

The classification is initially assessed as a percentage and divided into four classes. You can manually adjust the rating and the number of classes.

12

Adjust rating of the classification



Place Of Use	Organisation
Classification	1. Classification
Sorting	1
Gradings In Percent	
A	75
B	50
C	25
D	0

Save Cancel

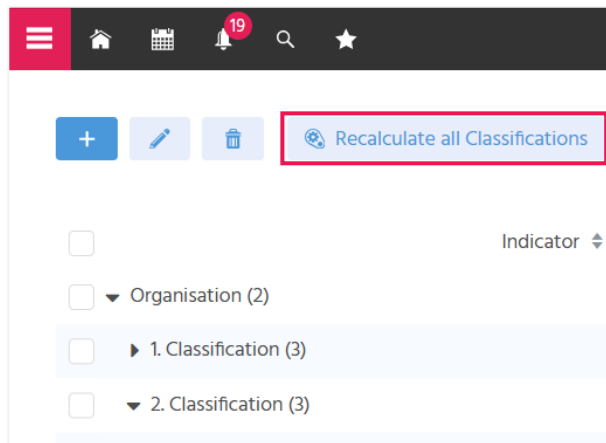
In the Edit mode you can add any number of classes.

Instead of letters, you can also use numbers for the classes.

Enter the **minimum percentage value that must be achieved** for each class (A, B, ...).

You can always delete a class.

Recalculating all classifications



The classification values (AC, BA, CD, etc.) are not calculated at runtime; rather, they are stored temporarily.

To recalculate these values using a process, there are the following options for triggering this process:

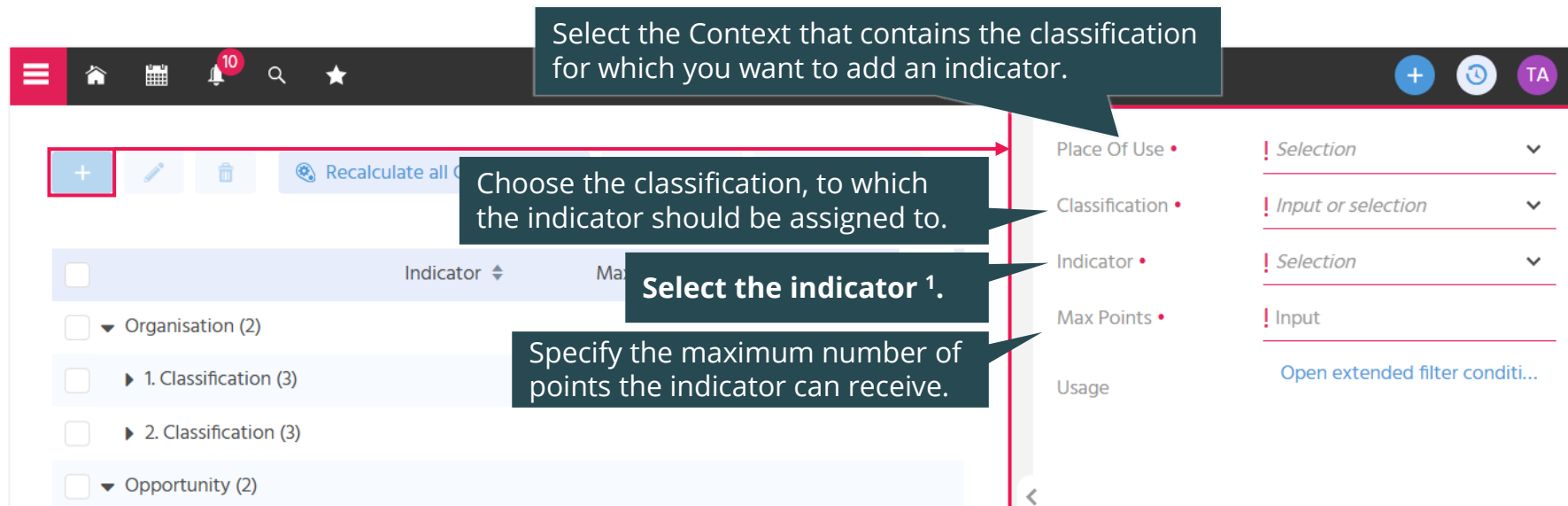
1. For **individual company or opportunity data records**, the **user** can initiate the process by executing the “Show Classification” action (in the company or opportunity preview).
2. For **all company or opportunity data records**, the **administrator** is able to
 - a) **start the process manually** by clicking on the “Recalculate all Classifications” button in the “Classification” Context.
 - b) **run the process automatically**. The settings for the server process “updateClassifications_serverProcess” can be defined individually in the ADITO Manager. We recommend running this process once a week.

As a result, all values are recalculated or calculated for the first time.

Create and edit indicators



Create indicators



The screenshot shows the ADITO 'Create indicators' interface. A dark blue header bar contains navigation icons (hamburger menu, home, calendar, notifications with a red '10' badge, search, and star) on the left and action icons (plus, refresh, and 'TA' in a purple circle) on the right. Below the header, a toolbar includes a plus icon in a blue box, an edit icon, a trash icon, and a 'Recalculate all' button. The main content area is divided into two sections. The left section is a list of contexts with checkboxes: 'Organisation (2)', '1. Classification (3)', '2. Classification (3)', and 'Opportunity (2)'. The right section is a form with fields: 'Place Of Use' (dropdown), 'Classification' (dropdown), 'Indicator' (dropdown), 'Max Points' (input), and 'Usage' (text area). A red box highlights the 'Indicator' dropdown and the 'Max Points' input field. Five callout boxes provide instructions: 1. 'Select the Context that contains the classification for which you want to add an indicator.' points to the context list. 2. 'Choose the classification, to which the indicator should be assigned to.' points to the 'Classification' dropdown. 3. 'Select the indicator 1.' points to the 'Indicator' dropdown. 4. 'Specify the maximum number of points the indicator can receive.' points to the 'Max Points' input field. 5. 'Select the indicator 1.' points to the 'Indicator' dropdown.

Select the Context that contains the classification for which you want to add an indicator.

Choose the classification, to which the indicator should be assigned to.

Select the indicator ¹.

Specify the maximum number of points the indicator can receive.



¹ See next slide

Create indicators

¹ Information on selecting the indicator

- The selection contains **attributes²**, **fields** and **complex information** about the Contexts, in which the classification is used.
- **Complex** information in the case of the opportunity include, for example, the **total of forecasts**, **industry of organisation**, and **start of the opportunity**. This information can be further extended through customization.

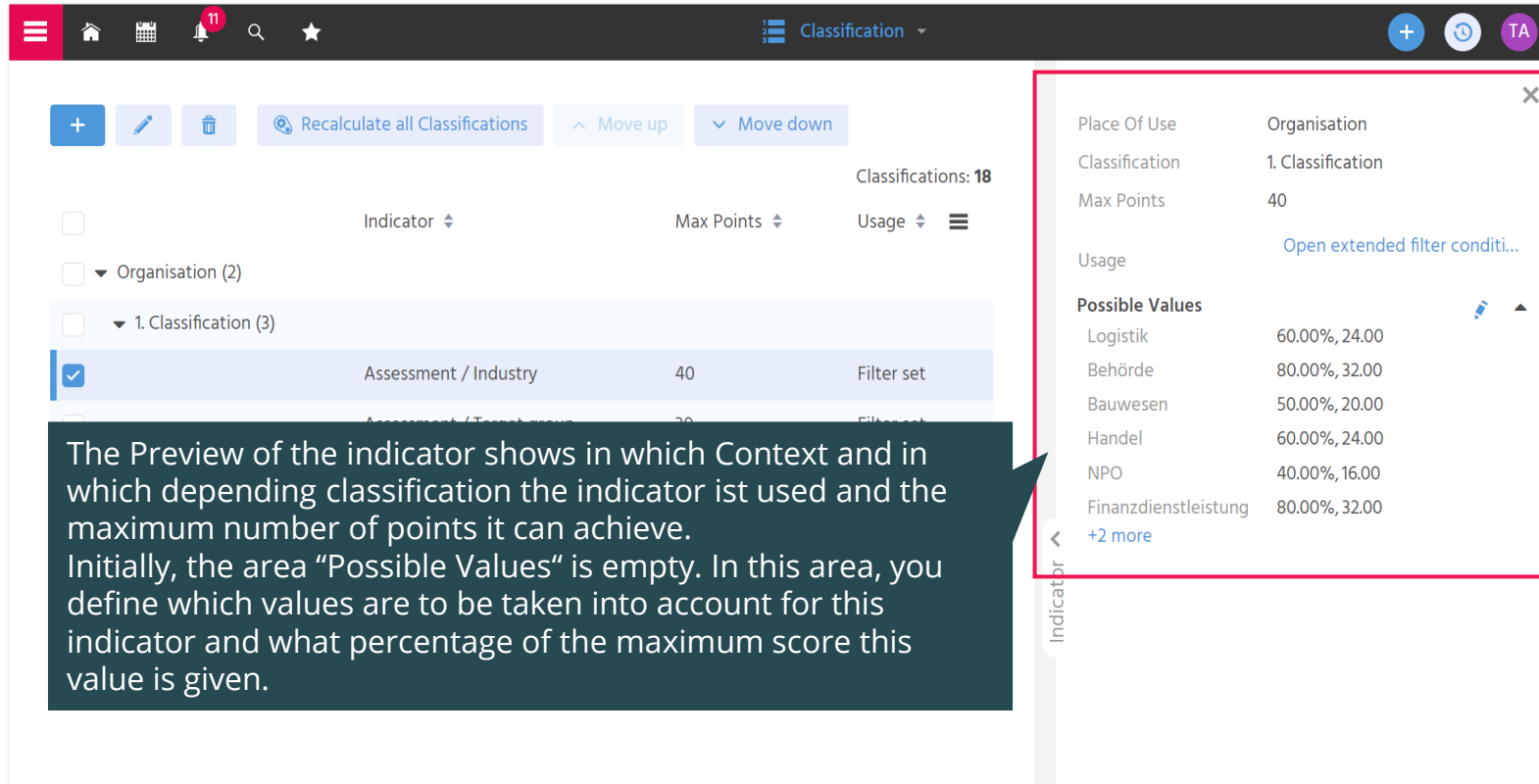


² Note regarding translation:

The attributes are stored in the language that the administrator uses when creating the parameter. This means that when the user executes the “Show classification” action (in the company or opportunity), the attributes names are displayed in this language, regardless of the language in which the user is using the client.

If it is necessary for the user to be able to use the name in the respective client language, customization is required.

Preview of indicator

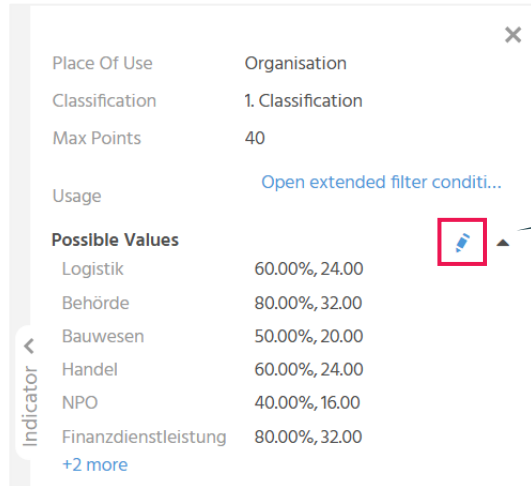


The Preview of the indicator shows in which Context and in which depending classification the indicator ist used and the maximum number of points it can achieve. Initially, the area "Possible Values" is empty. In this area, you define which values are to be taken into account for this indicator and what percentage of the maximum score this value is given.

Place Of Use	Organisation
Classification	1. Classification
Max Points	40
Usage	Open extended filter conditi...
Possible Values	
Logistik	60.00%, 24.00
Behörde	80.00%, 32.00
Bauwesen	50.00%, 20.00
Handel	60.00%, 24.00
NPO	40.00%, 16.00
Finanzdienstleistung	80.00%, 32.00
+2 more	

Creating indicator values

Creating/adding possible values for indicators



Place Of Use	Organisation
Classification	1. Classification
Max Points	40
Usage	Open extended filter condi...
Possible Values	
Logistik	60.00%, 24.00
Behörde	80.00%, 32.00
Bauwesen	50.00%, 20.00
Handel	60.00%, 24.00
NPO	40.00%, 16.00
Finanzdienstleistung	80.00%, 32.00
+2 more	

1. Open Indicator Preview.

2. Activate editing for the "Possible values" area.

Depending on whether the indicators exist as properties, fields, or complex information, the subsequent steps below can be accessed via the links.

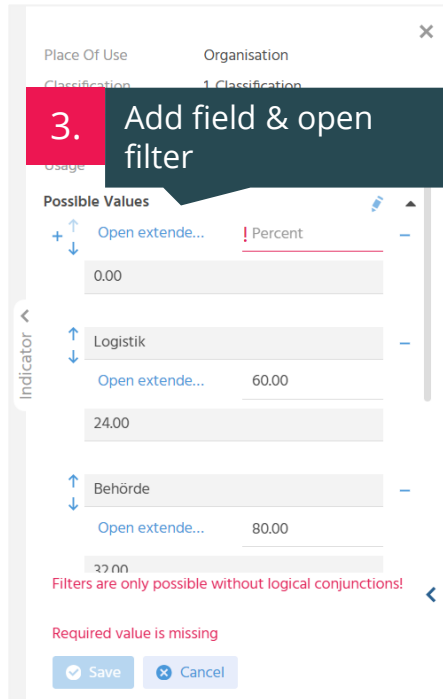
Following steps for [properties/fields with selection values](#).

Following steps for [complex information with selection values](#).

Following steps for [properties/fields/complex information with number values](#).

Creating indicator values

For properties/fields with selection values



Place Of Use Organisation

Classification 1 Classification

Usage

3. Add field & open filter

Possible Values

+ Open extend... ! Percent

0.00

Indicator

Logistik 60.00

Open extend... 24.00

Behörde 80.00

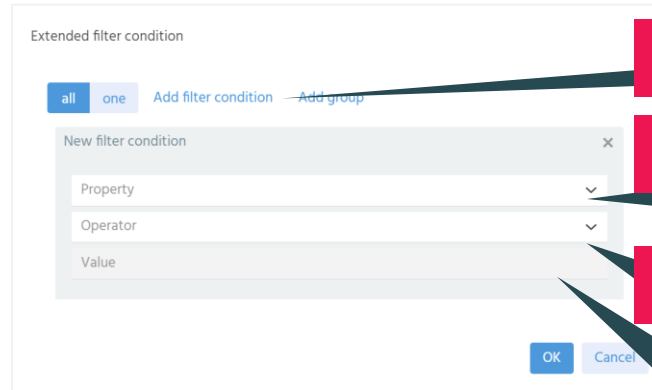
Open extend...

77 nn

Filters are only possible without logical conjunctions!

Required value is missing

Save Cancel



Extended filter condition

all one Add filter condition Add group

New filter condition

Property

Operator

Value

OK Cancel

4. Add filter conditions

5. Select property/field.

6. Operator "equal"

7. All values that are available for the property or field may be selected.



With the note "Filters are only possible without logical conjunctions!" you can only use simple filters, not a group of filters.

Place Of Use

Classification

Max Points

Usage

Organisation

1. Classification

40

Open extended filter conditions

Indicator

↑

↓

Open extended...

! Percent

0.00

↑

↓

Logistik

Open extended...

60.00

24.00

↑

↓

Behörde

Open extended...

80.00

22.00

Filters are only possible without logical conjunctions!

Required value is missing

Save

Cancel

8. Enter the **percentage of the maximum number of points** that this value receives here. You can see the result as an absolute number in the grayed-out field next to the percentage value.



Repeat the steps 3 to 8 as often as necessary,
until all wished values for this indicator have been entered



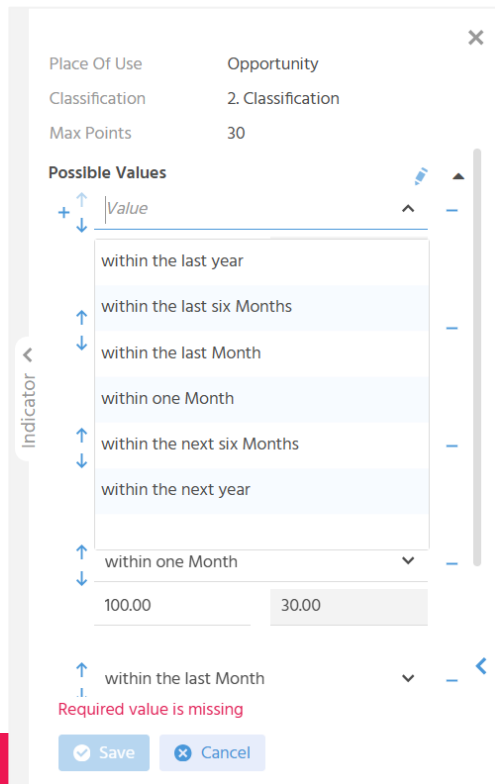
The order in which the values are displayed can be adjusted with the arrow keys.

Creating indicator values

For complex information with selection values

- For complex information, the possible values are directly available in a dropdown.

Complex information	Possible selection values
Start of the opportunity	Time frames
Industry of company	Selection values of the property "Industry" (available in the Company).



Place Of Use Opportunity

Classification 2. Classification

Max Points 30

Possible Values

+ |Value| -

within the last year

within the last six Months

within the last Month

within one Month

within the next six Months

within the next year

within one Month

100.00 30.00

within the last Month

Required value is missing

Save Cancel



The valuation is created as shown in the previous slide.



The order in which the values are displayed can be adjusted using the arrow buttons.



The selection for complex information was defined in the Customizing.

×

Place Of Use

Organisation

Classification

1. Classification

Max Points

30

Usage

[Open extended filter conditions](#)

Possible Values

+

↑

! Value

↓

!

Percent

0.00

Indicator

↑

↓

25,000.00

22.50

5,000.00

15.00

3,000.00

12.00

←

→

Required value is missing

✓ Save

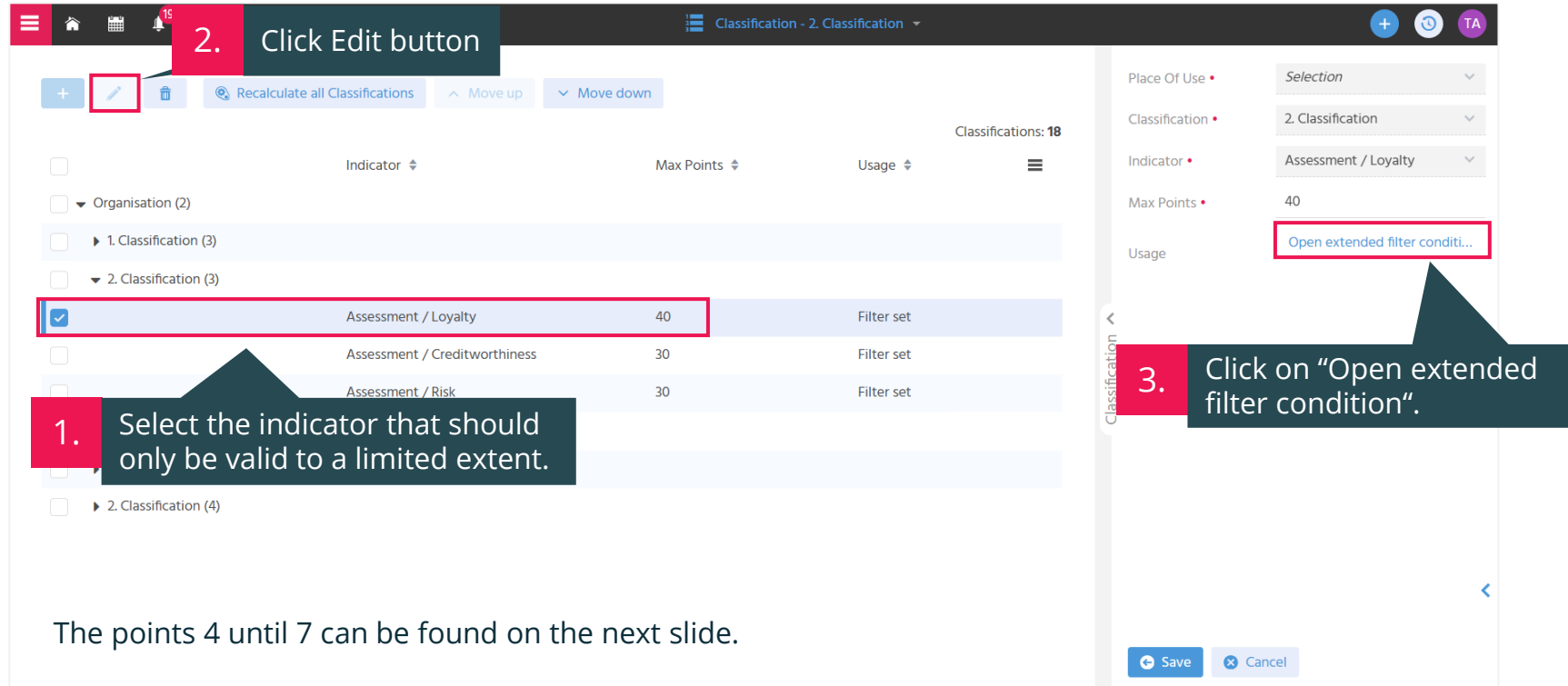
✕ Cancel

4. **Enter procentage value.** The **absolute point value** is calculated based on the maximum number of points for the indicator.



The order in which the values are displayed can be adjusted with the arrow keys.

Controlling the use of indicators



2. Click Edit button

1. Select the indicator that should only be valid to a limited extent.

	Indicator	Max Points	Usage
☐	Organisation (2)		
☐	1. Classification (3)		
☐	2. Classification (3)		
☒	Assessment / Loyalty	40	Filter set
☐	Assessment / Creditworthiness	30	Filter set
☐	Assessment / Risk	30	Filter set
☐	2. Classification (4)		

3. Click on "Open extended filter condition".

Classifications: 18

Place Of Use • Selection

Classification • 2. Classification

Indicator • Assessment / Loyalty

Max Points • 40

Usage • [Open extended filter condi...](#)

Save Cancel

The points 4 until 7 can be found on the next slide.

Controlling the use of indicators

In the Overlay

Extended filter condition 4. Click on "Add filter condition" ×

☐ all ☒ one Add filter condition Add group

Type equal "Interessant" ×

Type equal "Kunde" ×

New filter condition ×

5. Click on "New filter condition" OK Cancel



Depending on whether the classification is created for the company or the opportunity, the filter criteria from the respective Contexts are available.

Extended filter condition ×

☐ all ☒ one Add filter condition Add group

Type equal "Interessant" ×

Type equal "Kunde" ×

New filter condition ×

Property ▼

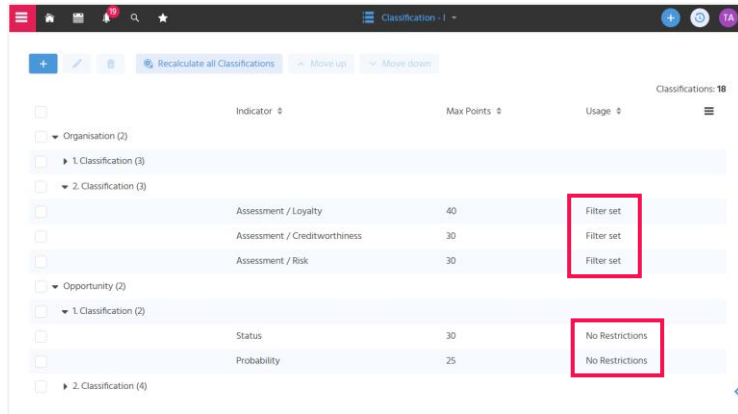
Operator ▼

Value

6. Add filter criteria OK Cancel

Controlling the use of indicators

View of administrator

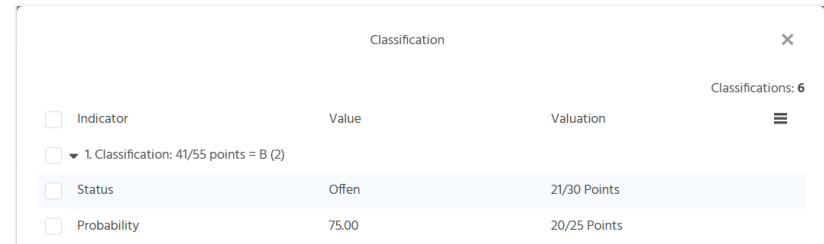


The screenshot shows the 'Classification' interface for an administrator. It features a table with columns for 'Indicator', 'Max Points', and 'Usage'. The table is organized into sections for 'Organisation (2)', 'Opportunity (2)', and 'Classification (3)'. The 'Usage' column contains three red boxes, each labeled 'Filter set'. The 'Classification (3)' section shows two rows: 'Status' with 30 points and 'Probability' with 25 points. The 'Usage' column for these rows contains two red boxes, each labeled 'No Restrictions'.

Indicator	Max Points	Usage
Assessment / Loyalty	40	Filter set
Assessment / Creditworthiness	30	Filter set
Assessment / Risk	30	Filter set
Status	30	No Restrictions
Probability	25	No Restrictions

The indicators for which a filter has been set are considered only for companies or opportunities that meet these filter criteria.

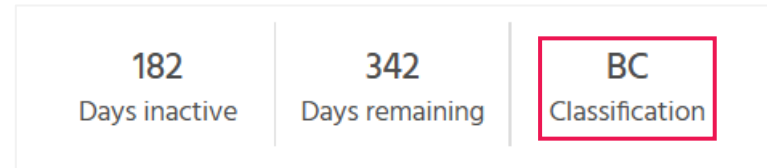
View of user



The screenshot shows the 'Classification' interface for a user. It features a table with columns for 'Indicator', 'Value', and 'Valuation'. The table is organized into sections for 'Organisation (2)', 'Opportunity (2)', and 'Classification (3)'. The 'Classification (3)' section shows two rows: 'Status' with a value of 'Often' and a valuation of '21/30 Points', and 'Probability' with a value of '75.00' and a valuation of '20/25 Points'.

Indicator	Value	Valuation
Status	Often	21/30 Points
Probability	75.00	20/25 Points

When displaying the classification for a company or an opportunity ("Show classification" action), only the classifications and indicators that are considered for this company/opportunity according to the filter are displayed.

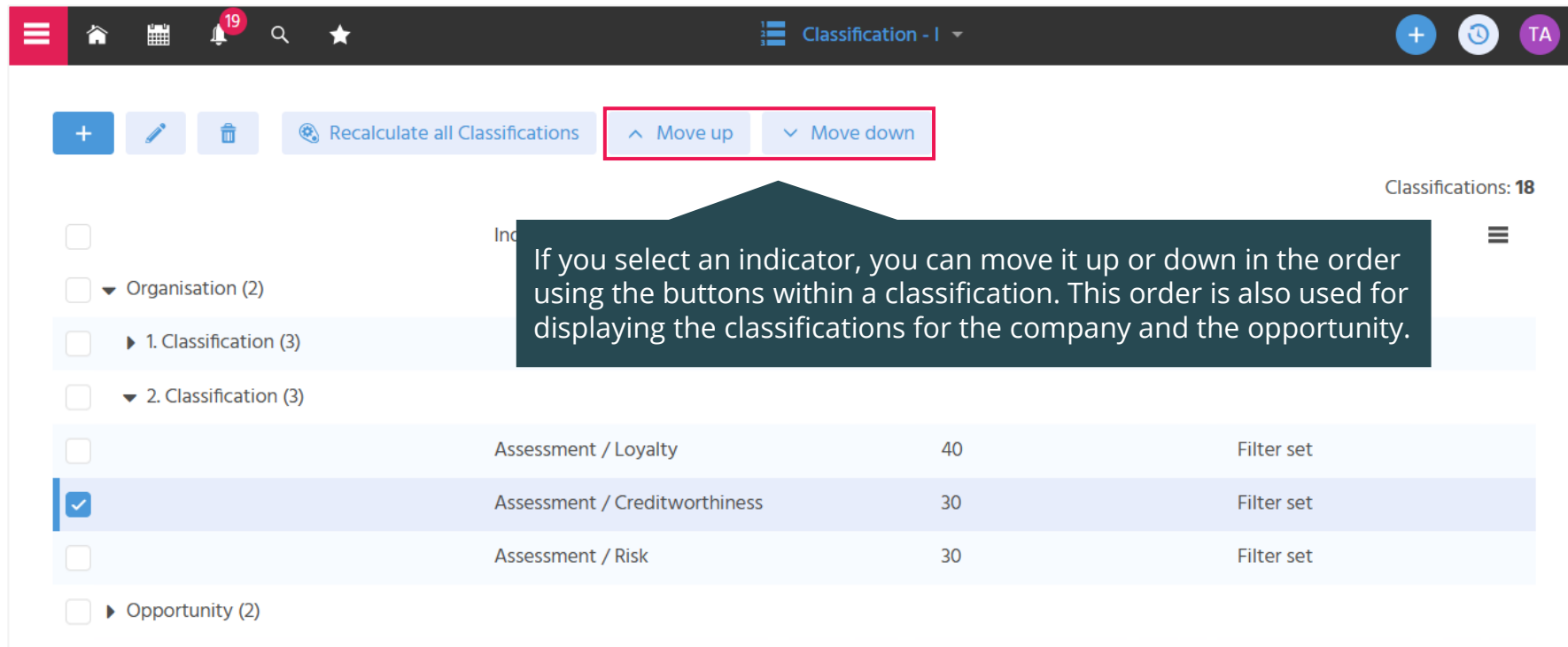


The screenshot shows a summary of indicators for a company or opportunity. It features three columns: 'Days inactive', 'Days remaining', and 'BC Classification'. The 'BC Classification' column is highlighted with a red box.

Days inactive	Days remaining	BC Classification
182	342	BC

Only those classes are displayed that contain indicators considered for the company or opportunity according to the filter.

Moving indicators



Classification - I

Recalculate all Classifications

Move up Move down

Classifications: 18

If you select an indicator, you can move it up or down in the order using the buttons within a classification. This order is also used for displaying the classifications for the company and the opportunity.

☐	Assessment / Loyalty	40	Filter set
☒	Assessment / Creditworthiness	30	Filter set
☐	Assessment / Risk	30	Filter set

Deleting

Deleting classifications

- Classifications that are no longer required may be deleted.
- This reduces the number of letters that display the rating result in the preview or in the filter view.

Deleting indicators

- Indicators, which are no longer needed in the classification, can be deleted.
- This attribute therefore remains recorded in the data set but is no longer considered an evaluated indicator in the classification.

Deleting possible values

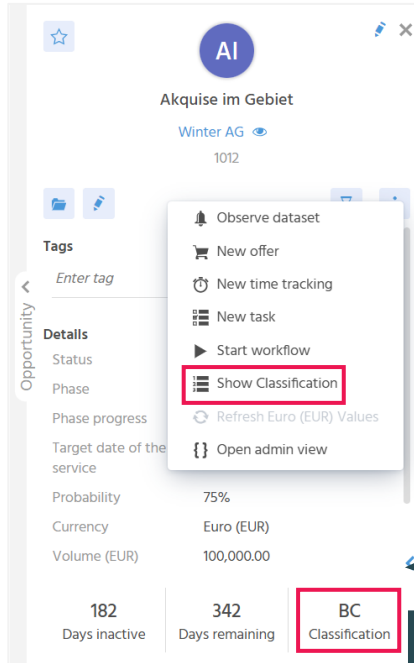
- Possible values, which are no longer needed in the indicator, can be deleted.
- This recording of the information in the classification is no longer being considered.

View of users



View of user

Show classification in Opportunity



The screenshot shows the ADITO user interface. At the top, there is a header with a star icon, a circular profile icon labeled 'AI', and a close icon. Below the header, the text 'Akquise im Gebiet' and 'Winter AG' are visible, along with the number '1012'. A left sidebar contains a 'Tags' section with an 'Enter tag' input and a 'Details' section with various fields. A dropdown menu is open, showing several actions: 'Observe dataset', 'New offer', 'New time tracking', 'New task', 'Start workflow', 'Show Classification' (highlighted with a red box), 'Refresh Euro (EUR) Values', and 'Open admin view'. At the bottom of the interface, there is a table with three columns: '182 Days inactive', '342 Days remaining', and 'BC Classification' (highlighted with a red box).

- Properties and fields of a Context that are relevant to the classification and are already maintained within the company or in the opportunity are used for the classification.
- The detailed overview of the classifications, along with the results of the individual indicators, is called up and recalculated using the “Show Classification” action.
- For properties that can be set multiple times, the value with the highest rating is used in the classification.
- The classes (A, B, C, D, etc.) result from the number of points achieved for the indicators.

Showing the classes in the preview (and in the filter view in the Classification column).

To **display the classes of a newly created company**, the “Show Classification” action must first be executed, and the data record must be reloaded.

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