

UX & Basics

ADITO Software GmbH

From version 2026.4.0 | April 2026





Screenshots

The UX design of ADITO is continuously optimized for you. There may therefore be deviations in the screenshots.



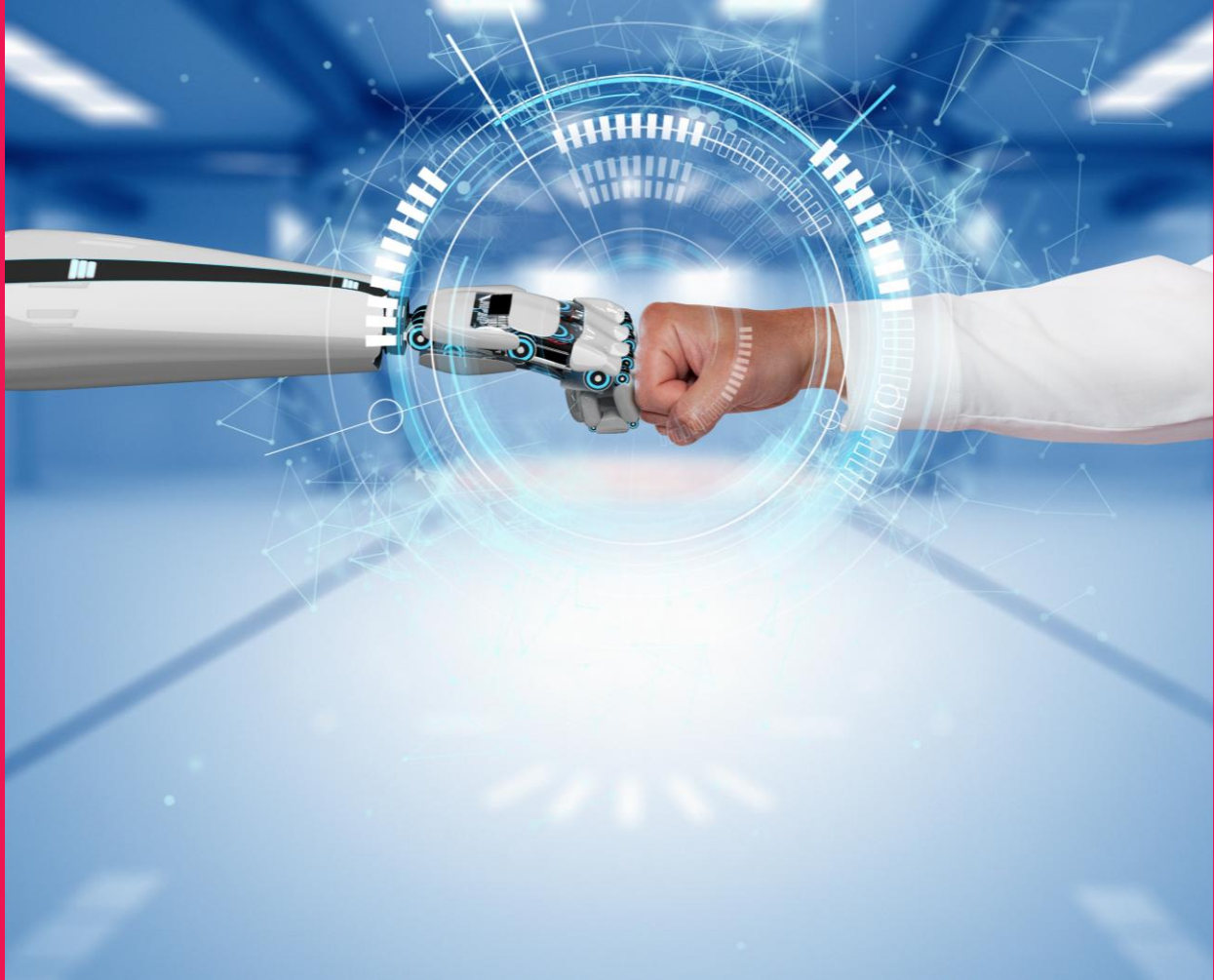
Agenda



- [Log-in](#)
- [Structure/terms of the Web Client](#)
- [Dashboards & Dashlets](#)
 - [Set up My Dashboard \(Home\)](#)
 - [Dashlets from the DashletStore](#)
 - [Creating individual Dashlets](#)
 - [Configuring Dashlets](#)
 - [Share Dashlets](#)
 - [Publish Dashlets](#)
 - [Delete Dashlets](#)
- [Searching for datasets: Index search](#)
- [Filter & grouping datasets](#)
- [Navigating within the Context](#)
 - [FilterView](#)
 - [Preview](#)
 - [MainView](#)
 - [EditView](#)
- [Quickentry](#)
- [Working in the web browser](#)
 - [Working with ADITO links](#)
 - [Copy button for links](#)
 - [Working in several browser tabs](#)
 - [Navigate back using the history button](#)
 - [Contrast](#)
 - [Zoom](#)
- [Planning of appointments](#)
 - [Open calendar](#)
 - [Control calendar display](#)
 - [Calendar of colleagues](#)
 - [Create appointments](#)
 - [Appointment Preview](#)
- [Mark or categorize datasets as "important"](#)
 - [Overview](#)
 - [Assigning tags](#)
 - [Favorites](#)
 - [#tags](#)
- [Documents in the Preview](#)
- [User-specific settings](#)
 - [User menu](#)
 - [Saving individual display settings](#)



Login



ADITO

☐ remain signed in

Select the language
of the Client.

Structure/terms of the Web Client



Import e-mails

Upload files
(drop e-mails here)

number of connections Responsible Subject Description

No data present

Already existing activities

ADITO Facebook Feed

ADITO Software GmbH
Seite folgen 676 Follower



My Tasks

Jan 13, 2026, 10:50 AM Kundeninformation b...
Bitte zeitnah an alle K...
rauschicken und über...

Aug 2, 2025, 2:09 PM

Appointments/Tasks

2
Overdue tasks

3
New tasks

0
Imminent appointments for today

ADITO Documentation

Title	Author	Last change
Documentation Overview	Tim Admin	Nov 23, 2025, 7:30 AM
Documentation External Work	Tim Admin	Nov 23, 2025, 7:29 AM
Documentation Marketing	Tim Admin	Nov 23, 2025, 7:29 AM
Documentation Service	Tim Admin	Nov 23, 2025, 7:29 AM
Documentation Knowledge Management	Tim Admin	Nov 23, 2025, 7:29 AM

Newsfeed (Preview)

Nov 19, 2025, 8:59 AM Neue Workshop-Reihe zur Stärkung der Kundenbindung

Unsere Kunden stehen im Mittelpunkt – und um diesen Fokus weiter auszubauen, startet ab nächstem Monat eine neue Workshop-Reihe für alle Service- und Vertriebsteams.Kundenbindung ist eine der zentralen Aufgaben unseres Unternehmens und ein Schlüsselfaktor für nachhaltigen...

Tim Admin

The system always opens in the Home screen (My Dashboard).



Content

Import e-mails

Upload files

(drop e-mails here)

Date

number of connections

Responsible

Subject

Description

No data present

Already existing activities

My Tasks

2026, 10:50 AM

Kundeninformation bzgl Betriebsferien versenden

Bitte zeitnah an alle Kunden, eine Information versenden und über unsere nächsten Betriebsferien informieren

ADITO Facebook Feed

ADITO Software GmbH

Seite folgen 676 Follower

VERTRIEB 4.0

DIGITALISIERUNG, CRM & KI gestalten die Zukunft des Vertriebs

Appointments/Tasks

2 Overdue tasks

3 New tasks

0 Imminent appointments for today

ADITO Documentation

Title	Author	Last change
KN Documentation Overview	Tim Admin	Nov 23, 2025, 7:30 AM 29
KN Documentation Basics	Tim Admin	Nov 23, 2025, 7:30 AM 24
KN Documentation Contact Management	Tim Admin	Nov 23, 2025, 7:30 AM 49
KN Documentation Sales	Tim Admin	Nov 23, 2025, 7:29 AM 36
KN Documentation Collaboration	Tim Admin	Nov 23, 2025, 7:29 AM 18
KN Documentation External Work	Tim Admin	Nov 23, 2025, 7:29 AM 22
KN Documentation Marketing	Tim Admin	Nov 23, 2025, 7:29 AM 28
KN Documentation Service	Tim Admin	Nov 23, 2025, 7:29 AM 16
KN Documentation Knowledge Management	Tim Admin	Nov 23, 2025, 7:29 AM 18

Newsfeed (Preview)

Nov 19, 2025, 8:59 AM

Neue Workshop-Reihe zur Stärkung der Kundenbindung

Unsere Kunden stehen im Mittelpunkt – und um diesen Fokus weiter auszubauen, startet ab nächstem Monat eine neue Workshop-Reihe für alle Service- und Vertriebsteams.Kundenbindung ist eine der zentralen Aufgaben unseres Unternehmens und ein Schlüsselfaktor für nachhaltigen...

Tim Admin

Global Bar



Burger button Sidebar



Home – My Dashboard



Calendar



Notificiations



Index search



Favorites



Quickentry



History



User menu

<

Import e-mails

Upload files

(drop e-mails here)

Date number of connections Responsible Subject

No data present

Already existing activities

ADITO Facebook Feed

ADITO Software GmbH

Seite folgen 676 Follower

VERTRIEB 4.0

DIGITALISIERUNG, CRM & KI gestalten die Zukunft des Vertriebs

Home

Contact Management

Contact, Company, Activity, Task, Contact synchronisation

Sales

Sales Dashboard, Planning, Opportunity, Offer, Receipt, Dunning History, Contract, Package, Product, Prices, Conversion Rates, Advertising material, Sales forecast

Collaboration

Project, Projectticket, ProjectType, ProjectticketType, Projectticket Attribute

External Work

Operation Recommendation, Expense Report, Resource, Operation, Resource planning, Operation Task, Operation Task Template

Marketing

Marketing Dashboard, Campaign Planning, Campaign, Event, Bulk Mail, Serial Letter, Mosaico, Questionnaire, Weblink, Webtracking, Interest, Email Filter, Webfile, Document Template

Service

Team leader dashboard, Service Dashboard, Service ticket

Service Administration

Inboxes, Inbox filter group, Service ticket template, Escalation, Employee Group, Employee group rule group

Knowledge Management

Knowledge category, Knowledge

Manager

Session, Server, Process, Process history, Database, Peer

Administration

Attribute, Keyword Category, Keyword Entry, Keyword Attribute, Relation Type, Classification, Target acquisition, Salutation, Duplicate Configuration, Audit Log, Export Template, Import Template, Workflow Definition, District definition, Checklists, Contact synchronisation dashboard, Topic Tree, Currency Rates, Signature Templates, Expense administration, Dunning Level, DSGVO Configuration

User Administration

Employee, Roles, Permission

Menu group

Author Last change

15

itation Overview

Tim Admin Nov 23, 2025, 7:30 AM 29

itation Basics

Tim Admin Nov 23, 2025, 7:30 AM 24

itation Contact Management

Tim Admin Nov 23, 2025, 7:30 AM 49

itation Sales

Tim Admin Nov 23, 2025, 7:29 AM 36

itation Collaboration

Tim Admin Nov 23, 2025, 7:29 AM 18

itation External Work

Tim Admin Nov 23, 2025, 7:29 AM 22

itation Marketing

Tim Admin Nov 23, 2025, 7:29 AM 28

itation Service

Tim Admin Nov 23, 2025, 7:29 AM 16

itation Knowledge Management

Tim Admin Nov 23, 2025, 7:29 AM 18

9 AM Neue Workshop-Reihe zur Stärkung der Kundenbindung

Unsere Kunden stehen im Mittelpunkt – und um diesen Fokus weiter auszubauen, startet ab nächstem Monat eine neue Workshop-Reihe für alle Service- und Vertriebsteams. Kundenbindung ist eine der zentralen Aufgaben unseres Unternehmens und ein Schlüsselfaktor für nachhaltigen...

Tim Admin



A user can only see the menu groups, which they are authorized for.



Import e-mails

Upload files

(drop e-mails here)

Date number of connections Responsible Subject

No data present

Already existing activities

ADITO Facebook Feed

ADITO Software GmbH

Seite folgen 676 Follower

VERTRIEB 4.0

DIGITALISIERUNG, CRM & KI gestalten die Zukunft des Vertriebs

Contact Management

Contact, Company, Activity, Task, Contact synchronisation

Sales

Sales Dashboard, Planning, Opportunity, Offer, Receipt, Dunning History, Contract, Product package, Product, Prices, Conversion Rates, Advertising material, Sales forecast

Collaboration

Project, Projectticket, ProjectType, ProjectticketType, Projectticket Attribute

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Operation Recommendation, Expense Report, Resource, Operation, Resource planning, Operation Task, Operation Task Template

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Marketing Dashboard, Campaign Planning, Campaign, Event, Bulk Mail, Serial Letter, Mosaico, Questionnaire, Weblink, Webtracking, Interest, Email Filter, Webfile, Document Template

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Service Administration

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Knowledge Management

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Session, Server, Process, Process history, Database, Peer

Administration

Attribute, Keyword Category, Keyword Entry, Keyword Attribute, Relation Type, Classification, Target acquisition, Salutation, Duplicate Configuration, Audit Log, Export Template, Import Template, Workflow Definition, District definition, Checklists, Contact synchronisation dashboard, Topic Tree, Currency Rates, Signature Templates, Expense administration, Dunning Level, DSGVO Configuration

User Administration

Employee, Roles, Permission

Contexts

on

Author Last change

itation Overview	Tim Admin	Nov 23, 2025, 7:30 AM	29
itation Basics	Tim Admin	Nov 23, 2025, 7:30 AM	24
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9AM Neue Workshop-Reihe zur Stärkung der Kundenbindung

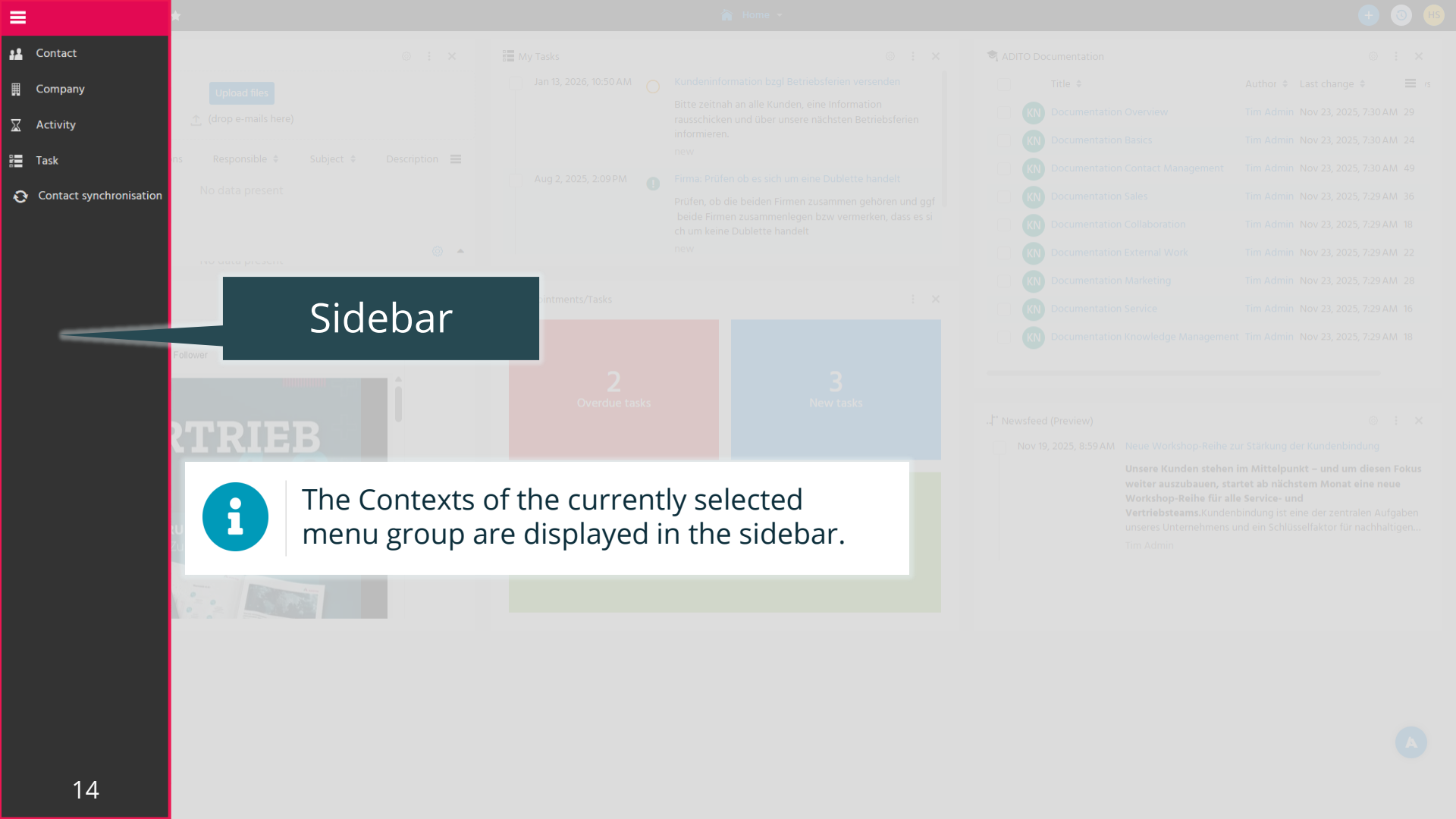
Unsere Kunden stehen im Mittelpunkt – und um diesen Fokus weiter auszubauen, startet ab nächstem Monat eine neue Workshop-Reihe für alle Service- und Vertriebsteams. Kundenbindung ist eine der zentralen Aufgaben unseres Unternehmens und ein Schlüsselfaktor für nachhaltigen...

Tim Admin



A user can only see the Contexts, for which they are authorized.

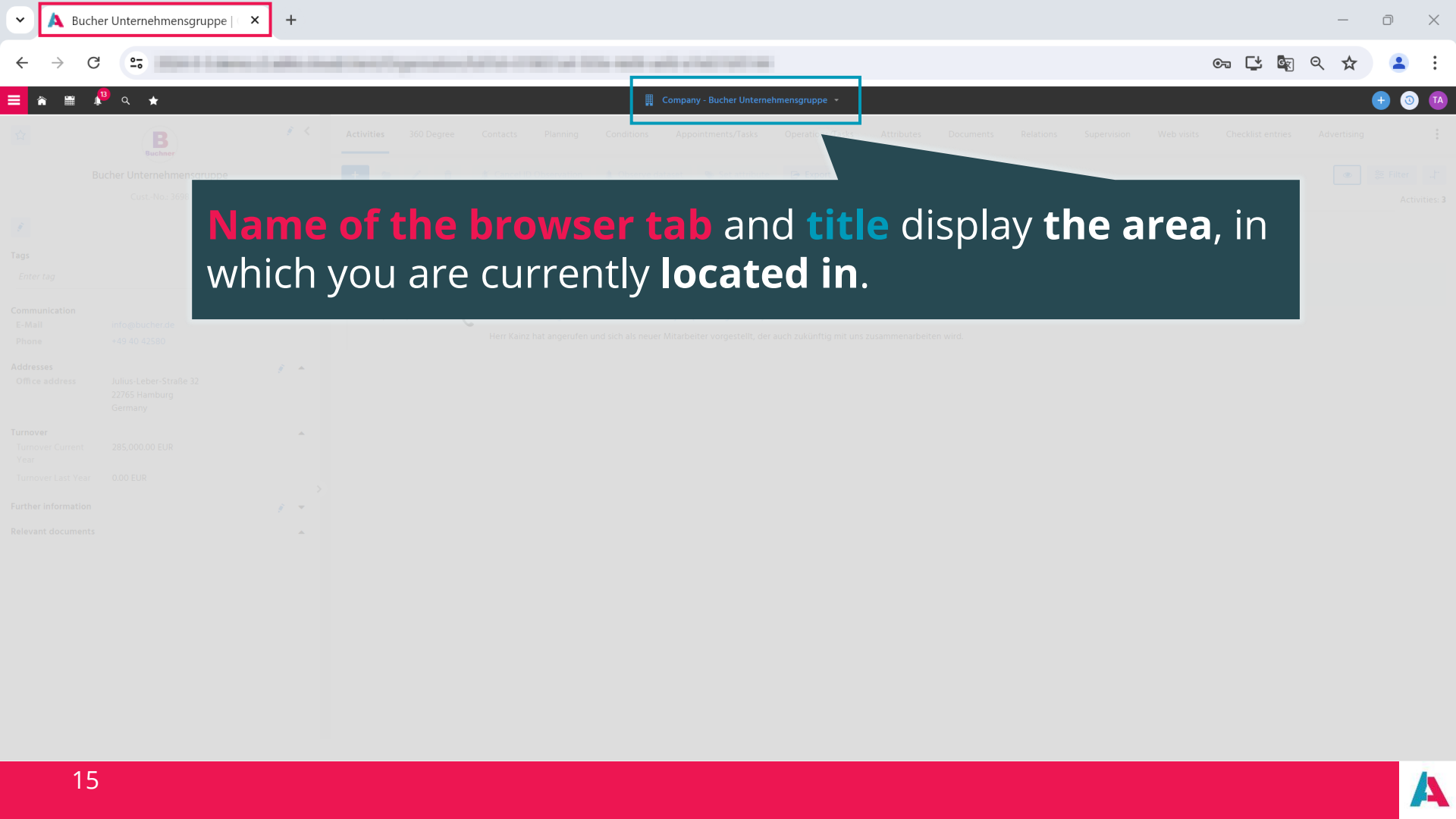




Sidebar



The Contexts of the currently selected menu group are displayed in the sidebar.



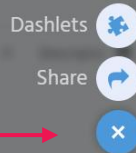
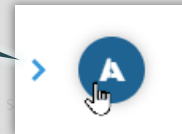
Name of the browser tab and **title** display the area, in which you are currently **located** in.

By using the **Floating Button**, a user can access, depending on the currently opened view, e.g.

- the DashletStore button
- the Share button to share the link of the currently opened view.

If the Floating Button is not required, it can be hidden with this arrow.

It can be defined in the [Settings](#) if the Floating Button should be shown or hidden by default. Therefore, the user can take appropriate action if required.



Dashboards & Dashlets



My Dashboard (Home) can always be accessed by pressing the Home button.

7
New tasks

2
Imminent appointments for today

My Dashboard (Home) is your starting screen that can be customized flexibly.

My Tasks

☐	Status	Subject	
☐	waiting	Fr. Vogel kont...	
☐	new	Freier Außend...	
☐	new	Event im Hause	Frau Birgit Lei
☐	new	Controlling Termin Vorbereiten	Herr Tim Adm
☐	in progress	Skyscraper VP für nächste Schritte	Frau Birgit Lei
☐	in progress	Vorbereitung Präsentation	Frau Susanne
☐	new	Anrufen: Abfrage aktueller Projektstatus	Frau Lisa Som
☐	new	Produkt Präsentation vorbereiten und mit Li:	Herr Tim Adm
☐	new	Lead nachfassen	Herr Peter Pfi
☐	new	Präsentation vor Ort vorbereiten	Frau Birgit Lei

Newsfeed (Preview)

Marketingmitarbeiter Marketing
Woran erkennen wir dich? An
und immer einen lockeren
ie kommst du ab jetzt jeden
Morgen zu ADITO? Mit Bus und Bahn oder (bei gutem...
Linda Reiter

Contact person EN

☐	Picture	Salutation	Title	Firstname	Lastname	Company	E-Mail	Phone	Address
☐	CB	Mr.		Carl	Bush	Lockman LLC	bush@lockman.com		21 London Road - GB SO15 2AD Southampton
☐	CD	Mr.		Cameron	Doyle	Glob Group	doyle@globgroup.com		32-40 Blackfriars Road - GB SE1 8NW London
☐	MF	Mrs.			Freeman	Glob Group	freeman@globgroup.com		32-40 Blackfriars Road - GB SE1 8NW London
☐	JF	Mrs.			Armstrong		jenniferfrost@fsa.org		69 New Street - GB B2 4DU Birmingham
☐	CM	Mr.	PhD				marsh@globgroup.com		32-40 Blackfriars Road - GB SE1 8NW London
☐	MR	Mrs.					read@lockman.com		21 London Road - GB SO15 2AD Southampton
☐	JS	Mr.							-
☐	SW	Mr.		Steven	Wallinger	Parker & Jenkins			26-40 Kensington High Street - GB W8 4PE Royal Borou...

Dashlets are the individually customizable components of a Dashboard.

Appointments/Tasks

10
Overdue tasks

7
New tasks

2
Imminent appointments for today

My Tasks

	Status	Subject	Requestor
☐	waiting	Fr. Vogel kontaktieren	Herr Tim Admin
☐	new	Freier Außendienst im Gebiet alle 4 Wochen	Herr Tim Admin
☐	new	Event im Hause	Frau Birgit Leicht
☐	new	Controlling Termin Vorbereiten	Herr Tim Admin
☐	in progress	Skyscraper VP für nächste Schritte	Frau Birgit Leicht
☐	in progress	Vorbereitung Präsentation	Frau Susanne Lustig
☐	new	Anrufen: Abfrage aktueller Projektstatus	Frau Lisa Sommer
☐	new	Produkt Präsentation vorbereiten und mit Li	Herr Tim Admin
☐	new	Lead nachfassen	Herr Peter Pfiffig
☐	new	Präsentation vor Ort vorbereiten	Frau Birgit Leicht

Newsfeed (Preview)

May 6, 2024, 1:32 PM

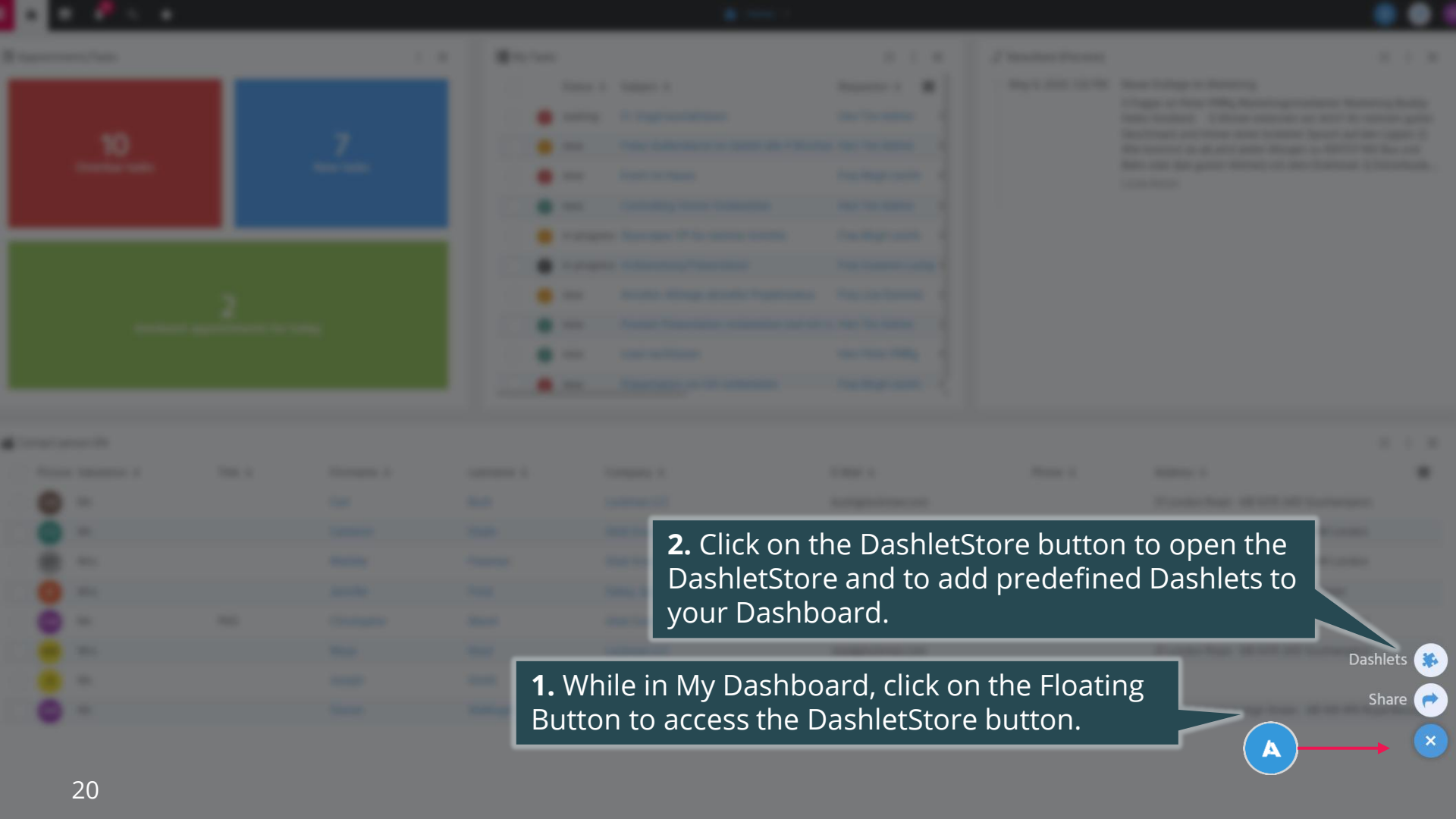
Neuer Kollege im Marketing

5 Fragen an Peter Pfiffig Marketingmitarbeiter Marketing Buddy: Heiko Storbeck 1) Woran erkennen wir dich? An meinem guten Geschmack und immer einen lockeren Spruch auf den Lippen 2) Wie kommst du ab jetzt jeden Morgen zu ADITO? Mit Bus und Bahn oder (bei gutem Wetter) mit dem Drahtesel. 3) Dönerbude,... Linda Reiter

Contact person EN

	Picture	Salutation	Title	Firstname	Lastname	Company	E-Mail	Phone	Address
☐	CB	Mr.		Carl	Bush				21 London Road - GB SO15 2AD Southampton
☐	CD	Mr.		Cameron	Doyle				Blackfriars Road - GB SE1 8NW London
☐	MF	Mrs.		Matilda	Freeman				Blackfriars Road - GB SE1 8NW London
☐	JF	Mrs.		Jennifer	Frost				W Street - GB B2 4DU Birmingham
☐	CM	Mr.	PhD	Christopher	Marsh	Glob Group	marsh@globgroup.com		32-40 Blackfriars Road - GB SE1 8NW London
☐	MR	Mrs.		Maya	Read	Lockman LLC	read@lockman.com		21 London Road - GB SO15 2AD Southampton
☐	JS	Mr.		Joseph	Smith	Nedick's			-
☐	SW	Mr.		Steven	Wallinger	Parker & Jenkins			26-40 Kensington High Street - GB W8 4PE Royal Borough ...

The **position** and **size** of a Dashlet can be adjusted. The **blue dashed frame** shows the next free position or the next possible size.



2. Click on the DashletStore button to open the DashletStore and to add predefined Dashlets to your Dashboard.

1. While in My Dashboard, click on the Floating Button to access the DashletStore button.

Appointments/Tasks

10
Overdue tasks

Imminent appointments

Contact person EN

Picture

Salutation

Mr.

Mr.

Mrs.

Mrs.

Mr.

Dashlets

All (83)

Admin (1)

Calendar (1)

Charts (7)

Contact Management (7)

Contact synchronisation (5)

Covid Information (2)

Districts (2)

Email (2)

Favorites (1)

Knowledge (3)

Marketing (10)

Notifications (1)

offline.SlaveAdministrationMyLastSync...

Project (3)

Reset Dashboard

f

ADITO Facebook Feed

Show all Facebook posts of ADITO

Add

Activities

Show all activities

Add

All Unlinked Mails

All mails that could not automatically linked are displayed here

Add

All synchronized datasets

Show all synchronized datasets

Add

Appointment CheckUp

Appointment checkup for the selected day

Add

Bulk Mail Opening Hours

Bulkmail Device Types

Reset the Dashboard to its original configuration.

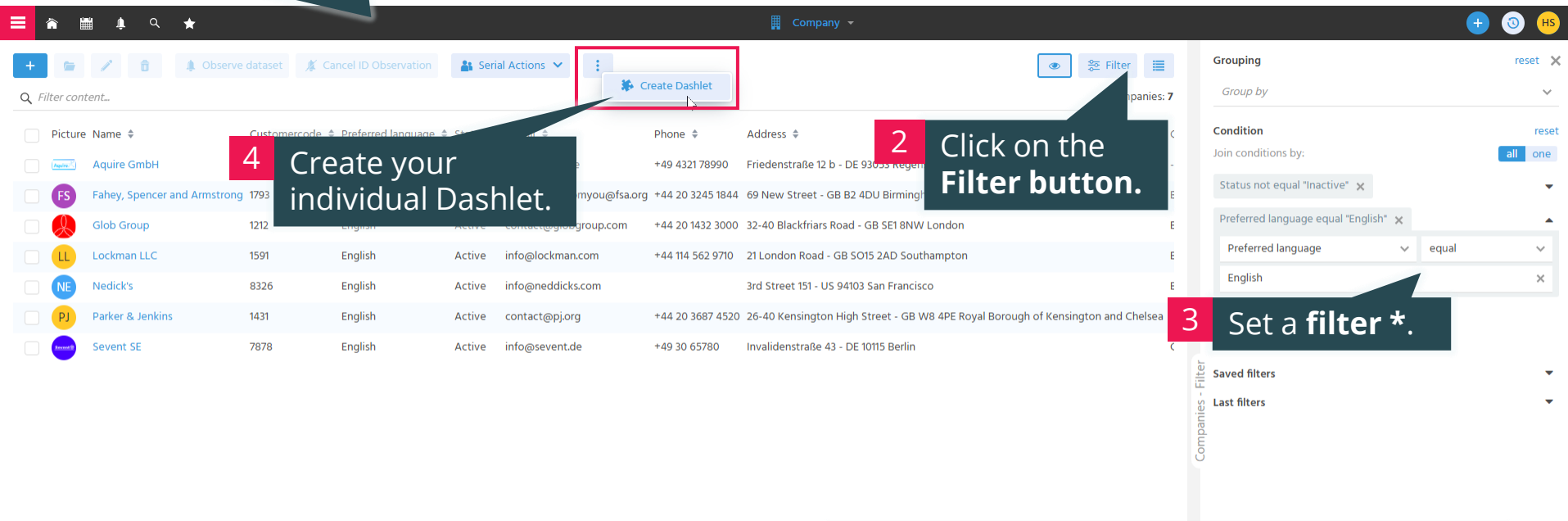
Dashlets are displayed depending on the user role.

Dashlets that **can only be used once by a user** and that are already placed on the Dashboard will no longer be displayed in the DashletStore.

21

Create individual Dashlets

1 Open the FilterView of the required Context.



The screenshot shows the ADITO interface with a table of company data. A red box highlights the 'Create Dashlet' button in the top toolbar. Another red box highlights the 'Filter' button in the top toolbar. A third red box highlights the 'Filter' button in the right sidebar. A fourth red box highlights the 'Create Dashlet' button in the top toolbar. A fifth red box highlights the 'Filter' button in the right sidebar.

Picture	Name	Customercode	Preferred language	Status	Phone	Address
	Aquire GmbH	1793	English	Active	+49 4321 78990	Friedenstraße 12 b - DE 93055 Regensburg
	Fahey, Spencer and Armstrong	1793	English	Active	+44 20 3245 1844	69 New Street - GB B2 4DU Birmingham
	Glob Group	1212	English	Active	+44 20 1432 3000	32-40 Blackfriars Road - GB SE1 8NW London
	Lockman LLC	1591	English	Active	+44 114 562 9710	21 London Road - GB SO15 2AD Southampton
	Nedick's	8326	English	Active		3rd Street 151 - US 94103 San Francisco
	Parker & Jenkins	1431	English	Active	+44 20 3687 4520	26-40 Kensington High Street - GB W8 4PE Royal Borough of Kensington and Chelsea
	Sevent SE	7878	English	Active	+49 30 65780	Invalidenstraße 43 - DE 10115 Berlin

Grouping

Group by

Condition

Join conditions by:

Status not equal "Inactive" x

Preferred language equal "English" x

Preferred language equal

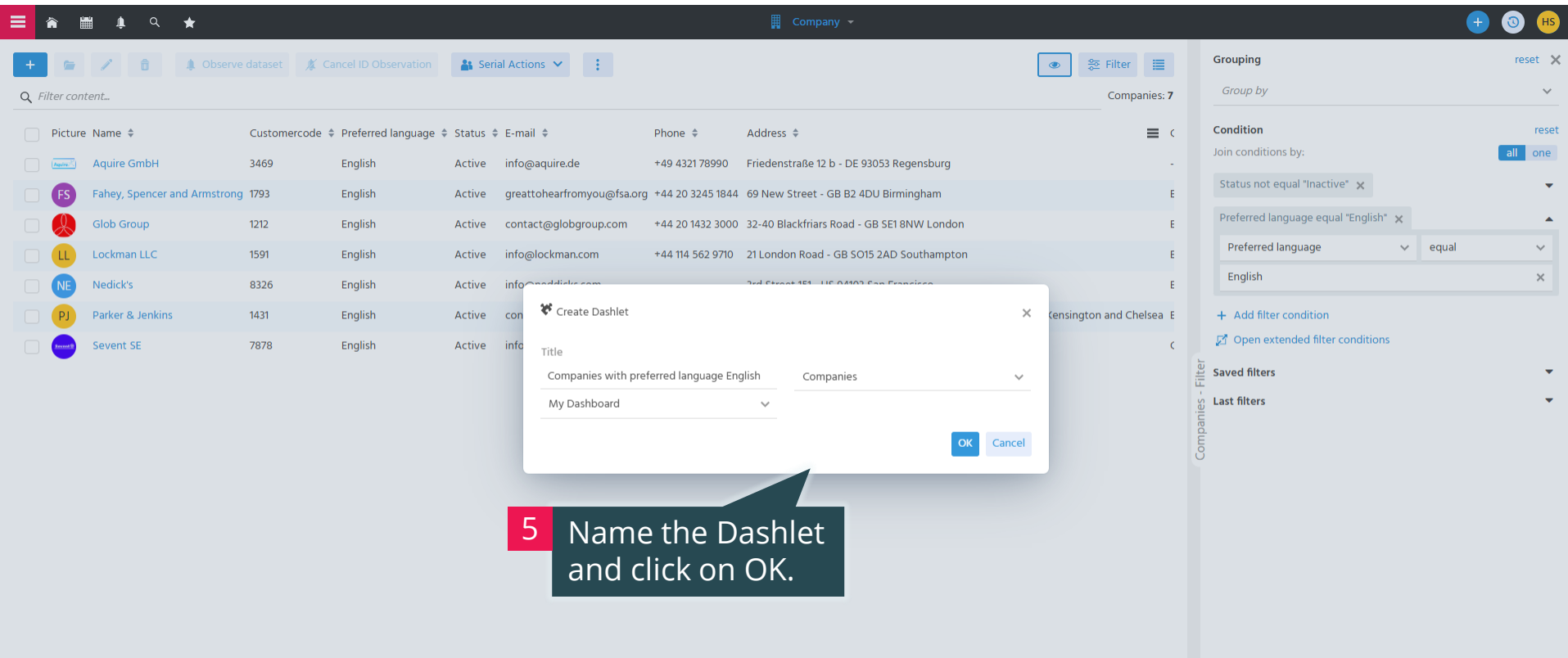
English x

Saved filters

Last filters

* The latest used filter will be transferred into the Dashlet.

Create individual Dashlets



The screenshot shows the ADITO interface with a table of companies. A modal dialog titled 'Create Dashlet' is open, allowing the user to name the dashlet and select the data source.

Table Data:

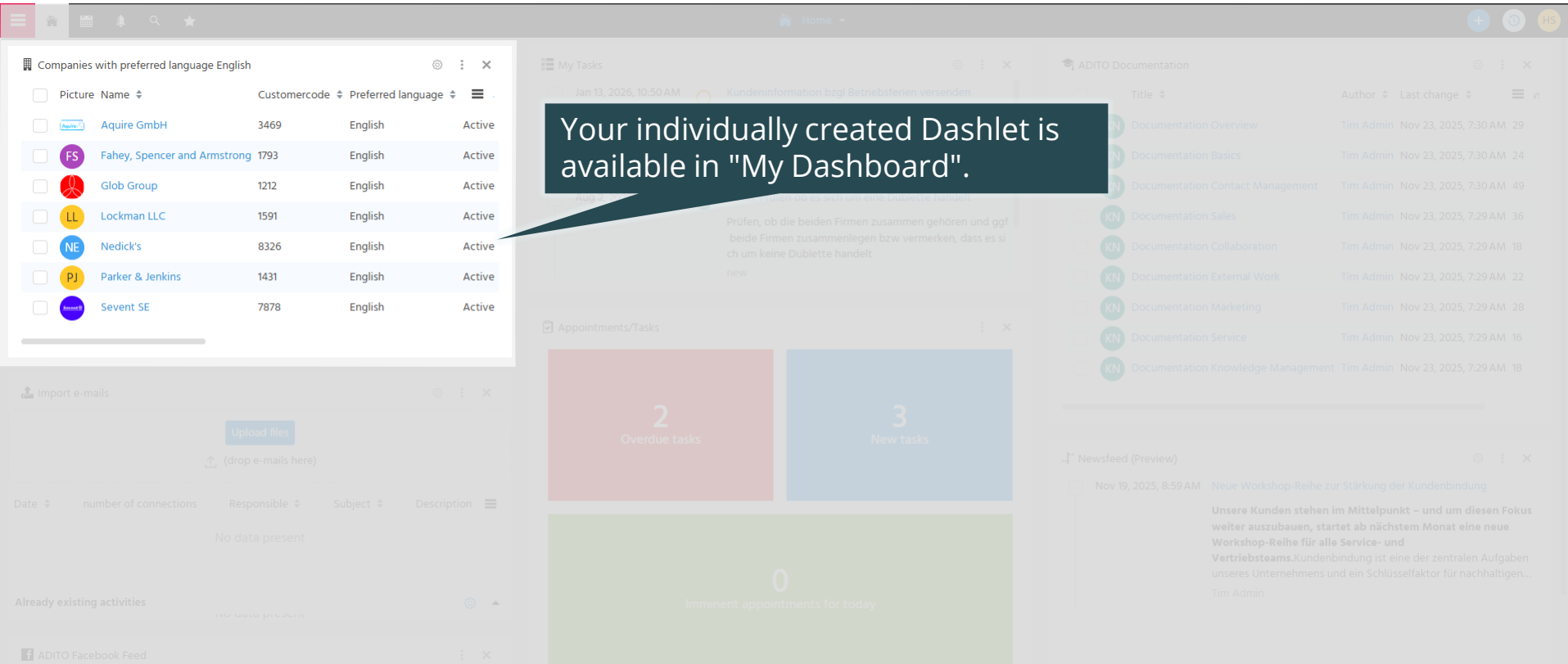
Picture	Name	Customercode	Preferred language	Status	E-mail	Phone	Address
	Aquire GmbH	3469	English	Active	info@acquire.de	+49 4321 78990	Friedenstraße 12 b - DE 93053 Regensburg
	Fahey, Spencer and Armstrong	1793	English	Active	greattohearfromyou@fsa.org	+44 20 3245 1844	69 New Street - GB B2 4DU Birmingham
	Glob Group	1212	English	Active	contact@globgroup.com	+44 20 1432 3000	32-40 Blackfriars Road - GB SE1 8NW London
	Lockman LLC	1591	English	Active	info@lockman.com	+44 114 562 9710	21 London Road - GB SO15 2AD Southampton
	Nedick's	8326	English	Active	info@nedicks.com	+44 114 562 9710	21 London Road - GB SO15 2AD Southampton
	Parker & Jenkins	1431	English	Active	con...		...
	Sevent SE	7878	English	Active	info...		...

Create Dashlet Dialog:

- Title: Companies with preferred language English
- My Dashboard: My Dashboard
- Buttons: OK, Cancel

5 Name the Dashlet and click on OK.

Create individual Dashlets



The screenshot displays the ADITO dashboard interface. A callout box points to the 'My Tasks' section, stating: "Your individually created Dashlet is available in 'My Dashboard'".

Companies with preferred language English

Picture	Name	Customercode	Preferred language	Active
	Aquire GmbH	3469	English	Active
	Fahey, Spencer and Armstrong	1793	English	Active
	Glob Group	1212	English	Active
	Lockman LLC	1591	English	Active
	Nedick's	8326	English	Active
	Parker & Jenkins	1431	English	Active
	Sevent SE	7878	English	Active

My Tasks

Jan 13, 2026, 10:50 AM: Kundeninformation bzgl. Betriebsferien versenden

Prüfen, ob die beiden Firmen zusammen gehören und ggf. beide Firmen zusammenlegen bzw. vermerken, dass es sich um keine Dublette handelt

Appointments/Tasks

- 2 Overdue tasks
- 3 New tasks
- 0 Imminent appointments for today

ADITO Documentation

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Documentation Overview	Tim Admin	Nov 23, 2025, 7:30 AM
Documentation Basics	Tim Admin	Nov 23, 2025, 7:30 AM
Documentation Contact Management	Tim Admin	Nov 23, 2025, 7:30 AM
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Documentation Collaboration	Tim Admin	Nov 23, 2025, 7:29 AM
Documentation External Work	Tim Admin	Nov 23, 2025, 7:29 AM
Documentation Marketing	Tim Admin	Nov 23, 2025, 7:29 AM
Documentation Service	Tim Admin	Nov 23, 2025, 7:29 AM
Documentation Knowledge Management	Tim Admin	Nov 23, 2025, 7:29 AM

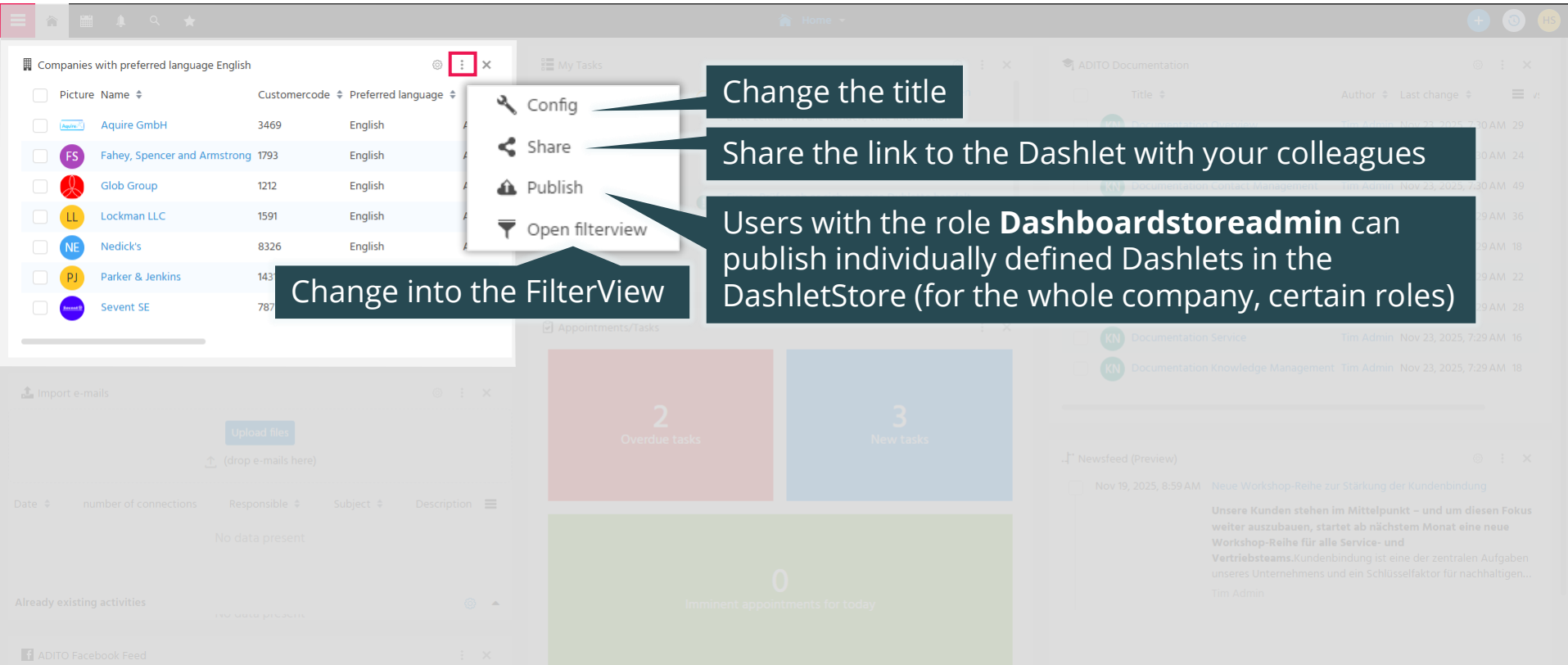
Newsfeed (Preview)

Nov 19, 2025, 8:59 AM: Neue Workshop-Reihe zur Stärkung der Kundenbindung

Unsere Kunden stehen im Mittelpunkt – und um diesen Fokus weiter auszubauen, startet ab nächstem Monat eine neue Workshop-Reihe für alle Service- und Vertriebstteams. Kundenbindung ist eine der zentralen Aufgaben unseres Unternehmens und ein Schlüsselfaktor für nachhaltigen...

Tim Admin

"Further Actions" button



The screenshot shows the ADITO interface. A table titled 'Companies with preferred language English' is visible. A red box highlights the 'Further Actions' button (three dots) in the top right corner of the table. A context menu is open, showing the following options:

- Config
- Share
- Publish
- Open filterview

Three callout boxes provide additional information:

- Change the title** (points to 'Config')
- Share the link to the Dashlet with your colleagues** (points to 'Share')
- Users with the role **Dashboardstoreadmin** can publish individually defined Dashlets in the DashletStore (for the whole company, certain roles)** (points to 'Publish')

A fourth callout box, **Change into the FilterView**, points to the 'Open filterview' option.

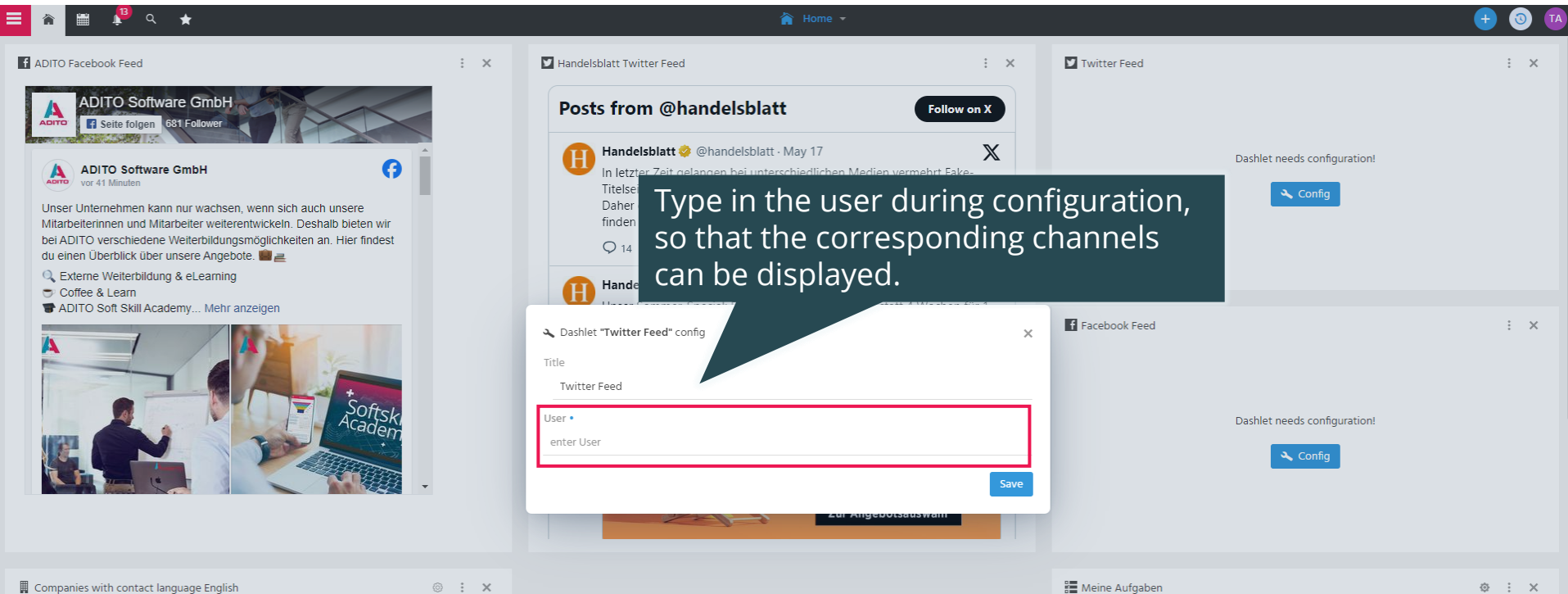
The table data is as follows:

Picture	Name	Customercode	Preferred language
	Aquire GmbH	3469	English
	Fahey, Spencer and Armstrong	1793	English
	Glob Group	1212	English
	Lockman LLC	1591	English
	Nedick's	8326	English
	Parker & Jenkins	143	English
	Sevent SE	787	English

The interface also shows a 'My Tasks' section with a 'Config' button, a 'Share' button, a 'Publish' button, and an 'Open filterview' button. Below this, there are three large cards: '2 Overdue tasks', '3 New tasks', and '0 Imminent appointments for today'. On the right, there is a 'Newsfeed (Preview)' section with a post from Nov 19, 2025, 8:59 AM, titled 'Neue Workshop-Reihe zur Stärkung der Kundenbindung'.

Configure Dashlets

Configuration of Social Media Dashlets



The screenshot displays the ADITO dashboard interface. At the top, there is a navigation bar with icons for home, calendar, notifications, search, and favorites. The main area contains several dashlets:

- ADITO Facebook Feed:** Shows a post from ADITO Software GmbH with text about company growth and employee development.
- Handelsblatt Twitter Feed:** Displays tweets from @handelsblatt, including a tweet about fake news.
- Twitter Feed:** A placeholder indicating "Dashlet needs configuration!" with a "Config" button.
- Facebook Feed:** Another placeholder indicating "Dashlet needs configuration!" with a "Config" button.

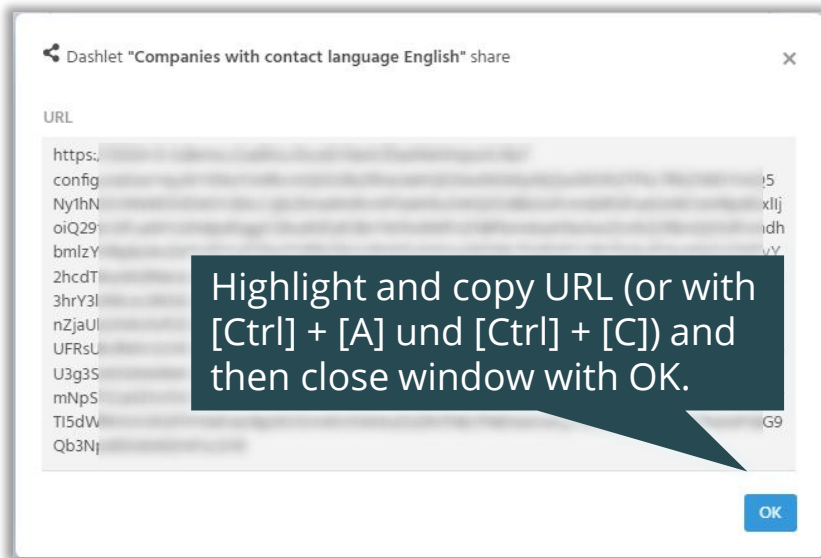
A configuration dialog box titled "Dashlet 'Twitter Feed' config" is open in the foreground. It contains a "Title" field with the value "Twitter Feed" and a "User" field with a red border and the placeholder text "enter User". A "Save" button is located at the bottom right of the dialog. A speech bubble points to the "User" field with the text: "Type in the user during configuration, so that the corresponding channels can be displayed."

Share Dashlets with individual colleagues



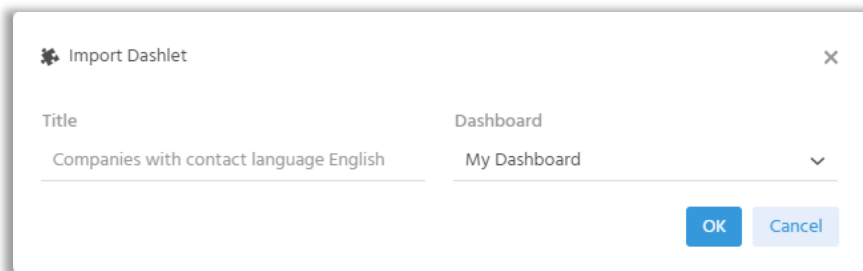
Procedure of sending it:

Highlight and copy link and send it to the recipient.



Procedure of importing it

Open link → Import Dashlet



Publish Dashlets

Company-wide in the DashletStore

Someone with the **role "Dashboardstoreadmin"** can publish Dashlets in the DashletStore.

To do so, the following settings have to be taken care of:

- Assign the Dashlet to a **category** in the DashletStore
- Select **roles** that can use this Dashlet
 - A user with the role of "Dashboardstoreadmin" can only select roles that they possess themselves. For instance, if they do not have a role in Sales, they cannot publish Dashlets for Sales.
- Select **icon** for Dashlet.
- Upload **preview image**, which is used in the DashletStore.
- Button **"Unique per Dashboard"**:
Specify whether the Dashlet can be placed on the Dashboard once or multiple times per user.



The screenshot shows a web form titled "Dashlet 'Companies with contact language English' publish". The form includes several sections: "Title" with the text "Companies with contact language English"; "Categories" with a dropdown menu showing "Contact Management" and a plus icon; "Description" with the text "Show all companies"; "Roles" with a dropdown menu showing "Select role"; "Extended Properties" with a dropdown menu showing "VAADIN:BUILDING"; "Preview" with an "Upload File..." button and a "Drop file here" area; and "Unique per dashboard" with a toggle switch. A "Publish" button is located at the bottom right of the form.

ADITO Software GmbH
Seite folgen 681 Follower

ADITO Software GmbH
vor 41 Minuten

Unser Unternehmen kann nur wachsen, Mitarbeiterinnen und Mitarbeiter weitere bei ADITO verschiedene Weiterbildungs du einen Überblick über unsere Angebot

Externe Weiterbildung & eLearning
Coffee & Learn
ADITO Soft Skill Academy... Mehr an



Companies with contact language English

- ☐ Picture Name ↕
- ☐ Aquire GmbH
- ☐ Fahey, Spencer and Armstrong
- ☐ Glob Group
- ☐ Lockman LLC
- ☐ Nedick's
- ☐ Parker & Jenkins
- ☐ Sevent SE

Dashlets

All (81)

Admin (1)

Calendar (1)

Charts (7)

Contact Management (8)

Contact synchronisation (5)

Covid Information (2)

Districts (2)

Email (1)

Favorites (1)

Knowledge (3)

Marketing (10)

Notifications (1)

offline.SlaveAdministrationMyLastSync...

Project (3)

Sales (15)

Search (1)

Service (15)

Reset Dashboard

Search Dashlets...



Activities

Show all activities

Add



Companies with contact language English

Show all companies

Add



My Tasks



Contacts

Show all contacts

Add



My Activities

Show my activities

Add



Edit

Delete

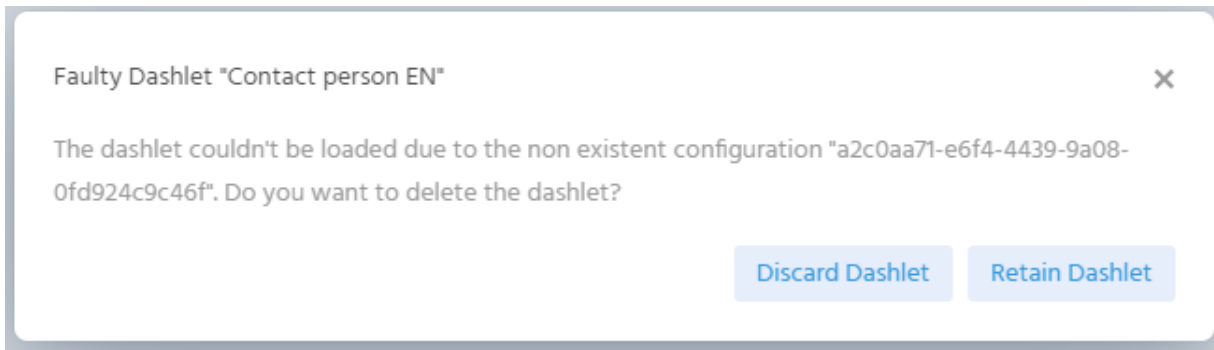
Dashletboardstoreadmins can subsequently edit the Dashlets they have published, as indicated by the "Further Actions" button.

Delete Dashlets

Delete Dashlets from Dashboard if they have been removed from the DashletStore

If a Dashlet gets removed from the DashletStore because, for example, a filter had to be adjusted or the logic was revised (either by the Dashletboardstoreadmin or in Customizing), it also shouldn't be used anymore by its users.

→ Users receive this message and can either **discard** or **retain** the Dashlet

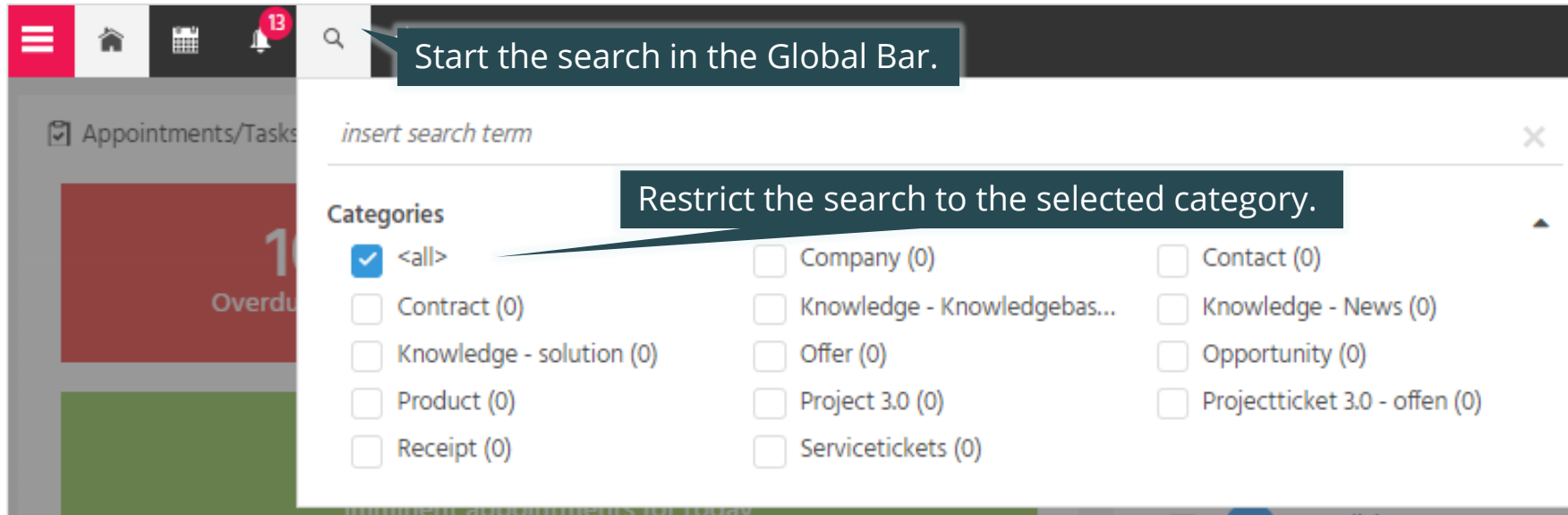


Searching for datasets: Index search



Index search

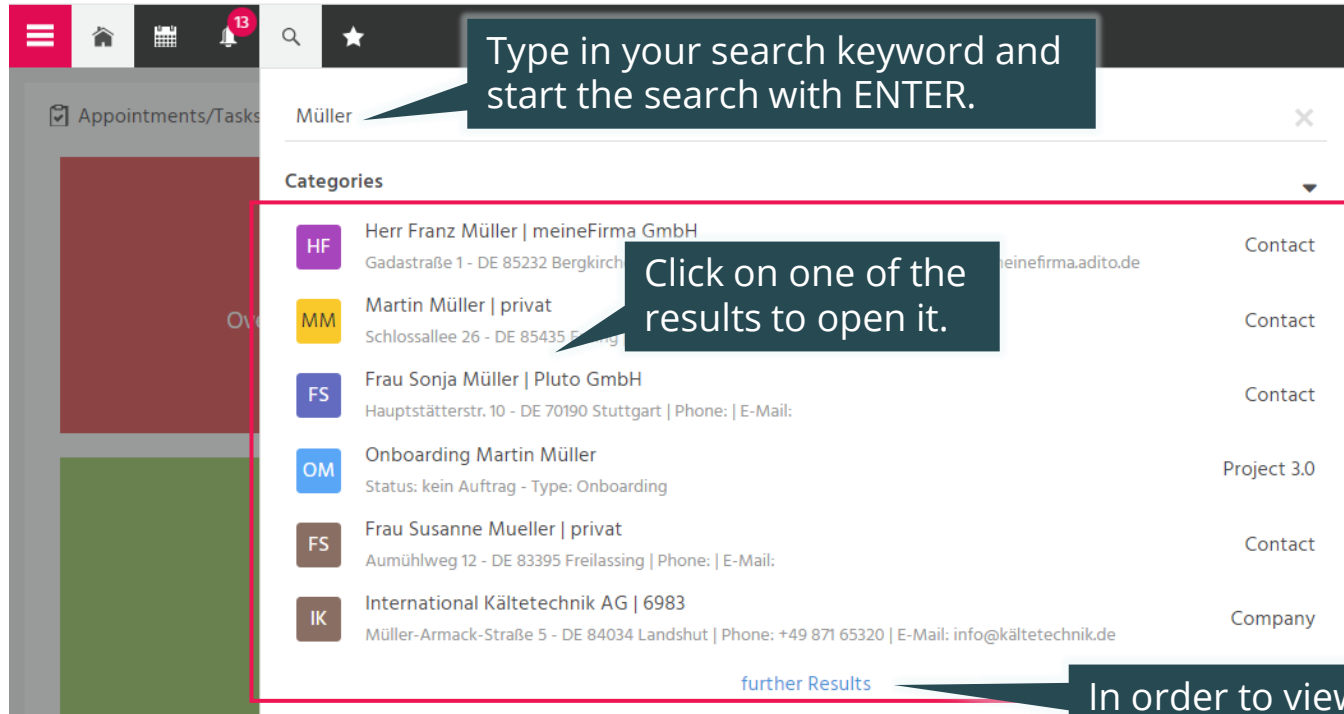
Searching datasets from all Contexts



The screenshot shows the ADITO user interface. At the top, a dark navigation bar contains icons for a menu, home, calendar, notifications (13), and a search icon. A callout box points to the search icon with the text "Start the search in the Global Bar." Below the navigation bar, a search modal is open. It features a text input field with the placeholder "insert search term" and a close button (X). Below the input field, a "Categories" section lists various data categories with checkboxes. A callout box points to the "<all>" category with the text "Restrict the search to the selected category." The categories listed are:

- ☒ <all>
- ☐ Contract (0)
- ☐ Knowledge - solution (0)
- ☐ Product (0)
- ☐ Receipt (0)
- ☐ Company (0)
- ☐ Knowledge - Knowledgebas...
- ☐ Offer (0)
- ☐ Project 3.0 (0)
- ☐ Servicetickets (0)
- ☐ Contact (0)
- ☐ Knowledge - News (0)
- ☐ Opportunity (0)
- ☐ Projectticket 3.0 - offen (0)

Index search



Type in your search keyword and start the search with ENTER.

Müller

Categories

- HF Herr Franz Müller | meineFirma GmbH
Gadastraße 1 - DE 85232 Bergkirch...
Contact
- MM Martin Müller | privat
Schlossallee 26 - DE 85435 F...
Contact
- FS Frau Sonja Müller | Pluto GmbH
Hauptstätterstr. 10 - DE 70190 Stuttgart | Phone: | E-Mail: |
Contact
- OM Onboarding Martin Müller
Status: kein Auftrag - Type: Onboarding
Project 3.0
- FS Frau Susanne Mueller | privat
Aumühlweg 12 - DE 83395 Freilassing | Phone: | E-Mail: |
Contact
- IK International Kältetechnik AG | 6983
Müller-Armack-Straße 5 - DE 84034 Landshut | Phone: +49 871 65320 | E-Mail: info@kältetechnik.de
Company

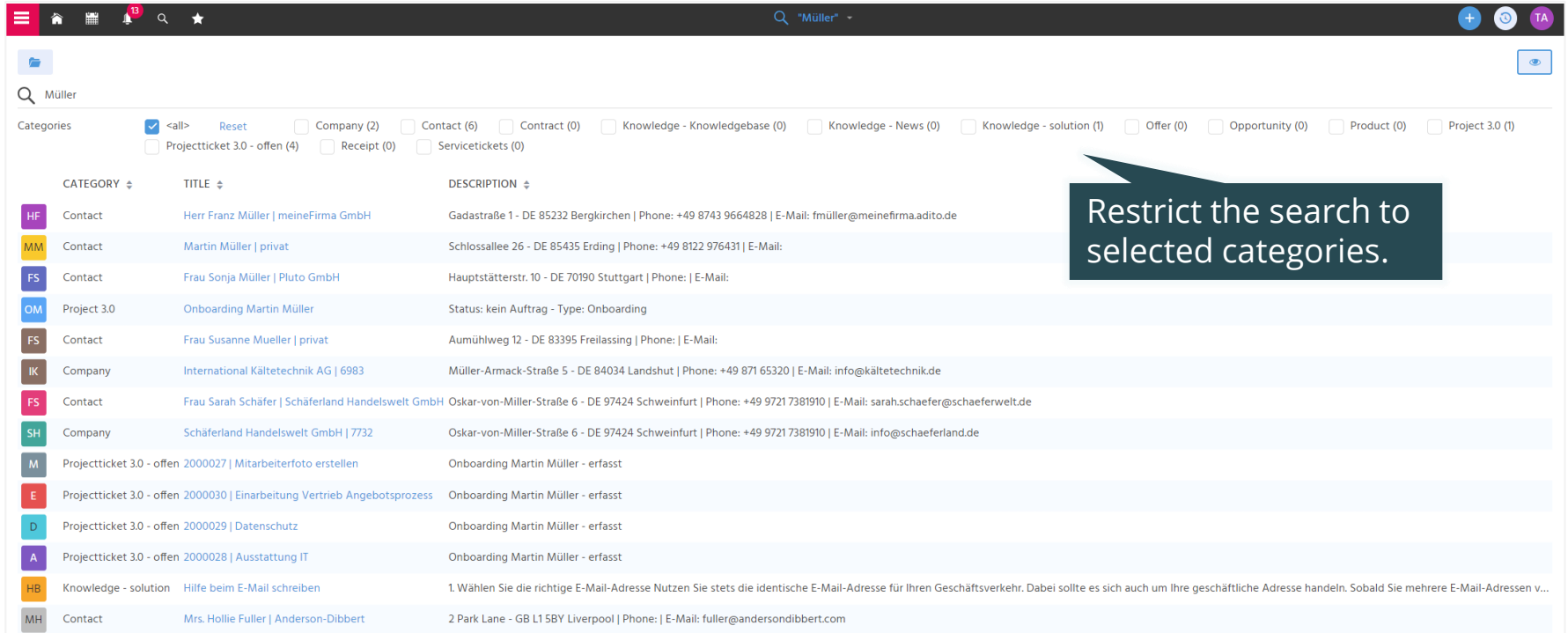
further Results

In order to view all search results, click on **further results**.

The **6 best search results** are presented.

Index search

Result view "further results": List of all search results in table form



The screenshot displays the ADITO search results interface. At the top, a search bar contains the query "Müller". Below the search bar, a list of categories is shown with checkboxes and counts: <all> (checked), Reset, Company (2), Contact (6), Contract (0), Knowledge - Knowledgebase (0), Knowledge - News (0), Knowledge - solution (1), Offer (0), Opportunity (0), Product (0), and Project 3.0 (1). A callout box points to the "Knowledge - solution (1)" category, stating: "Restrict the search to selected categories."

CATEGORY	TITLE	DESCRIPTION
HF	Contact	Herr Franz Müller meineFirma GmbH Gadastraße 1 - DE 85232 Bergkirchen Phone: +49 8743 9664828 E-Mail: fmüller@meinefirma.adito.de
MM	Contact	Martin Müller privat Schlossallee 26 - DE 85435 Erding Phone: +49 8122 976431 E-Mail:
FS	Contact	Frau Sonja Müller Pluto GmbH Hauptstätterstr. 10 - DE 70190 Stuttgart Phone: E-Mail:
OM	Project 3.0	Onboarding Martin Müller Status: kein Auftrag - Type: Onboarding
FS	Contact	Frau Susanne Mueller privat Aumühlweg 12 - DE 83395 Freilassing Phone: E-Mail:
IK	Company	International Kältetechnik AG 6983 Müller-Armack-Straße 5 - DE 84034 Landshut Phone: +49 871 65320 E-Mail: info@kältetechnik.de
FS	Contact	Frau Sarah Schäfer Schäferland Handelswelt GmbH Oskar-von-Miller-Straße 6 - DE 97424 Schweinfurt Phone: +49 9721 7381910 E-Mail: sarah.schaefer@schaeferwelt.de
SH	Company	Schäferland Handelswelt GmbH 7732 Oskar-von-Miller-Straße 6 - DE 97424 Schweinfurt Phone: +49 9721 7381910 E-Mail: info@schaeferland.de
M	Projectticket 3.0 - offen	2000027 Mitarbeiterfoto erstellen Onboarding Martin Müller - erfasst
E	Projectticket 3.0 - offen	2000030 Einarbeitung Vertrieb Angebotsprozess Onboarding Martin Müller - erfasst
D	Projectticket 3.0 - offen	2000029 Datenschutz Onboarding Martin Müller - erfasst
A	Projectticket 3.0 - offen	2000028 Ausstattung IT Onboarding Martin Müller - erfasst
HB	Knowledge - solution	Hilfe beim E-Mail schreiben 1. Wählen Sie die richtige E-Mail-Adresse Nutzen Sie stets die identische E-Mail-Adresse für Ihren Geschäftsverkehr. Dabei sollte es sich auch um Ihre geschäftliche Adresse handeln. Sobald Sie mehrere E-Mail-Adressen v...
MH	Contact	Mrs. Hollie Fuller Anderson-Dibbert 2 Park Lane - GB L1 5BY Liverpool Phone: E-Mail: fuller@andersondibbert.com

Index search

Possible placeholders

Placeholders can be combined by the user as required.

? Replaces a character

Examples:

- "Ma?er" finds *Maier* and *Mayer*
- "M??er" finds *Maier*, *Mayer*, *Meier*, *Moser*

* Replaces any number of characters (or none)

Examples:

- "Maier*" finds *Maier* and *Maierhofer*
- "*Maier" finds *Maier* and *Obermaier*



The placeholder* can be defined as the leading placeholder in the [user settings](#). Generally, the placeholder will only be attached at the end of the search term.

Index search

Syntax for the search

- "Most common input syntax" – Search for one or more terms
Input: **Term1 Term2 Term3**
Corresponds to input: Term1 OR Term2 OR Term3
- Search with "And"
Input: Term1 AND Term2
- Term must be included
Input: +Term
- Term should be excluded
Input: -Term
Input: !Term
- Bracketing combined terms
Input: (Term1 AND Term2) (Term3 AND Term4)
Corresponds to input: (Term1 AND Term2) OR (Term3 AND Term4)



In the project, one must consider whether the "most common input syntax" works with OR or AND.

Syntax for the search: Usage of special characters

- Special characters such as brackets, quotation marks, plus/minus, exclamation marks, are interpreted as **Operators** in order to map the Syntax for the search.
- Special characters that are integrated directly into a word without spaces or with spaces (at the beginning and end) are interpreted as **regular characters**. Example: Holz-Wurm Maschinen GmbH
- When using parentheses (using quotation marks or brackets), the system checks to see if they are closed after opening. To prevent this function from checking, place a backslash \ in front.

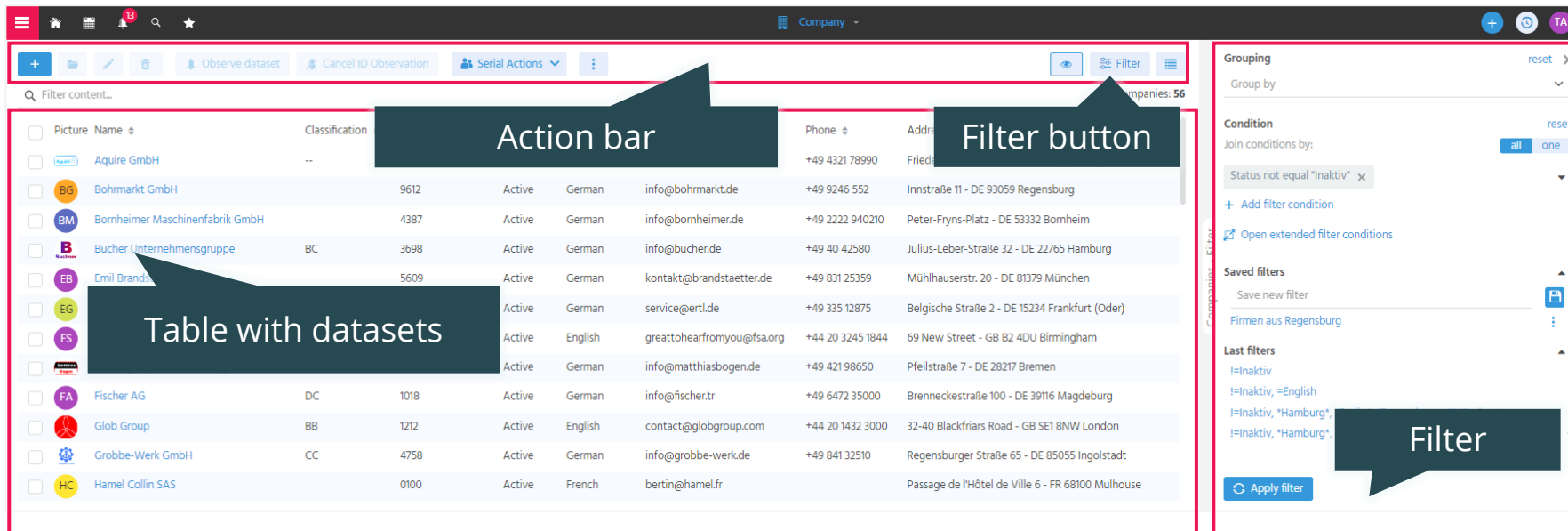
Filter & Grouping



Filter in Context

FilterView: Example Company

When opening a Context through the Global Menu or the Sidebar, the **FilterView** opens in the composition: Action bar, Table with datasets and Filter.



The screenshot displays the ADITO FilterView interface for a company context. The interface is composed of several key elements:

- Action bar:** Located at the top, it contains icons for adding, editing, deleting, and observing datasets, as well as a 'Filter' button.
- Table with datasets:** A table listing company datasets with columns for Picture, Name, Classification, and various attributes. The table is currently filtered to show 56 companies.
- Filter sidebar:** Located on the right, it allows for grouping and filtering data. It includes a 'Group by' dropdown, a 'Condition' section with a filter rule 'Status not equal "Inaktiv"', and a 'Last filters' section showing the current filter stack.

Callouts in the image highlight the 'Action bar', 'Table with datasets', and 'Filter button'.

Picture	Name	Classification	Phone	Address
	Aquire GmbH	--	+49 4321 78990	Fried...
BG	Bohrmarkt GmbH	9612	+49 9246 552	Innstraße 11 - DE 93059 Regensburg
BM	Bornheimer Maschinenfabrik GmbH	4387	+49 2222 940210	Peter-Fryns-Platz - DE 53332 Bornheim
B	Bucher Unternehmensgruppe	BC	+49 40 42580	Julius-Leber-Straße 32 - DE 22765 Hamburg
EB	Emil Brandt	5609	+49 831 25359	Mühlhauserstr. 20 - DE 81379 München
EG			+49 335 12875	Belgische Straße 2 - DE 15234 Frankfurt (Oder)
FS			+44 20 3245 1844	69 New Street - GB B2 4DU Birmingham
			+49 421 98650	Pfeilstraße 7 - DE 28217 Bremen
FA	Fischer AG	DC	+49 6472 35000	Brennekestraße 100 - DE 39116 Magdeburg
	Glob Group	BB	+44 20 1432 3000	32-40 Blackfriars Road - GB SE1 8NW London
	Grobbe-Werk GmbH	CC	+49 841 32510	Regensburger Straße 65 - DE 85055 Ingolstadt
HC	Hamel Collin SAS	0100		Passage de l'Hôtel de Ville 6 - FR 68100 Mulhouse

Filter in Context

Predefined filter

Predefined filter can be defined in Customizing for each Context. They will always be applied in the FilterView as soon as the user opens it.

If you do not need these filter conditions, you can remove them (either by clicking the "X" or selecting "reset") and then apply them using the button "Apply filter".

The screenshot displays the 'FilterView' interface for 'Companies - Filter'. It features a 'Grouping' section with a 'Group by' dropdown and a 'reset' link. Below this is the 'Condition' section, which includes a 'Join conditions by:' dropdown with 'all' and 'one' options, and a 'reset' link. A predefined filter condition, 'Status not equal "Inaktiv"', is highlighted with a red box. Below the condition list are links for '+ Add filter condition' and 'Open extended filter conditions'. At the bottom, there are sections for 'Saved filters' and 'Last filters', and a large blue 'Apply filter' button.

Grouping reset ×

Group by ▼

Condition reset

Join conditions by: all one

Status not equal "Inaktiv" × ▼

[+ Add filter condition](#)

[Open extended filter conditions](#)

Companies - Filter

Saved filters ▼

Last filters ▼

◀

↻ Apply filter

Filter in Context

Adding or deleting filter conditions

Click on the **X** to delete individual filter conditions.

Add further filter conditions via **" + Add filter condition"**.

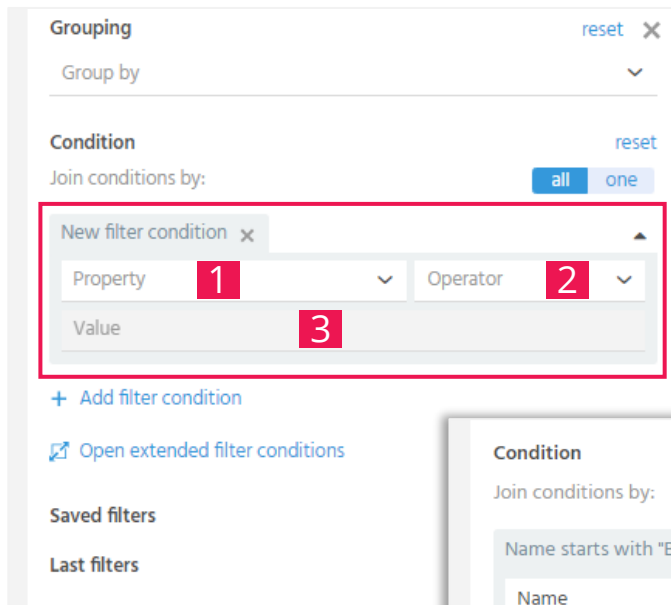
In order to view the result, click on the button "Apply filter" (or SHIFT + ENTER).

The screenshot shows a filter configuration panel with the following elements:

- Grouping**: A section with a "reset" link and a "Group by" dropdown menu.
- Condition**: A section with a "reset" link and a "Join conditions by:" section containing "all" and "one" buttons.
- Filter list**: A list of filter conditions. One condition, "Status not equal 'Inactive'", is highlighted with a red box and an "X" icon to its right for deletion.
- Buttons**: A "+ Add filter condition" button is highlighted with a red box. At the bottom, an "Apply filter" button is also highlighted with a red box.
- Other elements**: A link "Open extended filter conditions" and sections for "Saved filters" and "Last filters" are visible.

Filter in Context

Add filter conditions



Grouping reset ×

Group by ▼

Condition reset

Join conditions by: all one

New filter condition ×

Property 1 ▼ Operator 2 ▼

Value 3

[+ Add filter condition](#)

[Open extended filter conditions](#)

Saved filters

Last filters

Every filter condition consists of:

1. **Filter criteria***: Information which is searched.
2. **Operator**: e.g. *Contains, begins with or equal*
3. **Value**

* The filter criterion can be a field from the datasets, a field from a linked dataset, or a property.

Example filter criteria in the company:

- "Name": Field of the company
- "Condition/Price list": Property of the company
- "Product: Product group": Connection between company and product

Filter in Context

Last filters

Grouping reset ×

Group by ▼

Condition reset

Join conditions by: all one

Status not equal "Inactive" × ▼

Campaign participation equal "CRM-Scan" × ▲

Campaign participation ▼ equal ▼

CRM-Scan ▼

[+ Add filter condition](#)

[Open extended filter conditions](#)

Saved filters ▼

Last filters ▲

- !=Inactive, =CRM-Scan
- !=Inactive, =Herr Tim Admin
- !=Inactive, =Compliance > IT-Compliance
- !=Inactive, =Mitteilung über Änderung der AGB

The last 4 executed filters are listed under **Last filters**.

Click on the required filter to execute it.

Filter in Context

Last filter

Character "Last filter" *	Corresponding Operator (and value)
=	"equal" oder "within (timeframe)"
!=	Not equal
(NULL)	Is empty
(!NULL)	Is not empty
Wert	contains (the required value)
!*Wert*	Does not contain (the required value)
Wert*	Begins with (the required value)
*Wert	Ends with (the required value)
<Alle>	Reset filter
<	"past" or "smaller than"
>	"upcoming" or "bigger than"
<=	Smaller or equal
>=	Bigger or equal

The "characters" in the link of a filter will depend on the operator that has been selected for a filter criterion.

*No claim to be exhaustive

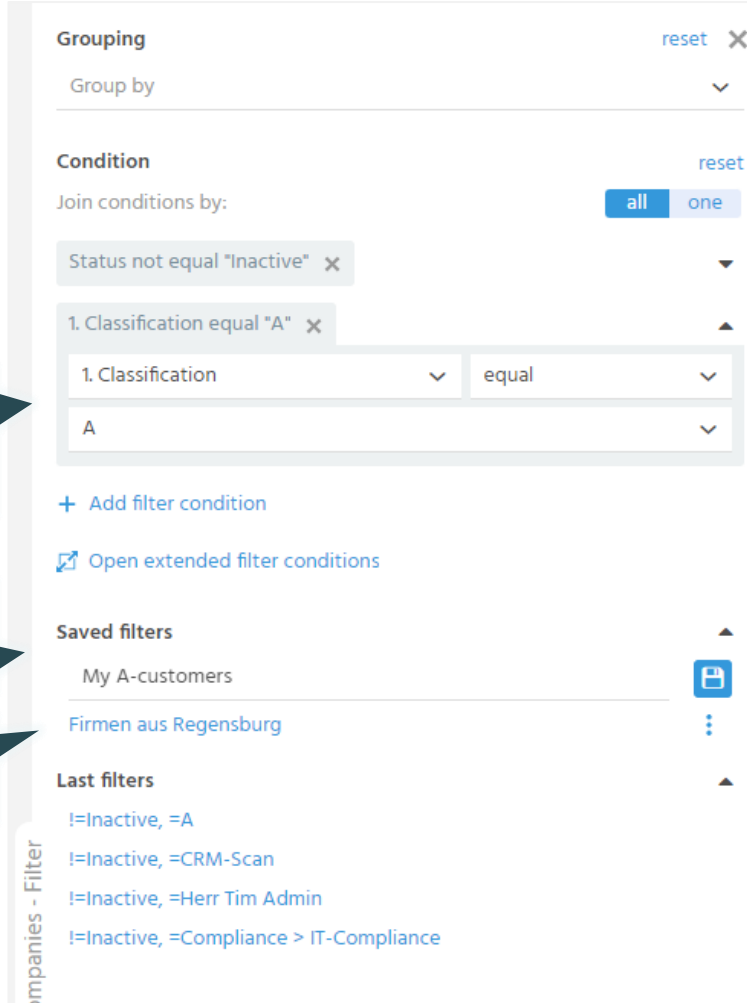
Filter in Context

Saved filter

Configure your filter conditions (here or in the expanded view) and apply the filter.

Name the filter and save it .

Click on the saved filter to execute it.



The screenshot shows the ADITO filter configuration interface. It includes sections for 'Grouping', 'Condition', 'Saved filters', and 'Last filters'. The 'Condition' section is expanded, showing a filter rule: 'Status not equal "Inactive"' joined with '1. Classification equal "A"'. The 'Saved filters' section shows a list of filters, including 'My A-customers' and 'Firmen aus Regensburg'. The 'Last filters' section shows a list of recent filters, including '!=Inactive, =A' and '!=Inactive, =CRM-Scan'.

Grouping reset ×

Group by ▼

Condition reset

Join conditions by: all one

Status not equal "Inactive" ×

1. Classification equal "A" ×

1. Classification ▼ equal ▼

A ▼

[+ Add filter condition](#)

[Open extended filter conditions](#)

Saved filters

My A-customers 📄

Firmen aus Regensburg ⋮

Last filters

!=Inactive, =A

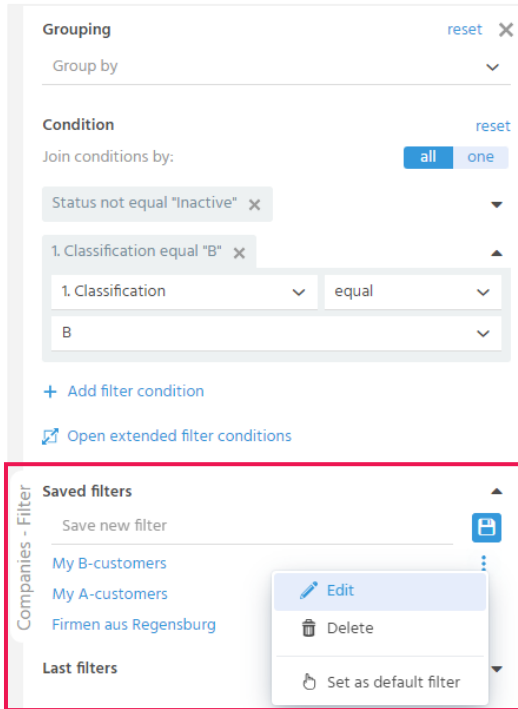
!=Inactive, =CRM-Scan

!=Inactive, =Herr Tim Admin

!=Inactive, =Compliance > IT-Compliance

Filter in Context

Saved filter ...



Grouping reset ×

Group by ▼

Condition reset

Join conditions by: all one

Status not equal "Inactive" ×

1. Classification equal "B" ×

1. Classification ▼ equal ▼

B ▼

+ Add filter condition

[Open extended filter conditions](#)

Saved filters

Save new filter 📁

My B-customers

My A-customers

Firmen aus Regensburg

Last filters

Edit

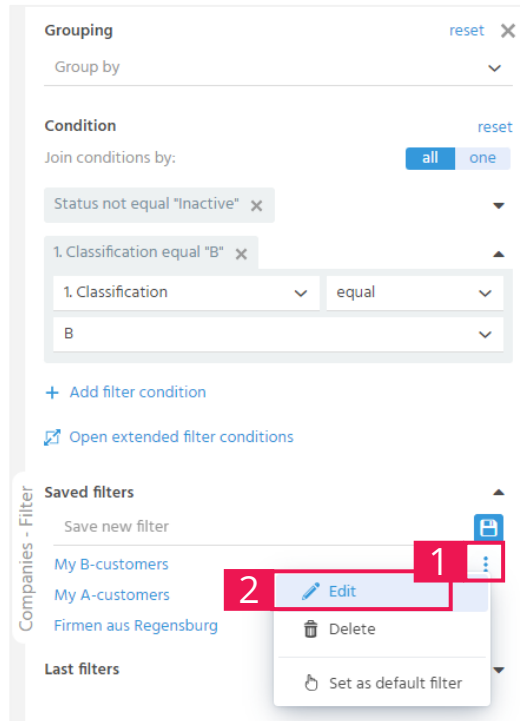
Delete

Set as default filter

- Can be edited subsequently (Grouping and filter condition and name).
- Can be deleted.
- Can be set as default filter.

Filter in Context

Edit saved filters



Grouping reset ×

Group by ▼

Condition reset

Join conditions by: all one

Status not equal "Inactive" ×

1. Classification equal "B" ×

1. Classification ▼ equal ▼

B ▼

+ Add filter condition

Open extended filter conditions

Companies - Filter

Saved filters

Save new filter ⏏

My B-customers ⋮

My A-customers ✎

Firmen aus Regensburg

Last filters

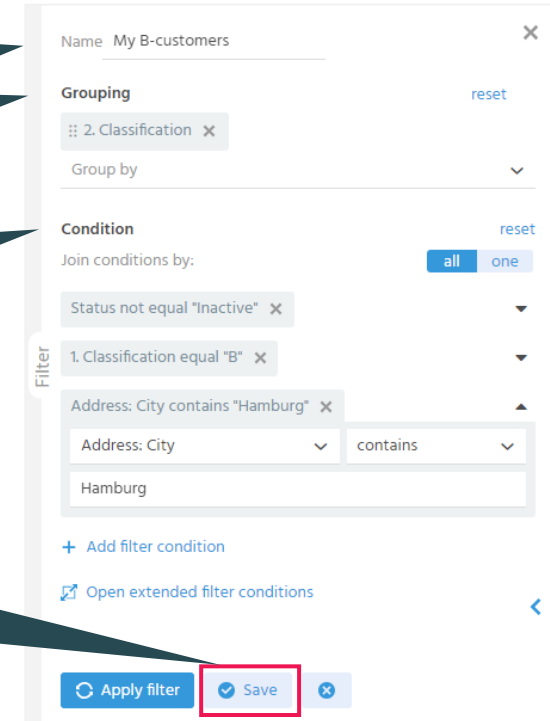
Set as default filter

Edit name

Edit Grouping

Edit filter conditions

To exit this view, click on the "Save" button to apply the changes to this saved filter.



Name My B-customers ×

Grouping reset

2. Classification ×

Group by ▼

Condition reset

Join conditions by: all one

Status not equal "Inactive" ×

1. Classification equal "B" ×

Address: City contains "Hamburg" ×

Address: City ▼ contains ▼

Hamburg

+ Add filter condition

Open extended filter conditions

Apply filter ✓ Save ×

Filter in Context

Edit saved filters with extended filter conditions

Name Customers: B Classification

Grouping

1. Classification

Group by

Condition

Join conditions by:

Status not equal "Inactive"

1. Classification equal "B"

+ Add filter condition

1 Open extended filter conditions

To add further filter criteria with an and-or link, open the extended view.

Apply filter Save

all one Add filter condition Add group

Status not equal "Inactive"

1. Classification equal "B"

2

all one Add filter condition Add group

Address: Zip code from contains "8"

Address: Zip code from contains "9"

Address: Zip code from

contains

9

Here you add groups and other filter conditions accordingly.

3 Apply filter Cancel

Click on "Apply filter" to exit this view.

Name Customers: B Classification

Grouping

1. Classification

Group by

Condition

Join conditions by:

Extended filter conditions available

+ Add filter condition

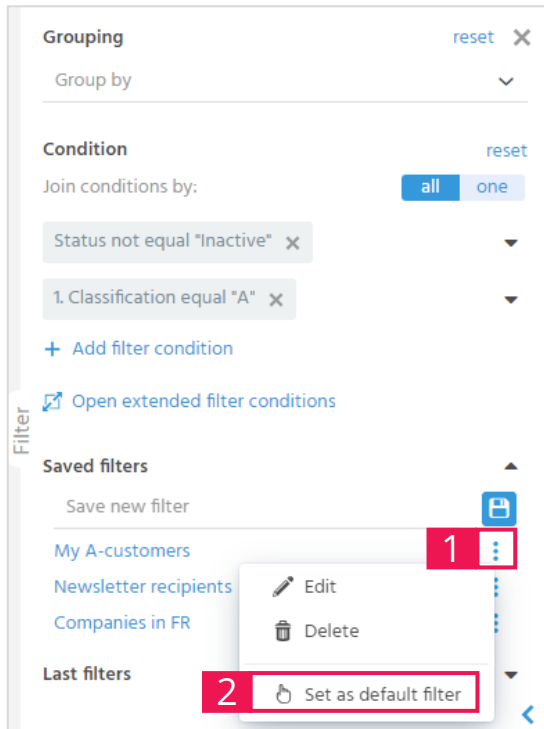
Open extended filter conditions

4 Save

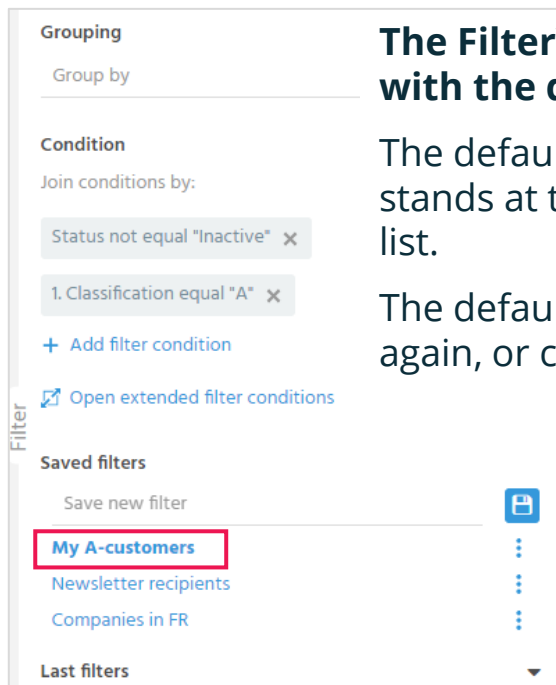
Click on "Save" to apply the changes to the filter.

Filter in Context

Set saved filter as a default filter



The screenshot shows the FilterView interface. On the left, a sidebar contains a 'Filter' section with 'Saved filters' and 'Last filters'. In the 'Saved filters' list, 'My A-customers' is highlighted with a red box and a red '1' next to its menu icon. A context menu is open over this filter, showing 'Edit' and 'Delete' options. In the 'Last filters' section, 'Set as default filter' is highlighted with a red box and a red '2' next to its icon. The main panel shows filter conditions: 'Status not equal "Inactive"' and '1. Classification equal "A"'. The 'Group by' dropdown is set to 'Group by'.

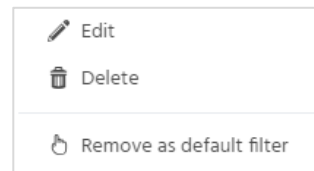


The screenshot shows the FilterView interface after the 'My A-customers' filter has been set as the default. In the 'Saved filters' list, 'My A-customers' is now bolded and highlighted with a red box. The 'Last filters' section is empty. The main panel shows the same filter conditions as the previous screenshot.

The FilterView now always opens with the default filter.

The default filter is marked in bold and stands at the top of the Saved filters list.

The default filter can be removed again, or can be replaced by new one.



A context menu is shown with three options: 'Edit' (with a pencil icon), 'Delete' (with a trash icon), and 'Remove as default filter' (with a hand icon).

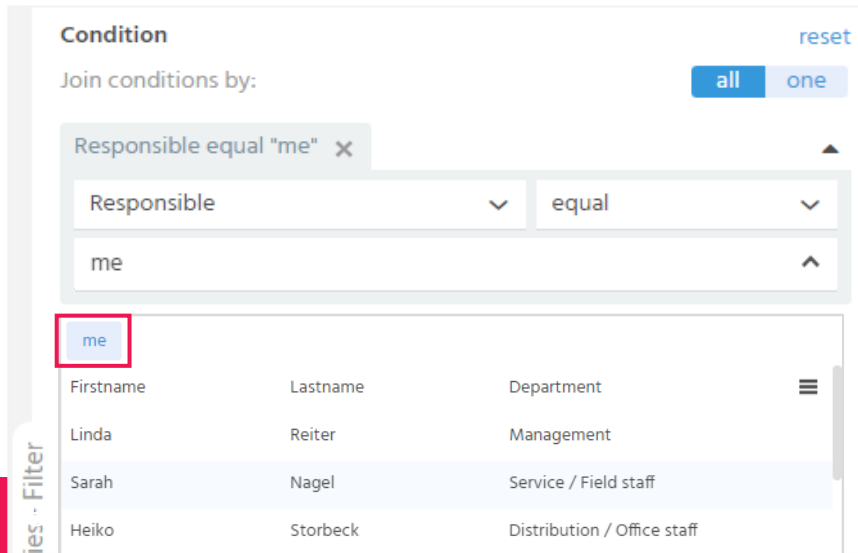
Filter in Context

Dynamic filter

Dynamic filter values take into account the **current status** of the system.

Example:

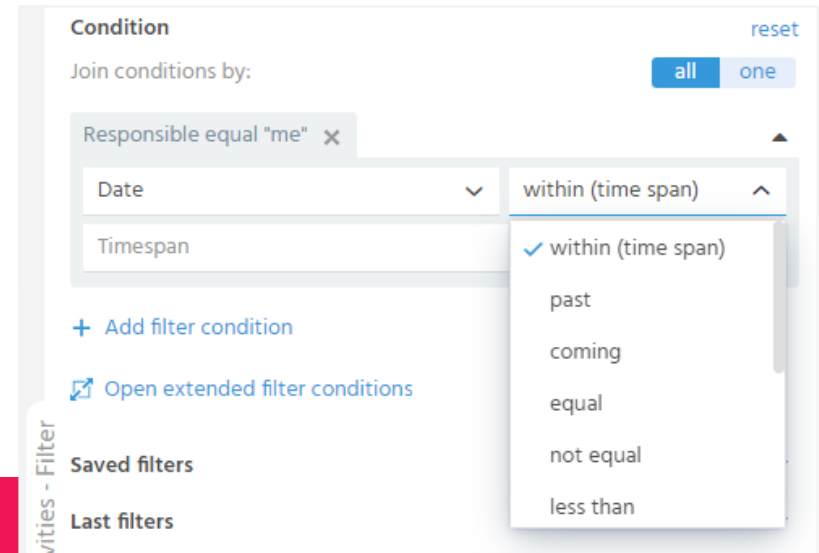
Who is the **currently signed in user**?



The screenshot shows the 'Condition' panel in the ADITO interface. The 'Join conditions by:' dropdown is set to 'all'. A filter condition is added: 'Responsible equal "me"'. The 'Responsible' dropdown is set to 'equal', and the value 'me' is entered in the text field. Below the filter, a table lists users with columns for Firstname, Lastname, and Department. The 'me' filter is highlighted with a red box.

Firstname	Lastname	Department
Linda	Reiter	Management
Sarah	Nagel	Service / Field staff
Heiko	Storbeck	Distribution / Office staff

What is today's **date**?

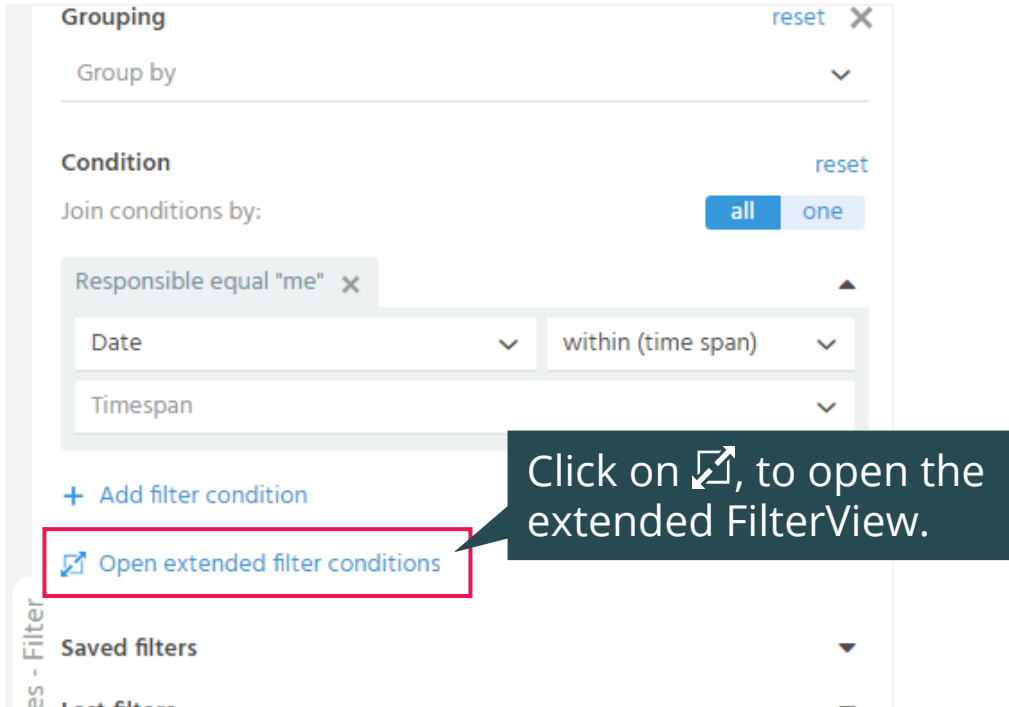


The screenshot shows the 'Condition' panel in the ADITO interface. The 'Join conditions by:' dropdown is set to 'all'. A filter condition is added: 'Date within (time span)'. The 'Date' dropdown is set to 'within (time span)', and the value 'Timespan' is entered in the text field. A dropdown menu is open, showing options: 'within (time span)' (checked), 'past', 'coming', 'equal', 'not equal', and 'less than'. Below the filter, a table lists users with columns for Firstname, Lastname, and Department.

Firstname	Lastname	Department
Linda	Reiter	Management
Sarah	Nagel	Service / Field staff
Heiko	Storbeck	Distribution / Office staff

Filter in Context

Extended FilterView

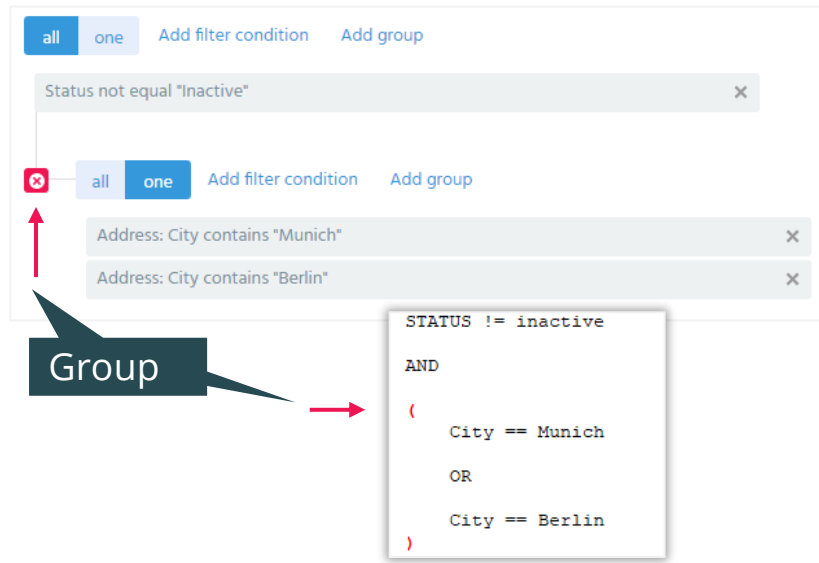


The screenshot displays the ADITO FilterView interface. It includes sections for 'Grouping' (with a 'reset' button and a dropdown for 'Group by'), 'Condition' (with a 'reset' button, 'Join conditions by:' buttons for 'all' and 'one', and a list of conditions including 'Responsible equal "me"'), and 'Saved filters'. A red box highlights the '+ Open extended filter conditions' button, which is accompanied by an external link icon. A callout bubble points to this button with the text: 'Click on ↗, to open the extended FilterView.'

Filter in Context

Extended FilterView

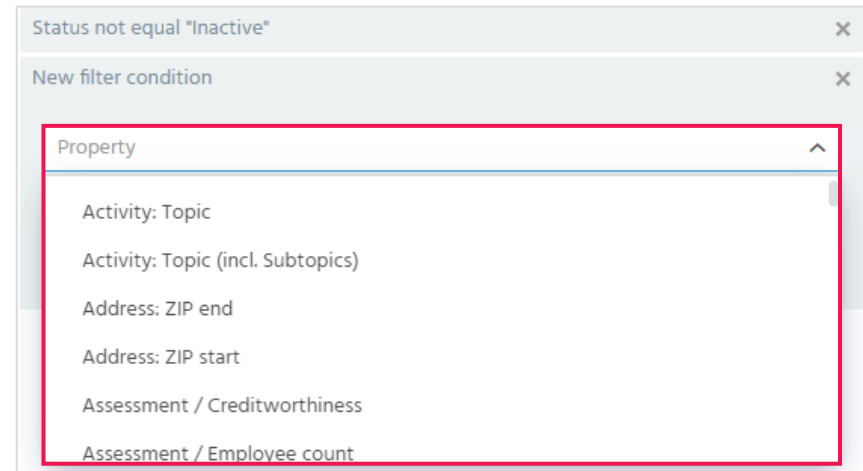
Grouping of filters



The screenshot shows a filter interface with a group of filters. The first filter is "Status not equal 'Inactive'". Below it, a group of filters is shown, indicated by a red 'x' icon. A callout box labeled "Group" points to this icon. The group contains two filters: "Address: City contains 'Munich'" and "Address: City contains 'Berlin'". A second callout box shows the resulting SQL query:

```
STATUS != inactive
AND
(
  City == Munich
  OR
  City == Berlin
)
```

Extended selection of filter properties



The screenshot shows the "New filter condition" dialog. The "Property" dropdown is open, showing a list of properties:

- Activity: Topic
- Activity: Topic (incl. Subtopics)
- Address: ZIP end
- Address: ZIP start
- Assessment / Creditworthiness
- Assessment / Employee count

Filter in Context – Use Cases

Filter in Context

Use case

The filter criteria is queried once: result contains data sets that meet all filter conditions:

"I would like to have an overview of all my active customers, who have more than 100 employees."

Condition

Join conditions by:

Status not equal "Inactive" ✕

Type equal "Customer" ✕

Assessment / Employee count greater or equal "100" ✕

all

one

reset

Each piece of filtered information can only be entered once in the dataset and queried once.

Hence, all filtered criteria can be linked with AND (all) and listed one after the other.

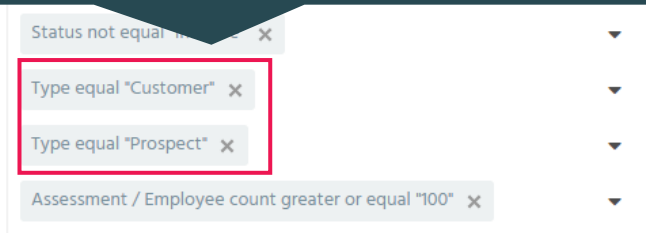
Filter in Context

Use case

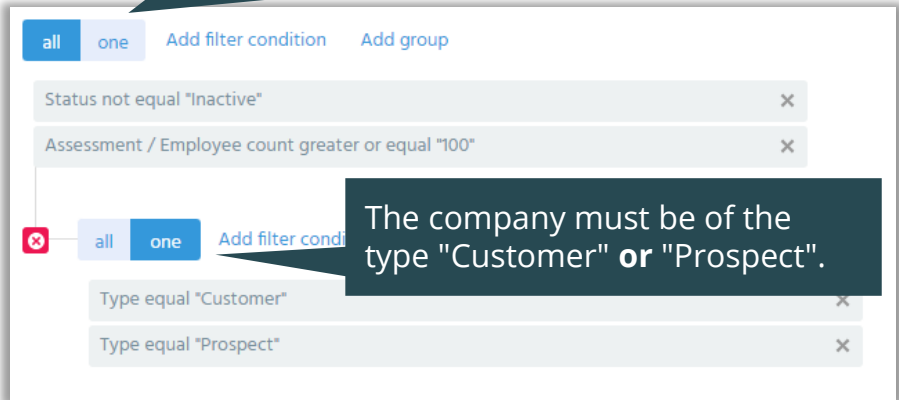
The same filter criterion is queried with different values: The result contains data records that fulfill either one value or the other.

"I would like to have an overview of all my active customers and prospects with more than 100 employees."

If the filter criteria "Type equal Prospect" is also included in the filter, you will not receive any results. This is because information that can only be entered once per dataset cannot be queried twice in a filter. You must open the extended FilterView in order to proceed.



With this filter you receive all of your active employees or prospects, who have more than 100 employees.

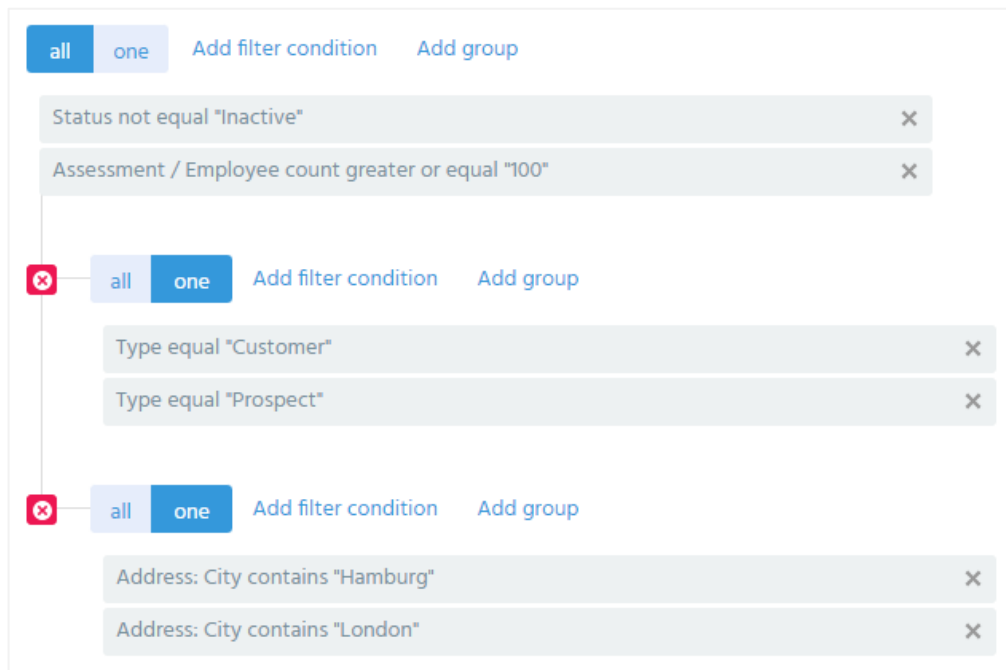


Filter in Context

Use case

Filter criteria are queried twice: result contains data sets that fulfill either one or both of the filter conditions.

"I would like to have an overview of all my active customers and prospects with more than 100 employees and a registered office in Hamburg or London".



The screenshot displays the ADITO filter interface, which is structured as a logical tree. At the top level, there are two tabs: 'all' (selected) and 'one'. To the right of these tabs are two links: 'Add filter condition' and 'Add group'. Below the tabs, there are two filter conditions listed in a light gray box, each with a close button (X) on the right:

- Status not equal "Inactive"
- Assessment / Employee count greater or equal "100"

Below this list, there is a red square icon with a white 'X' inside, followed by a sub-filter structure. This sub-filter has its own 'all' and 'one' tabs, with 'one' selected. To its right are links for 'Add filter condition' and 'Add group'. Below these tabs, there are two filter conditions listed in a light gray box, each with a close button (X) on the right:

- Type equal "Customer"
- Type equal "Prospect"

Below this sub-filter, there is another red square icon with a white 'X' inside, followed by another sub-filter structure. This sub-filter also has 'all' and 'one' tabs, with 'one' selected. To its right are links for 'Add filter condition' and 'Add group'. Below these tabs, there are two filter conditions listed in a light gray box, each with a close button (X) on the right:

- Address: City contains "Hamburg"
- Address: City contains "London"

Filter in Context

Use case

Filter criterion of linked Contexts is queried multiple times: result contains data sets that fulfill both filter conditions.



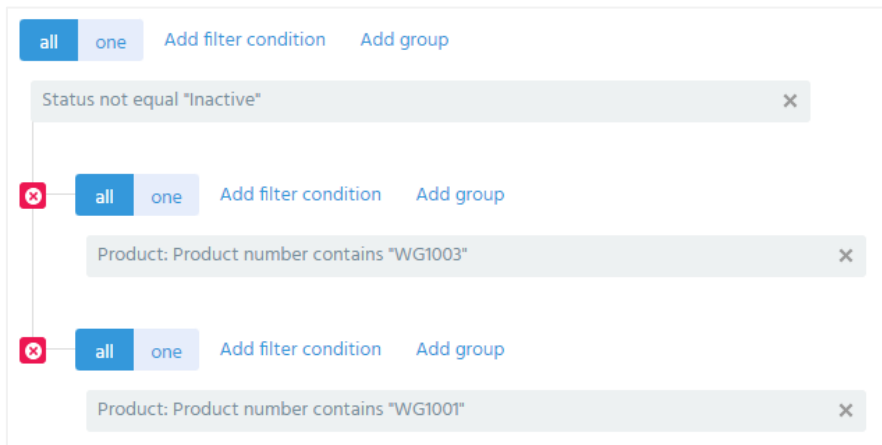
The filter criteria of linked Contexts can be identified by the colon.

In the Company, you can thus find filter criterion such as Address, Communication, Activity, Supervisor, Planning or Product.

Create the filter in such a way that everything to be checked for a linked dataset is within  group

A use case would be: *"I want to filter all active companies, who are linked with a certain product".*

The company searches for company datasets that are linked to the two products datasets.



The screenshot shows a filter configuration interface. At the top, there are buttons for 'all' (selected), 'one', 'Add filter condition', and 'Add group'. Below this, the filter is structured as follows:

- Condition 1: Status not equal "Inactive" (with a close button 'x')
- Group 1 (indicated by a red square with a white 'x'):
 - Condition 2: Product: Product number contains "WG1003" (with a close button 'x')
 - Condition 3: Product: Product number contains "WG1001" (with a close button 'x')

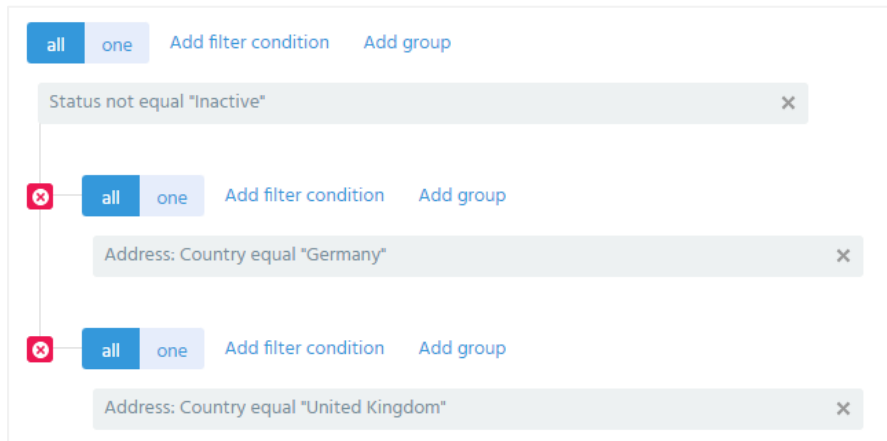
Filter in Context

Use case

Filter criterion of linked Contexts are queried multiple times: result contains dataset that fulfill both ("as well as") filter conditions.

Another use case that ties in with the use case "Companies from Hamburg and London". However, it searches for dataset that have two address entries (e.g. company address and delivery address). Not by filtering for companies that have either location, as in the simpler case.

"I would like to have an overview of all my active companies, that have their registered offices in Germany as well as in the United Kingdom."



The screenshot displays the ADITO filter configuration interface. At the top, there are tabs for 'all' (selected) and 'one', along with links for 'Add filter condition' and 'Add group'. Below this, a main container holds three filter conditions, each preceded by a red square icon with a white 'X' and a logical connector. The first condition is 'Status not equal "Inactive"'. The second and third conditions are grouped together under a single 'all' tab, indicating a logical AND relationship. These two conditions are 'Address: Country equal "Germany"' and 'Address: Country equal "United Kingdom"'. Each condition has its own 'Add filter condition' and 'Add group' links, and a close button (X) is present for each filter entry.

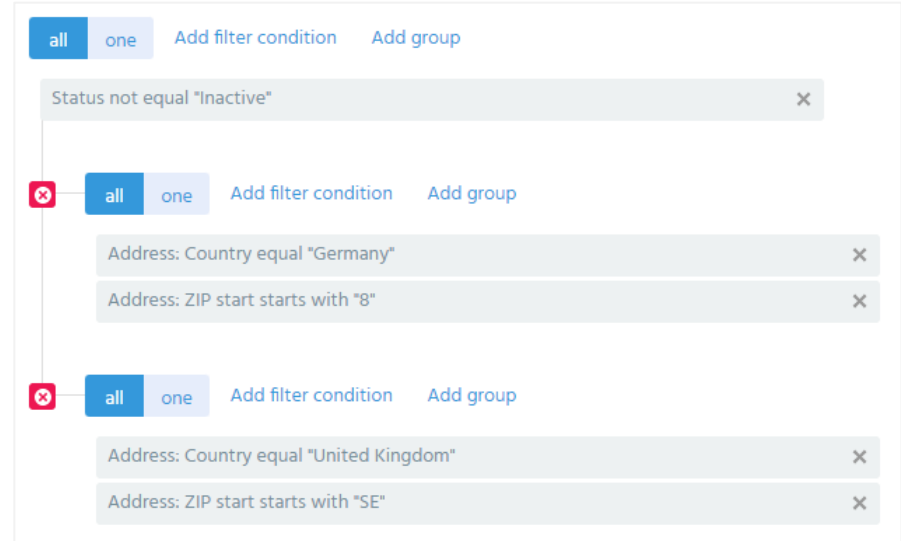
Filter in Context

Use case

Filter criterion of linked Contexts are queried multiple times: result contains dataset that fulfill both ("as well as") filter conditions.

The previous use case gets extended:

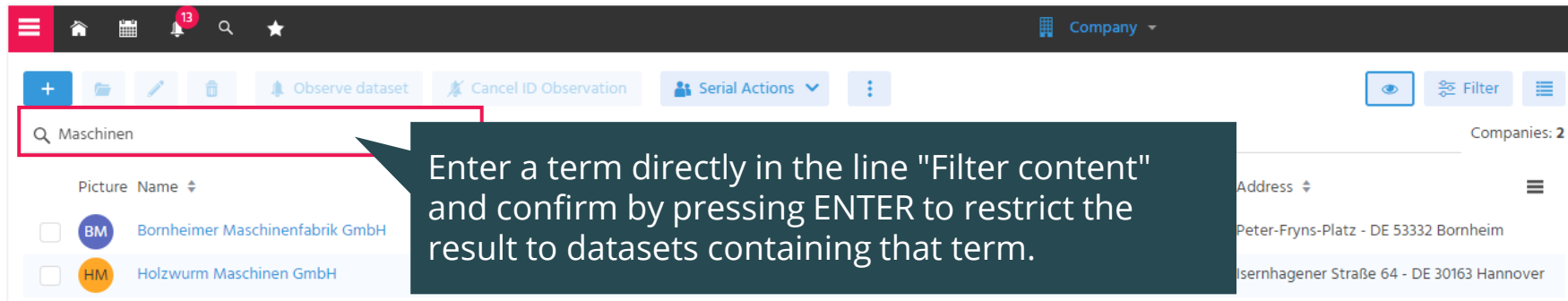
"I want an overview of all of my active companies that have their registered office in Germany and their ZIP code starts with 8, as well as a registered office in Great Britain with a ZIP code starting with SE."



The screenshot displays the ADITO filter interface, which is structured as a logical tree. At the top level, there are two main filter groups connected by an AND logic (represented by a red square with a white 'X'). Each group has its own 'all' and 'one' buttons, along with 'Add filter condition' and 'Add group' links. The first group contains a single filter condition: 'Status not equal "Inactive"'. The second group contains two filter conditions: 'Address: Country equal "Germany"' and 'Address: ZIP start starts with "8"'. The third group contains two filter conditions: 'Address: Country equal "United Kingdom"' and 'Address: ZIP start starts with "SE"'. Each filter condition is displayed in a light gray box with a close button (X) on the right.

Filter in Context

Using "Filter content"



Enter a term directly in the line "Filter content" and confirm by pressing ENTER to restrict the result to datasets containing that term.

Picture	Name
☐	 Bornheimer Maschinenfabrik GmbH
☐	 Holzwurm Maschinen GmbH

Companies: 2

Address

Peter-Fryns-Platz - DE 53332 Bornheim

Isenrahagener Straße 64 - DE 30163 Hannover

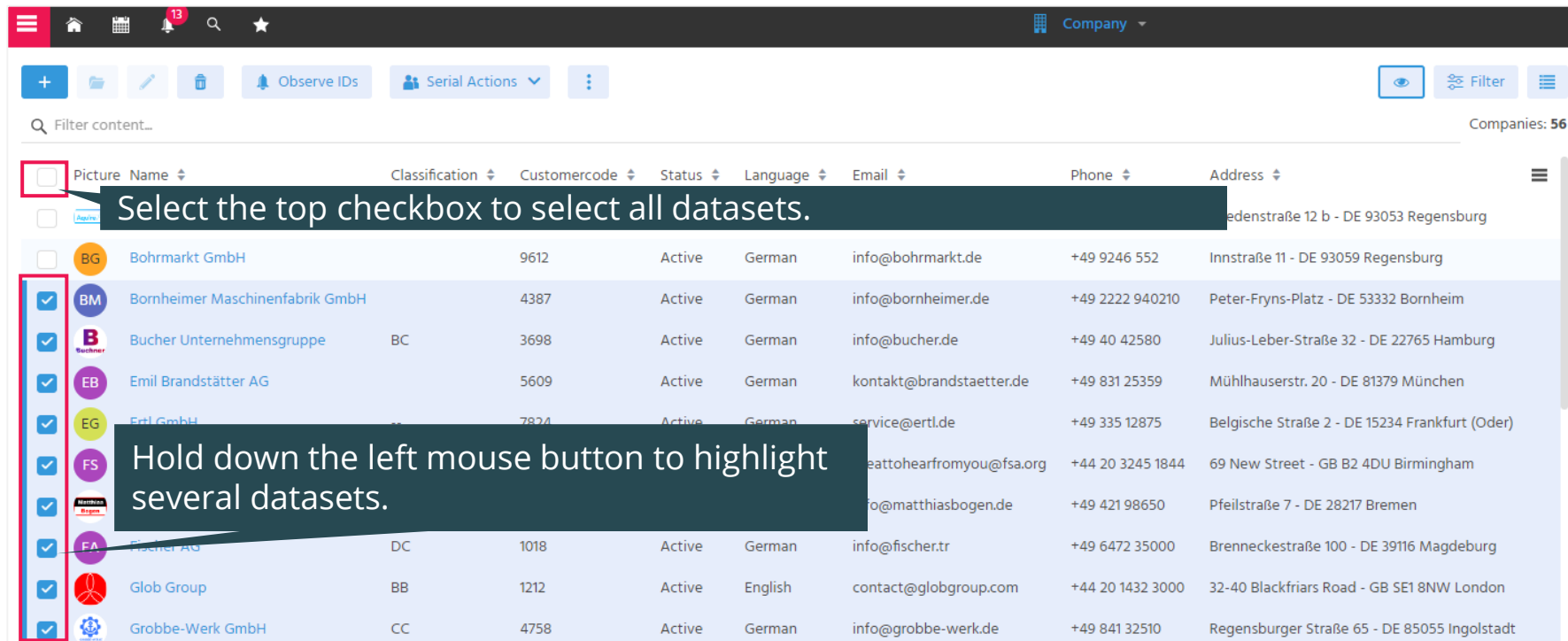


This functions in available in the following Contexts in the xRM. These following fields can be searched:

- Company (FilterView): Name and customer number
- Contact (FilterView: First and last name)
- Activity (Tab in Company or Contact): Subject line and description

Filter in Context

Selection of several datasets for further processing



Filter content...

Companies: 56

Picture	Name	Classification	Customercode	Status	Language	Email	Phone	Address
☐	Picture							
☐	AG							edenstraße 12 b - DE 93053 Regensburg
☐	BG		9612	Active	German	info@bohrmarkt.de	+49 9246 552	Innstraße 11 - DE 93059 Regensburg
☒	BM		4387	Active	German	info@bornheimer.de	+49 2222 940210	Peter-Fryns-Platz - DE 53332 Bornheim
☒	B	BC	3698	Active	German	info@bucher.de	+49 40 42580	Julius-Leber-Straße 32 - DE 22765 Hamburg
☒	EB		5609	Active	German	kontakt@brandstaetter.de	+49 831 25359	Mühlhauserstr. 20 - DE 81379 München
☒	EG		7824	Active	German	service@ertl.de	+49 335 12875	Belgische Straße 2 - DE 15234 Frankfurt (Oder)
☒	FS					eattohearfromyou@fsa.org	+44 20 3245 1844	69 New Street - GB B2 4DU Birmingham
☒	Matthias Bogen					fo@matthiasbogen.de	+49 421 98650	Pfeilstraße 7 - DE 28217 Bremen
☒	FA	DC	1018	Active	German	info@fischer.tr	+49 6472 35000	Brenneckestraße 100 - DE 39116 Magdeburg
☒	Glob Group	BB	1212	Active	English	contact@globgroup.com	+44 20 1432 3000	32-40 Blackfriars Road - GB SE1 8NW London
☒	Grobbe-Werk GmbH	CC	4758	Active	German	info@grobbe-werk.de	+49 841 32510	Regensburger Straße 65 - DE 85055 Ingolstadt

Grouping in Context

Once the first Grouping criterion is added and the "Apply filter" button is clicked, the view will automatically switch to the tree table view.

Open the Dropdown menu and define the criteria by which you would like to group.

The order of the grouping criteria can subsequently be adjusted using drag & drop.

If a Grouping has been applied in addition to the filter criteria, the Grouping will be displayed in the link under the "Last filters" section within [].

The screenshot displays a software interface with a table of companies. The table has columns for Picture, Name, Customercode, Status, and contact information. The 'GB' group is selected, showing 4 companies. A 'Grouping' panel on the right shows the criteria 'Preferred language' and 'Standard Country'. A 'Last filters' section at the bottom of the panel shows the filter 'Status not equal "Inactive"'. A red box highlights the 'Last filters' section.

Picture	Name	Customercode	Status	contact	Address
	Aquire GmbH	3469	Active	info@acquire.de	+49 4321 78990 Friedenstraße 12 b - DE 93053 Regensburg
	Sevent SE	7878	Active	info@sevent.de	+49 30 65780 Invalidenstraße 43 - DE 10115 Berlin
	Fahey, Spencer and Armstrong	1793	Active		
	Glob Group	1212	Active		
	Lockman LLC	1591	Active		
	Parker & Jenkins	1431	Active	contact@pj.org	+44 20 3687 4520 26-40 Kensington High Street - GB W8 4PE Royal Borough of Kensington and Chelsea BD
	Nedick's	8326	Active	info@neddicks.com	3rd Street 151 - US 94103 San Francisco BC

Grouping

- Preferred language
- Standard Country

Group by

Condition

Join conditions by: all one

Status not equal "Inactive"

Save filter

Last filters

[Preferred language, Standard Country] !=Inactive !=Inactive, =English

Navigating within the Context



Open Context via Global Menu

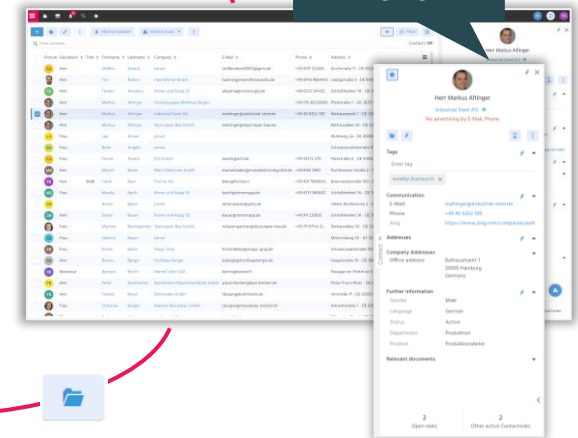
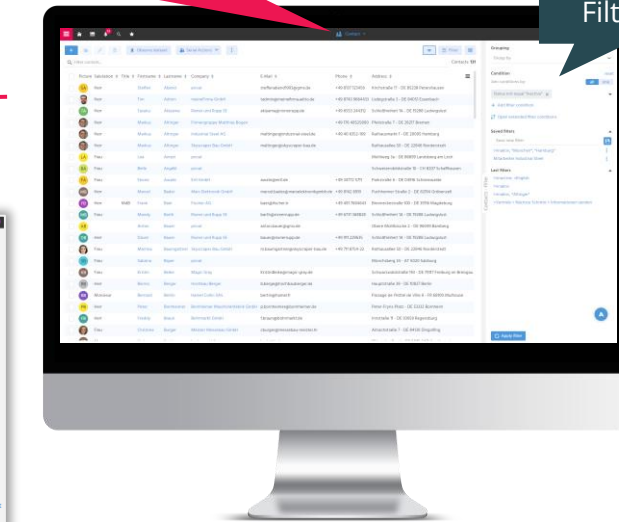
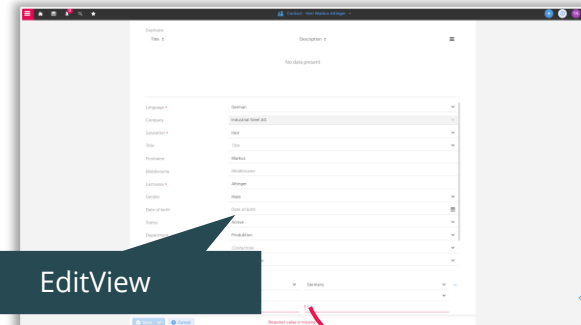
FilterView



Preview

EditView

MainView



Open dataset via Index search

MainView of the selected dataset

FilterView of the linked Context



Preview of the linked Context



EditView of the linked Context

MainView of the linked Context

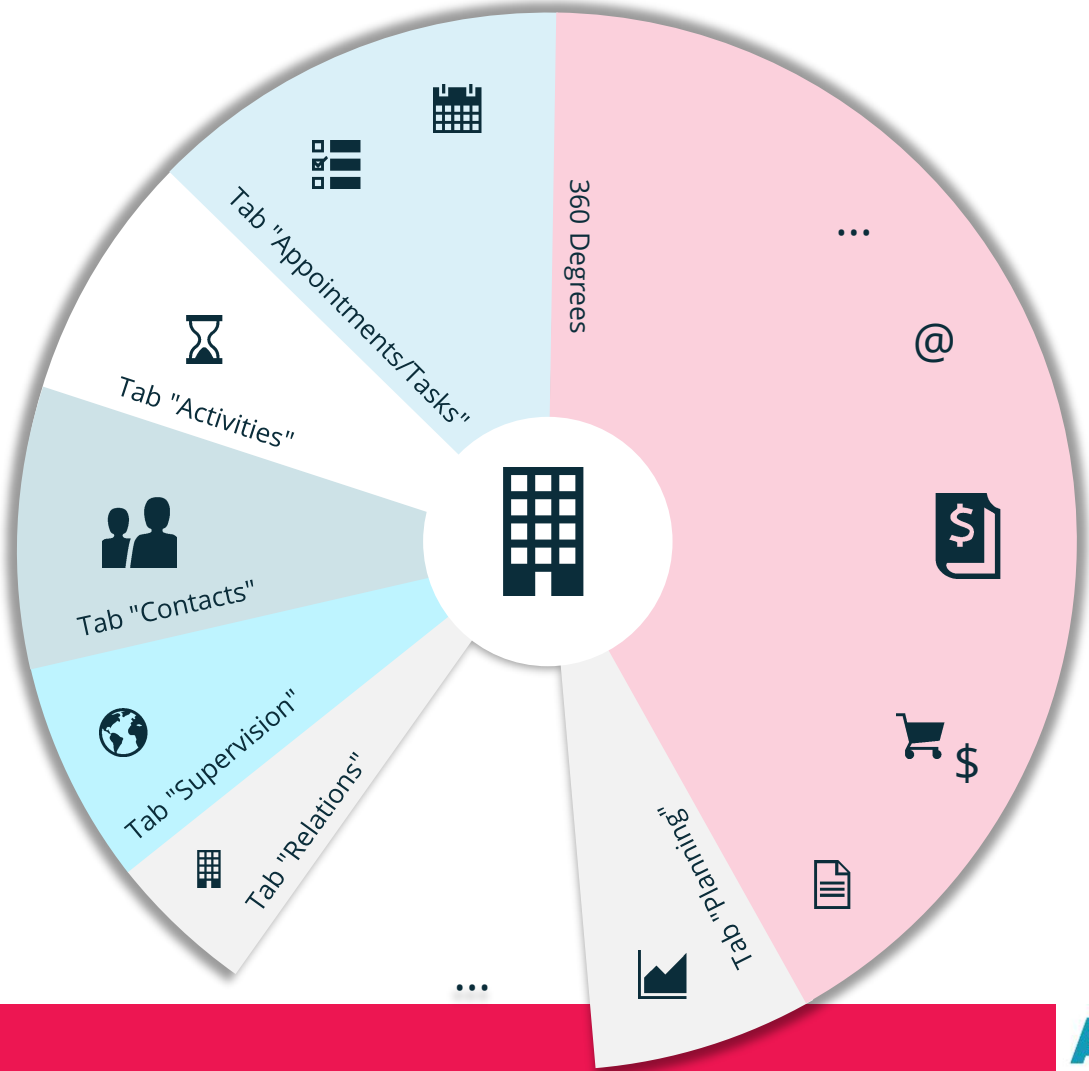


Where can I find linked data in the MainView?

Example: Company

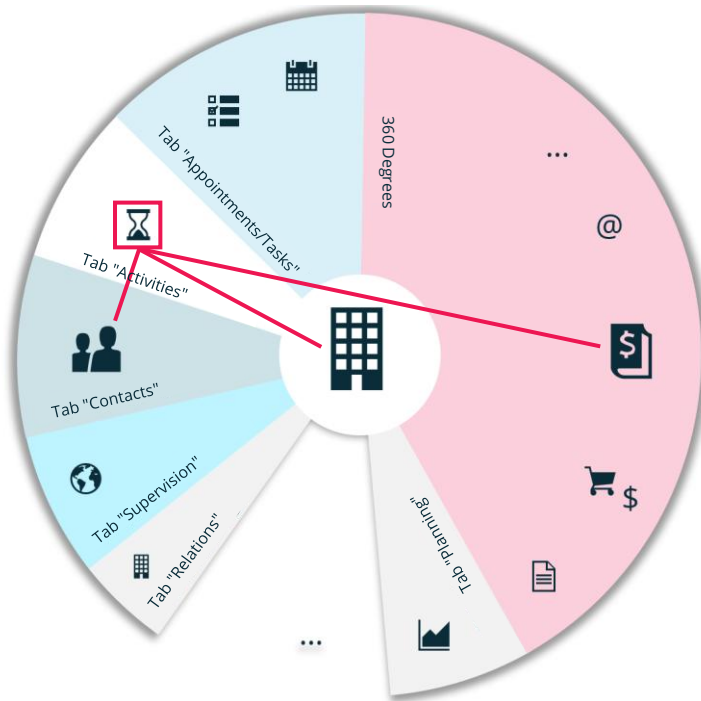
In the MainView, you will find all linked data in the **tabs** or the **360 Degrees** view.

Data that is linked to **central datasets** in the system (Company, sales project, campaign) can usually be found in their own tabs.



Where can I find linked data in the Preview?

In the Preview of an **Activity**, the linked data is displayed in the area "**Connections**".



2. Phase der Produkt-Planung startet
May 3, 2024, 12:49 PM

Details

Direction Outgoing
Category E-Mail
Responsible Frau Lisa Sommer
Key activity No

Connections

Company	Transatlantik Logistics GmbH
Contact	Herr Andreas Morgenstern
Contact	Frau Dr. Chloe Decker
Opportunity	1004 Transatlantik Initialprojekt Open

Description

Sehr geehrte Damen und Herren,
die Produktion des Produktes startet. Über den Verlauf und den
aktuellen Stand der Produktion können Sie sich in unserem
Kundenportal informieren.
Viele Grüße
Lisa Sommer
meine Firma
Wilhelm-Str. 2
80807 München
Fon: +49 8763 1333

2. Phase der Produkt-Planung startet
May 3, 2024, 12:49 PM

Details

Direction Outgoing
Category E-Mail
Responsible Frau Lisa Sommer
Key activity No

Connections

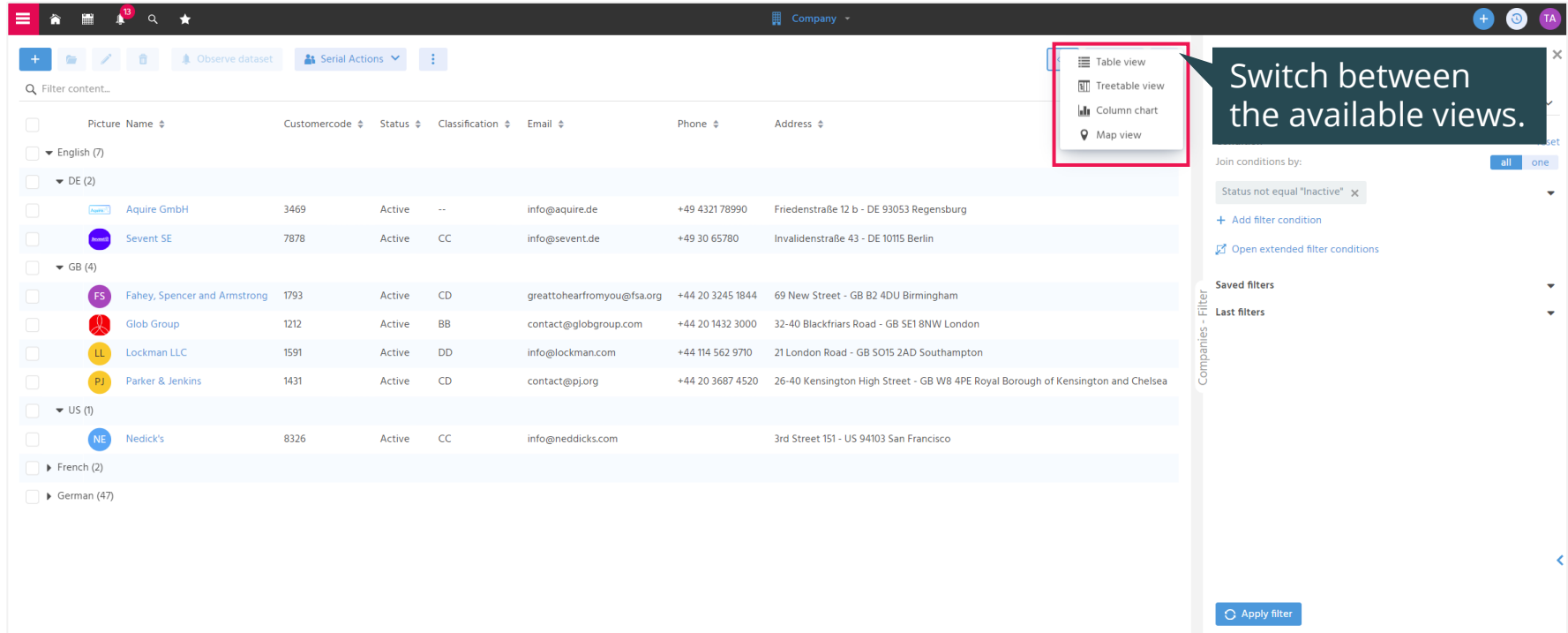
+	Company	Transatlantik Logis
	Contact	Herr Andreas Morg
	Contact	Frau Dr. Chloe Decl
	Opportunity	1004 Transatlantik

Save Cancel

FilterView



FilterView: switching view



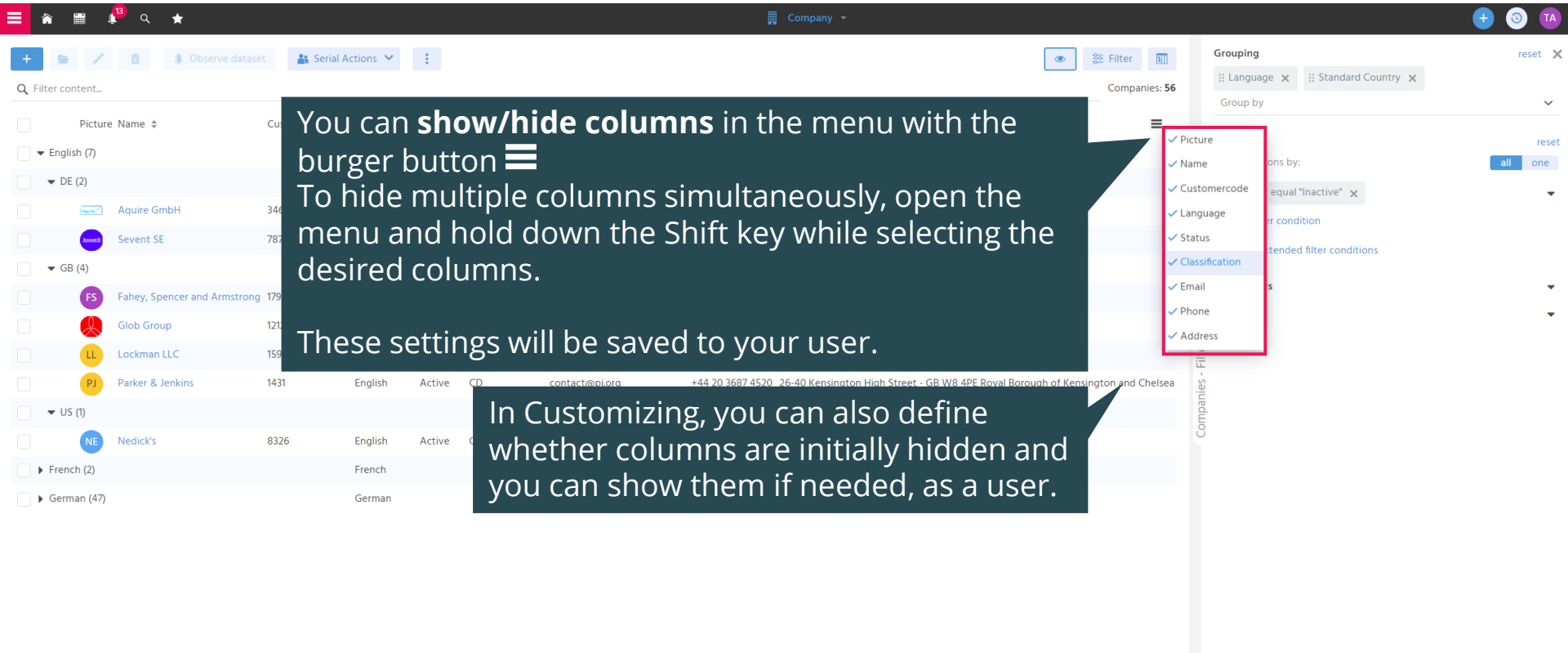
The screenshot displays the ADITO FilterView interface. The main area shows a table of company data with columns: Picture, Name, Customercode, Status, Classification, Email, Phone, and Address. The data is filtered by country, showing results for Germany (DE), Great Britain (GB), the United States (US), and France (French), along with a total for German companies (47).

A view switcher menu is highlighted with a red box, showing four options: Table view (selected), Treetable view, Column chart, and Map view. A callout box points to this menu with the text: "Switch between the available views."

On the right side, there is a filter configuration panel. It includes a "Join conditions by:" section with a dropdown menu set to "all". Below this, there is a filter condition: "Status not equal 'Inactive'". There are buttons to "Add filter condition" and "Open extended filter conditions". The panel also shows "Saved filters" and "Last filters" sections. At the bottom right, there is an "Apply filter" button.

Picture	Name	Customercode	Status	Classification	Email	Phone	Address
	English (7)						
	DE (2)						
	Aquire GmbH	3469	Active	--	info@acquire.de	+49 4321 78990	Friedenstraße 12 b - DE 93053 Regensburg
	Sevent SE	7878	Active	CC	info@sevent.de	+49 30 65780	Invalidenstraße 43 - DE 10115 Berlin
	GB (4)						
	Fahey, Spencer and Armstrong	1793	Active	CD	greattohearfromyou@fsa.org	+44 20 3245 1844	69 New Street - GB B2 4DU Birmingham
	Glob Group	1212	Active	BB	contact@globgroup.com	+44 20 1432 3000	32-40 Blackfriars Road - GB SE1 8NW London
	Lockman LLC	1591	Active	DD	info@lockman.com	+44 114 562 9710	21 London Road - GB SO15 2AD Southampton
	Parker & Jenkins	1431	Active	CD	contact@pj.org	+44 20 3687 4520	26-40 Kensington High Street - GB W8 4PE Royal Borough of Kensington and Chelsea
	US (1)						
	Nedick's	8326	Active	CC	info@neddicks.com		3rd Street 151 - US 94103 San Francisco
	French (2)						
	German (47)						

FilterView: Table view



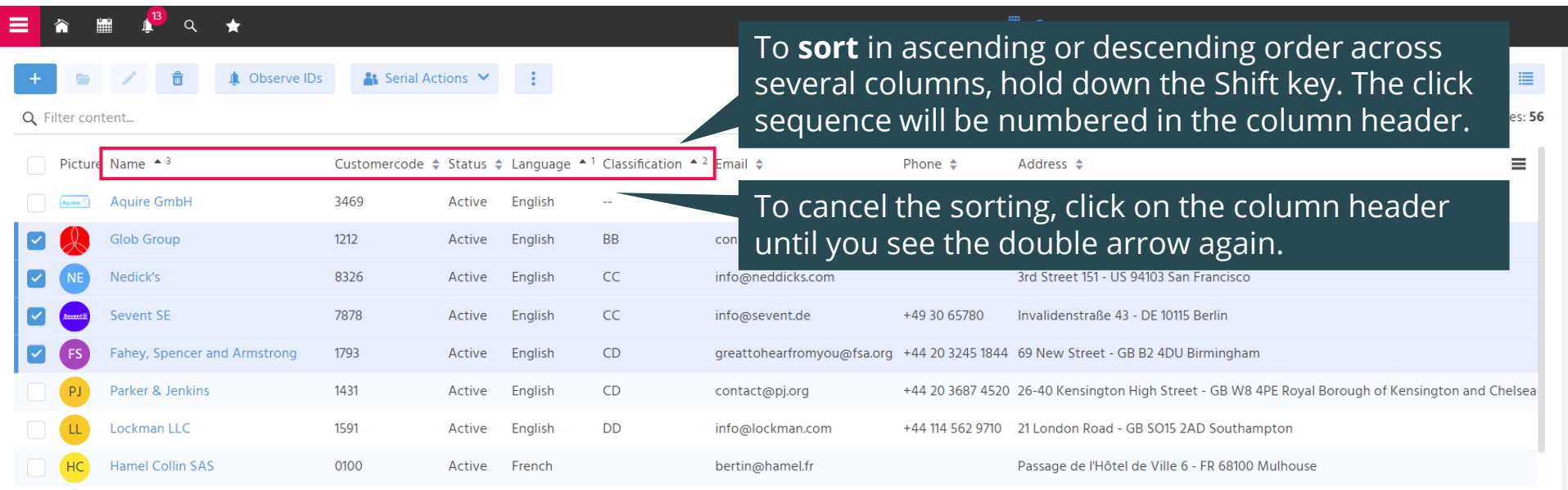
You can **show/hide columns** in the menu with the burger button ☰

To hide multiple columns simultaneously, open the menu and hold down the Shift key while selecting the desired columns.

These settings will be saved to your user.

In Customizing, you can also define whether columns are initially hidden and you can show them if needed, as a user.

FilterView: table view



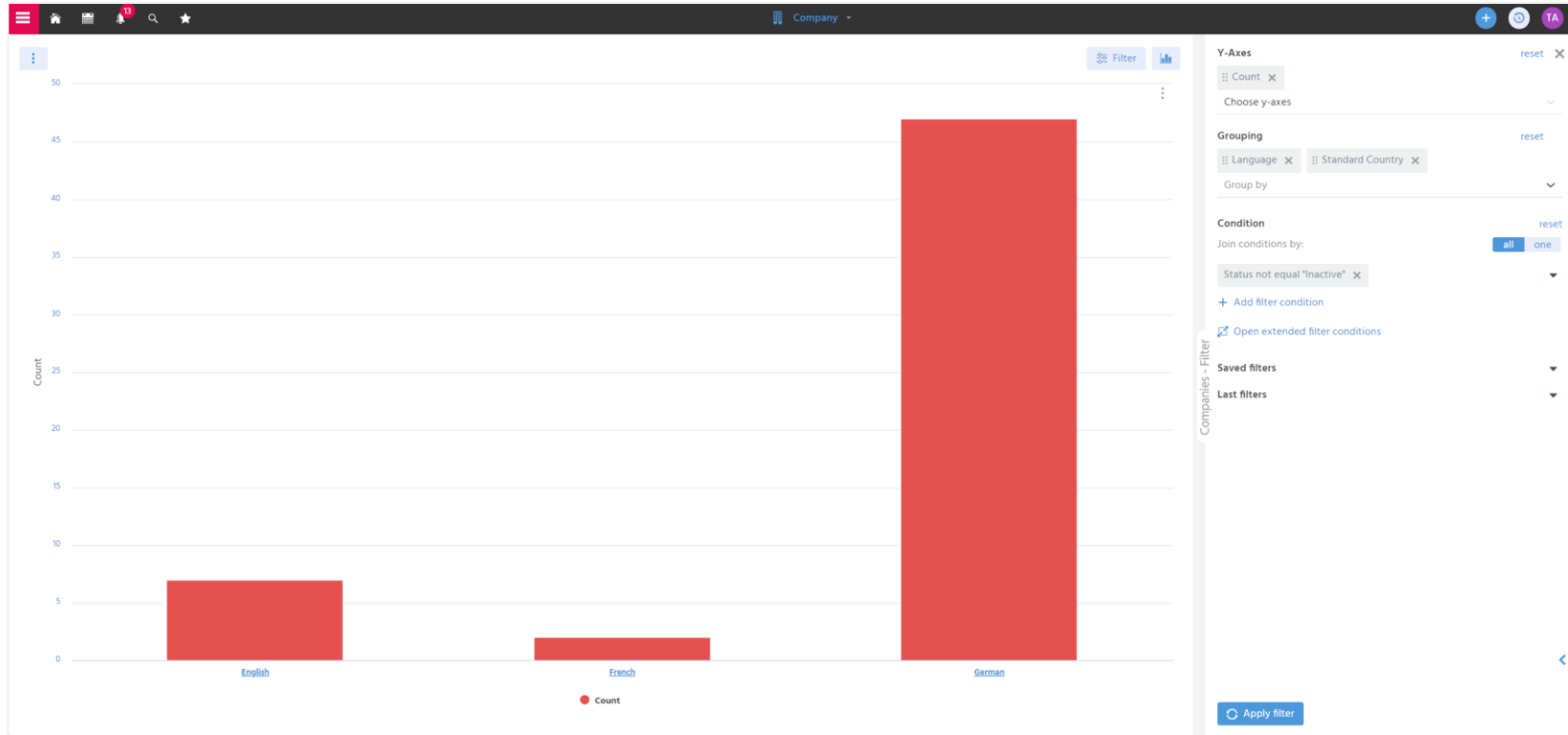
To **sort** in ascending or descending order across several columns, hold down the Shift key. The click sequence will be numbered in the column header.

To cancel the sorting, click on the column header until you see the double arrow again.

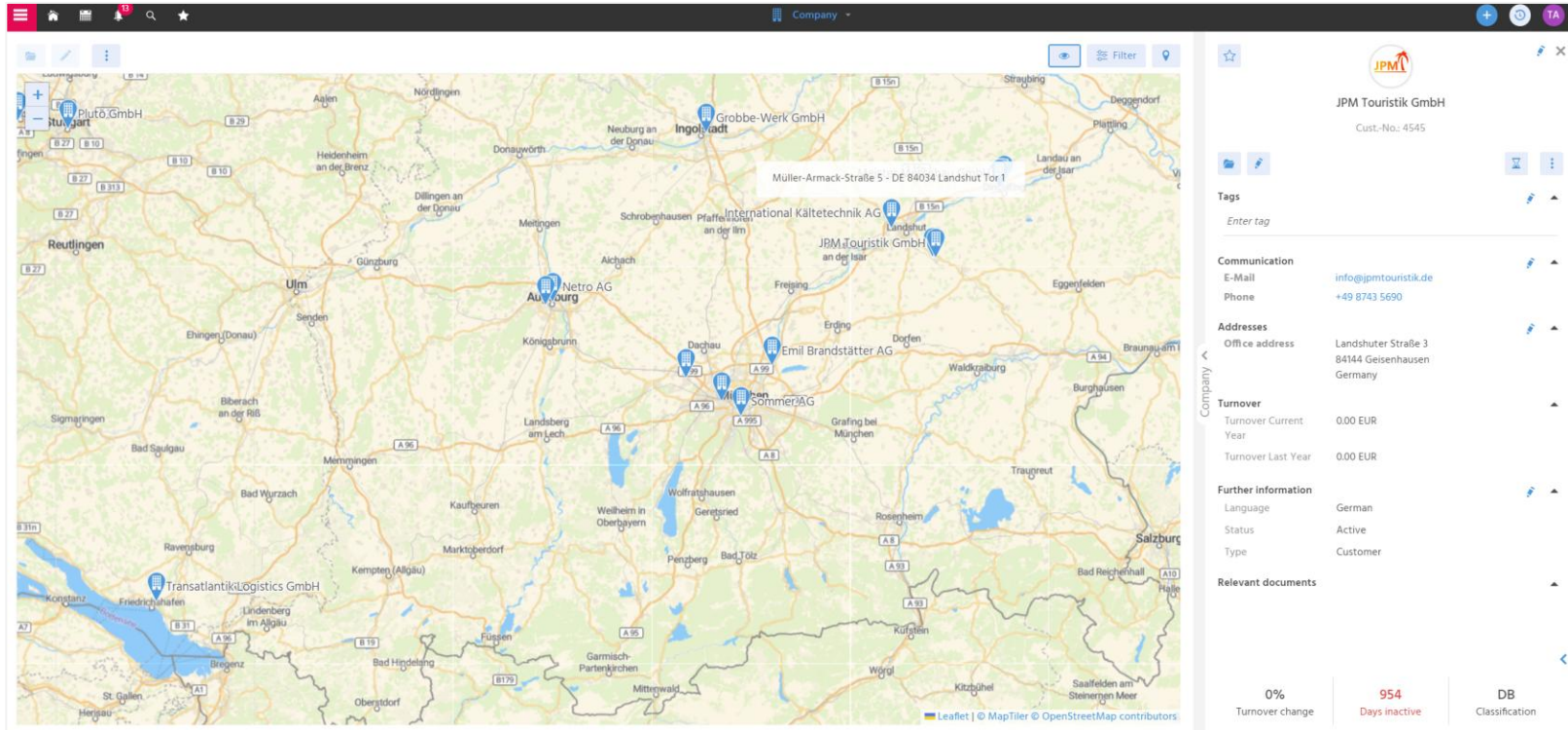
☐	Picture	Name ▲ ³	Customercode	Status	Language ▲ ¹	Classification ▲ ²	Email	Phone	Address
☐		Acquire GmbH	3469	Active	English	--			
☒		Glob Group	1212	Active	English	BB	con		
☒		Nedick's	8326	Active	English	CC	info@neddicks.com		3rd Street 151 - US 94103 San Francisco
☒		Sevent SE	7878	Active	English	CC	info@sevent.de	+49 30 65780	Invalidenstraße 43 - DE 10115 Berlin
☒		Fahey, Spencer and Armstrong	1793	Active	English	CD	greattohearfromyou@fsa.org	+44 20 3245 1844	69 New Street - GB B2 4DU Birmingham
☐		Parker & Jenkins	1431	Active	English	CD	contact@pj.org	+44 20 3687 4520	26-40 Kensington High Street - GB W8 4PE Royal Borough of Kensington and Chelsea
☐		Lockman LLC	1591	Active	English	DD	info@lockman.com	+44 114 562 9710	21 London Road - GB SO15 2AD Southampton
☐		Hamel Collin SAS	0100	Active	French		bertin@hamel.fr		Passage de l'Hôtel de Ville 6 - FR 68100 Mulhouse

Example: You want to sort companies after Language, Classification and Company name. First, the Language should be sorted, followed by taking classification into account within the language, and finally sorting the names alphabetically within the classification.
To do this, click on the "Language" column first, then on "Classification" and lastly on "Name".

FilterView: Column chart



FilterView: Map view



The screenshot displays the ADITO FilterView Map view interface. The main area shows a map of Southern Germany, centered around the region of Augsburg and Ingolstadt. Various locations are marked with blue pins, including Ingolstadt, Augsburg, and Landshut. A sidebar on the right displays details for the selected company, JPM Touristik GmbH.

Company: JPM Touristik GmbH
Cust.-No.: 4545

Tags:
Enter tag

Communication:
E-Mail: info@jpmtouristik.de
Phone: +49 8743 5690

Addresses:
Office address: Landshuter Straße 3
84144 Geisenhausen
Germany

Turnover:
Turnover Current Year: 0.00 EUR
Turnover Last Year: 0.00 EUR

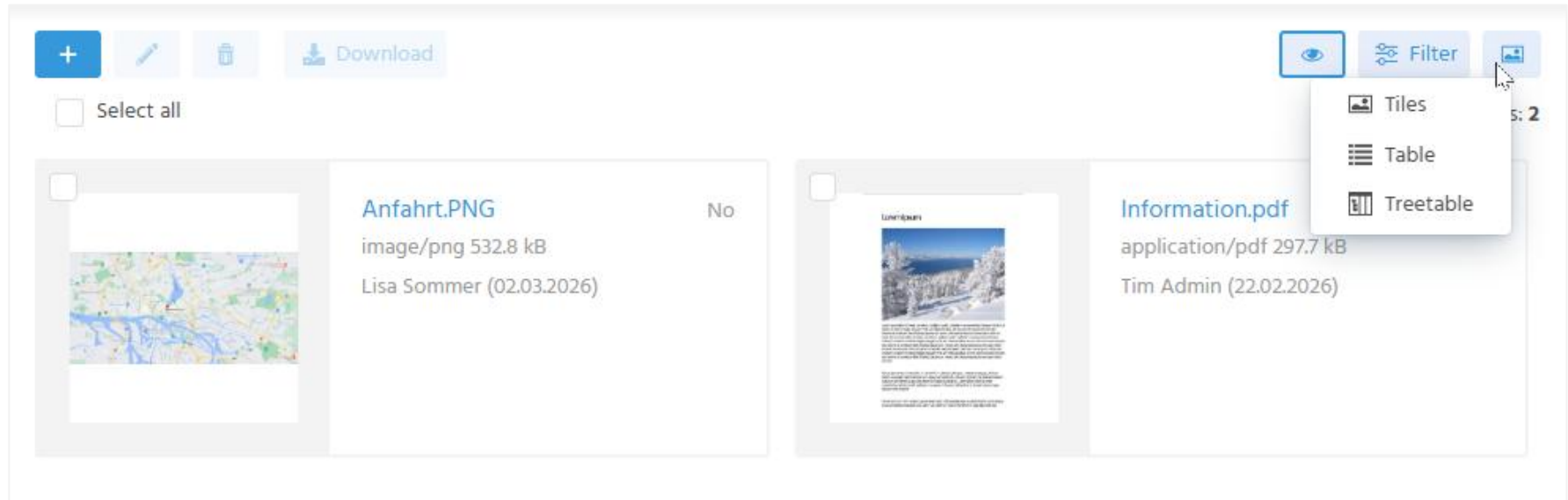
Further information:
Language: German
Status: Active
Type: Customer

Relevant documents:

0% Turnover change
954 Days inactive
DB Classification

FilterView: Tiles view

Example in the tab "Documents":



Top toolbar: +, Edit, Delete, Download

Select all

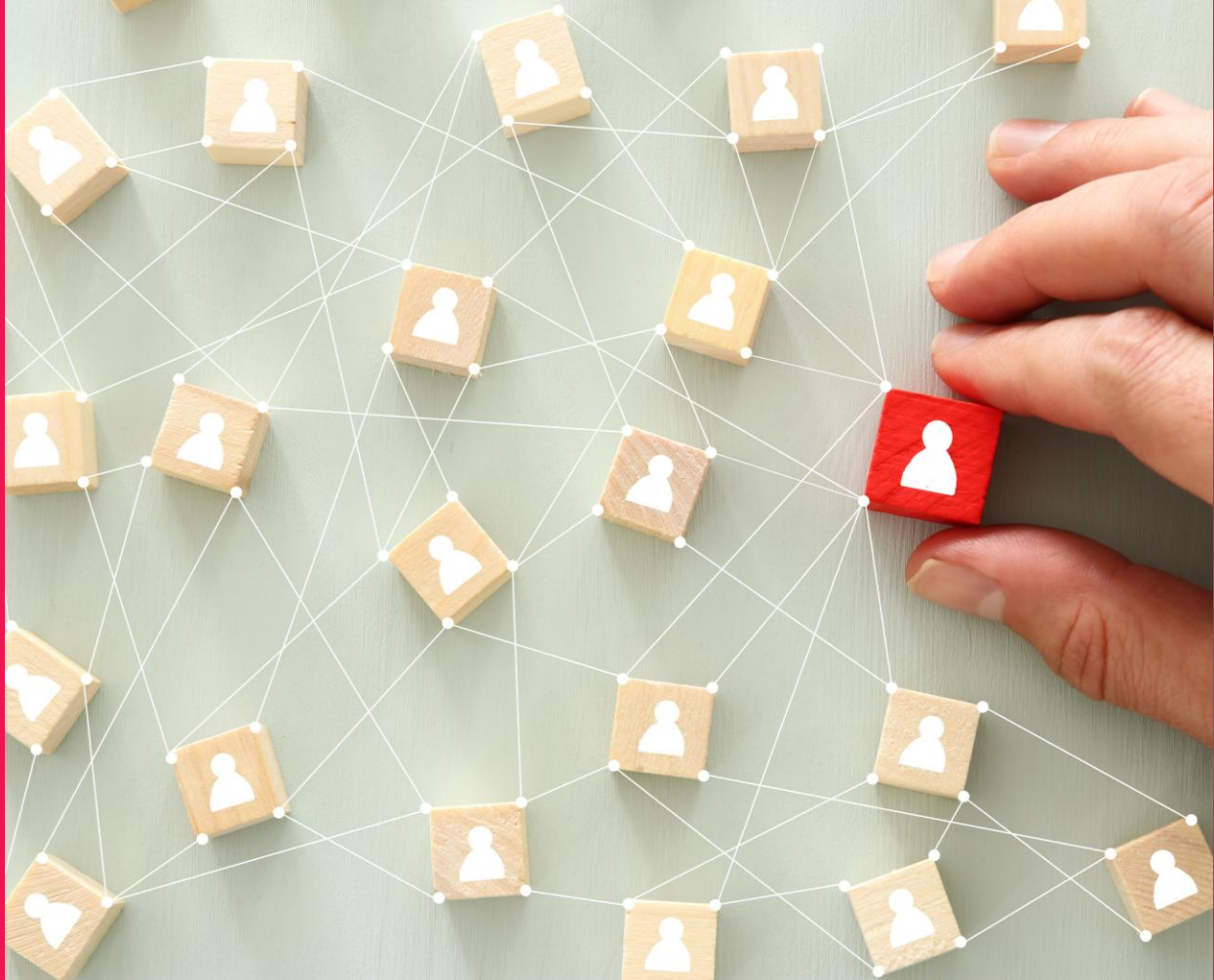
FilterView: Documents

Filter menu:

- Tiles
- Table
- Treetable

Thumbnail	Document Name	File Type	Size	User/Date
	Anfahrt.PNG	image/png	532.8 kB	Lisa Sommer (02.03.2026)
	Information.pdf	application/pdf	297.7 kB	Tim Admin (22.02.2026)

Preview

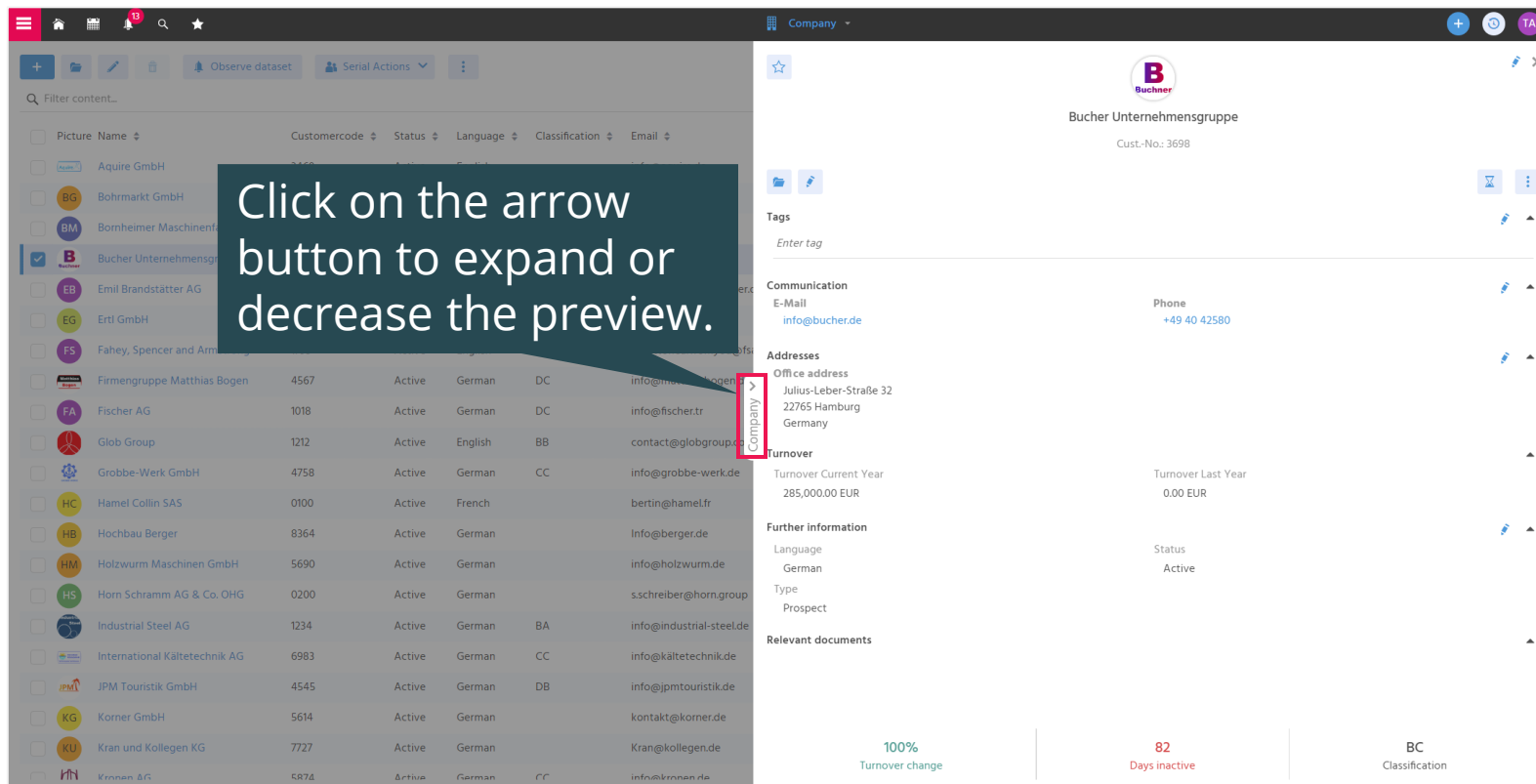


79



Expand preview

Click on the arrow button to expand or decrease the preview.



Picture	Name	Customercode	Status	Language	Classification	Email
	Aquire GmbH	3456	Active	German	CC	info@acquire.de
	Bohrmarkt GmbH	1234	Active	German	CC	info@bohrmarkt.de
	Bornheimer Maschinenfabrik	5678	Active	German	CC	info@bornheimer.de
	Bucher Unternehmensgruppe	3698	Active	German	CC	info@bucher.de
	Emil Brandstätter AG	9876	Active	German	CC	info@emilbrandstaetter.de
	Ertl GmbH	4321	Active	German	CC	info@ertl.de
	Fahey, Spencer and Associates	7654	Active	English	BB	info@fahey.com
	Firmengruppe Matthias Bogen	4567	Active	German	DC	info@matthiasbogen.de
	Fischer AG	1018	Active	German	DC	info@fischer.tr
	Glob Group	1212	Active	English	BB	contact@globgroup.com
	Grobbe-Werk GmbH	4758	Active	German	CC	info@grobbe-werk.de
	Hamel Collin SAS	0100	Active	French	CC	bertin@hamel.fr
	Hochbau Berger	8364	Active	German	CC	Info@berger.de
	Holzwurm Maschinen GmbH	5690	Active	German	CC	info@holzwurm.de
	Horn Schramm AG & Co. OHG	0200	Active	German	CC	sschreiber@horn.group
	Industrial Steel AG	1234	Active	German	BA	info@industrial-steel.de
	International Kältetechnik AG	6983	Active	German	CC	info@kältetechnik.de
	JPM Touristik GmbH	4545	Active	German	DB	info@jpmtouristik.de
	Korner GmbH	5614	Active	German	CC	kontakt@korner.de
	Kran und Kollegen KG	7727	Active	German	CC	Kran@kollegen.de
	Kranen & Co.	5874	Active	German	CC	info@kranen.de

Bucher Unternehmensgruppe
Cust.-No.: 3698

Tags
Enter tag

Communication
E-Mail: info@bucher.de
Phone: +49 40 42580

Addresses
Office address: Julius-Leber-Straße 32, 22765 Hamburg, Germany

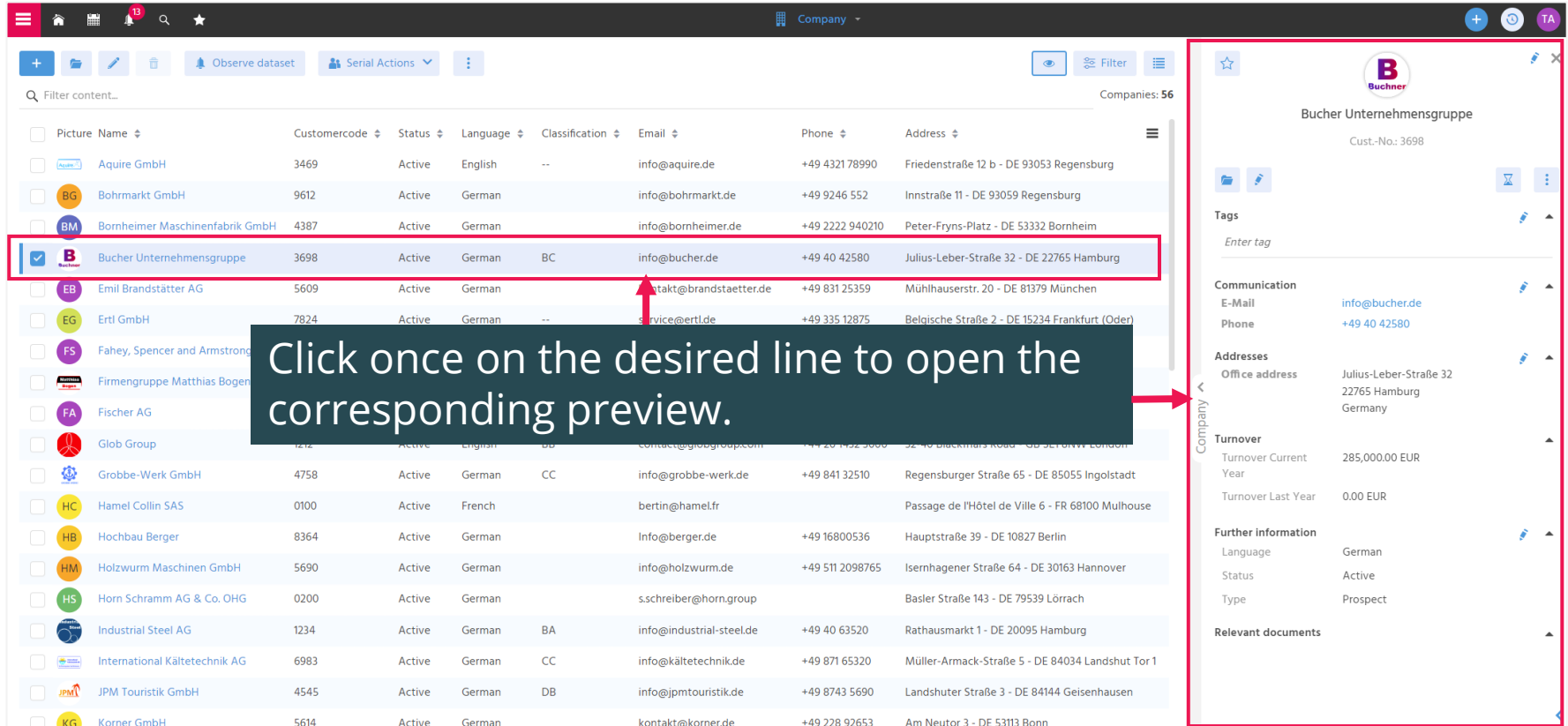
Turnover
Turnover Current Year: 285,000.00 EUR
Turnover Last Year: 0.00 EUR

Further information
Language: German
Type: Prospect
Status: Active

Relevant documents

100% Turnover change | 82 Days inactive | BC Classification

Open preview



The screenshot displays the ADITO software interface. At the top, there's a navigation bar with icons for home, datasets, notifications, search, and favorites. Below this is a toolbar with options like 'Observe dataset' and 'Serial Actions'. The main area features a table of companies with columns for selection, picture, name, customer code, status, language, classification, email, phone, and address. The company 'Bucher Unternehmensgruppe' is highlighted in blue. A red box surrounds this row, and a red arrow points from a text box to it. To the right, a detailed preview of the selected company is shown, including its logo, name, customer number, tags, communication details (email and phone), addresses, turnover information, and further details like language, status, type, and relevant documents.

	Picture	Name	Customercode	Status	Language	Classification	Email	Phone	Address
☐		Aquire GmbH	3469	Active	English	--	info@aqire.de	+49 4321 78990	Friedenstraße 12 b - DE 93053 Regensburg
☐		Bohrmarkt GmbH	9612	Active	German	--	info@bohrmarkt.de	+49 9246 552	Innstraße 11 - DE 93059 Regensburg
☐		Bornheimer Maschinenfabrik GmbH	4387	Active	German	--	info@bornheimer.de	+49 2222 940210	Peter-Fryns-Platz - DE 53332 Bornheim
☒		Bucher Unternehmensgruppe	3698	Active	German	BC	info@bucher.de	+49 40 42580	Julius-Leber-Straße 32 - DE 22765 Hamburg
☐		Emil Brandstätter AG	5609	Active	German	--	kontakt@brandstaetter.de	+49 831 25359	Mühlhauserstr. 20 - DE 81379 München
☐		Ertl GmbH	7824	Active	German	--	service@ertl.de	+49 335 12875	Belgische Straße 2 - DE 15234 Frankfurt (Oder)
☐		Fahey, Spencer and Armstrong							
☐		Firmengruppe Matthias Bogen							
☐		Fischer AG							
☐		Glob Group							
☐		Grobbe-Werk GmbH	4758	Active	German	CC	info@grobbe-werk.de	+49 841 32510	Regensburger Straße 65 - DE 85055 Ingolstadt
☐		Hamel Collin SAS	0100	Active	French	--	bertin@hamel.fr		Passage de l'Hôtel de Ville 6 - FR 68100 Mulhouse
☐		Hochbau Berger	8364	Active	German	--	Info@berger.de	+49 16800536	Hauptstraße 39 - DE 10827 Berlin
☐		Holzwurm Maschinen GmbH	5690	Active	German	--	info@holzwurm.de	+49 511 2098765	Isernhagener Straße 64 - DE 30163 Hannover
☐		Horn Schramm AG & Co. OHG	0200	Active	German	--	s.schreiber@horn.group		Basler Straße 143 - DE 79539 Lörrach
☐		Industrial Steel AG	1234	Active	German	BA	info@industrial-steel.de	+49 40 63520	Rathausmarkt 1 - DE 20095 Hamburg
☐		International Kältetechnik AG	6983	Active	German	CC	info@kältetechnik.de	+49 871 65320	Müller-Armack-Straße 5 - DE 84034 Landshut Tor 1
☐		JPM Touristik GmbH	4545	Active	German	DB	info@jpmtouristik.de	+49 8743 5690	Landshuter Straße 3 - DE 84144 Geisenhausen
☐		Korner GmbH	5614	Active	German	--	kontakt@korner.de	+49 228 92653	Am Neutor 3 - DE 53113 Bonn

Click once on the desired line to open the corresponding preview.

Preview

Header with an image/icon, the most important data such as Name and Actions:

- Open (the MainView)
- Edit (master data)
- Create a new activity
- Further Actions

Areas for Favorites, Communication data, sales data and further information.

Footer displays calculated characteristic data.

Header

Buchner Unternehmensgruppe
Cust.-No.: 3698

Tags

Enter tag

Communication

E-Mail: info@bucher.de
Phone: +49 40 42580

Addresses

Office address: Julius-Leber-Straße 32
22765 Hamburg
Germany

Turnover

Turnover Current Year: 285,000.00 EUR
Turnover Last Year: 0.00 EUR

Further information

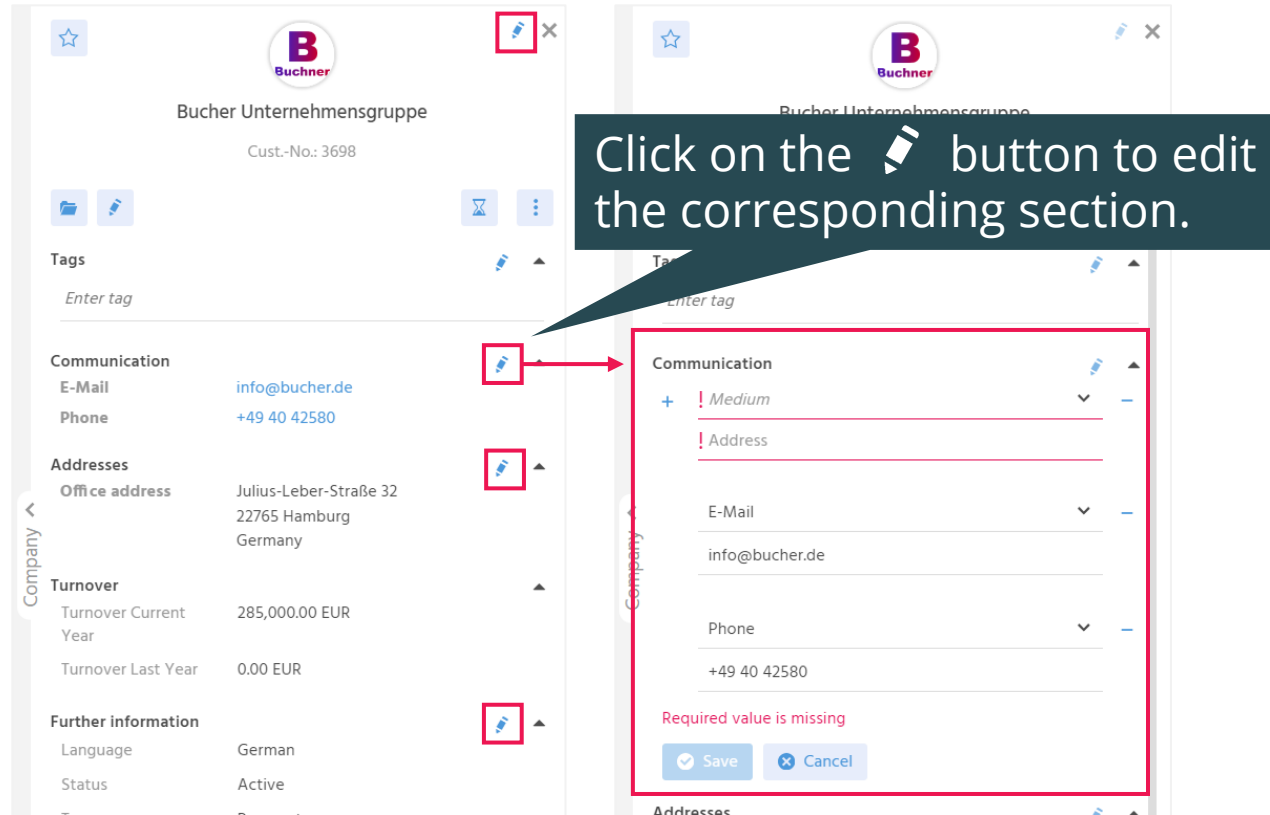
Language: German
Status: Active
Type: Prospect

Relevant documents

Footer

100% Turnover change
82 Days inactive
BC Classification

Preview: sections



The screenshot displays the ADITO interface for a company profile. The company name is 'Bucher Unternehmensgruppe' with a customer number 'Cust.-No.: 3698'. The profile is divided into several sections: 'Tags', 'Communication', 'Addresses', 'Turnover', and 'Further information'. Each section has an edit icon (a pencil inside a square) to its right. A callout box with a dark background and white text points to the 'Communication' edit icon, stating: 'Click on the  button to edit the corresponding section.'

Communication

E-Mail	info@bucher.de
Phone	+49 40 42580

Addresses

Office address	Julius-Leber-Straße 32 22765 Hamburg Germany
----------------	--

Turnover

Turnover Current Year	285,000.00 EUR
Turnover Last Year	0.00 EUR

Further information

Language	German
Status	Active

Communication Edit Form

Communication

+ ! Medium

! Address

E-Mail

info@bucher.de

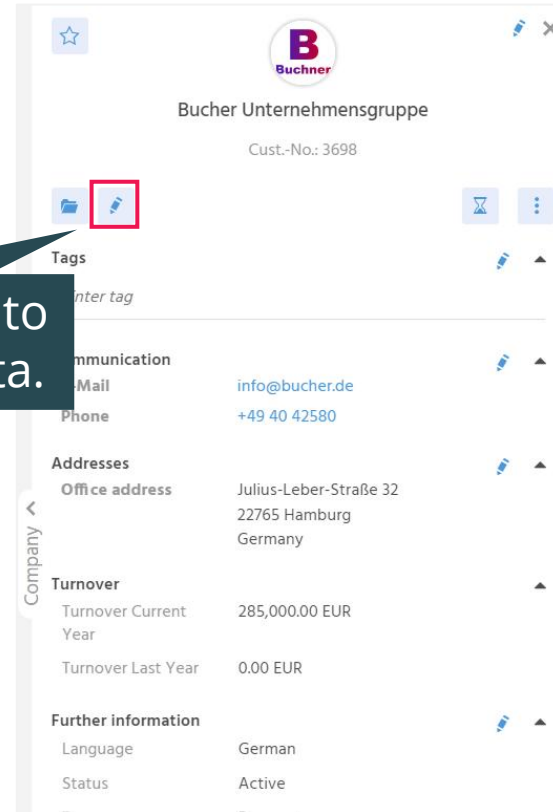
Phone

+49 40 42580

Required value is missing

Preview: master data

Open the EditView to edit the master data.



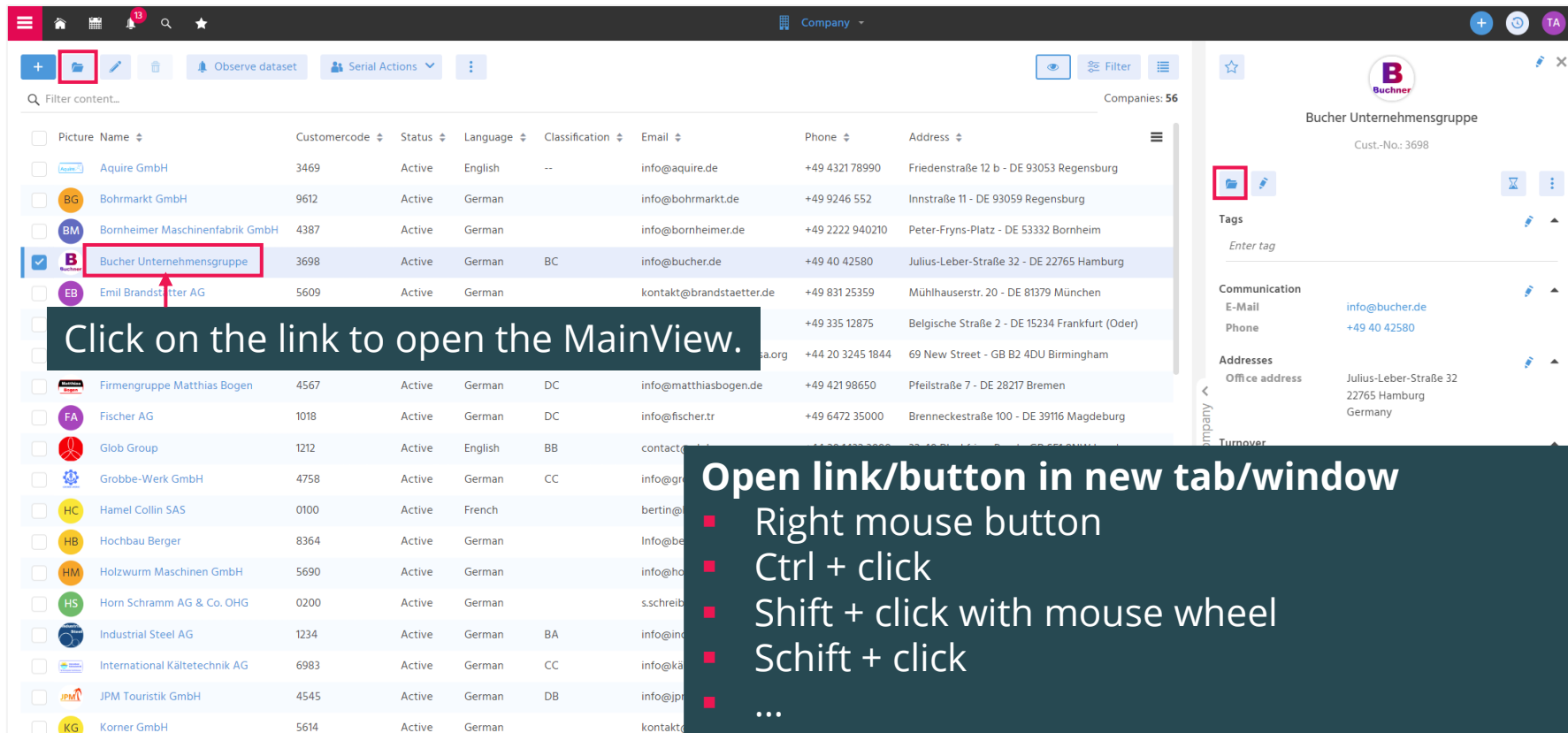
The screenshot shows a user interface for managing master data. At the top, there is a star icon, a logo for 'Bucher' (a blue circle with a white 'B'), and a close button. Below the logo, the company name 'Bucher Unternehmensgruppe' and its customer number 'Cust.-No.: 3698' are displayed. A sidebar on the left contains a folder icon and an edit icon (a blue pencil inside a square), which is highlighted with a red box. A dark blue callout box points to this edit icon with the text 'Open the EditView to edit the master data.' The main content area is divided into sections: 'Tags' with an input field 'Enter tag', 'Communication' with fields for 'Mail' (info@bucher.de) and 'Phone' (+49 40 42580), 'Addresses' with 'Office address' (Julius-Leber-Straße 32, 22765 Hamburg, Germany), 'Turnover' with 'Turnover Current Year' (285,000.00 EUR) and 'Turnover Last Year' (0.00 EUR), and 'Further information' with 'Language' (German) and 'Status' (Active). Each section has a blue pencil icon and an expand/collapse arrow on the right. A vertical label 'Company' is positioned to the left of the 'Turnover' and 'Further information' sections.

Bucher Unternehmensgruppe	
Cust.-No.: 3698	
Tags	Enter tag
Communication	
Mail	info@bucher.de
Phone	+49 40 42580
Addresses	
Office address	Julius-Leber-Straße 32 22765 Hamburg Germany
Turnover	
Turnover Current Year	285,000.00 EUR
Turnover Last Year	0.00 EUR
Further information	
Language	German
Status	Active

MainView



Open MainView



Click on the link to open the MainView.

Open link/button in new tab/window

- Right mouse button
- Ctrl + click
- Shift + click with mouse wheel
- Shift + click
- ...

Picture	Name	Customercode	Status	Language	Classification	Email	Phone	Address								
	Aquire GmbH	3469	Active	English	--	info@aqire.de	+49 4321 78990	Friedenstraße 12 b - DE 93053 Regensburg								
	Bohrmarkt GmbH	9612	Active	German	--	info@bohrmarkt.de	+49 9246 552	Innstraße 11 - DE 93059 Regensburg								
	Bornheimer Maschinenfabrik GmbH	4387	Active	German	--	info@bornheimer.de	+49 2222 940210	Peter-Fryns-Platz - DE 53332 Bornheim								
	Bucher Unternehmensgruppe	3698	Active	German	BC	info@bucher.de	+49 40 42580	Julius-Leber-Straße 32 - DE 22765 Hamburg								
	Emil Brandstätter AG	5609	Active	German	--	kontakt@brandstaetter.de	+49 831 25359	Mühlhauserstr. 20 - DE 81379 München								
						+49 335 12875	+49 20 3245 1844	Belgische Straße 2 - DE 15234 Frankfurt (Oder)								
								69 New Street - GB B2 4DU Birmingham								
	Firmengruppe Matthias Bogen	4567	Active	German	DC	info@matthiasbogen.de	+49 421 98650	Pfeilstraße 7 - DE 28217 Bremen								
	Fischer AG	1018	Active	German	DC	info@fischer.tr	+49 6472 35000	Brenneckestraße 100 - DE 39116 Magdeburg								
	Glob Group	1212	Active	English	BB	contact@globgroup.co.uk	+44 1453 3388	100, 101, 102, 103, 104, 105, 106, 107, 108, 109, 110, 111, 112, 113, 114, 115, 116, 117, 118, 119, 120, 121, 122, 123, 124, 125, 126, 127, 128, 129, 130, 131, 132, 133, 134, 135, 136, 137, 138, 139, 140, 141, 142, 143, 144, 145, 146, 147, 148, 149, 150, 151, 152, 153, 154, 155, 156, 157, 158, 159, 160, 161, 162, 163, 164, 165, 166, 167, 168, 169, 170, 171, 172, 173, 174, 175, 176, 177, 178, 179, 180, 181, 182, 183, 184, 185, 186, 187, 188, 189, 190, 191, 192, 193, 194, 195, 196, 197, 198, 199, 200, 201, 202, 203, 204, 205, 206, 207, 208, 209, 210, 211, 212, 213, 214, 215, 216, 217, 218, 219, 220, 221, 222, 223, 224, 225, 226, 227, 228, 229, 230, 231, 232, 233, 234, 235, 236, 237, 238, 239, 240, 241, 242, 243, 244, 245, 246, 247, 248, 249, 250, 251, 252, 253, 254, 255, 256, 257, 258, 259, 260, 261, 262, 263, 264, 265, 266, 267, 268, 269, 270, 271, 272, 273, 274, 275, 276, 277, 278, 279, 280, 281, 282, 283, 284, 285, 286, 287, 288, 289, 290, 291, 292, 293, 294, 295, 296, 297, 298, 299, 300, 301, 302, 303, 304, 305, 306, 307, 308, 309, 310, 311, 312, 313, 314, 315, 316, 317, 318, 319, 320, 321, 322, 323, 324, 325, 326, 327, 328, 329, 330, 331, 332, 333, 334, 335, 336, 337, 338, 339, 340, 341, 342, 343, 344, 345, 346, 347, 348, 349, 350, 351, 352, 353, 354, 355, 356, 357, 358, 359, 360, 361, 362, 363, 364, 365, 366, 367, 368, 369, 370, 371, 372, 373, 374, 375, 376, 377, 378, 379, 380, 381, 382, 383, 384, 385, 386, 387, 388, 389, 390, 391, 392, 393, 394, 395, 396, 397, 398, 399, 400, 401, 402, 403, 404, 405, 406, 407, 408, 409, 410, 411, 412, 413, 414, 415, 416, 417, 418, 419, 420, 421, 422, 423, 424, 425, 426, 427, 428, 429, 430, 431, 432, 433, 434, 435, 436, 437, 438, 439, 440, 441, 442, 443, 444, 445, 446, 447, 448, 449, 450, 451, 452, 453, 454, 455, 456, 457, 458, 459, 460, 461, 462, 463, 464, 465, 466, 467, 468, 469, 470, 471, 472, 473, 474, 475, 476, 477, 478, 479, 480, 481, 482, 483, 484, 485, 486, 487, 488, 489, 490, 491, 492, 493, 494, 495, 496, 497, 498, 499, 500, 501, 502, 503, 504, 505, 506, 507, 508, 509, 510, 511, 512, 513, 514, 515, 516, 517, 518, 519, 520, 521, 522, 523, 524, 525, 526, 527, 528, 529, 530, 531, 532, 533, 534, 535, 536, 537, 538, 539, 540, 541, 542, 543, 544, 545, 546, 547, 548, 549, 550, 551, 552, 553, 554, 555, 556, 557, 558, 559, 560, 561, 562, 563, 564, 565, 566, 567, 568, 569, 570, 571, 572, 573, 574, 575, 576, 577, 578, 579, 580, 581, 582, 583, 584, 585, 586, 587, 588, 589, 590, 591, 592, 593, 594, 595, 596, 597, 598, 599, 600, 601, 602, 603, 604, 605, 606, 607, 608, 609, 610, 611, 612, 613, 614, 615, 616, 617, 618, 619, 620, 621, 622, 623, 624, 625, 626, 627, 628, 629, 630, 631, 632, 633, 634, 635, 636, 637, 638, 639, 640, 641, 642, 643, 644, 645, 646, 647, 648, 649, 650, 651, 652, 653, 654, 655, 656, 657, 658, 659, 660, 661, 662, 663, 664, 665, 666, 667, 668, 669, 670, 671, 672, 673, 674, 675, 676, 677, 678, 679, 680, 681, 682, 683, 684, 685, 686, 687, 688, 689, 690, 691, 692, 693, 694, 695, 696, 697, 698, 699, 700, 701, 702, 703, 704, 705, 706, 707, 708, 709, 710, 711, 712, 713, 714, 715, 716, 717, 718, 719, 720, 721, 722, 723, 724, 725, 726, 727, 728, 729, 730, 731, 732, 733, 734, 735, 736, 737, 738, 739, 740, 741, 742, 743, 744, 745, 746, 747, 748, 749, 750, 751, 752, 753, 754, 755, 756, 757, 758, 759, 760, 761, 762, 763, 764, 765, 766, 767, 768, 769, 770, 771, 772, 773, 774, 775, 776, 777, 778, 779, 780, 781, 782, 783, 784, 785, 786, 787, 788, 789, 790, 791, 792, 793, 794, 795, 796, 797, 798, 799, 800, 801, 802, 803, 804, 805, 806, 807, 808, 809, 810, 811, 812, 813, 814, 815, 816, 817, 818, 819, 820, 821, 822, 823, 824, 825, 826, 827, 828, 829, 830, 831, 832, 833, 834, 835, 836, 837, 838, 839, 840, 841, 842, 843, 844, 845, 846, 847, 848, 849, 850, 851, 852, 853, 854, 855, 856, 857, 858, 859, 860, 861, 862, 863, 864, 865, 866, 867, 868, 869, 870, 871, 872, 873, 874, 875, 876, 877, 878, 879, 880, 881, 882, 883, 884, 885, 886, 887, 888, 889, 890, 891, 892, 893, 894, 895, 896, 897, 898, 899, 900, 901, 902, 903, 904, 905, 906, 907, 908, 909, 910, 911, 912, 913, 914, 915, 916, 917, 918, 919, 920, 921, 922, 923, 924, 925, 926, 927, 928, 929, 930, 931, 932, 933, 934, 935, 936, 937, 938, 939, 940, 941, 942, 943, 944, 945, 946, 947, 948, 949, 950, 951, 952, 953, 954, 955, 956, 957, 958, 959, 960, 961, 962, 963, 964, 965, 966, 967, 968, 969, 970, 971, 972, 973, 974, 975, 976, 977, 978, 979, 980, 981, 982, 983, 984, 985, 986, 987, 988, 989, 990, 991, 992, 993, 994, 995, 996, 997, 998, 999, 1000								

Company: 56

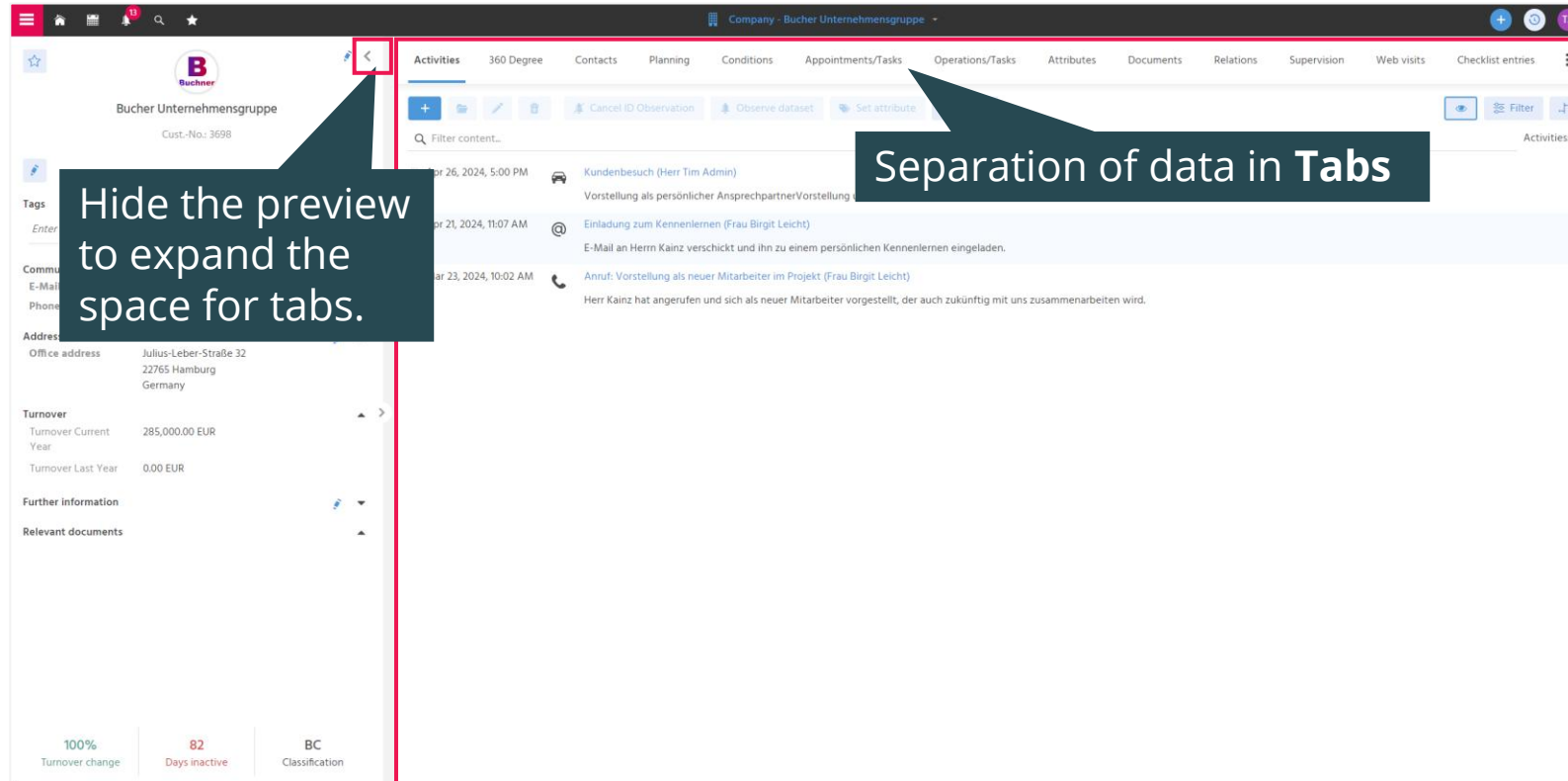
Bucher Unternehmensgruppe
Cust.-No.: 3698

Tags
Enter tag

Communication
E-Mail: info@bucher.de
Phone: +49 40 42580

Addresses
Office address: Julius-Leber-Straße 32
22765 Hamburg
Germany

MainView



The screenshot shows the ADITO MainView interface for a company named 'Buchner Unternehmensgruppe'. The interface is divided into several sections:

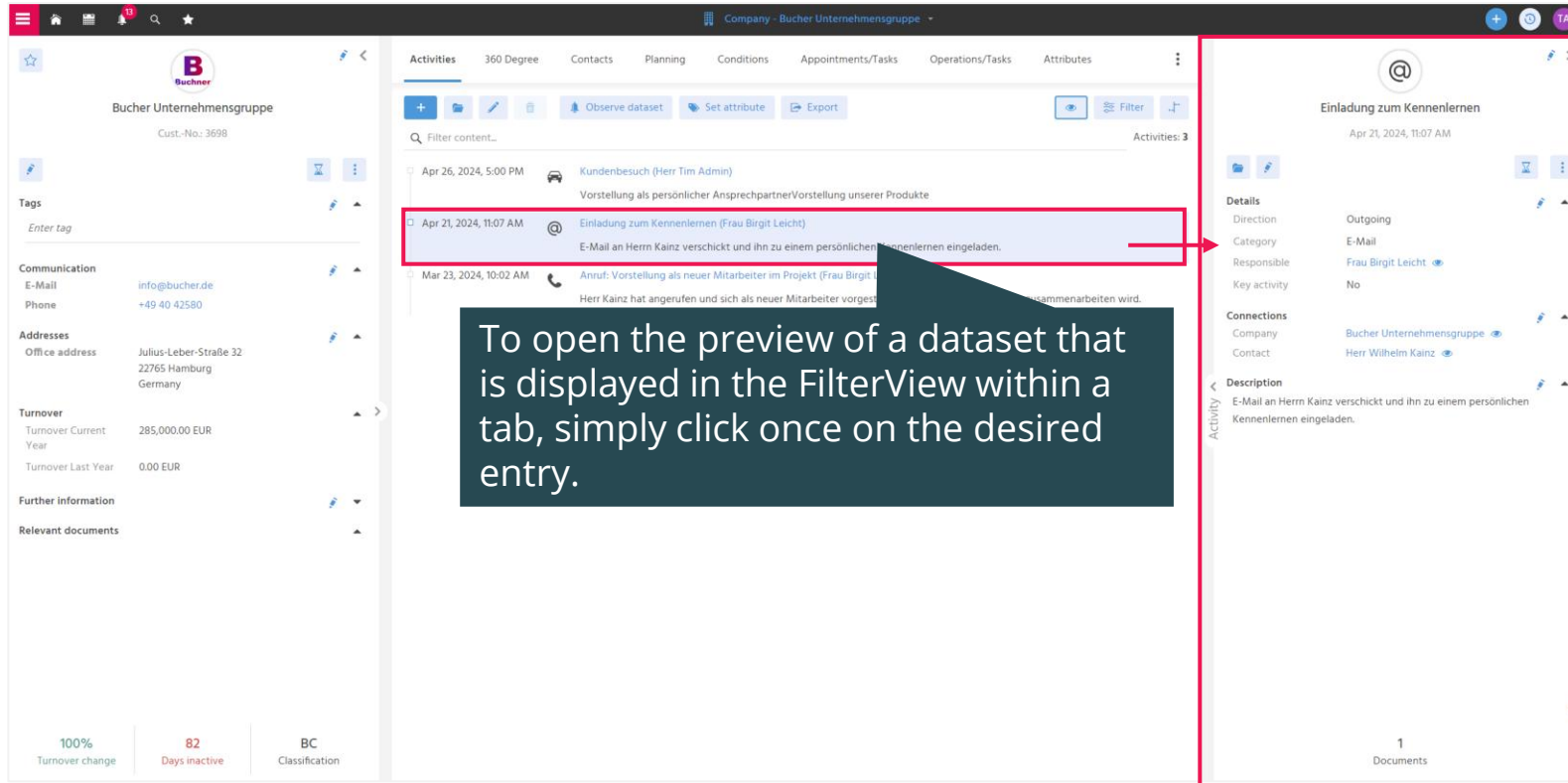
- Left Sidebar:** Contains navigation icons, the company logo, name, and customer number (Cust.-No.: 3698). Below this are sections for 'Tags', 'Communication' (E-Mail, Phone), 'Address' (Office address), 'Turnover' (Current, Last Year), 'Further information', and 'Relevant documents'.
- Top Bar:** Displays the company name and a search bar.
- Tab Bar:** A horizontal bar at the top of the main content area with tabs for 'Activities', '360 Degree', 'Contacts', 'Planning', 'Conditions', 'Appointments/Tasks', 'Operations/Tasks', 'Attributes', 'Documents', 'Relations', 'Supervision', 'Web visits', and 'Checklist entries'. The 'Activities' tab is currently selected.
- Main Content Area:** Displays a list of activities. The first activity is 'Kundenbesuch (Herr Tim Admin)' on '2024, 5:00 PM'. The second is 'Einladung zum Kennenlernen (Frau Birgit Leicht)' on '2024, 11:07 AM'. The third is 'Anruf: Vorstellung als neuer Mitarbeiter im Projekt (Frau Birgit Leicht)' on '2024, 10:02 AM'.

Two callout boxes provide instructions:

- A box on the left sidebar says: "Hide the preview to expand the space for tabs." It points to a small icon in the top left corner of the sidebar.
- A box on the right side of the tab bar says: "Separation of data in Tabs". It points to the 'Operations/Tasks' tab.

At the bottom of the interface, there are three status indicators: '100% Turnover change', '82 Days inactive', and 'BC Classification'.

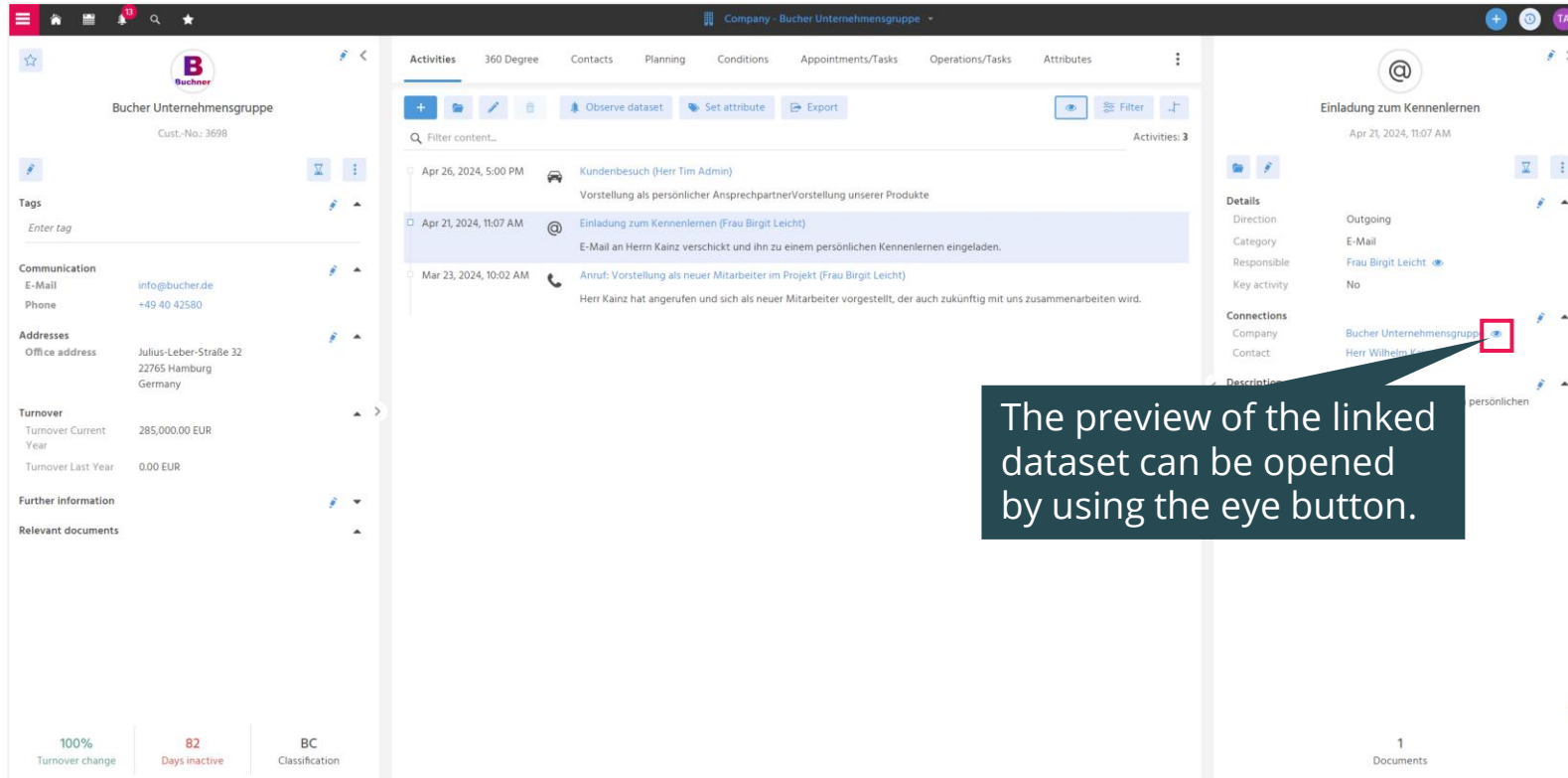
MainView: Open preview



The screenshot displays the ADITO MainView interface. On the left, a sidebar shows the company profile for 'Bucher Unternehmensgruppe' (Cust.-No.: 3698), including contact information, addresses, turnover, and further information. The main area is titled 'Activities' and shows a list of activities. A red box highlights a specific activity: 'Einladung zum Kennenlernen (Frau Birgit Leicht)' dated 'Apr 21, 2024, 11:07 AM'. A red arrow points from this entry to a detailed preview panel on the right. The preview panel shows the activity details, including the direction (Outgoing), category (E-Mail), responsible person (Frau Birgit Leicht), key activity (No), connections (Bucher Unternehmensgruppe, Herr Wilhelm Kainz), and description (E-Mail an Herrn Kainz verschickt und ihn zu einem persönlichen Kennenlernen eingeladen.). A dark blue text box is overlaid on the activity list, providing instructions on how to open the preview.

To open the preview of a dataset that is displayed in the FilterView within a tab, simply click once on the desired entry.

MainView: Open preview



The screenshot displays the ADITO MainView interface for a company profile. The left sidebar contains company details for 'Bucher Unternehmensgruppe' (Cust.-No.: 3698), including communication, addresses, turnover, and further information. The main area shows a list of activities, with the selected activity 'Einladung zum Kennenlernen (Frau Birgit Leicht)' highlighted. The right sidebar shows details for this activity, including direction, category, responsible person, and key activity. A red box highlights the 'eye' icon in the 'Connections' section, which is used to open the preview of the linked dataset. A callout box points to this icon with the text: 'The preview of the linked dataset can be opened by using the eye button.'

Company - Bucher Unternehmensgruppe

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

Filter content...

Activities: 3

- Apr 26, 2024, 5:00 PM Kundenbesuch (Herr Tim Admin)
Vorstellung als persönlicher AnsprechpartnerVorstellung unserer Produkte
- Apr 21, 2024, 11:07 AM Einladung zum Kennenlernen (Frau Birgit Leicht)
E-Mail an Herrn Kainz verschickt und ihn zu einem persönlichen Kennenlernen eingeladen.
- Mar 23, 2024, 10:02 AM Anruf: Vorstellung als neuer Mitarbeiter im Projekt (Frau Birgit Leicht)
Herr Kainz hat angerufen und sich als neuer Mitarbeiter vorgestellt, der auch zukünftig mit uns zusammenarbeiten wird.

Details

Direction Outgoing
Category E-Mail
Responsible Frau Birgit Leicht
Key activity No

Connections

Company Bucher Unternehmensgruppe
Contact Herr Wilhelm Kainz

Description

1 Documents

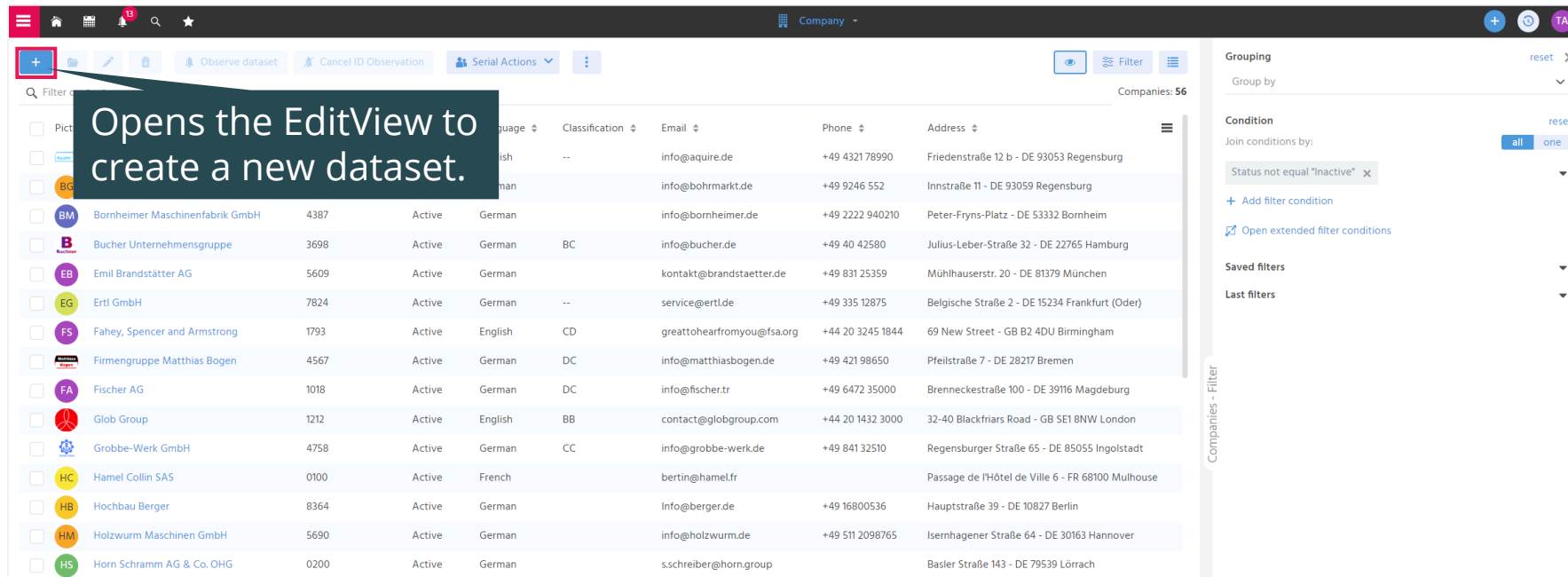
100% Turnover change
82 Days inactive
BC Classification

EditView



Creating datasets

New creation in the FilterView of a Context



Opens the EditView to create a new dataset.

	Language	Classification	Email	Phone	Address				
☐	Pict								
☐	Heute								
☐	BG								
☐	BM	Bornheimer Maschinenfabrik GmbH	4387	Active	German	info@bornheimer.de	+49 2222 940210	Peter-Fryns-Platz - DE 53332 Bornheim	
☐	B	Bucher Unternehmensgruppe	3698	Active	German	BC	info@bucher.de	+49 40 42580	Julius-Leber-Straße 32 - DE 22765 Hamburg
☐	EB	Emil Brandstätter AG	5609	Active	German		kontakt@brandstaetter.de	+49 831 25359	Mühlhauserstr. 20 - DE 81379 München
☐	EG	Ertl GmbH	7824	Active	German	--	service@ertl.de	+49 335 12875	Belgische Straße 2 - DE 15234 Frankfurt (Oder)
☐	FS	Fahey, Spencer and Armstrong	1793	Active	English	CD	greattohearfromyou@fsa.org	+44 20 3245 1844	69 New Street - GB B2 4DU Birmingham
☐	Firmengruppe Matthias Bogen	4567	Active	German	DC	info@matthiasbogen.de	+49 421 98650	Pfeilstraße 7 - DE 28217 Bremen	
☐	FA	Fischer AG	1018	Active	German	DC	info@fischer.tr	+49 6472 35000	Brenneckestraße 100 - DE 39116 Magdeburg
☐	Glob Group	1212	Active	English	BB	contact@globgroup.com	+44 20 1432 3000	32-40 Blackfriars Road - GB SE1 1NW London	
☐	Grobbe-Werk GmbH	4758	Active	German	CC	info@grobbe-werk.de	+49 841 32510	Regensburger Straße 65 - DE 85055 Ingolstadt	
☐	HC	Hamel Collin SAS	0100	Active	French		bertin@hamel.fr		Passage de l'Hôtel de Ville 6 - FR 68100 Mulhouse
☐	HB	Hochbau Berger	8364	Active	German		Info@berger.de	+49 16800536	Hauptstraße 39 - DE 10827 Berlin
☐	HM	Holzurm Maschinen GmbH	5690	Active	German		info@holzurm.de	+49 511 2098765	Isernhagener Straße 64 - DE 30163 Hannover
☐	HS	Horn Schramm AG & Co. OHG	0200	Active	German		s.schreiber@horn.group		Basler Straße 143 - DE 79539 Lörrach

Companies: 56

Grouping
Group by
reset X

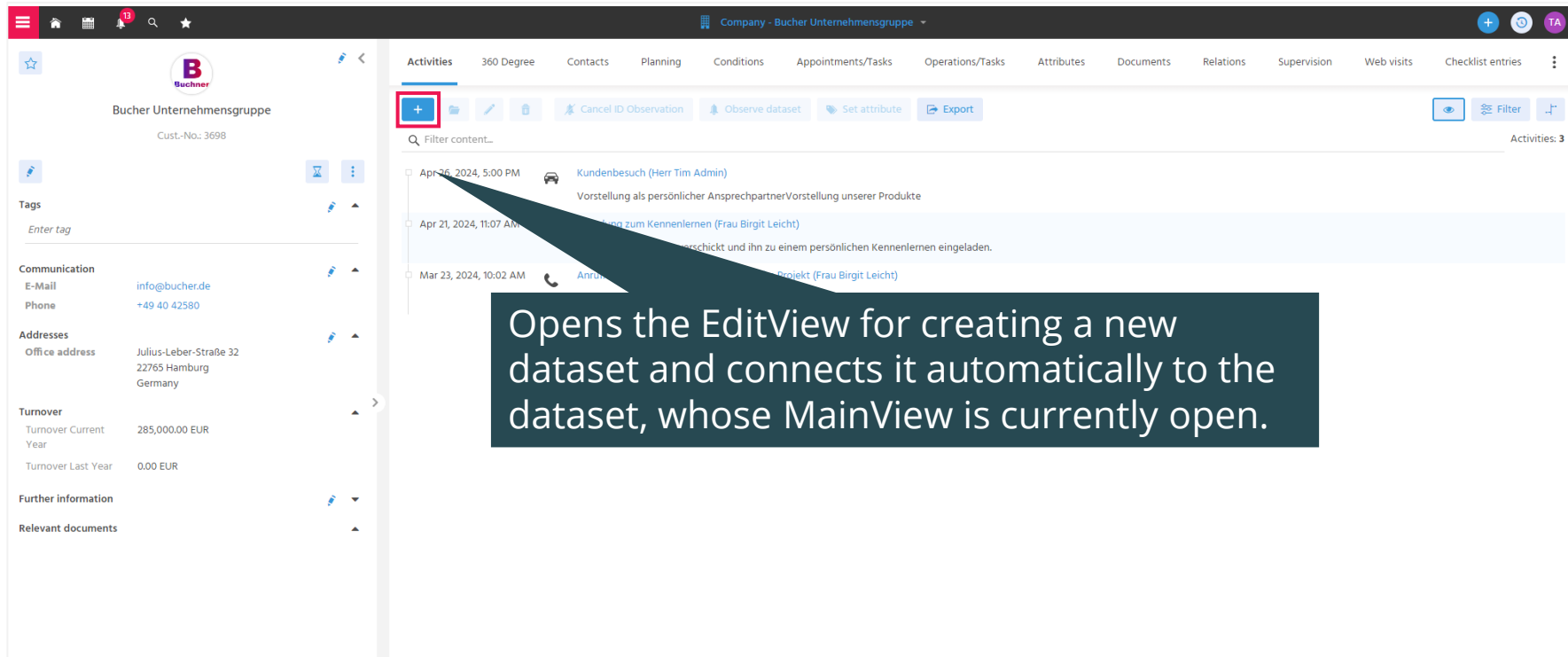
Condition
Join conditions by:
all one
Status not equal "Inactive" X
+ Add filter condition
Open extended filter conditions

Saved filters
Last filters

Companies - Filter

Creating and linking datasets

Create in the tab "Activities"



The screenshot displays the ADITO software interface. On the left, a sidebar shows the company profile for 'Bucher Unternehmensgruppe' with details like 'Cust.-No.: 3698', 'E-Mail: info@bucher.de', and 'Phone: +49 40 42580'. The main area is titled 'Activities' and contains a list of activities. A red box highlights a '+' icon in the top bar of the Activities section. A dark blue callout box points to this icon with the text: 'Opens the EditView for creating a new dataset and connects it automatically to the dataset, whose MainView is currently open.'

Company - Bucher Unternehmensgruppe

Activities 360 Degree Contacts Planning Conditions Appointments/Tasks Operations/Tasks Attributes Documents Relations Supervision Web visits Checklist entries

+ Cancel ID Observation Observe dataset Set attribute Export

Filter content...

Activities: 3

Apr 26, 2024, 5:00 PM Kundenbesuch (Herr Tim Admin)
Vorstellung als persönlicher Ansprechpartner Vorstellung unserer Produkte

Apr 21, 2024, 11:07 AM Einladung zum Kennenlernen (Frau Birgit Leicht)
... geschickt und ihn zu einem persönlichen Kennenlernen eingeladen.

Mar 23, 2024, 10:02 AM Anford... Projekt (Frau Birgit Leicht)

Example: Create company

Company

Duplicate

Title Description

No data present

Name	! Name	
Customercode	Customercode	
Information	Information	
Preferred language	German	x
Status	Active	x
Type	Type	
Address		
+ Office address	x Germany	-
! Postcode		! City
! Street		State
Address addition		Identifier
Search		
Communication		
+ ! Medium		! Address
Add Attribute		
+ Assessment / Industry	x ! Value	-

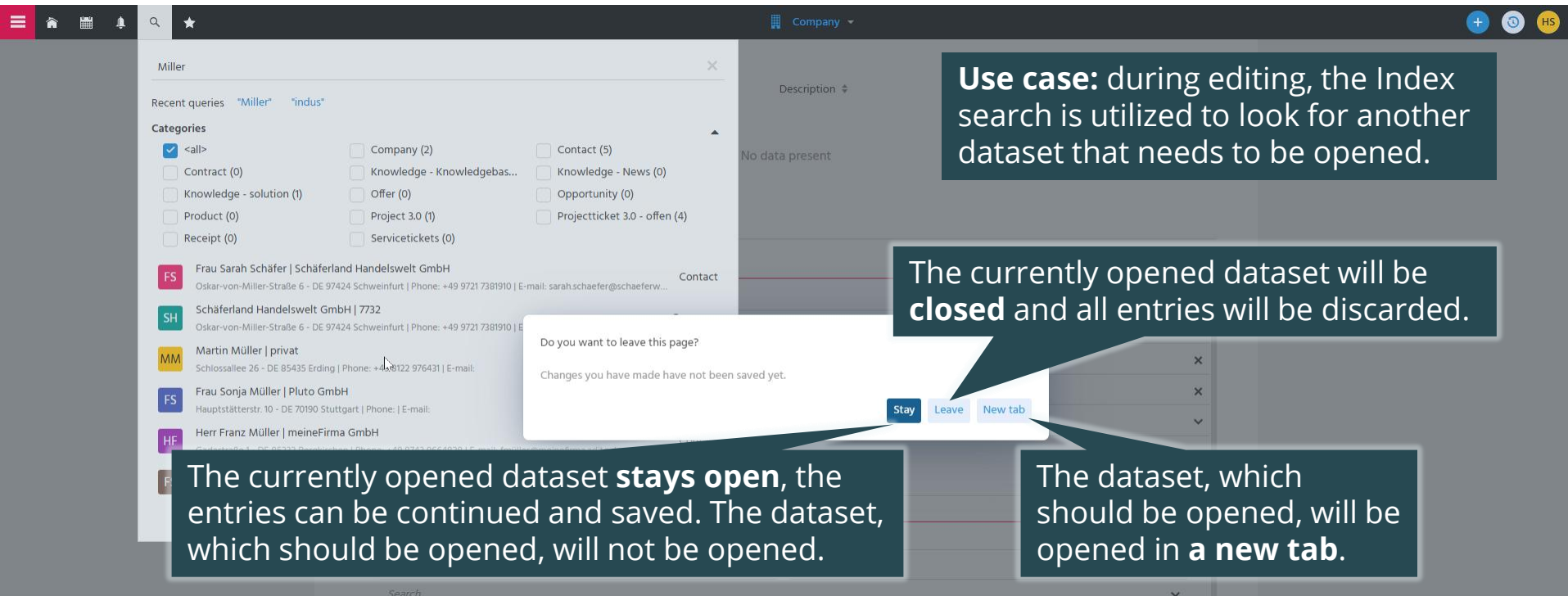
Save Cancel

Required value is missing

Add field

Delete field

Leaving page with unsaved data



The screenshot shows the EditView interface with a search bar containing 'Miller'. Below the search bar, there are categories and a list of results. A confirmation dialog is displayed in the center, asking 'Do you want to leave this page?' with the message 'Changes you have made have not been saved yet.' and three buttons: 'Stay', 'Leave', and 'New tab'.

Use case: during editing, the Index search is utilized to look for another dataset that needs to be opened.

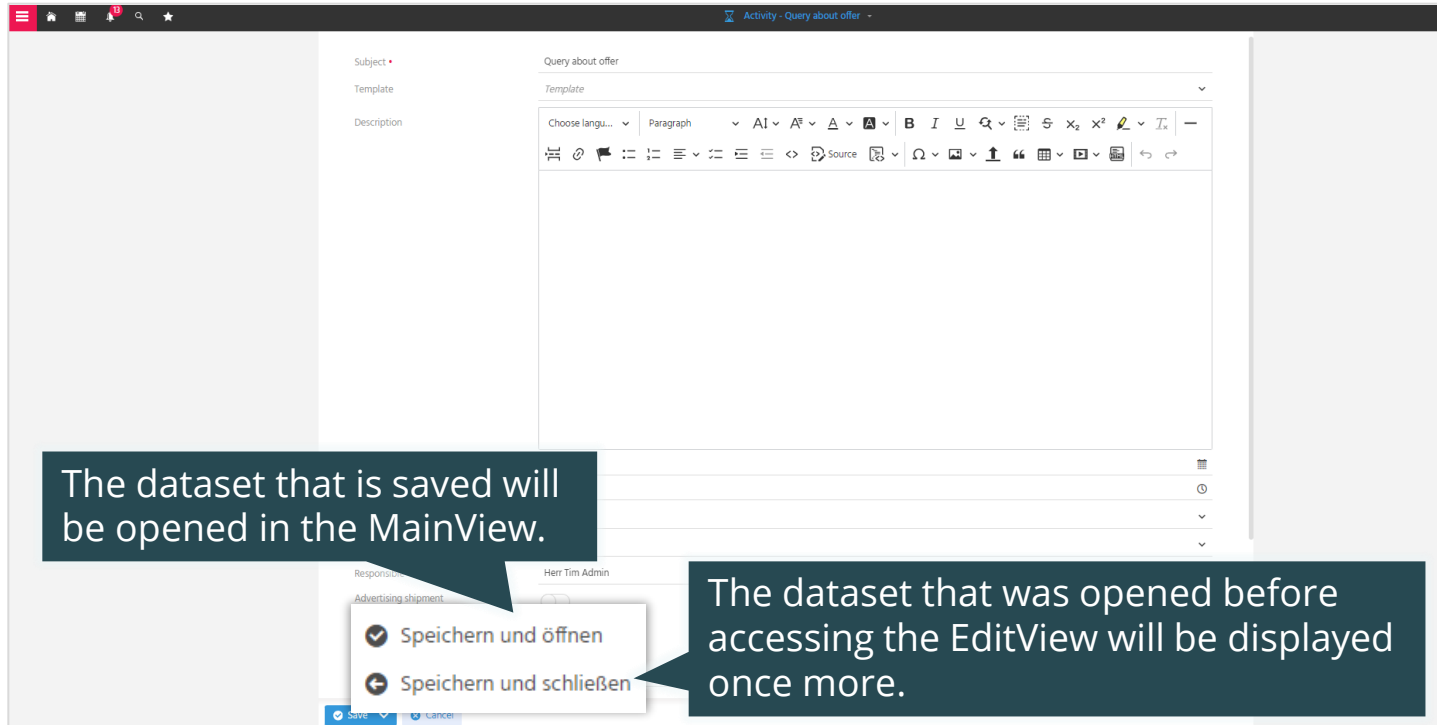
The currently opened dataset will be **closed** and all entries will be discarded.

The currently opened dataset **stays open**, the entries can be continued and saved. The dataset, which should be opened, will not be opened.

The dataset, which should be opened, will be opened in a **new tab**.

EditView: Save

Options: Save and close, Save and open entry



The dataset that is saved will be opened in the MainView.

The dataset that was opened before accessing the EditView will be displayed once more.

Default Actions

The default Actions are in the FilterView (also in other views).



Create new:

The button labeled with a "plus" sign opens the EditView **to create a new dataset**.



Open:

The button labeled with a "folder" sign opens the **MainView** of the selected dataset.



Edit:

Using the action with the "pencil" sign opens the EditView **to edit a dataset**.



Delete:

The button labeled with a "trash can" **deletes a dataset**.

These Actions are greyed out if they are **not possible** (no datasets highlighted) or **authorized** (permission).

Characteristics of the Plus button



Opens the Quickentry menu, which can be used to directly open the EditView of certain Contexts.



Opens the EditView to create a new dataset for a Context. This button can be found in the FilterView of a Context.



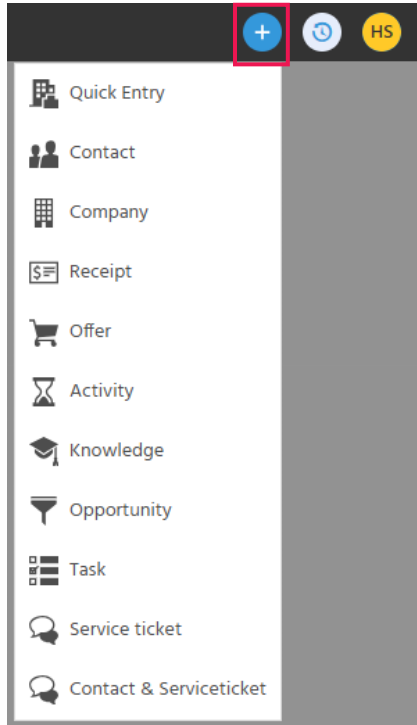
Add fields (or blocks of multiple fields), in which additional data can be added. These fields can then be removed using the corresponding minus button.

Quickentry



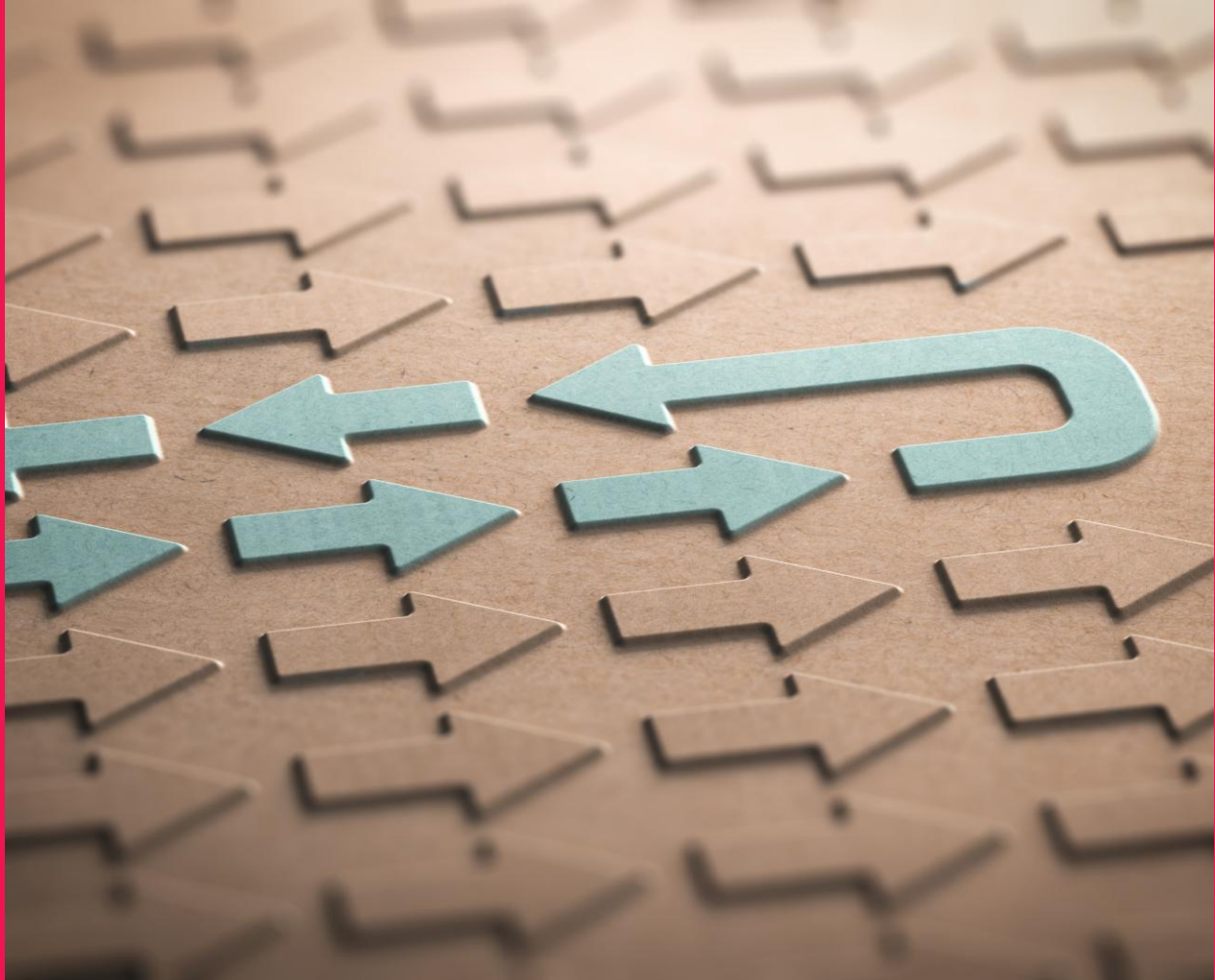
Creating datasets: Quickentry

Global Bar: Quickentry



By using the Quickentry, new datasets can be created.

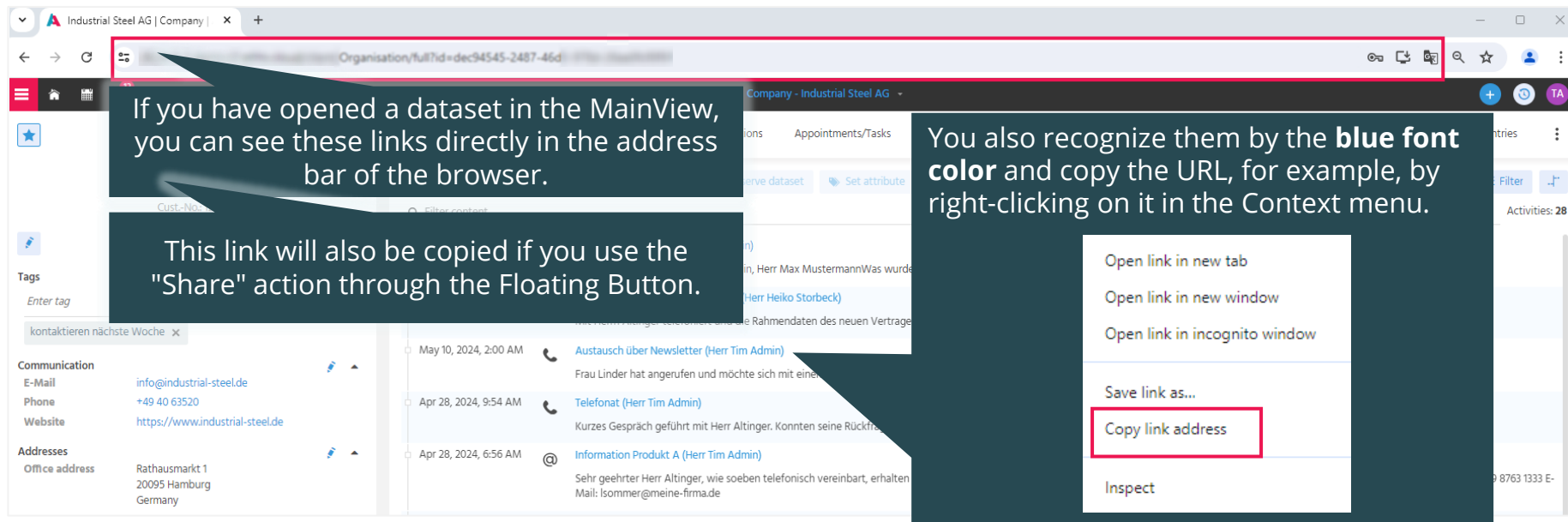
Working in the Web Browser



Handling in the web browser

Working with links

Datasets (of a Company/Contact/Activity, etc.) and filter conditions have a link in ADITO. These ADITO links can be shared, allowing another user to also open them and be directed to the same position.



The screenshot shows the ADITO web application in a browser. The address bar displays the URL: `Organisation/full?id=dec94545-2487-46d...`. A red box highlights the address bar, and a callout points to it with the text: "If you have opened a dataset in the MainView, you can see these links directly in the address bar of the browser."

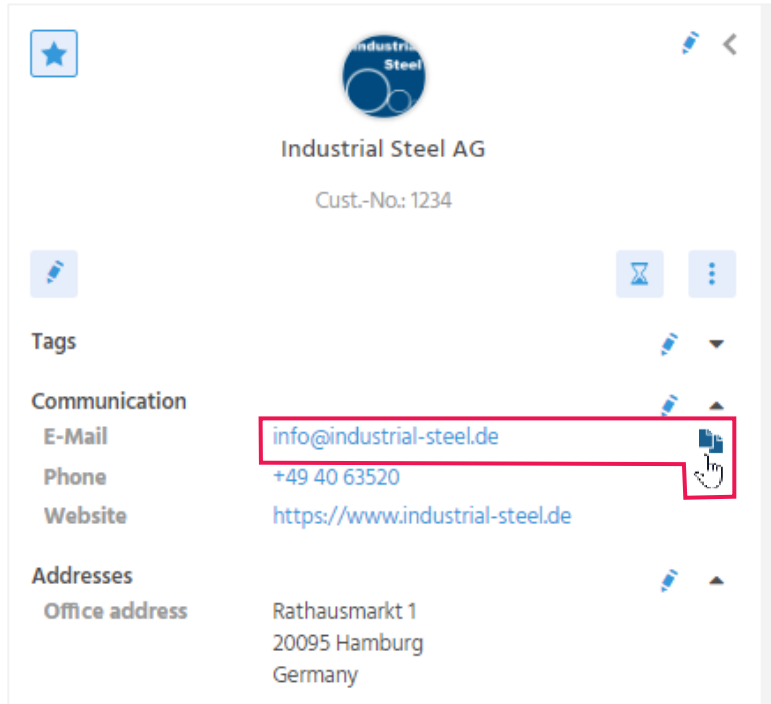
Below the address bar, a callout points to a link in the "Communication" section: `info@industrial-steel.de`. The text says: "This link will also be copied if you use the 'Share' action through the Floating Button."

On the right, a context menu is open over a link. The menu options are: "Open link in new tab", "Open link in new window", "Open link in incognito window", "Save link as...", "Copy link address" (highlighted with a red box), and "Inspect". A callout points to the "Copy link address" option with the text: "You also recognize them by the **blue font color** and copy the URL, for example, by right-clicking on it in the Context menu."

The background shows the ADITO interface with a sidebar on the left containing navigation icons and a main view displaying a list of communication activities for "Industrial Steel AG".

Handling in the web browser

Copy button for links



The Copy button  will be displayed as soon as you move the mouse over a link, telephone number or email address.

This feature allows you to swiftly copy the content of this line to the clipboard.



The copy button is only available in the Desktop view.

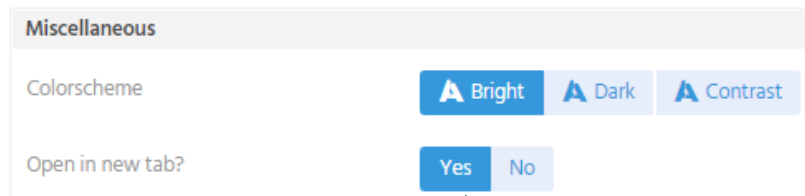
Handling in the web browser

Working in several browser tabs

ADITO can be used in several browser tabs at the same time:

- Hover above a link and click the right mouse key to open the Context menu => "Open link in a new tab"
- Hover above a link and click the middle mouse button (mouse wheel)
- Copy link from address field and paste it in a new browser tab

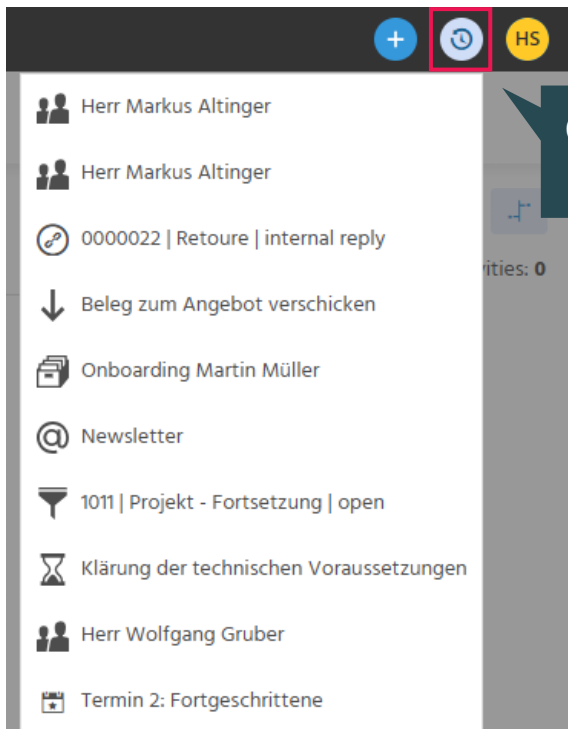
If you do not want to open the tabs as described on the left, you can utilize this function in the ["Settings" located in the user menu](#).



ADITO always opens a new browser tab as soon as you click on a link.

Navigating back using the history button

Global Bar: Open history (without going back in the browser)



Click on the history button to open the list containing the 11 most recently accessed datasets.

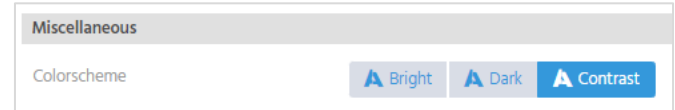
The list only refers to datasets that have been opened within a tab in the MainView.

If you are working with multiple tabs, each tab has its own history.

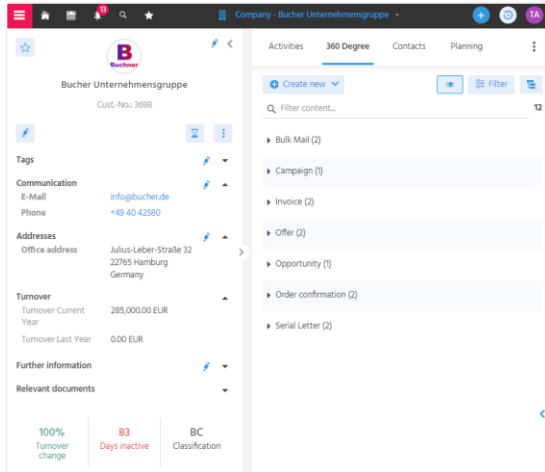
Contrast

Activating contrast

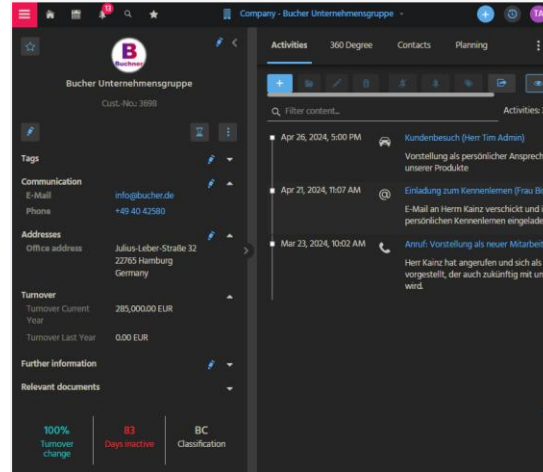
To display ADITO in a high-contrast colorscheme, activate it in the "Settings" of the user menu.



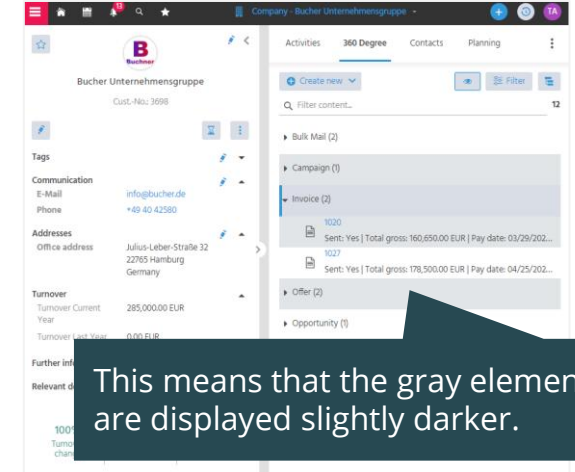
Bright



Dark



Contrast



Adjusting browser zoom

The screenshot shows a web browser window with the address bar displaying the URL: `2024-0-3.demo.c2.adito.cloud/client/Organisation/full?id=019651a4-503e-4e06-aefd-e7e631bf3144`. The browser's address bar shows a zoom level of 150%, with minus and plus buttons and a 'Reset' button. A red box highlights this area. A dark blue callout box with white text is overlaid on the right side of the browser window, stating: 'Adjust the zoom factor individually by holding down the [Ctrl] key and using the mouse wheel to set the desired zoom factor, for example.'

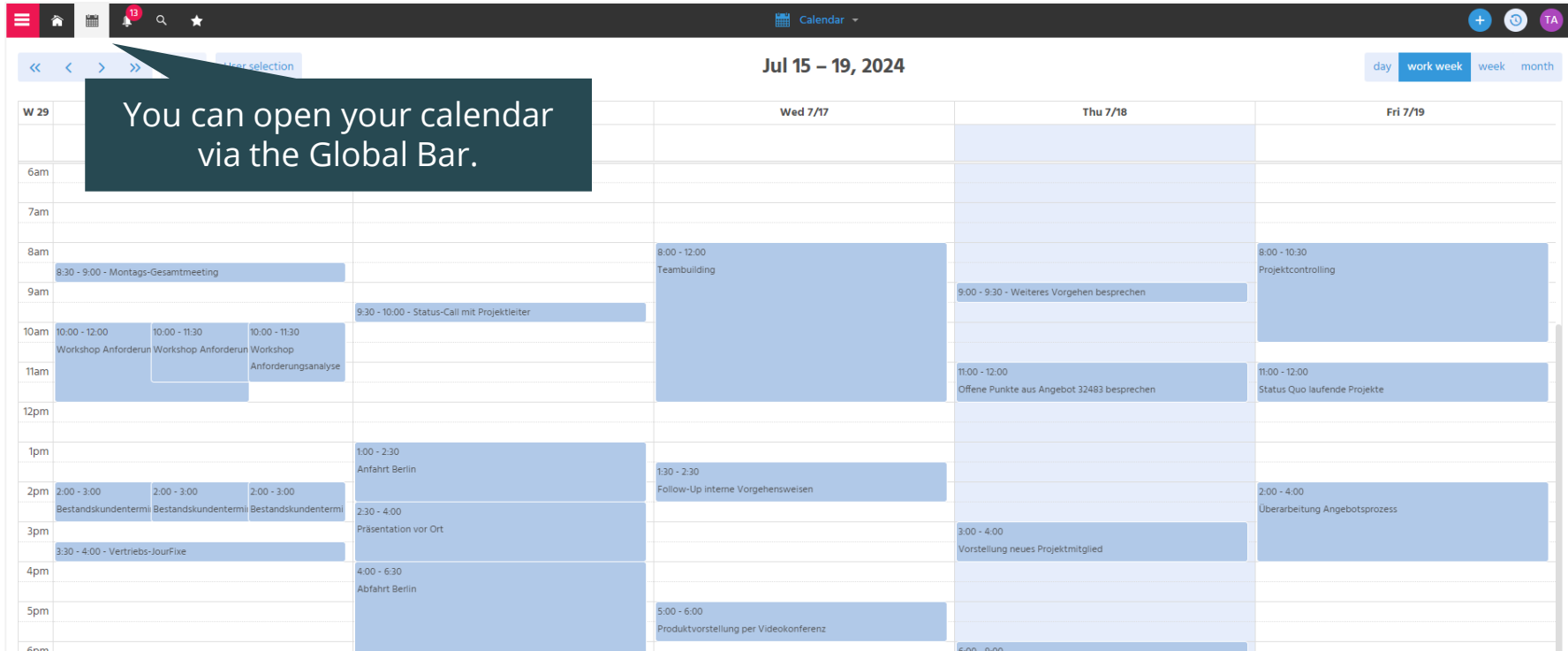
The main content area of the browser shows the ADITO interface for 'Bucher Unternehmensgruppe'. The left sidebar contains the company logo, name, and contact information (Cust.-No.: 3698, E-Mail: info@bucher.de, Phone: +49 40 42580, Office address: Julius-Leber-Straße 32, 22765 Hamburg, Germany). The main content area displays a list of activities, including 'Kundenbesuch (Herr Tim Admin)', 'Einladung zum Kennenlernen (Frau Birgit Leicht)', and 'Anruf: Vorstellung als neuer Mitarbeiter im Projekt (Frau Birgit Leicht)'. The right sidebar shows 'Activities: 3'.

Planning of appointments



Calendar

Using own calendar in ADITO

The screenshot shows the ADITO calendar interface. At the top, there's a dark navigation bar with icons for menu, home, calendar, notifications (13), search, and favorites. A 'Calendar' dropdown menu is visible. On the right of the navigation bar are three circular icons: a plus sign, a refresh icon, and a user profile icon labeled 'TA'. Below the navigation bar, the calendar view is set to 'work week' for the dates 'Jul 15 - 19, 2024'. A dark blue callout box with white text says 'You can open your calendar via the Global Bar.' The calendar grid shows events for Wednesday (7/17), Thursday (7/18), and Friday (7/19). Events include meetings, workshops, and presentations.

You can open your calendar via the Global Bar.

Jul 15 - 19, 2024

day **work week** week month

W 29	Wed 7/17	Thu 7/18	Fri 7/19
6am			
7am			
8am	8:00 - 12:00 Teambuilding		8:00 - 10:30 Projektcontrolling
9am	9:30 - 10:00 - Status-Call mit Projektleiter	9:00 - 9:30 - Weiteres Vorgehen besprechen	
10am	10:00 - 12:00 Workshop Anforderun 10:00 - 11:30 Workshop Anforderun 10:00 - 11:30 Anforderungsanalyse		
11am		11:00 - 12:00 Offene Punkte aus Angebot 32483 besprechen	11:00 - 12:00 Status Quo laufende Projekte
12pm			
1pm	1:00 - 2:30 Anfahrt Berlin		
2pm	2:00 - 3:00 Bestandskundentermi 2:00 - 3:00 Bestandskundentermi 2:00 - 3:00 Bestandskundentermi	1:30 - 2:30 Follow-Up interne Vorgehensweisen	2:00 - 4:00 Überarbeitung Angebotsprozess
3pm	2:30 - 4:00 Präsentation vor Ort	3:00 - 4:00 Vorstellung neues Projektmitglied	
4pm	3:30 - 4:00 - Vertriebs-JourFixe		
5pm	4:00 - 6:30 Abfahrt Berlin	5:00 - 6:00 Produktvorstellung per Videokonferenz	
6pm		6:00 - 8:00	

Calendar

Set calendar display individually

In the "[Settings](#)" in the [user menu](#), the display of your calendar can be controlled:

- Display "week" or "month" view with or without weekend
- Display "Working Week" with the days that have been selected

Calendar

Show weekend

Yes

No

work week

☐ Sun

☒ Mon

☒ Tue

☒ Wed

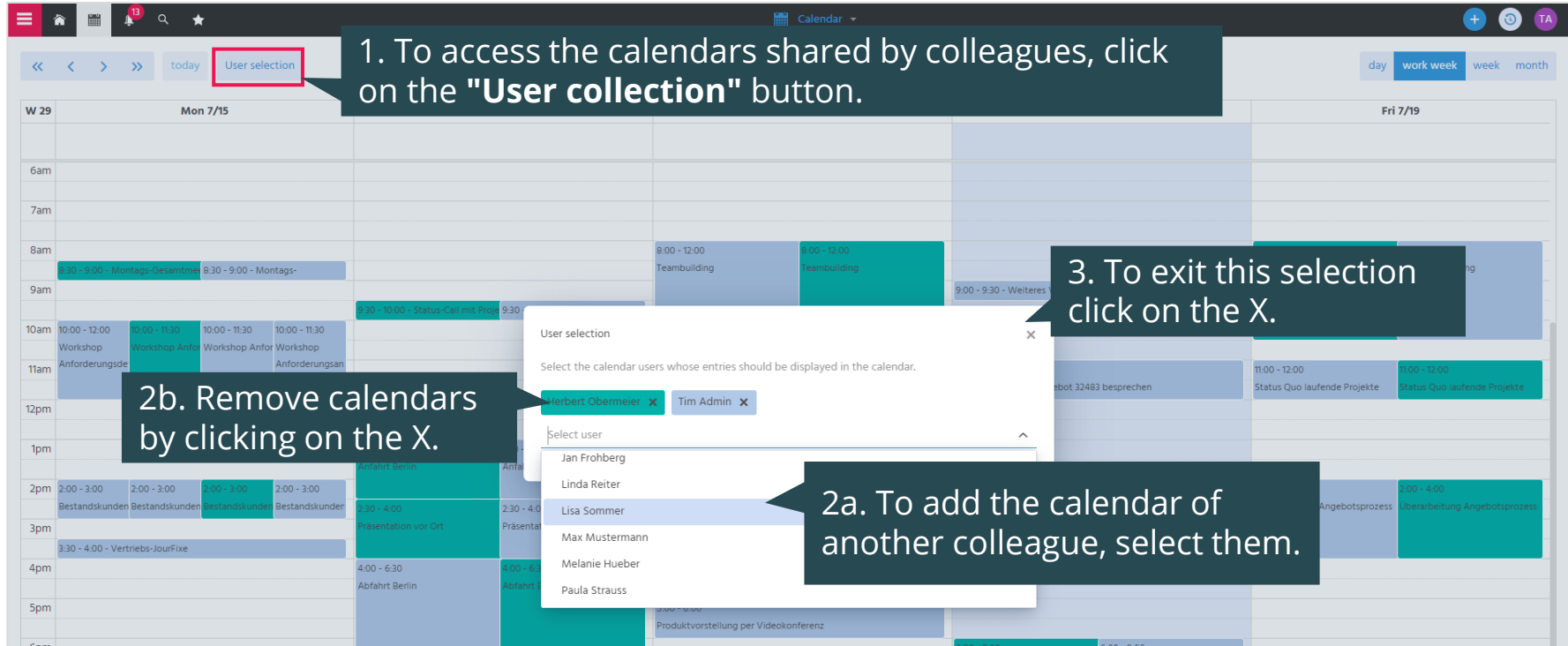
☒ Thu

☒ Fri

☐ Sat

Calendar

Show calendar of colleagues



The screenshot shows the ADITO calendar application. At the top, there is a navigation bar with a menu icon, home icon, calendar icon, and a 'Calendar' dropdown. Below this is a toolbar with navigation arrows, a 'today' button, and a 'User selection' button highlighted with a red box. The main area displays a calendar grid for Monday, July 15th, and Friday, July 19th. Various events are shown as colored blocks, such as 'Teambuilding' and 'Status Quo laufende Projekte'. A 'User selection' dialog box is open in the center, showing a list of users to be added to the calendar. The dialog has a title 'User selection', a description 'Select the calendar users whose entries should be displayed in the calendar.', and a list of users: Jan Froberg, Linda Reiter, Lisa Sommer, Max Mustermann, Melanie Hueber, and Paula Strauss. The 'Herbert Obermeier' and 'Tim Admin' users are already selected and shown with 'X' icons. Callout boxes provide instructions: 1. To access the calendars shared by colleagues, click on the "User collection" button. 2b. Remove calendars by clicking on the X. 2a. To add the calendar of another colleague, select them. 3. To exit this selection click on the X.

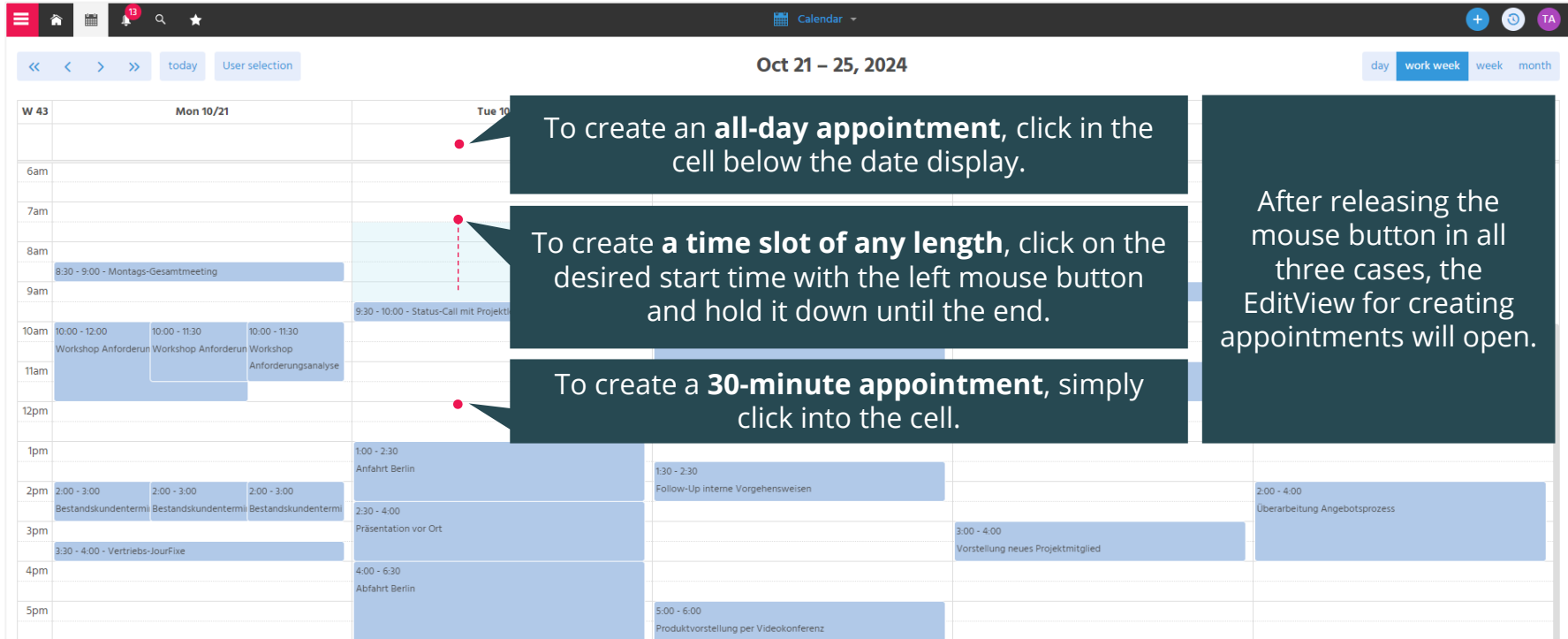
1. To access the calendars shared by colleagues, click on the "User collection" button.

2b. Remove calendars by clicking on the X.

2a. To add the calendar of another colleague, select them.

3. To exit this selection click on the X.

Creating appointments in the calendar



Calendar

Oct 21 – 25, 2024

day work week week month

W 43 Mon 10/21 Tue 10/22

6am

7am

8am

9am

10am

11am

12pm

1pm

2pm

3pm

4pm

5pm

8:30 - 9:00 - Montags-Gesamtmeeting

9:30 - 10:00 - Status-Call mit Projektleiter

10:00 - 12:00 Workshop Anfordern

10:00 - 11:30 Workshop Anfordern

10:00 - 11:30 Workshop Anfordern

11:00 - 11:30 Workshop Anfordern

1:00 - 2:30 Anfahrt Berlin

2:00 - 3:00 Bestandskundentermin

2:00 - 3:00 Bestandskundentermin

2:00 - 3:00 Bestandskundentermin

2:30 - 4:00 Präsentation vor Ort

3:00 - 4:00 Vertriebs-JourFixe

4:00 - 6:30 Abfahrt Berlin

1:30 - 2:30 Follow-Up interne Vorgehensweisen

3:00 - 4:00 Vorstellung neues Projektmitglied

5:00 - 6:00 Produktvorstellung per Videokonferenz

2:00 - 4:00 Überarbeitung Angebotsprozess

To create an **all-day appointment**, click in the cell below the date display.

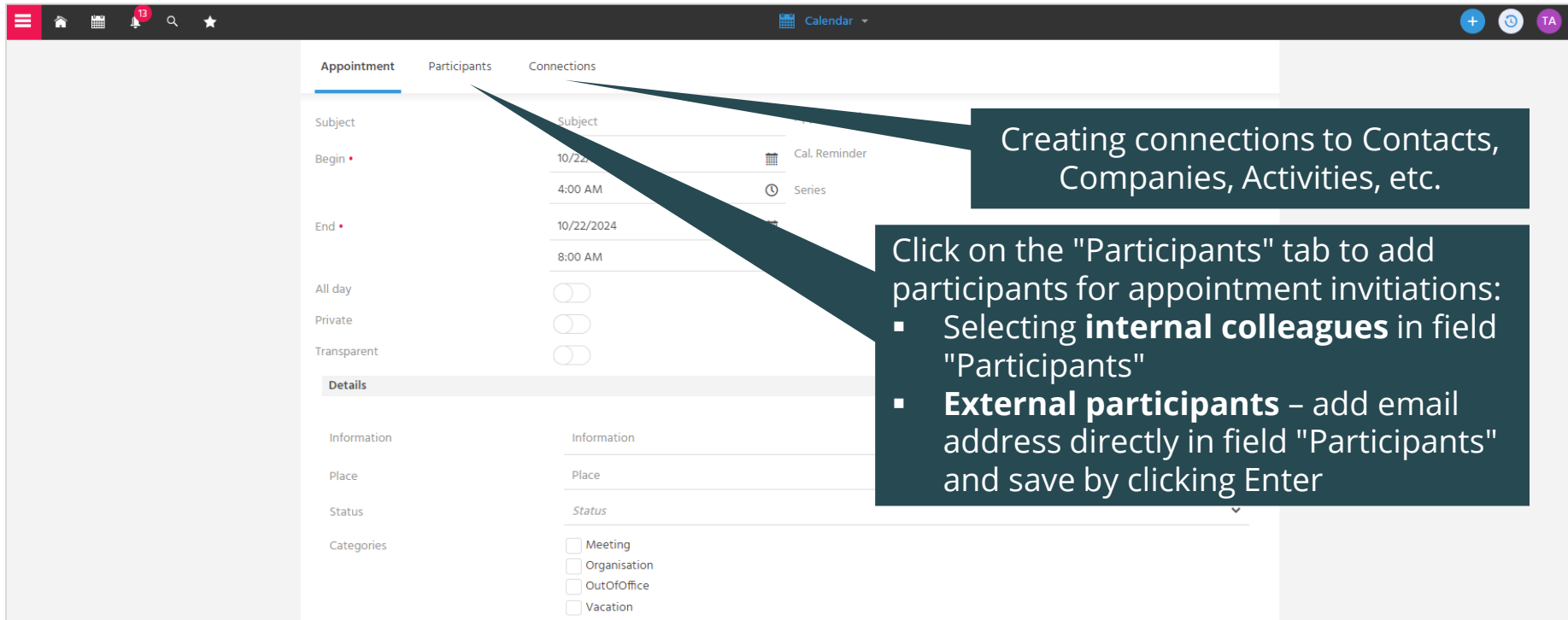
To create a **time slot of any length**, click on the desired start time with the left mouse button and hold it down until the end.

To create a **30-minute appointment**, simply click into the cell.

After releasing the mouse button in all three cases, the EditView for creating appointments will open.

Calendar

Creating appointments



The screenshot shows the ADITO Calendar interface. The 'Appointment' form is open, with the 'Participants' tab selected. The form includes fields for Subject, Begin, End, All day, Private, and Transparent. The 'Details' section is expanded, showing Information, Place, Status, and Categories. A callout box points to the 'Participants' tab and provides instructions on how to add participants.

Creating connections to Contacts, Companies, Activities, etc.

Click on the "Participants" tab to add participants for appointment invitations:

- Selecting **internal colleagues** in field "Participants"
- **External participants** – add email address directly in field "Participants" and save by clicking Enter

Calendar

Creating appointments in Company/Contact

If you create the appointment within the company, the link to it will be automatically generated.

The screenshot displays the user interface of the Bucher Unternehmensgruppe system. At the top, the company name 'Bucher Unternehmensgruppe' and customer number 'Cust.-No.: 3698' are visible. A sidebar on the left contains navigation links: Tags, Communication, Addresses, Further information, Relevant Documents, and Turnover. A dropdown menu is open, listing various actions. The 'New appointment' option is highlighted with a red rectangular border. At the bottom of the interface, there are three status indicators: '26 Days inactive', '100% Turnover change', and 'BC Classification'. A small 'A' logo is in the bottom right corner.

- Observe dataset
- New task
- Write e-mail
- New letter
- Add to Campaign
- New offer
- New opportunity
- New operation recommendation
- Show Classification
- New operation
- Create operation task
- New appointment**
- Add to serial letter
- Add to bulk mail
- Open Location
- Radius Search
- Customer Base Sheet
- Start workflow
- Edit defaults
- Open admin view

26 Days inactive | 100% Turnover change | BC Classification

Calendar



Appointment preview

Open the appointment preview by clicking on the appointment.

Calendar view for Jul 15 – 19, 2024. The interface shows a weekly calendar with appointments listed by time slots. A callout box highlights an appointment on Monday, July 15, at 8:30-9:00 AM titled "Montags-Gesamtmeeing".

Further Actions

- Delete recurring appointment
- New operation
- New activity

Overview of all invited participants.

Overview of all linked data.



Calendar



Linked appointments e.g. within Company

The screenshot displays the ADITO software interface for 'Industrial Steel AG'. The left sidebar contains company information: 'Industrial Steel AG', 'Cust.-No.: 1234', 'E-Mail: info@industrial-steel.de', 'Phone: +49 40 63520', 'Website: https://www.industrial-steel.de', 'Office address: Rathausmarkt 1, 20095 Hamburg, Germany', 'Turnover Current: 683,860.00 EUR', 'Turnover Last Year: 0.00 EUR', and 'Relevant documents: Information.pdf'. The main area shows a calendar view with a list of appointments. The appointments are:

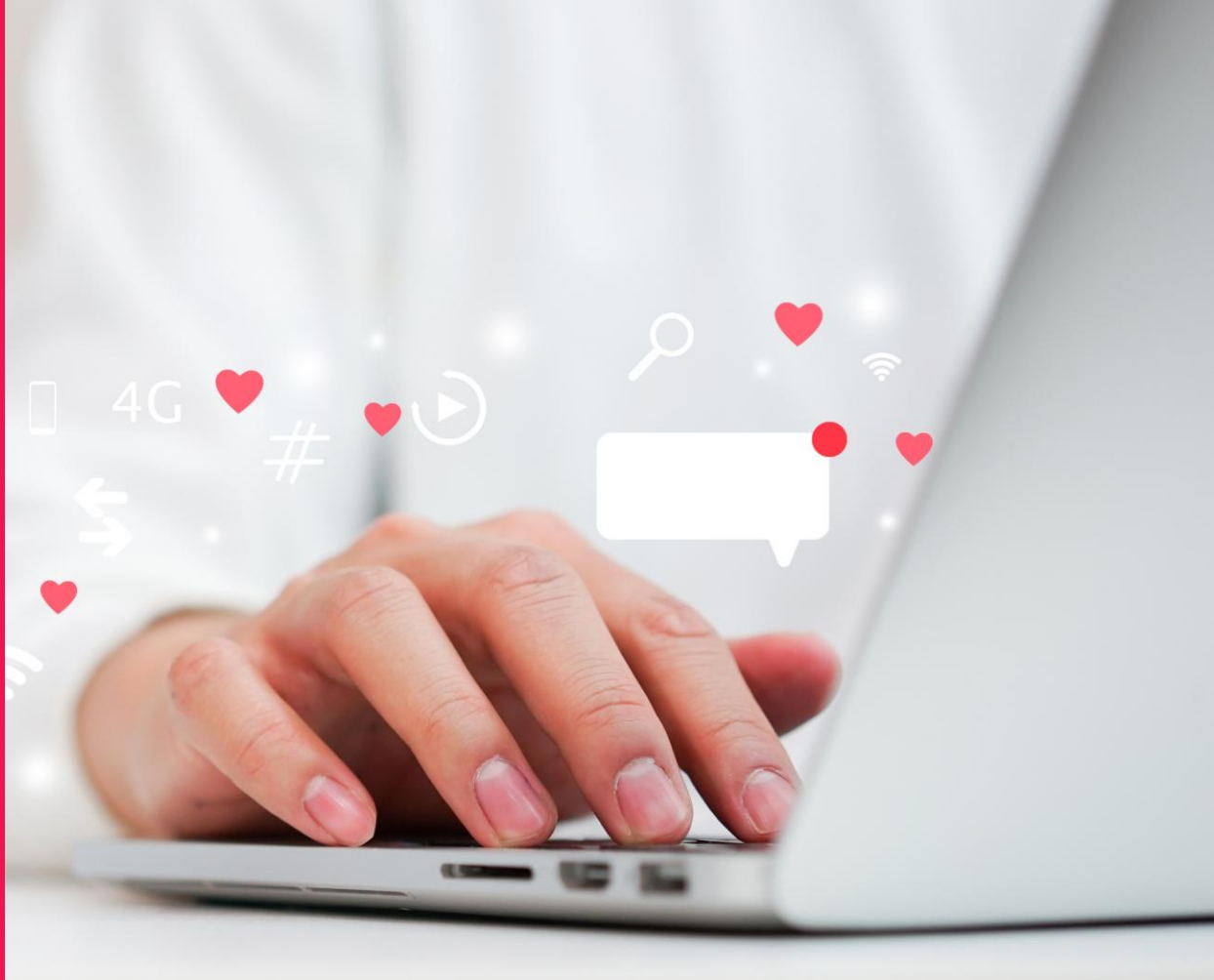
- Jun 7, 2024, 3:36 AM: Verträge prüfen. Bitte die vorhanden Verträge überprüfen, alle Erweiterungen müssen darin abgedeckt sein. (new)
- May 21, 2024, 2:23 PM: Rahmenvertrag aktualisieren und an Herrn Altinger schicken. Mit Herrn Altinger telefoniert und die Rahmendaten des neuen Vertrages besprochen. Gültig ab sofort Zahlungsweise: Halbjährlich befristet auf ein Jahr. (new)
- May 17, 2024, 2:29 PM: Austausch über Newsletter - Bitte Frau Linder anrufen. Frau Linder hat angerufen und möchte sich mit einem unserer Marketingkollegen bzgl. Newsletter austauschen.
- May 12, 2024, 2:29 PM: (partially visible)
- May 9, 2024, 2:29 PM: (partially visible)

The right-hand panel shows details for a 'Status-Call mit Projektleiter' on 07/16/2024 from 09:30 to 10:30 o'clock. It includes sections for 'Information', 'Details' (Place: Online, Status: Confirmed), 'Participants' (Admin, hobermeier, Isommer, mmustermann), and 'Connections' (Company: Industrial Steel AG).

Overview of all appointments, which are linked to this dataset.



**Marking
datasets as
"important" or
categorizing**



Tags: overview

There are 2 possibilities to use tags:

1. **Public tags**

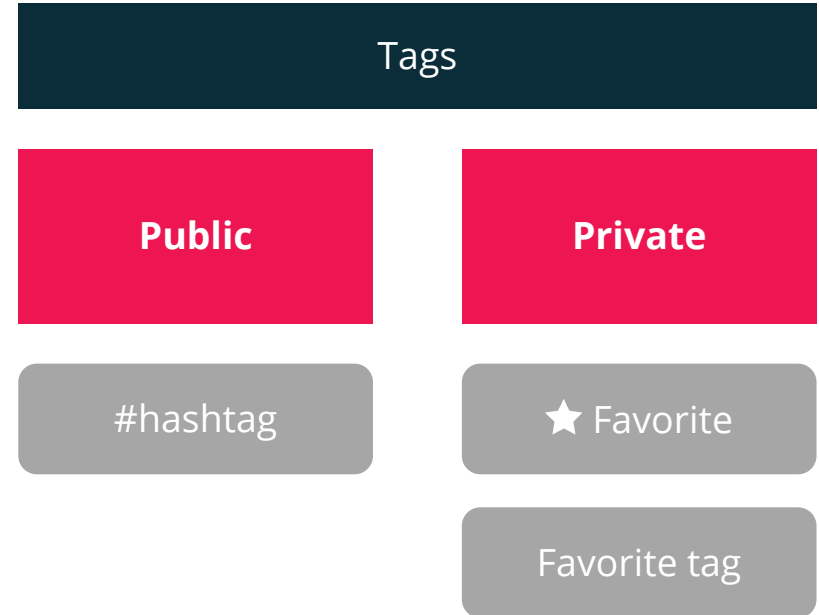
for a system-wide categorization and use in the index search.*

2. **Private tags**

for marking important data

→ Quick access in the Context "Favorites"

→ Filter in the respective FilterView using the "Favorite groups" filter.



*Can be compared to social networks. This function can be deactivated in the system if it is not required.

Assigning tags (1)

In the preview of a dataset

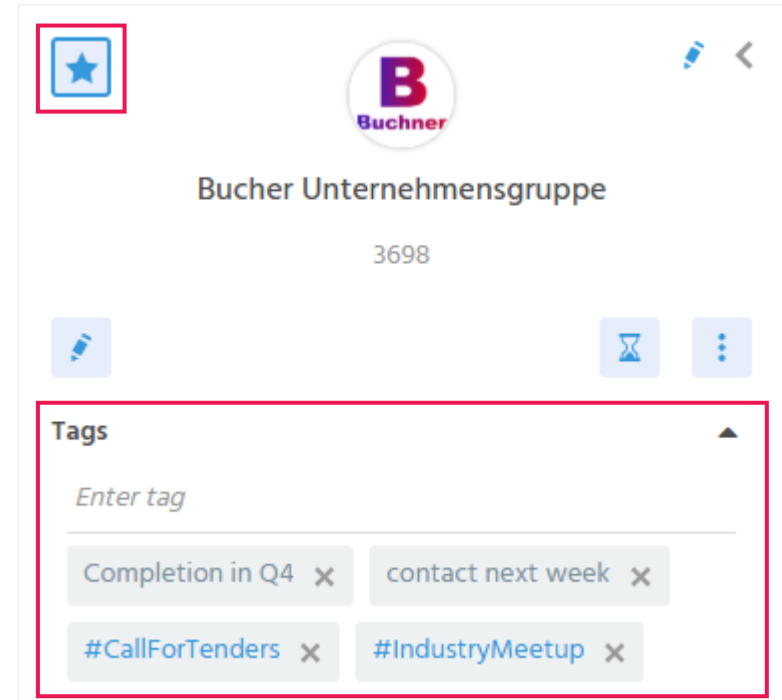
All tags can be assigned within the **"Tags"** section:

★ button

- **Favorite** is activated ★ or inactive ☆

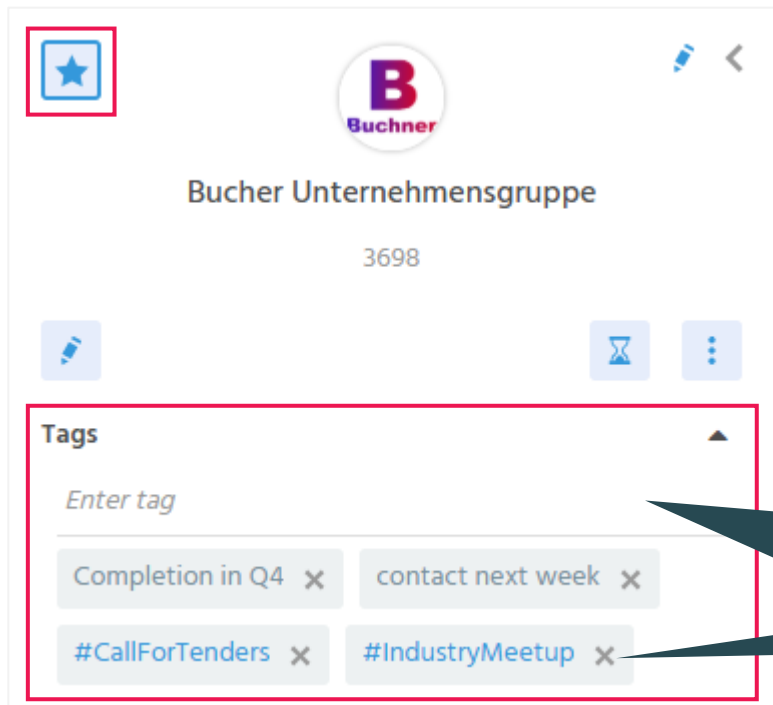
Field "Enter tag" + ENTER

- **Private tags** cannot begin with #, can contain blank spaces
- **Public tags** must begin with #, cannot contain blank spaces



Assigning tags (2)

In the preview of a dataset



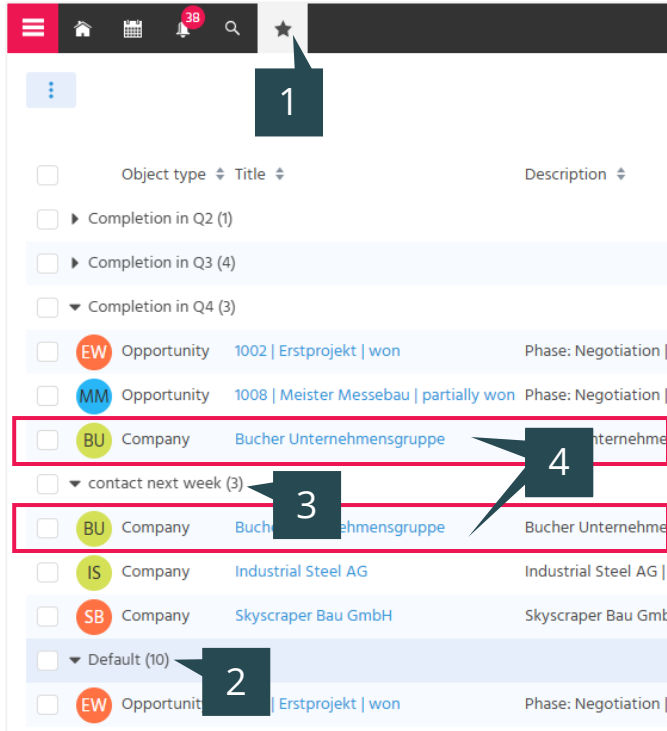
A maximum of 100 tags can be entered per dataset (sum of all private tags and public tags of all users)

If you enter any tag in the preview, **existing** tags will be displayed (via autocomplete or suggestion list). If a tag does not exist yet, it can be created by pressing **Enter**.

Click on the **X** to delete the tag.

Favorite tags

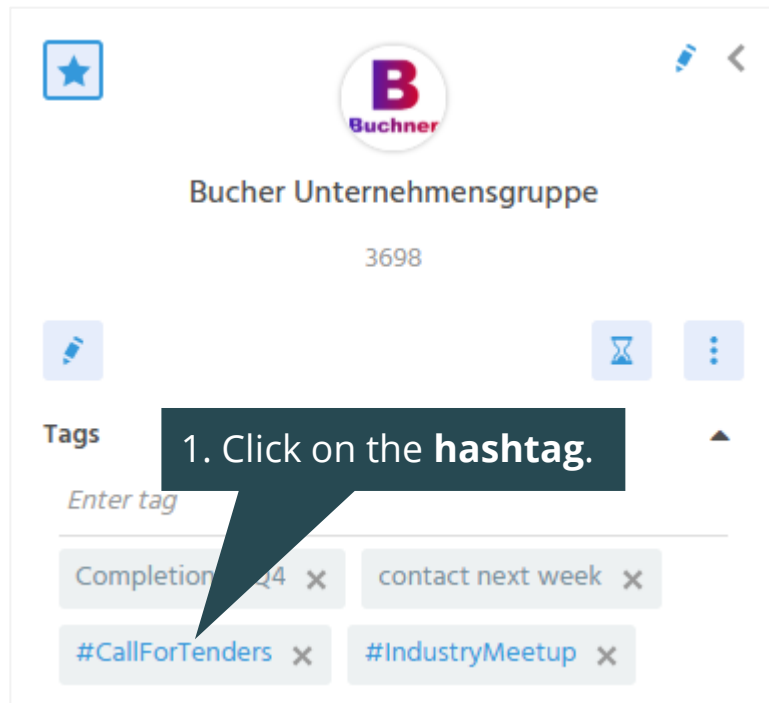
Overview in the Context "Favorite"



1. In the Context "Favorite", the datasets are grouped by tag.
2. If you activated the ★ **button**, the datasets will be displayed in the private tag "**Default**".
3. When assigning an private tag, it will be displayed in the corresponding favorite tag (e.g. "**contact next week**").
4. If you assign more tags to a dataset, they will be displayed in the corresponding private tags section (★ button and/or one or more tags).

#tags

Search system-wide for datasets that are linked with hashtags (1)



Bucher Unternehmensgruppe

3698

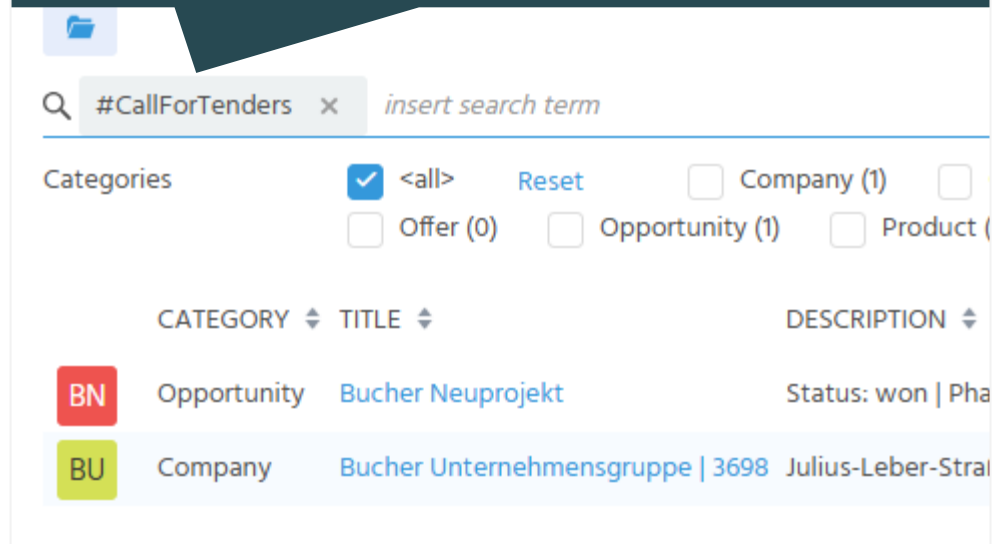
Tags

Enter tag

Completion 4 x contact next week x

#CallForTenders x #IndustryMeetup x

2. The **index search** is opened in an extended view, with further datasets listed for which this hashtag is assigned.



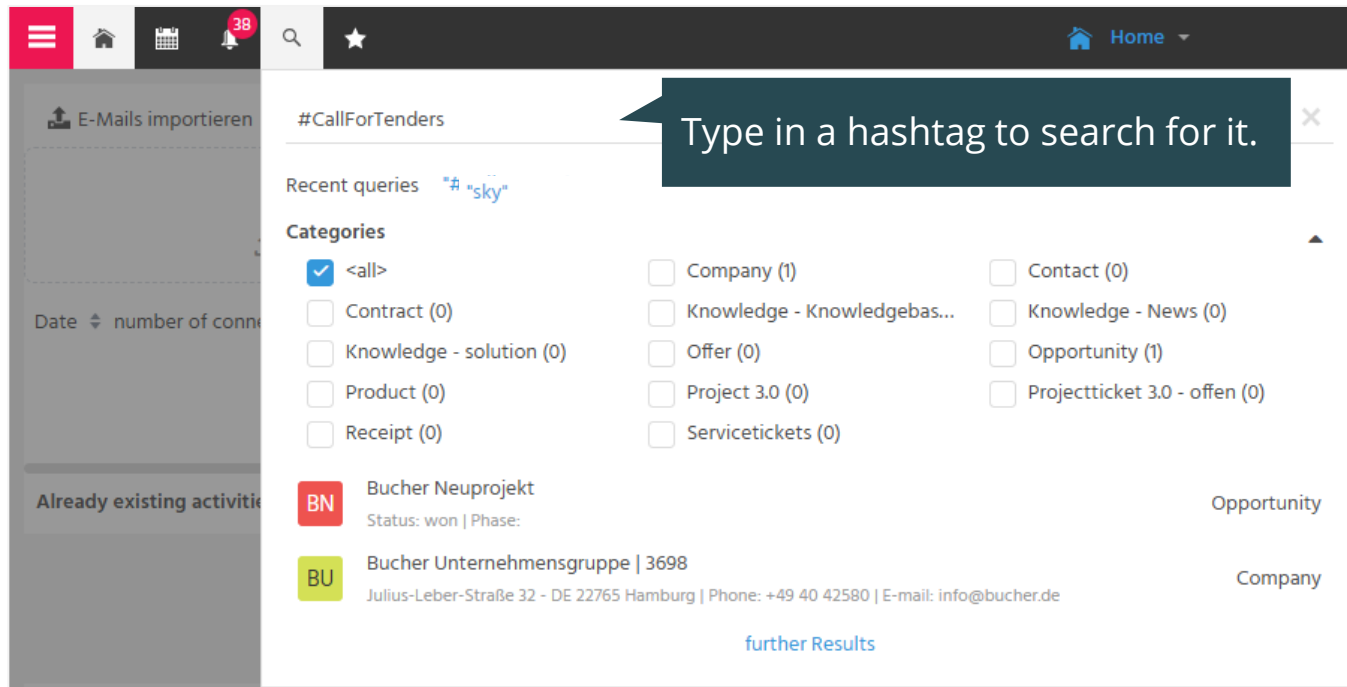
Q #CallForTenders x insert search term

Categories ☒ <all> Reset ☐ Company (1) ☐ Offer (0) ☐ Opportunity (1) ☐ Product (1)

	CATEGORY	TITLE	DESCRIPTION
BN	Opportunity	Bucher Neuprojekt	Status: won Pha
BU	Company	Bucher Unternehmensgruppe 3698	Julius-Leber-Stral

#tags

Search system-wide for datasets that are linked with hashtags (2)

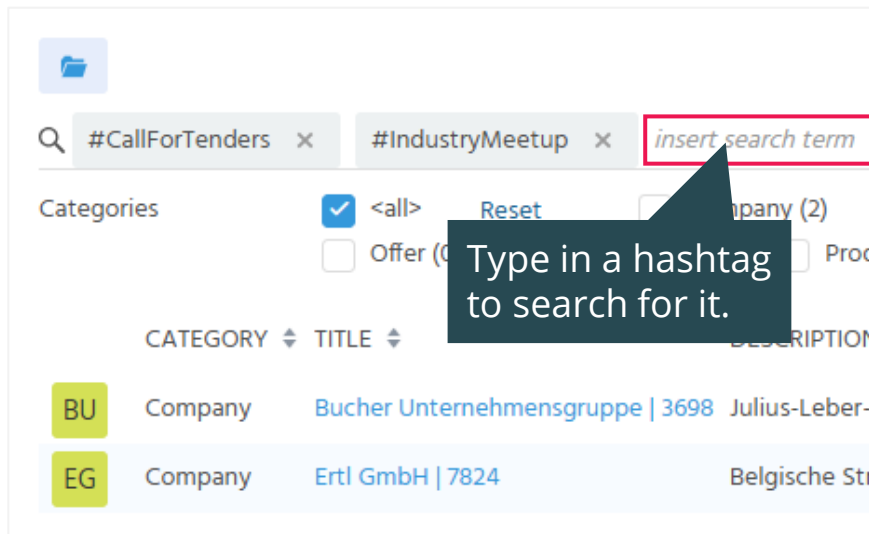


The screenshot shows the ADITO search interface. The top navigation bar includes a menu icon, home icon, calendar icon, a notification bell with '38', a search icon, and a star icon. The main search bar contains the hashtag '#CallForTenders'. A dark blue callout box with a white border and a close 'X' button contains the text 'Type in a hashtag to search for it.' Below the search bar, the 'Recent queries' section shows '"# "sky"'. The 'Categories' section lists various filters with checkboxes and counts: '<all>' (checked), 'Contract (0)', 'Knowledge - solution (0)', 'Product (0)', 'Receipt (0)', 'Company (1)', 'Knowledge - Knowledgebas...' (0), 'Offer (0)', 'Project 3.0 (0)', 'Servicetickets (0)', 'Contact (0)', 'Knowledge - News (0)', 'Opportunity (1)', and 'Projectticket 3.0 - offen (0)'. Below the categories, two results are shown: 'BN Bucher Neuprojekt' with status 'won' and phase 'Phase:', categorized as 'Opportunity'; and 'BU Bucher Unternehmensgruppe | 3698' with address 'Julius-Leber-Straße 32 - DE 22765 Hamburg', phone '+49 40 42580', and email 'info@bucher.de', categorized as 'Company'. A blue link 'further Results' is at the bottom.

- Autocompletion is **not** available here.
- In the "**further results**" view, you can search for more tags.

#tags

Search system-wide for datasets that are linked with hashtags (3)



Search bar: #CallForTenders x #IndustryMeetup x insert search term

Categories: ☒ <all> [Reset](#) ☐ Company (2) ☐ Offer (0) ☐ Proc

CATEGORY	TITLE	DESCRIPTION
BU	Company	Bucher Unternehmensgruppe 3698 Julius-Leber-
EG	Company	Ertl GmbH 7824 Belgische Str

Type in a hashtag to search for it.

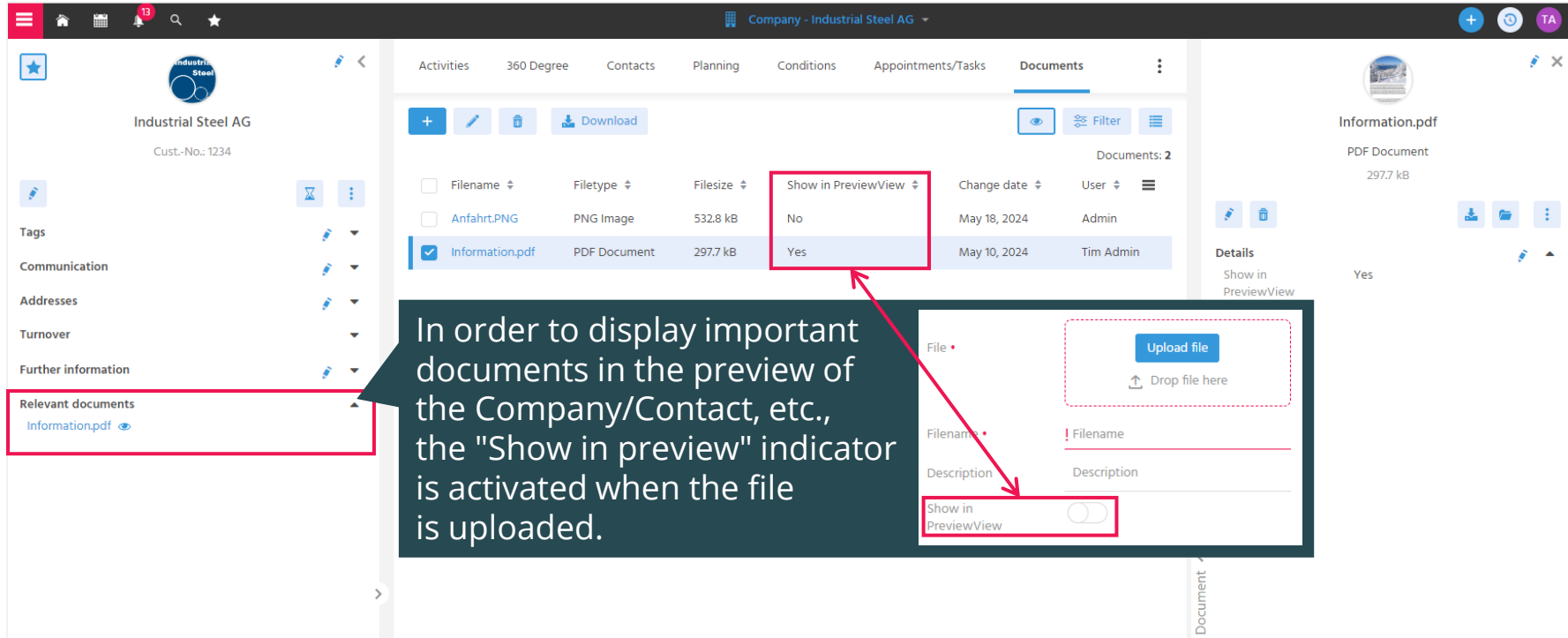
- As soon as # is typed in, the autocomplete or suggestion list becomes available.
- The datasets that are being searched for are displayed beneath the search bar.
- You can search for multiple hashtags simultaneously. In this scenario, the hashtags are connected with the operator **AND**, meaning that the results must be associated with **all** of the hashtags that have been searched for.

Documents



Documents

Display of important documents in the preview



Industrial Steel AG
Cust.-No.: 1234

Activities 360 Degree Contacts Planning Conditions Appointments/Tasks Documents

Download

Filename	Filetype	Filesize	Show in PreviewView	Change date	User
Anfahrt.PNG	PNG Image	532.8 kB	No	May 18, 2024	Admin
Information.pdf	PDF Document	297.7 kB	Yes	May 10, 2024	Tim Admin

Documents: 2

Information.pdf
PDF Document
297.7 kB

Details
Show in PreviewView
Yes

Relevant documents
Information.pdf

In order to display important documents in the preview of the Company/Contact, etc., the "Show in preview" indicator is activated when the file is uploaded.

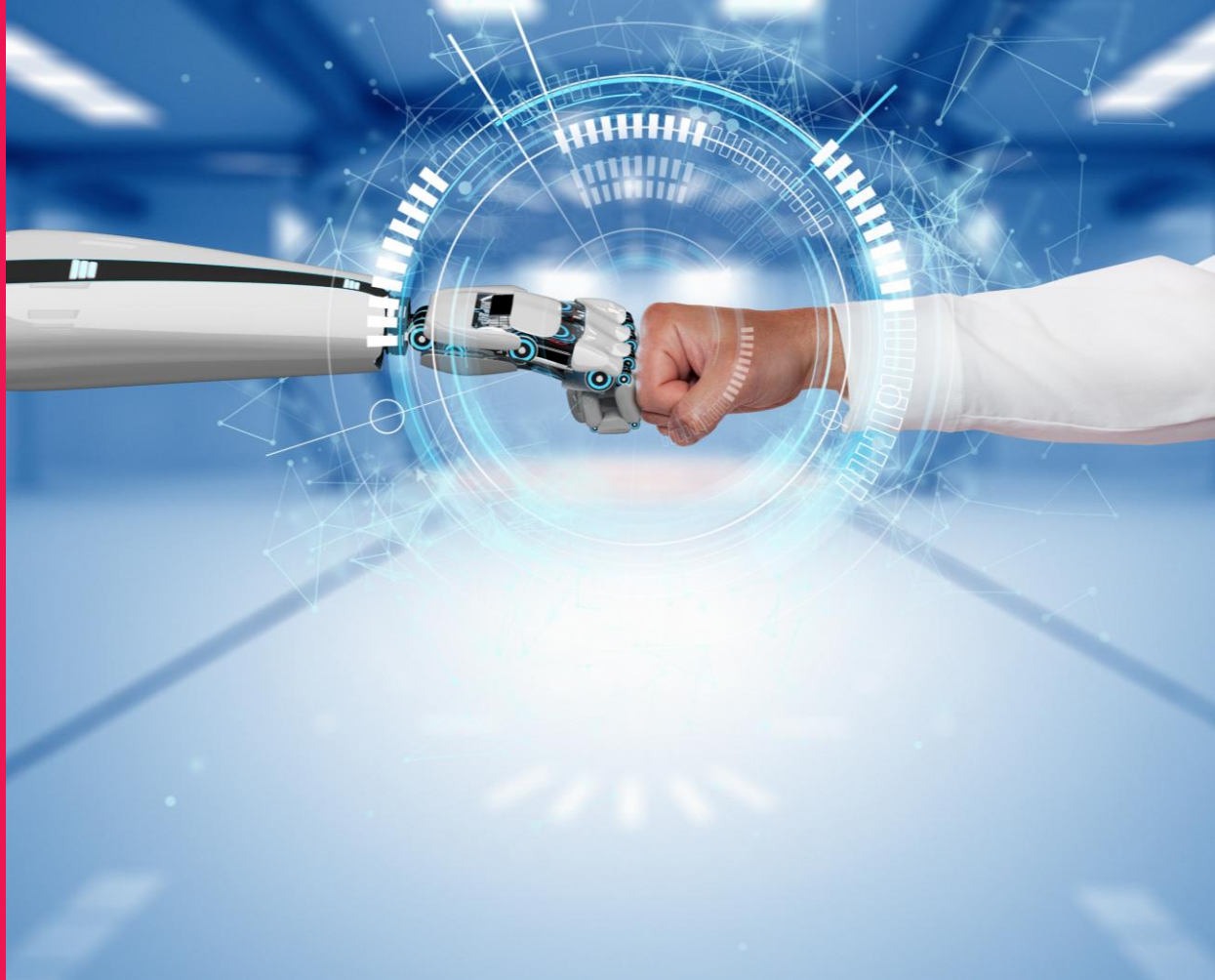
File •
Filename •
Description •
Show in PreviewView

Upload file
Drop file here

Filename
Description

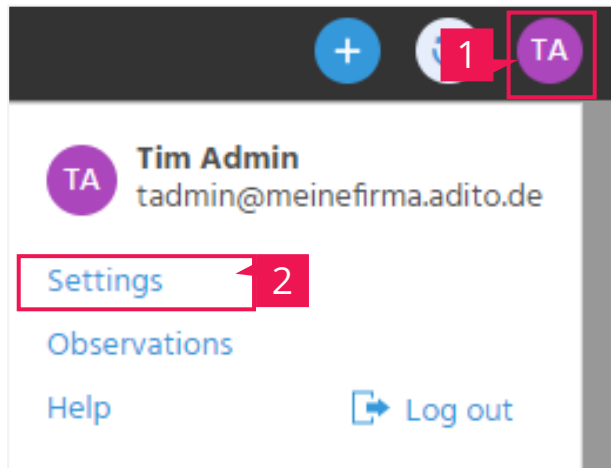
Show in PreviewView

User specific settings



User menu

Settings



Setting options

- Change **password**
- Adjust **currency**
- Configure **telephone** (which Context opens with incoming calls & connected CTI system)
- **Topic tree configuration** (favorites and presets)
- Activate **notifications by email**
- Configure **placeholders in the index search**
- Customize **color scheme**
- Activate **Open in new tab** → links will always be opened in a new tab
- **Expanding Floating Action Button by default?** (New login required)
- Change **locale** and **time zone** (New login required to execute changes in the system)
- Customize **calendar display**

Which settings are saved for the user?

Fade in and out of...

Areas

(Preview, filter etc.)

Tags

Communication

E-Mail: info@industrial-steel.de

Phone: +49 40 63520

Website: <https://www.industrial-steel.de>

Addresses

Turnover

Further information

Relevant documents

Information.pdf

Columns in the table

(FilterView)

Companies: 50

mail	Phone	Address
fo@acquire.de	+49 4321	
fo@bohrmarkt.de	+49 9246	
fo@bornheimer.de	+49 2221	
fo@bucher.de	+49 40 4	
kontakt@brandstaetter.de	+49 831	
service@ertl.de	+49 335	
reattohearfromyou@fsa.org	+44 20 3	
fo@matthiasbogen.de	+49 421 98650	Pfeilstraße 7 - DE
fo@fischer.tr	+49 6472 35000	Brenneckestraße
kontakt@globgroup.com	+44 20 1432 3000	32-40 Blackfriars

Action bars

(Dashlet or tabs)

My responsible Organisations

Picture	Name	Customercode	Email
	Aquire GmbH	3469	info@acquire.de
	Bohrmarkt GmbH	9612	info@bohrmarkt.de
	Bornheimer Maschinenfabrik GmbH	4387	info@bornheimer.de
	Brandt Feldmann AG	1674	
	Bucher Unternehmensgruppe	3698	info@bucher.de

My Tasks

Status	Subject	Requestor
	Fr. Vogel kontaktieren	Herr Tim Admin
	Freier Außendienst im Gebiet alle 4 Wochen	Herr Tim Admin
	Event im Hause	Frau Birgit Leicht

Whether an area, a column or the Action bar is shown or hidden is saved for you. This means that once you show, for example, the Action bar, it will always remain displayed.

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