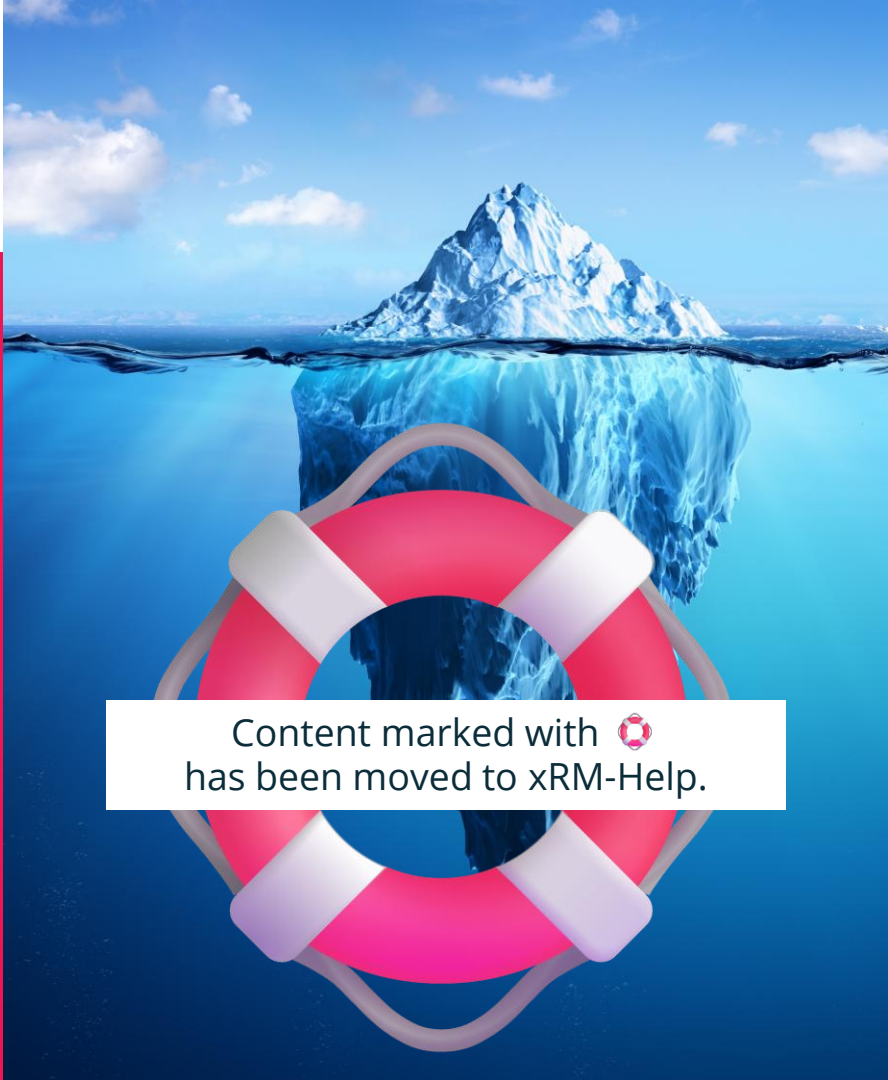


Contact Management: Company, Contact Activity, Task

ADITO Software GmbH

From version xRM 2026.4.0 | April 2026

An iceberg floating in the ocean under a blue sky with clouds. A red and white lifebuoy is positioned in the foreground, partially obscuring the iceberg. The water is a deep blue, and the sky is a lighter blue with scattered white clouds.

Content marked with  has been moved to xRM-Help.



Screenshots

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



Agenda (1/3)

- [Overview menu group "Contact management"](#)
-  Creating new
 -  Company
 -  Contact
 -  Quickentry
- [Communication & Address](#)
 - [Phone number: system, !\[\]\(cdcd8a42e5993b465235781ccc1c8555_img.jpg\) verification, usage](#)
 -  Email/website: verification
 -  Address: creating new, verification
 -  Recognizing defaults
 -  Adjusting defaults
 - [Specific filter criteria](#)
- [Serial actions in the FilterView](#)
 - [Company](#)
 - [Setting an attribute](#)
 - [Contact](#)
- [Company](#)
 - [Tab "Activities"](#)
 - [Tab "360"](#)
 - [Tab "Contact"](#)
 - [Tab "Appointments/Tasks"](#)
 - [Tab "Attributes" - "attributes"](#)
 - [Tab "Attributes" - "sensitive attributes"](#)
 - [Tab "Relations"](#)
 - [Company-specific document storage](#)
 - [Overview of further tabs](#)
 - [Create customer base sheet](#)
 - [Company classification](#)
 - [Change of name](#)
 - [Deleting a company](#)
 - [Radius search](#)

Agenda (2/3)

▪ Contact:

- [Presentation in the CRM](#)
-  Tab “Other Functions”
 -  Case 1: Contact works at more companies
 -  Case 2: Contact switches from one company to another
 -  Case 3: Contact leaves the company
 -  Case 4: Delete function
- [Personified salutation](#)
- [Overview of further tabs](#)
- [vCard Export/](#)  Import

▪ Activity

- [Definition](#)
- [Linking with objects](#)
- [Automatic linking when new creation](#)
- [New creation](#)
- [Mentioning colleagues](#)
- [Manual linking](#)
- [Topic tree](#)
- [Tab “History”](#)
- [Automatic new creation of Activities](#)
- [Automatic new creation of Activities: emails](#)
 - [Creating emails with mailbridge](#)
 - [Creating emails using Outlook add-in](#)
 - [Creating emails with dashlet](#)
 - [Email attachments in the tab “Documents”](#)
 - [Unlinked Activities](#)
 - [Category System”](#)
- [Summarize activities supported by AI](#)

Agenda (3/3)

- Task
 - Definition
 - Group and single Tasks, as well as private Tasks
 - Priority and due date
 - Adding editor
 - Linking with Service tickets or Activities
 - Use cases
 - Overview of my tasks
 - Dashlet “Appointments/Tasks”
 - How can I find out if tasks were completed?
 - Taking over tasks from colleagues

"Overview"



Contact management



Contact management

 Company	 Contact	 Activity	 Contact synch.
--	--	---	---

Task/appointment management

 Tasks	 Calendar
--	---

Classification	Salutation	 Topic tree	Contact synch. dashboard
Export template	 Document template		
Duplicate configuration	GDPR Configuration		
Relation type			

Administration for Contact management

-  To be defined in advance by administration
-  Occasional functional administrative adjustments
-  Used "daily" by users



Communication & Address



Communication

Entry of telephone numbers

If letters are entered instead of digits when entering the extension number, they are replaced as digits in the same way as on telephone keypads.

A combination of three letters **must** always be used when entering.

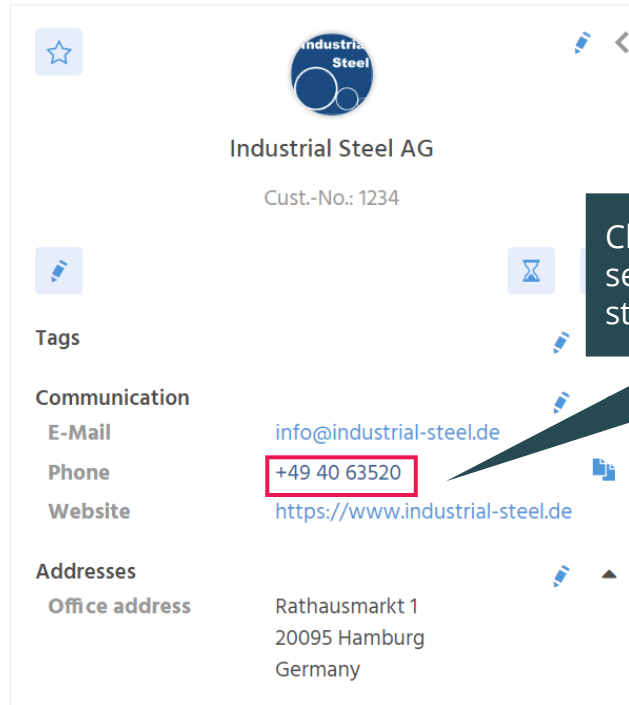
Example: +49 0871 7**ADG** -> +49 0871 7**234**

If only one or two letters are entered, they are automatically deleted after a brief moment.



Communication

Starting a call (without CTI connection)



Industrial Steel AG
Cust.-No.: 1234

Tags

Communication

E-Mail: info@industrial-steel.de

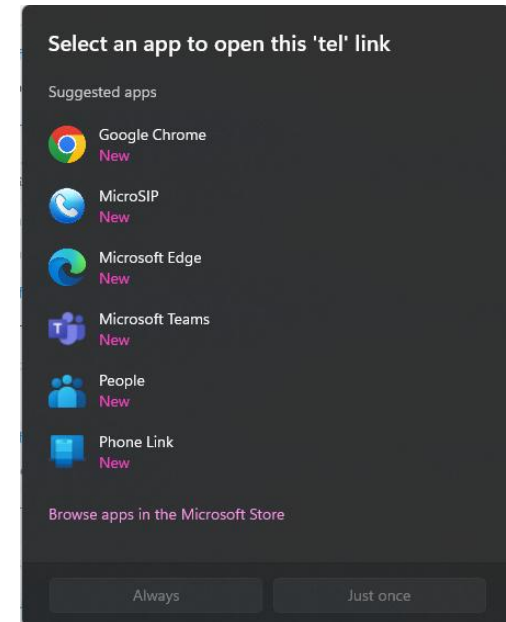
Phone: [+49 40 63520](tel:+494063520)

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

Addresses

Office address: Rathausmarkt 1
20095 Hamburg
Germany

Click on the telephone number and select the app that should be used to start the call.



Select an app to open this 'tel' link

Suggested apps

- Google Chrome New
- MicroSIP New
- Microsoft Edge New
- Microsoft Teams New
- People New
- Phone Link New

Browse apps in the Microsoft Store

Always Just once

Communication

Making calls with CTI connection

If a CTI connection exists, the system supports telephony as follows:

- Clicking on the phone number in the preview triggers the call.
- Pop-up/notification for incoming calls shows the recognized data record (company or contact).
- The context that is opened by clicking on the pop-up can be specified in the user settings.



Whether and how this can be utilized must be considered in the relevant project.

Trigger a call



Employee



Click on the phone number to start the call.

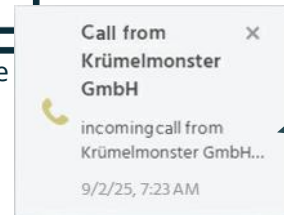
Answering a call



Employee



Customer



Popup opens. Click on the pop-up to open the data record.

Contacts in the Outlook contact book

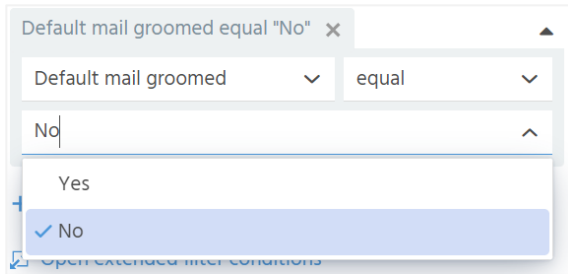


Do you need the companies or contacts from ADITO as Outlook contacts, for example?

Further information about this application can be found in the documentation on “EWS Contact Synchronization.”

Communication & address

Filter



Default mail groomed equal "No" x

Default mail groomed v equal v

No ^

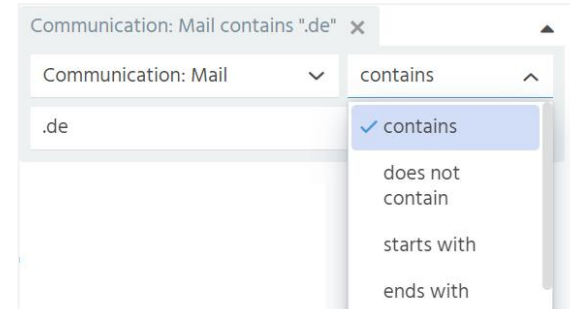
Yes

✓ No

Open extended filter conditions

Default address groomed
Default mail groomed
Default phone groomed

With these filter criteria, you can filter companies or contacts for which **no standards have been maintained yet**, in order to add them.



Communication: Mail contains ".de" x

Communication: Mail v contains ^

.de

✓ contains

does not contain

starts with

ends with

Communication: Link
Communication: Mail
Communication: Phone
Communication: Address
Communication: Medium

With these filter criteria, you can search for specific entries or verify if an address is available for a medium.

Serial actions in the FilterView



Serial actions in the FilterView

</

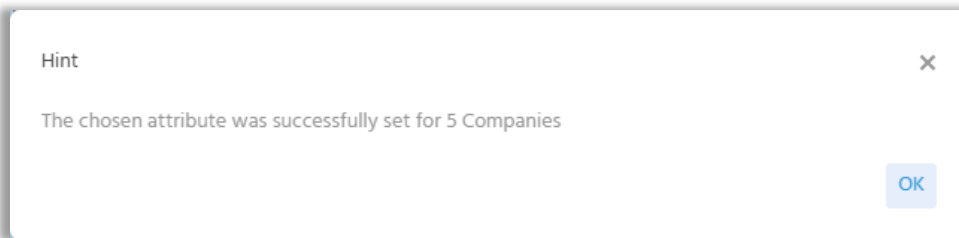
Serial actions: adding attributes

5
Affected rows

+	Assessment / Indu	Service	-
	Conditions / Price	! Value	-
		Standard	
		Key account	
		Special price list	
		Service	

Several attributes can be added, selected, and thus set simultaneously on the datasets.

After saving, a note is displayed indicating how many datasets the property has been set.



The serial action "Set attribute" is also available in the Contact and for Activities.

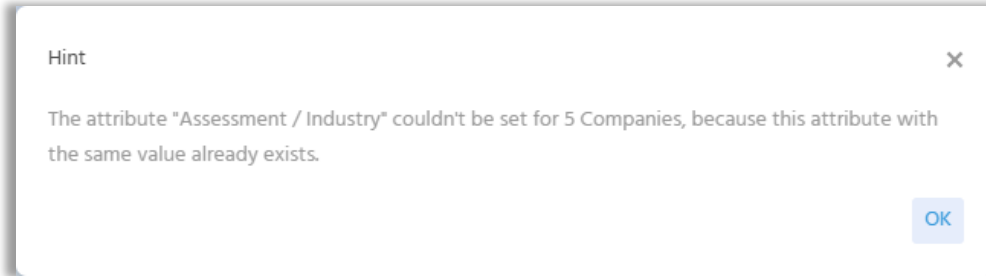
Serial actions: setting attributes

Please note how often a property can or may be set.

- Attributes, that are entered **a maximum of once per dataset** will be overwritten.
- Attributes that are entered **any number of times per dataset** are created **any number of times**.
- Attributes that are entered **a maximum of x times per dataset** are created **x times**. As soon as x is exceeded, the user receives a message.

Serial actions: setting attributes

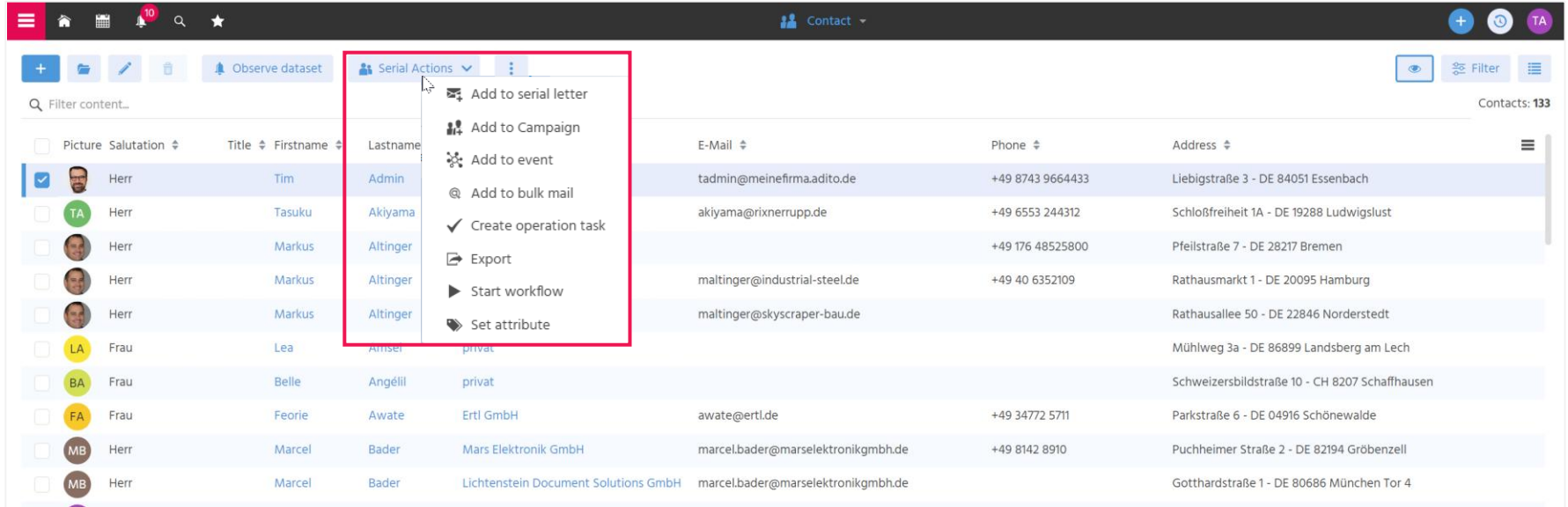
If the attributes **cannot be set** for some of the datasets, the information will be displayed in the hint after saving. The number of datasets for which the setting was not possible, along with their reasons, will be shown.



Possible reasons:

- Attributes with the same value already exist
- The maximum number of entered attributes for this dataset has already been reached.

Serial actions in the FilterView



The screenshot displays the ADITO Contact FilterView interface. A red box highlights the 'Serial Actions' dropdown menu, which is open, showing the following options:

- Add to serial letter
- Add to Campaign
- Add to event
- Add to bulk mail
- Create operation task
- Export
- Start workflow
- Set attribute

The background shows a list of contacts with columns: Picture, Salutation, Title, Firstname, Lastname, E-Mail, Phone, and Address. The 'Lastname' column is currently selected, showing a list of names including Admin, Akiyama, Altinger, and others.

Picture	Salutation	Title	Firstname	Lastname	E-Mail	Phone	Address
☒	Herr		Tim	Admin	tadmin@meinefirma.adito.de	+49 8743 9664433	Liebigstraße 3 - DE 84051 Essenbach
☐	Herr		Tasuku	Akiyama	akiyama@rixnerrupp.de	+49 6553 244312	Schloßfreiheit 1A - DE 19288 Ludwigslust
☐	Herr		Markus	Altinger		+49 176 48525800	Pfeilstraße 7 - DE 28217 Bremen
☐	Herr		Markus	Altinger	maltinger@industrial-steel.de	+49 40 6352109	Rathausmarkt 1 - DE 20095 Hamburg
☐	Herr		Markus	Altinger	maltinger@skyscraper-bau.de		Rathausallee 50 - DE 22846 Norderstedt
☐	Frau		Lea	Amser			Mühlweg 3a - DE 86899 Landsberg am Lech
☐	Frau		Belle	Angéllil			Schweizersbildstraße 10 - CH 8207 Schaffhausen
☐	Frau		Feorie	Awate	awate@ertl.de	+49 34772 5711	Parkstraße 6 - DE 04916 Schönevalde
☐	Herr		Marcel	Bader	marcel.bader@marselektronikgmbh.de	+49 8142 8910	Puchheimer Straße 2 - DE 82194 Gröbenzell
☐	Herr		Marcel	Bader	marcel.bader@marselektronikgmbh.de		Gotthardstraße 1 - DE 80686 München Tor 4

Company



Company



Tab "Activities"

The screenshot displays the ADITO interface for the 'Company - Industrial Steel AG' entity. The left sidebar contains company information such as contact details, addresses, and further information. The main area shows a list of activities, with one activity highlighted by a red icon. The right sidebar provides details for the selected activity, including direction, category, responsible person, key activity, connections, and description.

Company - Industrial Steel AG
Cust.-No.: 1234

Activities 360 Degree Contacts Appointments/Tasks Operations/Tasks Attributes Documents Relations

Phone call regarding contract update (Heiko Storbeck)
Jun 10, 2025, 2:21 PM
Spoke to Mr Altinger on the phone and discussed the key details of the new contract. Valid with immediate effect. Payment method: half-yearly. Limited to one year.

Key activities containing particularly important information are highlighted with a red icon.

List of activities associated with the selected company.

Details
Direction: Outgoing
Category: Phone
Responsible: Heiko Storbeck
Key activity: Yes

Connections
Task: Rahmenvertrag aktualisieren und an ...
Company: Industrial Steel AG
Contact: Mr. Markus Altinger
Contract: Framework contract 1005 | Valid, limi...

Description
Spoke to Mr Altinger on the phone and discussed the key details of the new contract.
Valid with immediate effect.
Payment method: half-yearly.
Limited to one year.



Company

Tab “360 Degrees”

Overview of linked Contexts:

- Offers
- Receipts
- Campaign
- Opportunitys
- Serial mails
- Serial letters
- Service tickets
- Contracts
- Advertising material
- etc.

The screenshot displays the '360 Degree' tab in a software interface for 'Industrial Steel AG'. The interface includes a top navigation bar with tabs: Activities, 360 Degree, Contacts, Appointments/Tasks, and Operations/Tasks. Below the navigation bar, there is a 'Create new' button and a search bar labeled 'Filter content'. A callout points to the search bar, stating: 'Search option based on the title or description of the linked data.' To the right of the search bar, there are two view toggles: 'Timeline View' and 'Tree view'. A callout points to these toggles, stating: 'Timeline View' and 'Tree view'. The main content area shows a list of contexts, including 'Advertising material', 'Bulk Mail (3)', 'Campaign (5)', 'Cancellation (3)', and 'Contract (3)'. The 'Contract (3)' section is expanded, showing three contracts: 'Framework contract 1002 | Valid, limited', 'Framework contract 1005 | Valid, limited', and 'Service contract 1001 | Valid, limited'. Each contract entry includes details such as 'Payment method: Quarterly', 'Next due date', and 'Contract expiry date'. On the right side of the interface, there is a sidebar with a star icon, a red circle with 'FC', and the text 'Framework contract 1002' and 'Andreas Tannenbaum | Industrial Steel AG'. Below this, there are sections for 'Tags' (with a search bar 'Enter tag'), 'Details' (with fields for Status, Contract start date, Contract expiry date, Payment method, and Next due date), and 'Description'. A blue circle with a white 'A' is located at the bottom right of the sidebar.

Company



Tab "Contacts"

Industrial Steel AG

Cust.-No.: 1234

Tags

Communication

Addresses

Further information

Relevant Documents

Turnover

Industrial Steel AG

Cust.-No.: 1234

Tags

Communication

Addresses

Further information

Relevant Documents

Turnover

Activities

360 Degree

Contacts

Appointments/Tasks

Operations/Tasks

Attributes

Documents

Relations

Serial Actions

Filter

Contacts: 8

☐	Picture	Salutation	Title	Firstname	Lastname	E-Mail	Phone	Department	Contactr
☒		Mr.		Markus	Altinger	maltinger@industrial-steel.de	+49 40 6352-109	Produktion	
☐		Herr		Wolfgang	Gruber	w.gruber@industrialsteel.com		IT	IT-Leiter
☐		Herr		Wilhelm	Kainz	wkainz@industrial-steel.de	+49 160 98712364	Vertrieb	
☐		Frau		Anja	Lindner	alindner@industrial-steel.de	+49 40 6352-111	Marketing	Marketingmitart
☐		Frau		Anja	Lindner-Brunner	alindnerbrunner@industrial-steel.de	+49 171 98712364		
☐		Herr		Peter	Macher	pmacher@industrial-steel.de	+49 170 1212121	Vertrieb	Vertriebsleiter
☐		Frau		Petra	Solana	psolana@industrial-steel.de	+49 171 9654874	Marketing	Marketingleiter
☐		Herr		Andreas	Tannenbaum	atannenbaum@industrial-steel.de	+49 40 6352105	IT	IT-Mitarbeiter

Mr. Markus Altinger

Industrial Steel AG

Tags

Communication

Addresses

Company Addresses

Further information

Relevant Documents

Mr. Markus Altinger

Industrial Steel AG

Tags

Communication

Addresses

Company Addresses

Further information

Relevant Documents

45

Tab "Appointments/Tasks"

Industrial Steel AG

Activities360 DegreeContactsPlanningConditionsAppointments/TasksOperations/TasksAttributesDocumentsRelations

+📁✎🗑️

Set completedObserve datasetCancel ID Observation

👁️Filter

Tasks: 7

Aug 29, 2024, 3:36 AM

○

Verträge prüfen
Bitte die vorhanden Verträge überprüfen, alle Erweiterungen müssen darin abgedeckt sein.
new

Aug 12, 2024, 2:23 PM

!

Rahmenvertrag aktualisieren und an Herrn Altinger schicken
Mit Herrn Altinger telefoniert und die Rahmendaten des neuen Vertrages besprochen.Gültig ab sofortZahlungsweise: HalbjährlichBefristet auf ein Jahr.
new

Aug 8, 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.
new

Aug 3, 2024, 11:07 AM

!

Mit der Vertriebsleitung abstimmen, wie viel Prozent Rabatt gegeben werden kann.
Preisabstimmung.
waiting

Linked Appointments

Subject	Begin	End	Place
Status-Call mit Projektleiter	Jul 30, 2024, 9:30 AM	Jul 30, 2024, 10:00 AM	Online
Vorstellung neues Projektmitglied	Aug 1, 2024, 3:00 PM	Aug 1, 2024, 4:00 PM	Online

Grouping

reset

Group by

Condition

reset

Join conditions by:

allone

Status not equal "completed"✕

Statusnot equalcompleted

+ Add filter condition

Open extended filter conditions

Saved filters

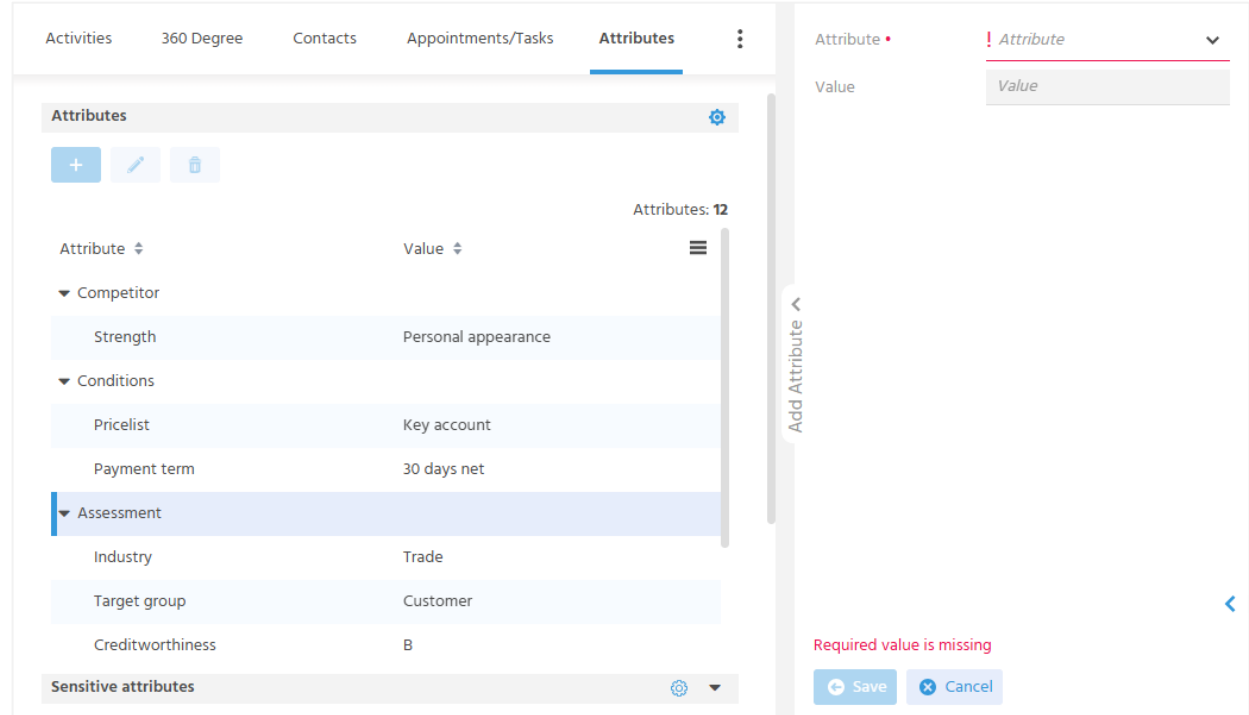
Last filters

47

ADITO

Tab “Attributes” – table “Attributes”

- Qualify companies using additional information through attributes.
- **Advantages:**
 - Attributes can be maintained centrally at this stage.
 - Attributes can be used as filter criteria and be maintained in the FilterView with serial actions in the selected datasets.
 - Attributes can be adjusted and extended by the specialist administration.



Activities 360 Degree Contacts Appointments/Tasks **Attributes**

Attributes

Attributes: 12

Attribute	Value
▼ Competitor	
Strength	Personal appearance
▼ Conditions	
Pricelist	Key account
Payment term	30 days net
▼ Assessment	
Industry	Trade
Target group	Customer
Creditworthiness	B

Sensitive attributes

Attribute • ! Attribute

Value Value

Required value is missing

Save Cancel

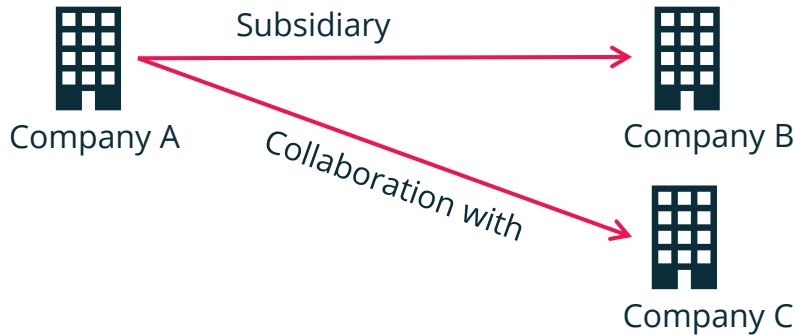
Tab “Attributes” – table “sensitive attributes”

- For what are attributes used?
To map sensitive information to the company using attributes,
 - which may be visible only to a restricted group of participants.
 - which may be maintained only by a limited number of participants.A “restricted group of participants” can be defined in such a way that different departments use different sensitive attributes and do not have access to one another.
- This allows the sales department, for example, to enter information in the company that is used solely within the department.
- **Advantages:**
 - Sensitive attributes can be maintained centrally for each dataset (not through serial action) if the user has a corresponding authorized role.
 - Sensitive attributes can be used as filter criteria.
 - Sensitive attributes can be adapted and extended by specialists in the administration.

Company

Tab "Relations"

Displayed here are the relations between companies and if applicable, between companies and contacts.



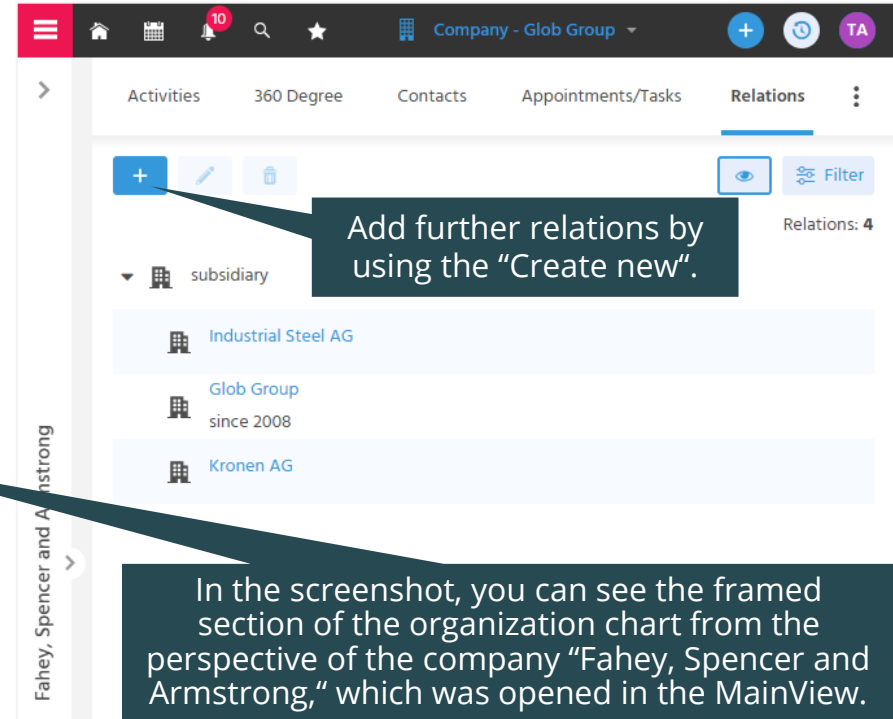
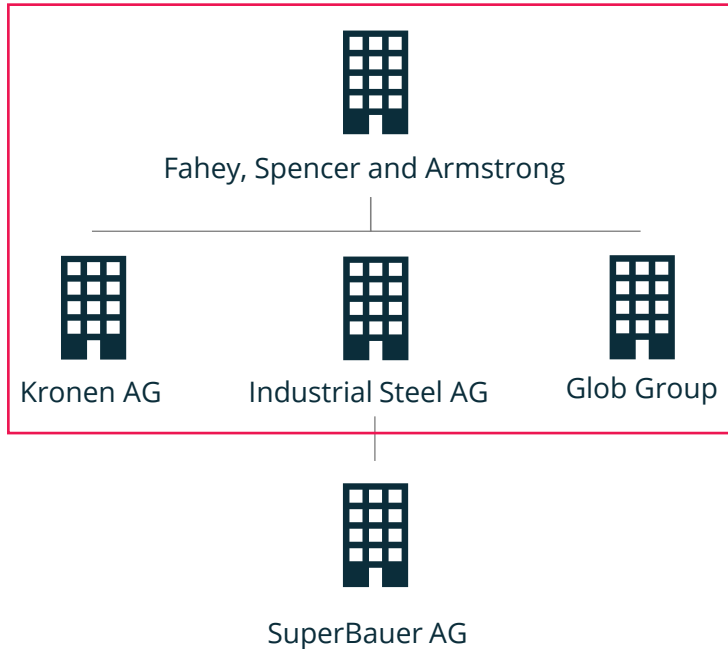
The screenshot shows the ADITO interface for the 'Company - SuperBauer AG' profile. The 'Relations' tab is selected, showing a list of relationships. The left sidebar indicates the user is viewing 'Industrial Steel AG'.

Relations: 9

- parent company
 - Fahey, Spencer and Armstrong
- member
 - Firmengruppe Matthias Bogen
- subsidiary
 - SuperBauer AG since 2012
- collaboration with
 - Transatlantik Logistics GmbH
 - Skyscraper Bau GmbH

Company

Tab “Relations”: Hierarchy levels



The screenshot shows the ADITO interface with the "Relations" tab selected. The interface displays a list of subsidiaries under the company "Fahey, Spencer and Armstrong". A callout box points to the "+" button, stating: "Add further relations by using the 'Create new'". Another callout box points to the framed section of the organization chart, stating: "In the screenshot, you can see the framed section of the organization chart from the perspective of the company 'Fahey, Spencer and Armstrong,' which was opened in the MainView."

Activities 360 Degree Contacts Appointments/Tasks Relations Filter

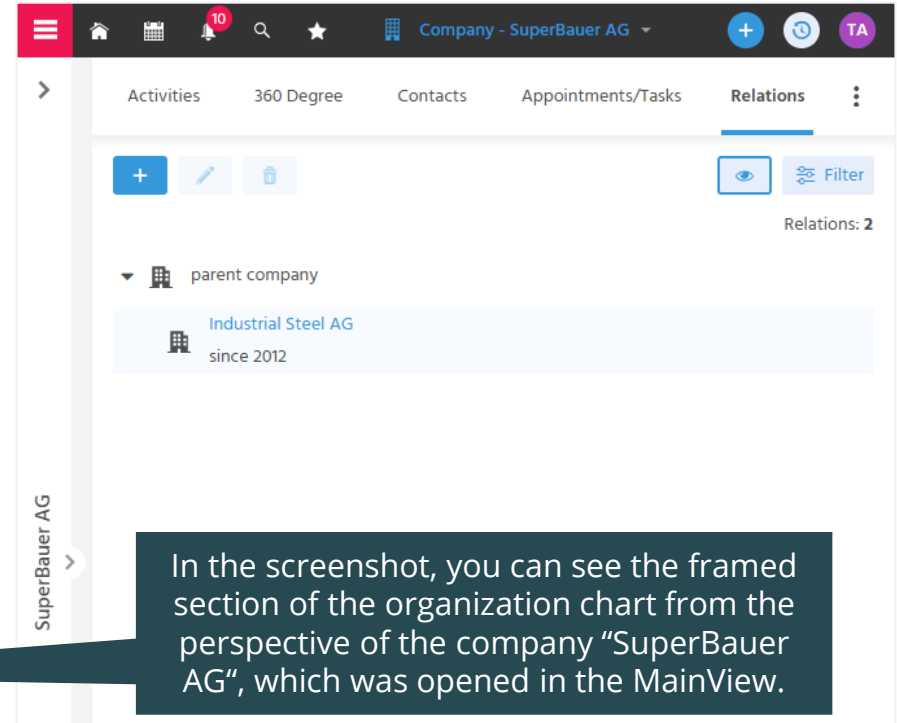
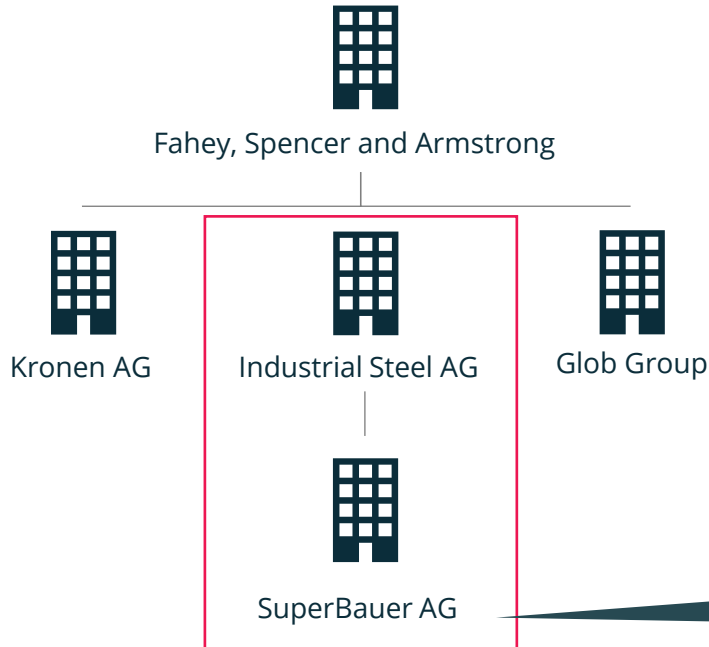
Relations: 4

subsidary

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

Company

Tab “Relations”: Hierarchy levels

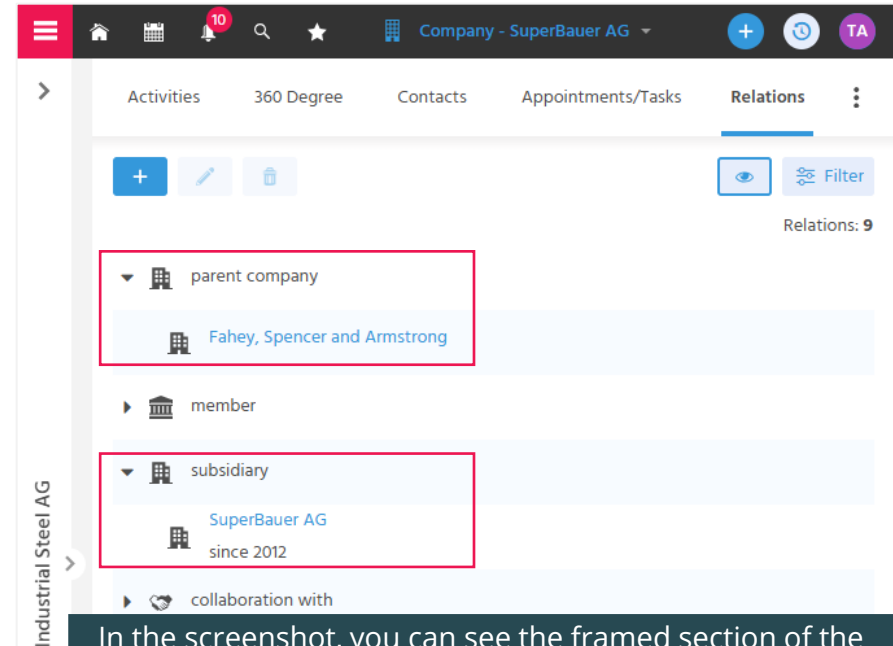
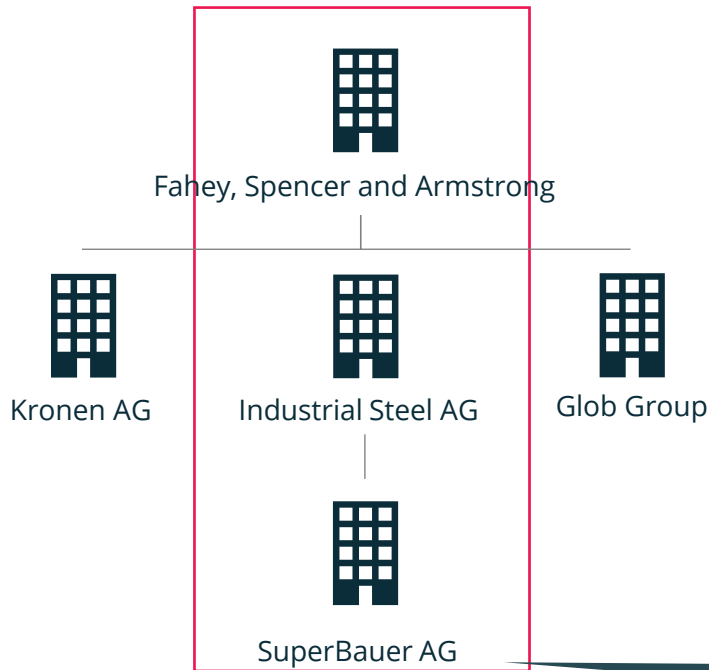


The screenshot shows the ADITO interface with the 'Relations' tab selected for the company 'SuperBauer AG'. The interface includes a top navigation bar with icons for home, calendar, notifications (10), search, star, and a dropdown menu for 'Company - SuperBauer AG'. Below the navigation bar, there are tabs for 'Activities', '360 Degree', 'Contacts', 'Appointments/Tasks', and 'Relations'. The 'Relations' tab is active, showing a list of relationships. A 'parent company' section is visible, containing a relationship with 'Industrial Steel AG' since 2012. A red box highlights this relationship, and a callout line points to a text box on the right.

In the screenshot, you can see the framed section of the organization chart from the perspective of the company “SuperBauer AG”, which was opened in the MainView.

Company

Tab “Relations”: Hierarchy levels



In the screenshot, you can see the framed section of the organization chart from the perspective of the company “Industrial Steel AG”, which was opened in the MainView.

Company

Company-specific document storage

Documents related to the company can be

- stored as binary files in the standard **'Documents' tab**, or
- via a **SharePoint link** in the 'Further information' section of the companies preview. This means that a SharePoint folder can be accessed directly from ADITO.

The screenshot displays the ADITO interface for a company profile. At the top, there is a star icon, a circular logo with a red 'B' and the name 'Bucher', and a close button. Below this, the company name 'Bucher Unternehmensgruppe' and its identification number 'Cust.-No.: 3698' are shown. A navigation bar contains icons for folders, documents, a timer, and a menu. The main content area is divided into sections: 'Tags' with an input field 'Enter tag'; 'Communication'; 'Addresses'; 'Further information' which contains a table of details; 'Relevant Documents'; and 'Turnover'. A vertical sidebar on the left is labeled 'Company' with a back arrow. The 'SharePoint Link' entry in the 'Further information' table is highlighted with a red rectangle.

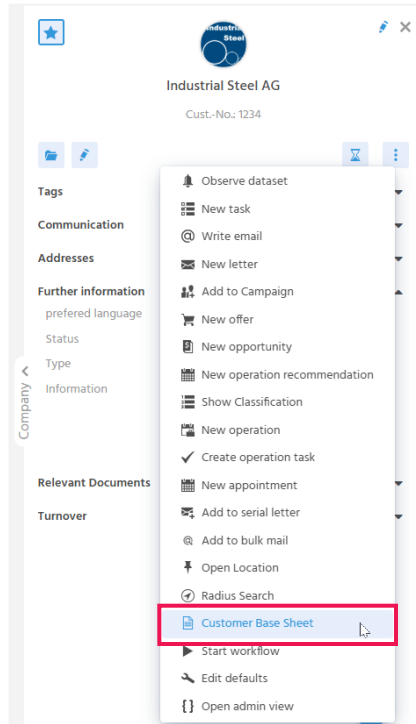
Further information	
Preferred language	German
Status	Active
Type	Prospect
SharePoint Link	https://aditosoftware.sharepoint.com/sites/

Further tabs

Tabs and their functionalities

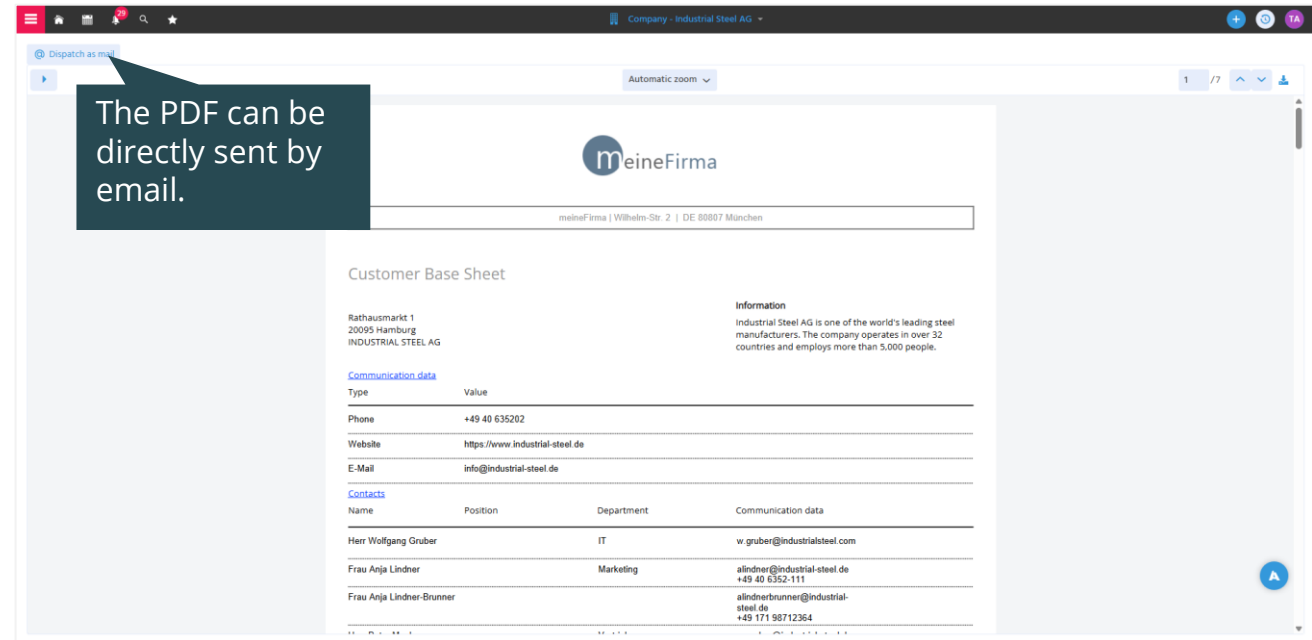
- **Planning:** Graphic overview of the created sales plans
- **Conditions:** Entering information and customer-specific prices
- **Operations/tasks:** Display of operations and operational tasks with resourcing planning
- **Documents:** Storage for binary files
- **Supervision:** Listing of areas and responsible parties
- **Checklist entries:** Display of checklists to support qualification efforts
- **Advertising:** Overview of channel-specific advertising settings and interests. For more information can be found in the marketing-specific documentation
- **Duplicates:** Display of duplicates recognized by the system. Further information can be found in the documentation on "Duplicate Management"
- **Logs:** List of changes made to the dataset

Create a Customer Base Sheet



The screenshot shows the ADITO interface for a company named 'Industrial Steel AG'. The left sidebar contains a 'Company' menu with various options. The 'Customer Base Sheet' option is highlighted with a red box. A dropdown menu is open, showing various actions like 'Observe dataset', 'New task', 'Write email', etc. The 'Customer Base Sheet' option is at the bottom of the dropdown.

- Observe dataset
- New task
- Write email
- 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



The screenshot shows the 'Customer Base Sheet' PDF document. A callout box points to the 'Dispatch as mail' button, stating: 'The PDF can be directly sent by email.' The document content includes the 'meineFirma' logo, company address, and contact information.

meineFirma
meineFirma | Wilhelm-Str. 2 | DE 80807 München

Customer Base Sheet

Information
Industrial Steel AG is one of the world's leading steel manufacturers. The company operates in over 32 countries and employs more than 5.000 people.

Communication data

Type	Value
Phone	+49 40 635202
Website	https://www.industrial-steel.de
E-Mail	info@industrial-steel.de

Contacts

Name	Position	Department	Communication data
Herr Wolfgang Gruber		IT	w.gruber@industrialsteel.com
Frau Anja Lindner		Marketing	alindner@industrial-steel.de +49 40 6352-111
Frau Anja Lindner-Brunner			alindnerbrunner@industrial-steel.de +49 171 98712364

Company

Classification

- Attributes and fields of the Context that are relevant for classification and are already maintained by the company are used for the classification.
- In the case of attributes that can be set multiple times, the property with the highest value is utilized.
- The classifications are rated (A, B, C, D, etc.) depending on the points earned.
- The “Show Classification” action brings up the detailed overview of the classification and recalculates it based on the latest database (for more information, see the following slide).

The screenshot displays a user interface for a company profile. At the top, there's a navigation bar with icons for home, calendar, notifications, search, and favorites. The main header shows the company logo (a red circle with a white stylized 'G'), the name 'Glob Group', and the customer number 'Cust.-No.: 1212'. Below this, there's a section for 'Tags' and 'Communication' with fields for E-Mail (contact@globgroup.com), Phone (+44 20 1432 3000), and another Phone (+49 871 9751500). The 'Addresses' section is empty. The 'Further information' section shows 'preferred language' as English, 'Status' as Active, and 'Type' as Customer. The 'Relevant Documents' and 'Turnover' sections are also empty. A dropdown menu is open on the right side, listing various actions: 'Observe dataset', 'New task', 'Write email', 'New letter', 'Add to Campaign', 'New offer', 'New opportunity', 'New operation recommendation', 'Show Classification' (highlighted with a red box), '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', and 'Open admin view'. At the bottom, there's a status bar with three indicators: '94 Days inactive', '0% Turnover change', and 'BB Classification'. A dark blue speech bubble points to the 'Show Classification' option in the dropdown menu.

Identification of the classification in the MainView (and in the FilterView)

94 Days inactive | 0% Turnover change | BB Classification

Classification: Indicator, Values, Valuation

Classification ×		
Classifications: 6		
☐ Indicator	Value	Valuation
☐ ▼ 1. Classification: 53/85 points = B (3)		
☐ Assessment / Industry	Maschinenbau	20/32 Points
☐ Assessment / Target group	Kunde	30/30 Points
☐ Assessment / Employee count	270.00	3/22.5 Points
☐ ▼ 2. Classification: 76.5/100 points = A (3)		
☐ Assessment / Loyalty	Mittel	24/40 Points
☐ Assessment / Creditworthiness	B	22.5/30 Points
☐ Assessment / Risk	kein Risiko	30/30 Points

- Classifications comprise several parameters from a specific subject area.
- Indicators can be dynamically available; this means that, for example, different information is entered for a Prospect than for a Customer.
- The indicators consist of attributes and fields of the Context, which are relevant for the classification.
- Values that are available for selection for the attributes and fields are scored.

Company

Company changes name (1/2)

In the Preview: click on the Edit-button in order to change the company name.



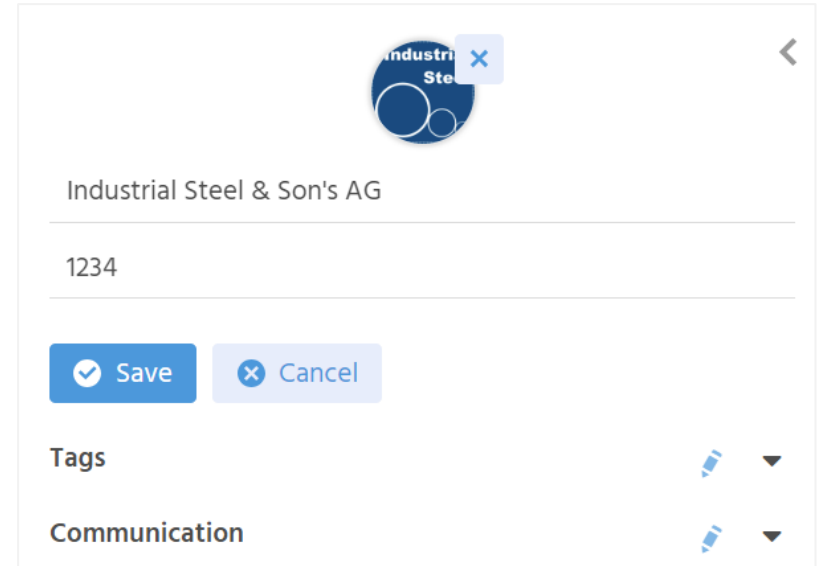
The card displays the company logo, name, and customer number. A red box highlights the edit icon in the top right corner. A speech bubble points to this icon with the text: "In the Preview: click on the Edit-button in order to change the company name." Below the company name is the customer number "Cust.-No.: 1234". At the bottom, there are sections for "Tags" and "Communication", each with an edit icon and a dropdown arrow.

Industrial Steel AG

Cust.-No.: 1234

Tags

Communication



The edit form shows the company name and customer number in input fields. The name field contains "Industrial Steel & Son's AG" and the customer number field contains "1234". Below these fields are "Save" and "Cancel" buttons. At the bottom, there are sections for "Tags" and "Communication", each with an edit icon and a dropdown arrow.

Industrial Steel & Son's AG

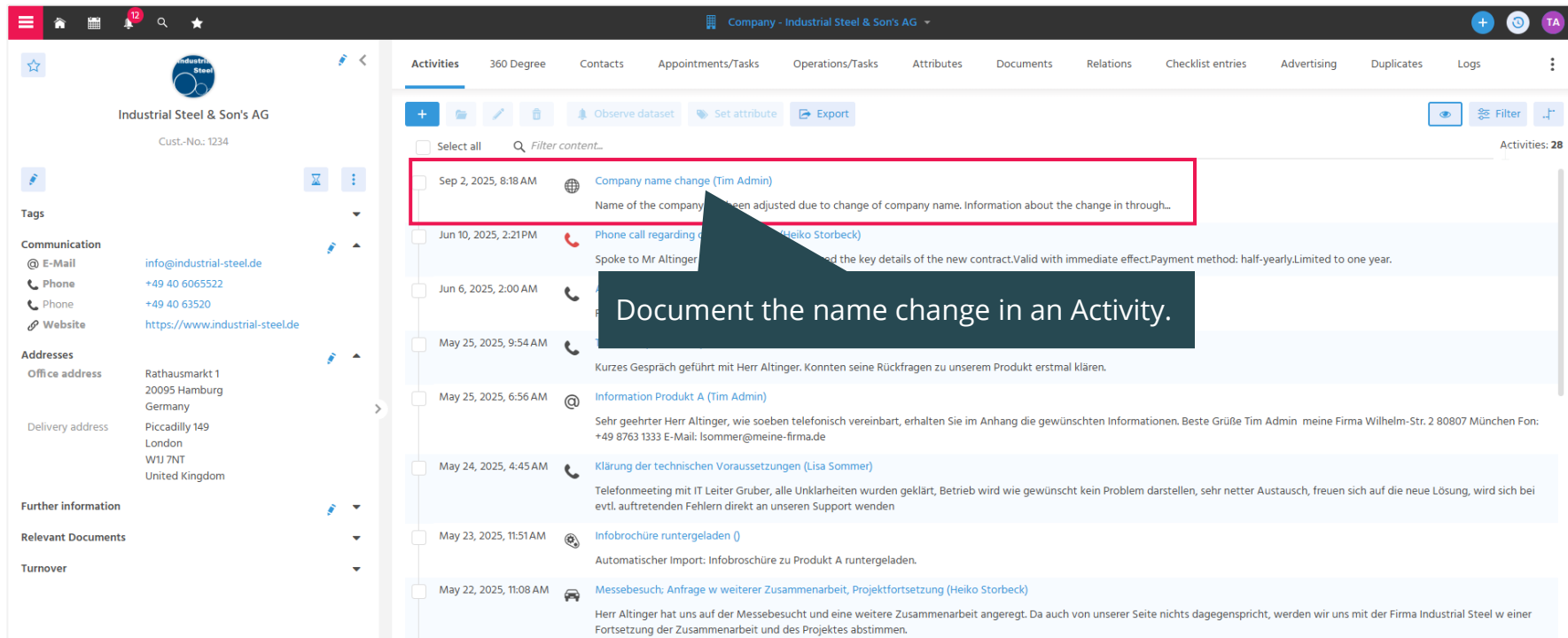
1234

Save Cancel

Tags

Communication

Company changes name (2/2)



Company - Industrial Steel & Son's AG

Cust.-No.: 1234

Communication

- E-Mail: info@industrial-steel.de
- Phone: +49 40 6065522
- Phone: +49 40 63520
- Website: <https://www.industrial-steel.de>

Addresses

- Office address: Rathausmarkt 1, 20095 Hamburg, Germany
- Delivery address: Piccadilly 149, London, W1J 7NT, United Kingdom

Further information

Relevant Documents

Turnover

Activities

- Company name change (Tim Admin)**
Name of the company has been adjusted due to change of company name. Information about the change in through...
- Phone call regarding...** (Heiko Storbeck)
Spoke to Mr Altinger... the key details of the new contract. Valid with immediate effect. Payment method: half-yearly. Limited to one year.
- Jun 6, 2025, 2:00 AM**
Kurzes Gespräch geführt mit Herr Altinger. Konnten seine Rückfragen zu unserem Produkt erstmal klären.
- May 25, 2025, 9:54 AM**
Information Produkt A (Tim Admin)
Sehr geehrter Herr Altinger, wie soeben telefonisch vereinbart, erhalten Sie im Anhang die gewünschten Informationen. Beste Grüße Tim Admin meine Firma Wilhelm-Str. 2 80807 München Fon: +49 8763 1333 E-Mail: Isommer@meine-firma.de
- May 24, 2025, 4:45 AM**
Klärung der technischen Voraussetzungen (Lisa Sommer)
Telefonmeeting mit IT Leiter Gruber, alle Unklarheiten wurden geklärt, Betrieb wird wie gewünscht kein Problem darstellen, sehr netter Austausch, freuen sich auf die neue Lösung, wird sich bei evtl. auftretenden Fehlern direkt an unseren Support wenden
- May 23, 2025, 11:51 AM**
Infobroschüre heruntergeladen ()
Automatischer Import: Infobroschüre zu Produkt A heruntergeladen.
- May 22, 2025, 11:08 AM**
Messebesuch: Anfrage w weiterer Zusammenarbeit, Projektfortsetzung (Heiko Storbeck)
Herr Altinger hat uns auf der Messebesuch und eine weitere Zusammenarbeit angeregt. Da auch von unserer Seite nichts dagegenspricht, werden wir uns mit der Firma Industrial Steel w einer Fortsetzung der Zusammenarbeit und des Projektes abstimmen.

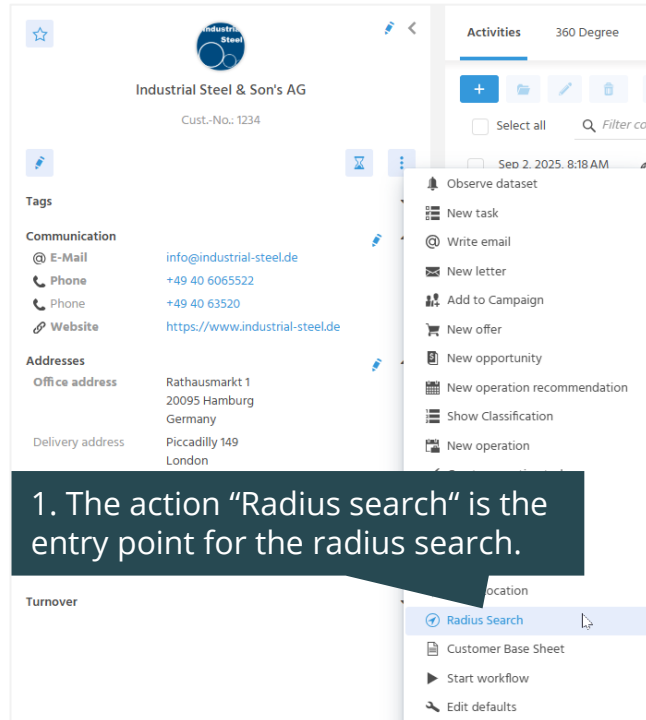
Company

When can a company be deleted?

- If there are **no further links** behind the company
 - The company can be deleted from the CRM by the user using the delete button
- If there are **additional links** associated with the Company (in Activities, Contacts, Tasks, Documents, Opportunities, Offers, Contracts or Relations), the dataset can no longer be deleted.
 - The company will be set to **Status = inactive** by the user.
- If a company is a **duplicated dataset**
 - Resolve duplicates, so the duplicate will be deleted.

Company – Radius search

Finding companies in the radius of a company



Industrial Steel & Son's AG
Cust.-No.: 1234

Tags

Communication

- @ E-Mail: info@industrial-steel.de
- Phone: +49 40 6065522
- Phone: +49 40 63520
- Website: <https://www.industrial-steel.de>

Addresses

Office address: Rathausmarkt 1, 20095 Hamburg, Germany

Delivery address: Piccadilly 149, London

Activities

- Observe dataset
- New task
- Write email
- New letter
- Add to Campaign
- New offer
- New opportunity
- New operation recommendation
- Show Classification
- New operation

Turnover

Location

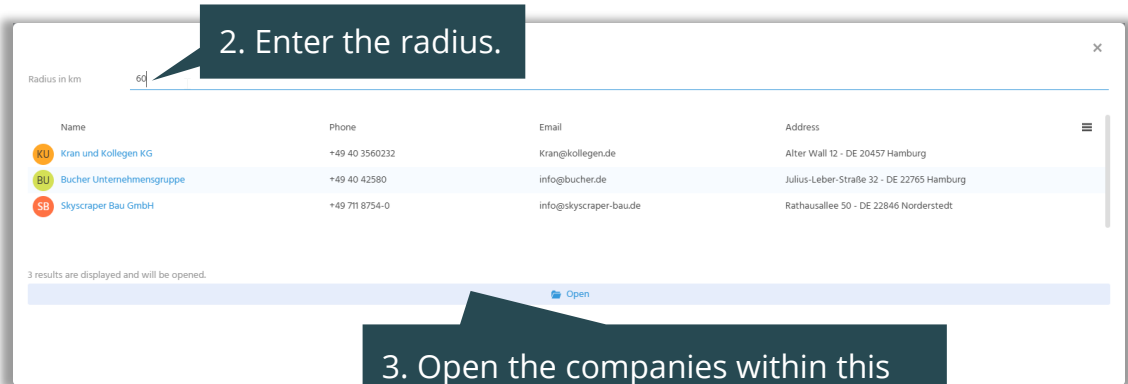
Radius Search

Customer Base Sheet

Start workflow

Edit defaults

1. The action "Radius search" is the entry point for the radius search.



2. Enter the radius.

Radius in km: 60

Name	Phone	Email	Address
 Kran und Kollegen KG	+49 40 3560232	Krangkollegen.de	Alter Wall 12 - DE 20457 Hamburg
 Bucher Unternehmensgruppe	+49 40 42580	info@bucher.de	Julius-Leber-Straße 32 - DE 22765 Hamburg
 Skyscraper Bau GmbH	+49 711 8754-0	info@skyscraper-bau.de	Rathausallee 50 - DE 22846 Norderstedt

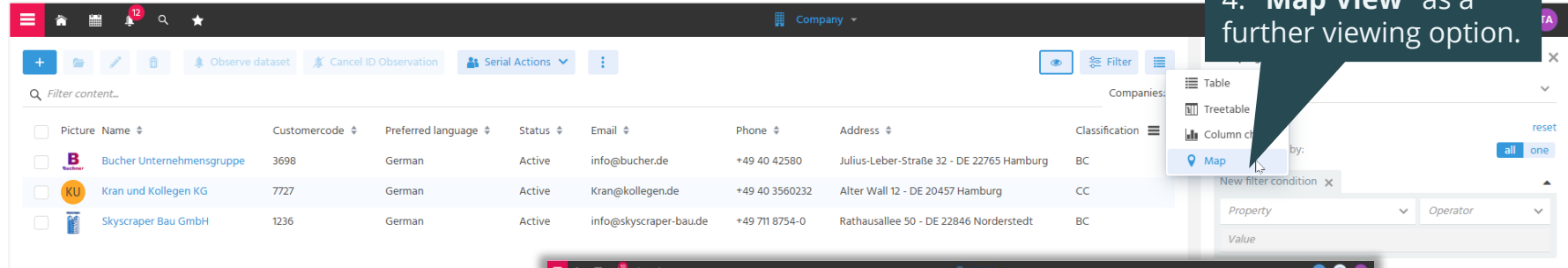
3 results are displayed and will be opened.

Open

3. Open the companies within this radius in the **FilterView**.

Company – Radius search

Finding companies in the radius of a company



4. "Map View" as a further viewing option.

Picture	Name	Customercode	Preferred language	Status	Email	Phone	Address	Classification
	Bucher Unternehmensgruppe	3698	German	Active	info@bucher.de	+49 40 42580	Julius-Leber-Straße 32 - DE 22765 Hamburg	BC
	Kran und Kollegen KG	7727	German	Active	Kran@kollegen.de	+49 40 3560232	Alter Wall 12 - DE 20457 Hamburg	CC
	Skyscraper Bau GmbH	1236	German	Active	info@skyscraper-bau.de	+49 711 8754-0	Rathausallee 50 - DE 22846 Norderstedt	BC

Filter can be used in the other available view modes.

In the Tooltip, the address is shown.

By clicking on the pin, the Preview opens.

Contact



Contact – technical mapping

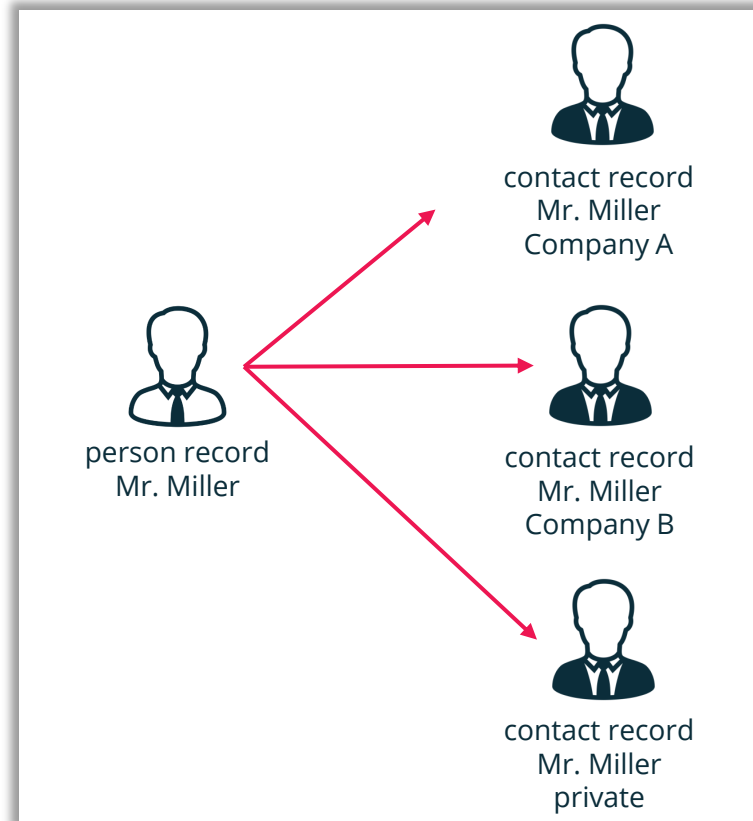
Example

Mr. Miller appears several times in the system:

- Mr. Miller is always the same person
→ **one person record**
 - Personal data that is the same in every function (e.g. name, date of birth)
 - Storage in the person record
- Mr. Miller can hold various functions
→ **one or more contact records**
 - Function-related data that varies depending on the function (e.g. company, communication data)
 - Stored in the contact record
 - The function can also be 'private' if the person is registered as a **private individual**



In ADITO, a **contact** is **always** represented as a **combination of person and function**.



Contact

Personified Lettersalutation

You can enter an individual salutation for the contact as a “personified lettersalutation”.

- The personified letter salutation can be subsequently added in the Preview of the contact. It will then be used in letters and emails.
- If no personified letter salutation has been added, it will be created by default from the salutation, title and surname.

The screenshot displays a contact management interface for a contact named Mr. Joe Miller. The interface includes a header with a star icon, a profile picture with initials 'JM', and the contact's name and company. Below the header, there are icons for folders, a pencil, and a trash can. The main section is a list of fields for the contact, including Tags, Communication, Addresses, Company Addresses, and Further information. The 'Further information' section is expanded, showing fields for Gender, Salutation, Date of birth, Preferred language, Status, Department, Contactrole, and Position. The 'Lettersalutation' field is highlighted with a red border and contains the text 'Hello Joe'. At the bottom of the form, there are 'Save' and 'Cancel' buttons. The footer shows '0 Other active functions' and '0 Open tasks'.

Gender	Male	X
Salutation	Mr.	▼
Date of birth	Date of birth	📅
Preferred language	English	▼
Status	Active	X
Department	Sales	X
Contactrole	Sales manager	X
Position	Position	▼
Lettersalutation	Hello Joe	

Save Cancel

Relevant Documents

0 Other active functions | 0 Open tasks

Further tabs

Tabs and their functionalities

Analogue to company:

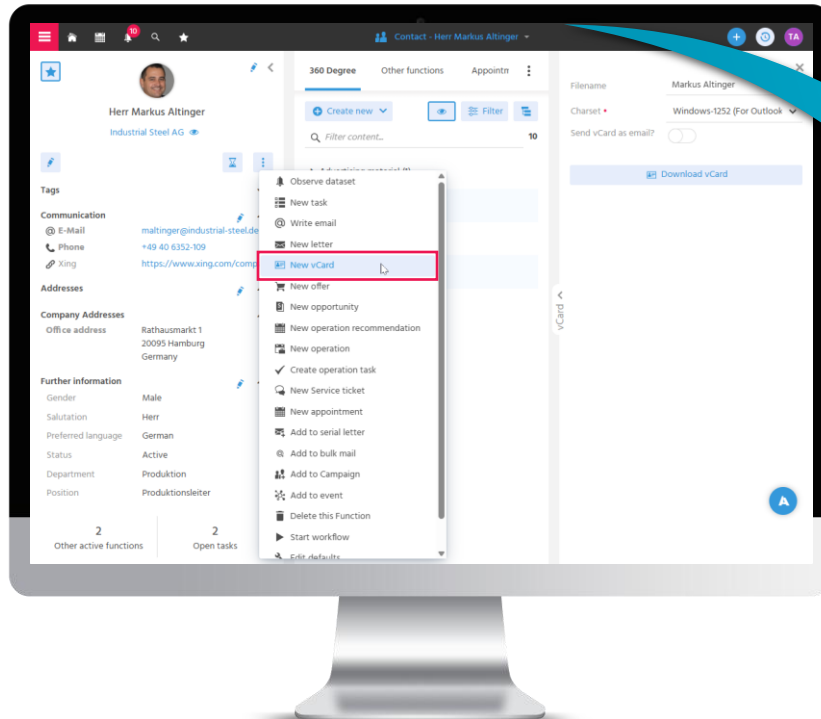
- **Activities**
- **360 Degrees**
- **Appointments/Tasks**
- **Operations/Tasks:** Display of operations and operational tasks with resource planning
- **Attributes**
- **Documents:** Storage for binary files
- **Relations:** Who is acquainted with whom, who is supported by whom, and who reports to whom?
- **Advertising:** Overview of channel-specific advertising settings and interests
- **Data Privacy:** Overview of the data protection relevant information
Further information can be found in the documentation “Data protection in the contact person”.
- **Duplicates:** Display of duplicates recognized by the system
- **Logs:** List of changes made to the dataset

vCard Export/Import



vCard Export

General procedure



Open contact preview

Execute the 'Generate vCard' action

Download

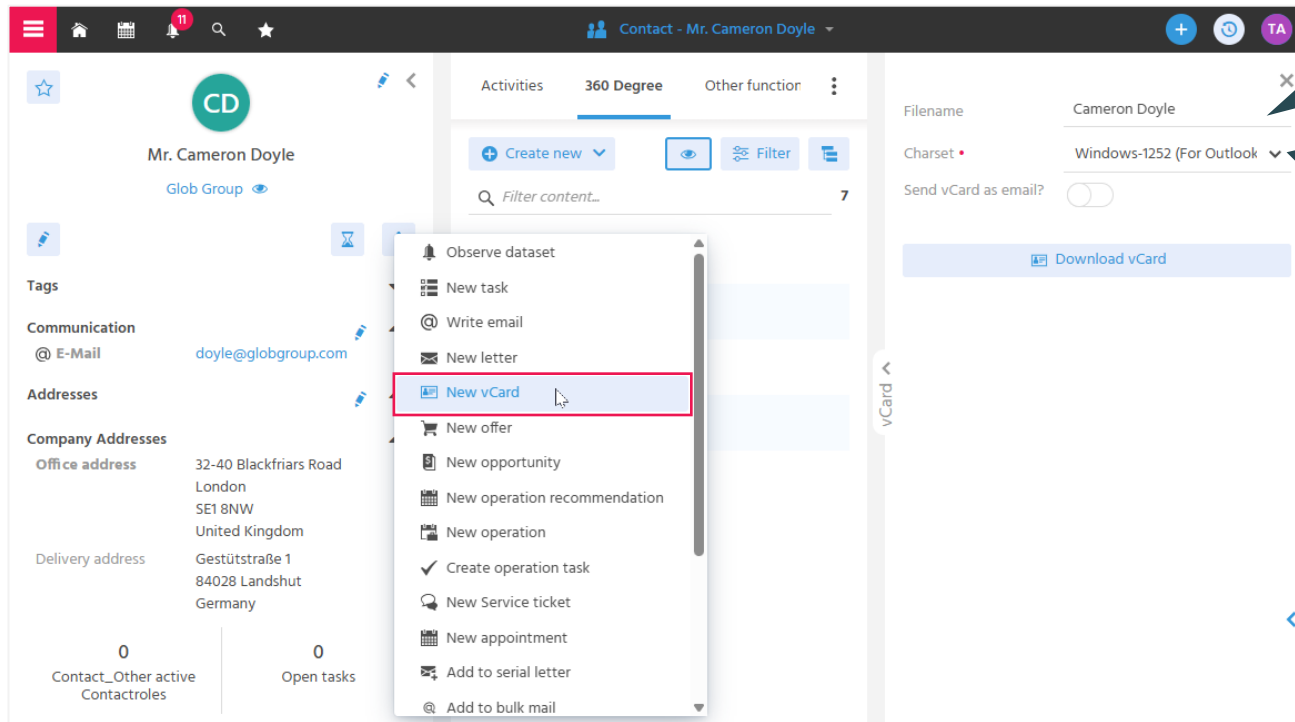
- vCard or
- vCard attached to an email



The exported vCard
complies with VCF 3.0.

vCard Export

Download vCard



The screenshot shows the ADITO interface for a contact named Mr. Cameron Doyle. On the left, there is a sidebar with contact details including tags, communication (E-Mail: doyle@globgroup.com), addresses, and company addresses. The main area displays a list of activities for this contact. A context menu is open over the activities list, with the 'New vCard' option highlighted. On the right, a panel titled 'vCard' shows the export settings: Filename (Cameron Doyle), Charset (Windows-1252 (For Outlook)), and a toggle for 'Send vCard as email'. A 'Download vCard' button is visible at the bottom of this panel.

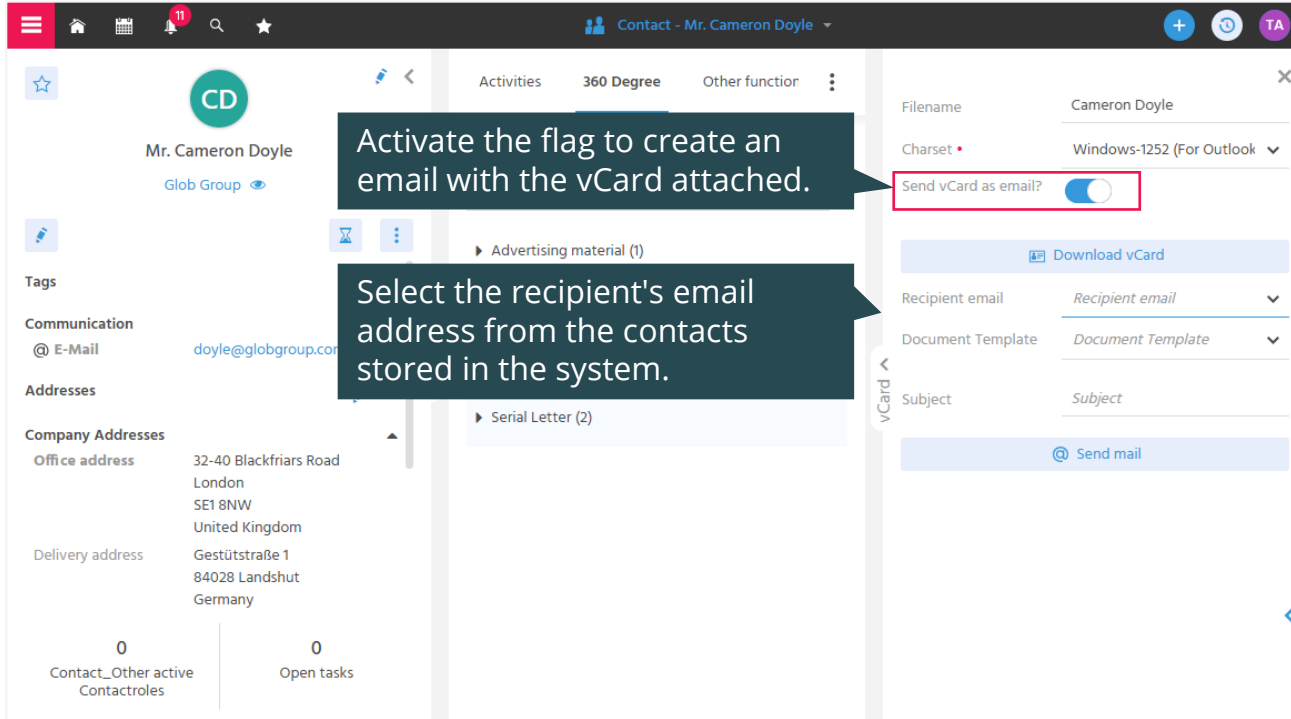
The file name can be customised as needed.

UTF-8 (for mobile devices) or Windows-1252 (for Outlook)

Download in vcf format

vCard Export

Download vCard attached to an email



Mr. Cameron Doyle
Glob Group

Tags

Communication
@ E-Mail
doyle@globgroup.com

Addresses

Company Addresses
Office address
32-40 Blackfriars Road
London
SE1 8NW
United Kingdom

Delivery address
Gestütstraße 1
84028 Landshut
Germany

0 Contact_Other active Contactroles

0 Open tasks

Activities 360 Degree Other function

Advertising material (1)

Serial Letter (2)

Filename Cameron Doyle

Charset Windows-1252 (For Outlook)

Send vCard as email? ☒

Download vCard

Recipient email Recipient email

Document Template Document Template

Subject Subject

Send mail

Activate the flag to create an email with the vCard attached.

Select the recipient's email address from the contacts stored in the system.

Recipient email	m.kleber@holzwurm.de	X
Document Template	Email with signature	X
Subject	Mr. Doyle's vCard	

Senden	An	☐ m.kleber@holzwurm.de
	Cc	
	Bcc	☐ mailbridge@domain.local
Betreff Mr. Doyle's vCard		
Cameron Doyle.vcf 27 KB		

Sehr geehrter Herr Kleber,

Kind regard
Herr Tim A

meineFirma GmbH
Liebigstraße 3

The salutation depends on the recipient's preferred language.



Activity

Activity

Definition

Activities document the **communication that has taken place** and are **linked to the objects** that are involved.

The link shows the activity for the objects involved (e.g. the dataset of the company, the contact who was spoken to, the offer that prompted the call, etc.)

In ADITO, the activities are recorded using 3 characteristics:

- **Category:** Phone, mail, visit, online meeting, etc.
- **Direction:** outgoing, incoming, internal
- **Key activity:** yes/no – optical indication of very important activities



The distribution of tasks is mapped separately via the “Tasks” context.



Activity

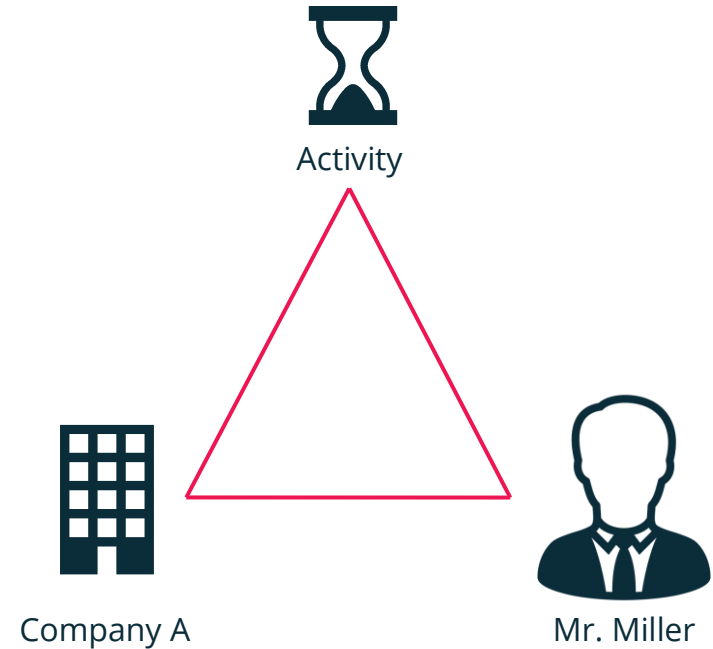
Linking with objects

Activity is linked with corresponding datasets depending on the situation.

Example:

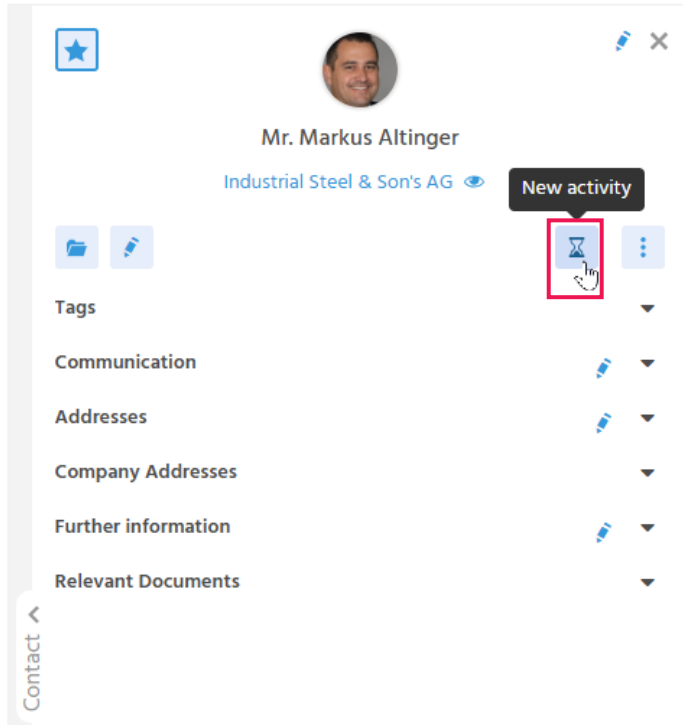
You have telephoned with Mr. Miller from Company A.

- **Activity “Phone”** is connected with object **Mr. Miller** and object **Company A**



Activity

Automatic links when creating



Click on the ⌚ button, to link a new activity with the dataset of **Markus Altinger** and the dataset of **Industrial Steel AG**.

Thus, after saving, it is only visible at Industrial Steel AG; all other companies where Mr Markus Altinger is active remain unaffected.



The ⌚ button is hidden for inactive datasets (Company/Contact). When creating a new activity, inactive contacts can no longer be searched in the link selection.

Creating new (1/3)

87

Required value is missing

Activity

Creating new (2/3)

Templates can be used to make it easier to record the content of an activity.

These are selected in the “Templates” field and added in the “Description” field under any text that has already been entered. Several templates can also be added.

For example, an “initial visit” can be documented using the “Visit report” and “Initial contact” templates.

In addition, “topics” can be stored on the templates, which are inserted in the activity when the template is used. If topics are set to inactive at some point, they are no longer applied. If topics are stored in several templates, they are only inserted once in the activity.

Subject •

Template

Description

! Subject

Template

Q search

Name	Language
Besuchsbericht	German
Erstkontakt	German
Visitreport	English

Additional templates can be added to the system by the specialist administrator.

Responsible Tim Admin

Key activity

Save Cancel

Required value is missing

Activity

Creating new (3/3)

The datasets from which the new creation of the activity was initiated are automatically linked. In this case, the “New activity” action was performed on the “Markus Altinger” contact. Consequently, the company for which this contact works is also automatically linked.

Date • 9/2/2025
12:56 PM

Category • ! Category
! Direction

Direction • ! Direction

Responsible Tim Admin

Key activity ☐

Connection

+ Contact	▼	Mr. Markus Altinger	▼	—
Company	▼	Industrial Steel & Son's AG	▼	—
! Type	▼	! Object	▼	—

Add Attribute

+ Attribute	▼	Value
-------------	---	-------

Document +

Only favorite topics ☐

Topic

+ ↑	Vertrieb > Erstkontakt > Allgemein	↓
Description		

Advertising shipment ☐

To visually highlight an activity with particularly important information in the overview, it can be marked as a “key activity”. The icon for the activity is then displayed in red.

Additional links to other datasets can also be included.

The “File upload” field can be added to record documents (e.g., scanned letters).

Further information to [topic tree](#)

Further information about the advertising shipment can be found in the documentation to the topic “Sales”.

Save Cancel

Required value is missing

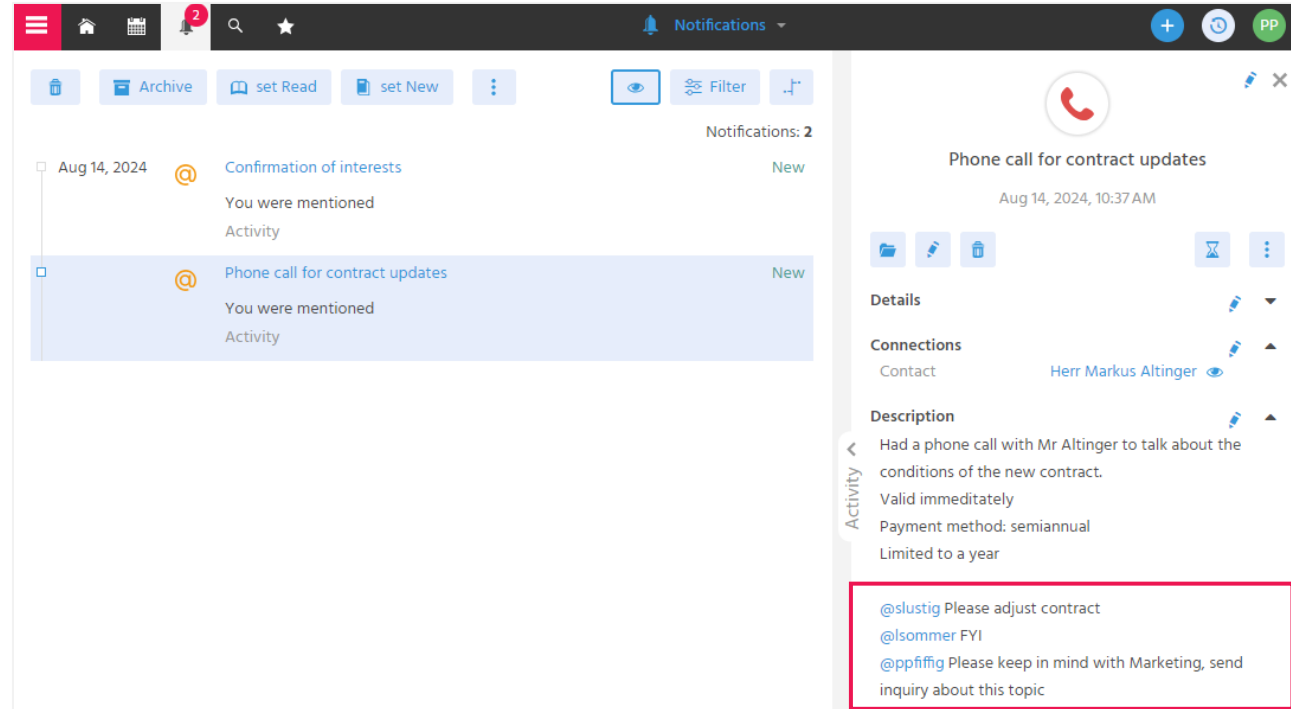
Activity

Mentioning colleagues

For example, to draw the attention of several colleagues to the information recorded in an activity, they can be mentioned in the activity's description.

This means that they can quickly find out about it or implement small tasks directly. It is no longer necessary to derive a task from the activity.

As soon as the activity is saved, the mentioned colleagues receive a notification.



The screenshot displays the ADITO application interface. The top navigation bar includes a menu icon, home, calendar, notifications (with a red badge showing '2'), search, and star icons. Below the navigation bar, there are buttons for 'Archive', 'set Read', 'set New', and a 'Filter' button. The main content area shows a list of activities. The first activity is dated 'Aug 14, 2024' and titled 'Confirmation of interests'. The second activity is titled 'Phone call for contract updates' and is highlighted in blue. The right sidebar shows the details of the selected activity, 'Phone call for contract updates', dated 'Aug 14, 2024, 10:37 AM'. The details section includes 'Details', 'Connections' (listing 'Herr Markus Altinger'), and 'Description'. The description text is: 'Had a phone call with Mr Altinger to talk about the conditions of the new contract. Valid immediately. Payment method: semiannual. Limited to a year'. At the bottom of the sidebar, there is a red-bordered box containing three mentions: '@slustig Please adjust contract', '@lsommer FYI', and '@ppffig Please keep in mind with Marketing, send inquiry about this topic'.

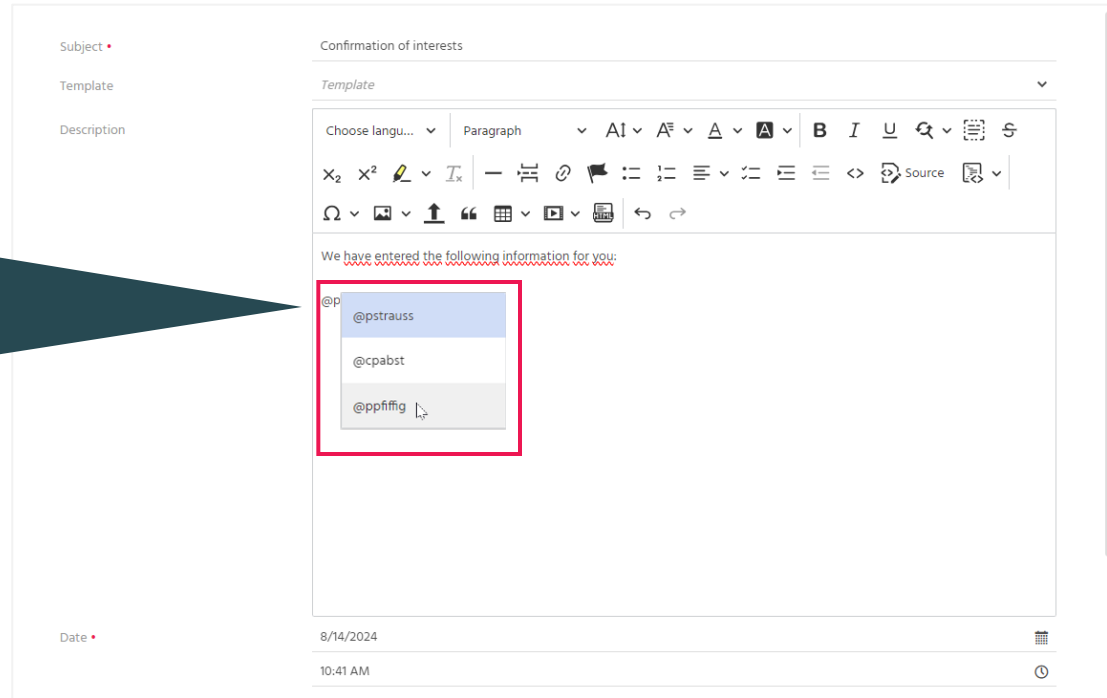
Activity

Mentioning colleagues

Mention colleagues by entering the first letter of their name after the @ sign (without spaces).

You will then be shown a **selection list** that uses autocomplete, and you can select from it.

The mentioned colleagues will receive a notification (see previous slide) and can be informed.



The screenshot shows an email composition window. On the left, there are fields for 'Subject', 'Template', and 'Description'. On the right, there is a 'Confirmation of interests' section with a 'Template' dropdown. Below this is a rich text editor with a toolbar containing various formatting options like bold, italic, underline, and link. The main text area contains the sentence 'We have entered the following information for you:'. Below this sentence, an autocomplete selection list is displayed, triggered by the '@p' prefix. The list shows three suggestions: '@pstrauss', '@cpabst', and '@ppffiffig'. The first suggestion, '@pstrauss', is highlighted with a blue background. A red rectangular box is drawn around the entire selection list. At the bottom of the window, there are fields for 'Date' showing '8/14/2024' and '10:41 AM'.

Activity

Manual relinking

If you would like to connect additional datasets with the activity, you can also do this subsequently in the Preview.

To do this, edit the area “Connections” and add the respective dataset.



Phone call regarding contract update

Jun 10, 2025, 2:21 PM





Details

Direction

Outgoing

Category

Phone

Responsible

Heiko Storbeck 

Key activity

Yes

Connections



 ! Type	▼	! Object	▼	—
Company	▼	Industrial Steel & So	▼	—
Contact	▼	Mr. Markus Altinger	▼	—
Contract	▼	Framework contract	▼	—

Required value is missing

 Save  Cancel

Description



Spoke to Mr Altinger on the phone and discussed the key details of the new contract.

Valid with immediate effect.

Payment method: half-yearly.

Limited to one year.

0

Documents



Topic tree

- With the topic tree, the possibility has been created to assign topics to Contexts (e.g., activities), which are organized in a tree structure. A description (free text) can be stored for each of these topics.
- This means that datasets of these Contexts can be recorded quickly and in a structured manner, and evaluated (filtered) by topic in order to derive recommendations for action from this analysis. The analysis, based on the topics, can also take place in linked datasets, such as company/contact information according to topics that were recorded in linked activities.
- An even more efficient use of the topic tree is possible by utilizing topic tree favorites or topic tree presets. The most important topics are individually marked or categorized by department to enable quicker access or automatic entry.



Further information on the use and administration of the topic tree can be found in the separate document titled “Contact Management: Topic Tree”.

Activity

Tab “History”: connection with Tasks or Activities

- Tasks, service tickets, or subsequent activities can be created for an activity.
- The connections are displayed in the tab “History”.

The screenshot displays a software interface for managing activities. At the top, a red phone icon is next to the title "Phone call regarding contract update". Below the title, the date and time "Jun 10, 2025, 2:21PM" are shown. A sidebar on the left contains icons for a folder, a pencil, and a trash can. The main content area is divided into sections: "Details", "Connections", and "Description". The "Details" section lists "Direction" (Outgoing), "Category" (Phone), "Responsible" (Heiko Storb), and "Key activity" (Yes). The "Connections" section lists "Task" (Rahmenvert), "Company" (Industrial Steel & Son's AG), "Contact" (Mr. Markus Altinger), and "Contract" (Framework contract 1005 | Valid, limi...). The "Description" section contains the text: "Spoke to Mr Altinger on the phone and discussed the key details of the new contract. Valid with immediate effect. Payment method: half-yearly. Limited to one year." A context menu is open over the "Connections" section, listing options: "Observe dataset", "Export", "New task", "New offer", "New Service ticket", "Open admin view", and "New appointment".

Phone call regarding contract update

Jun 10, 2025, 2:21PM

Details

Direction: Outgoing

Category: Phone

Responsible: Heiko Storb

Key activity: Yes

Connections

Task: Rahmenvert

Company: Industrial Steel & Son's AG

Contact: Mr. Markus Altinger

Contract: Framework contract 1005 | Valid, limi...

Description

Spoke to Mr Altinger on the phone and discussed the key details of the new contract.

Valid with immediate effect.

Payment method: half-yearly.

Limited to one year.

Context menu options:

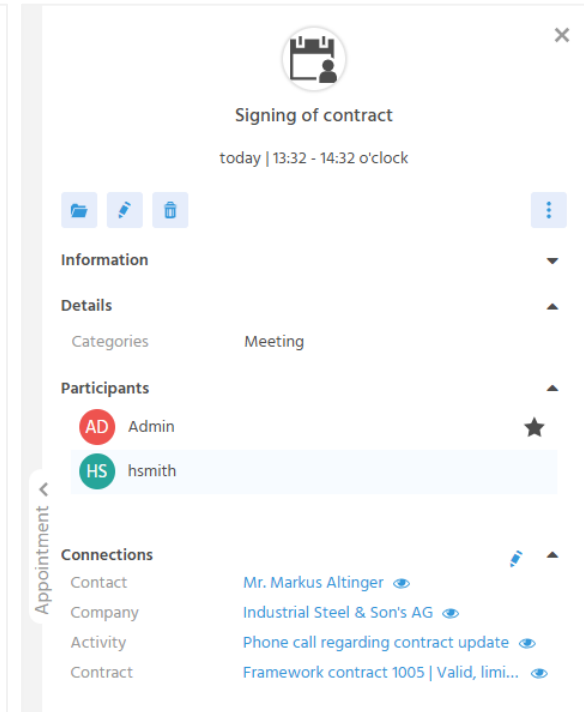
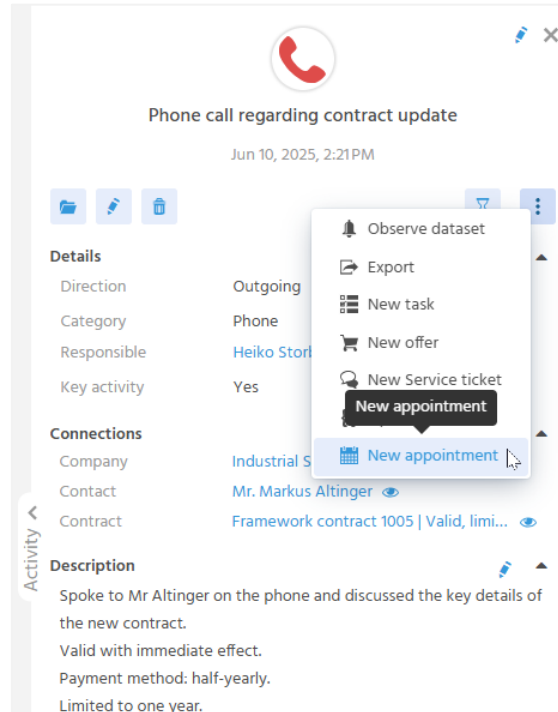
- Observe dataset
- Export
- New task
- New offer
- New Service ticket
- Open admin view
- New appointment

Activity

Creation of an appointment from the activity

If, for example, a call log is created for a contact and a telephone call with an appointment is logged in it, then it is possible to create an appointment from this activity.

- The appointment will be connected with the activity; in the appointment the connections from the activity will be taken over.
- The subject of the activity will be adopted into the information field of the appointment.



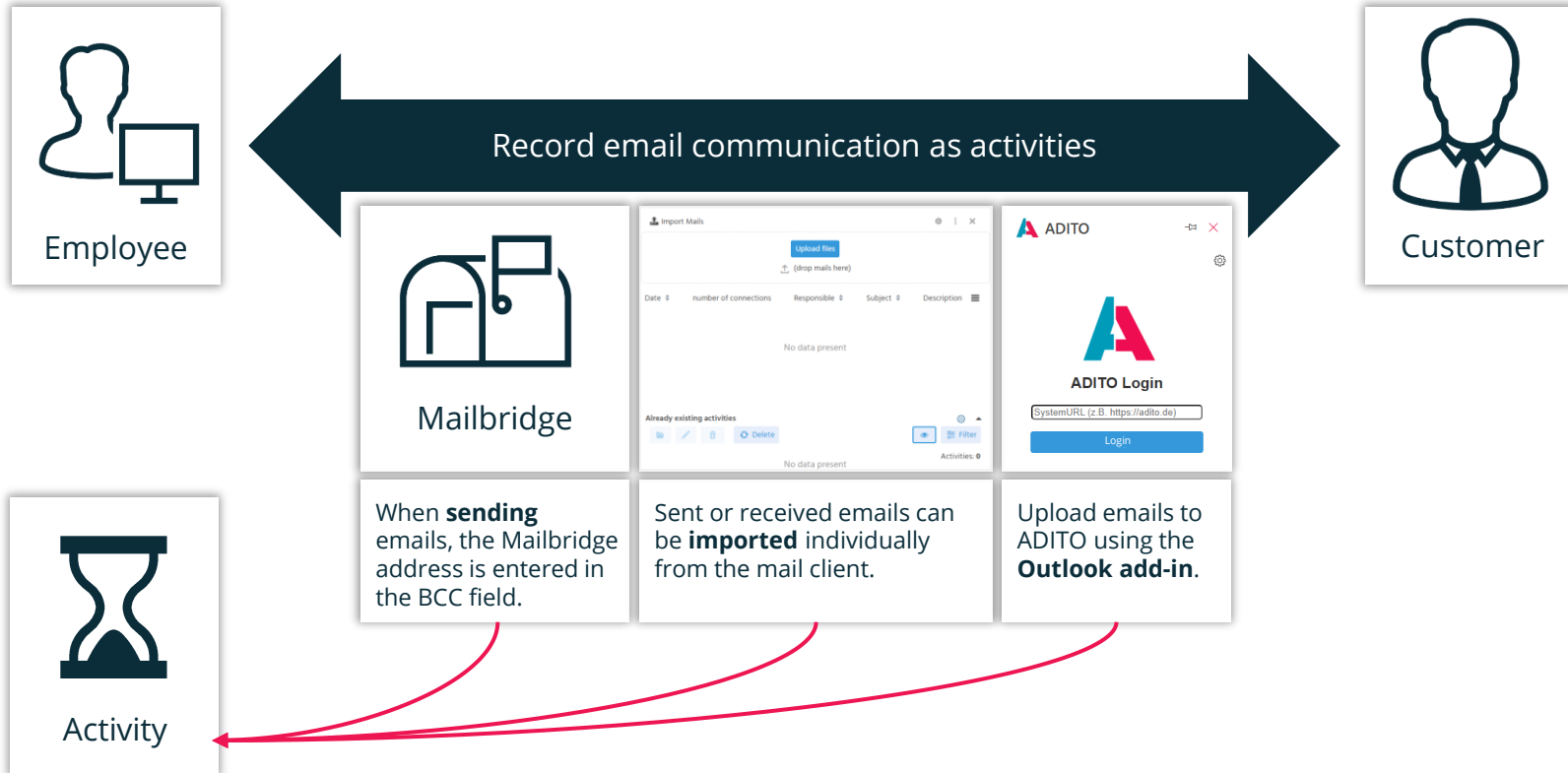
Activity

Automatic creation of activities for

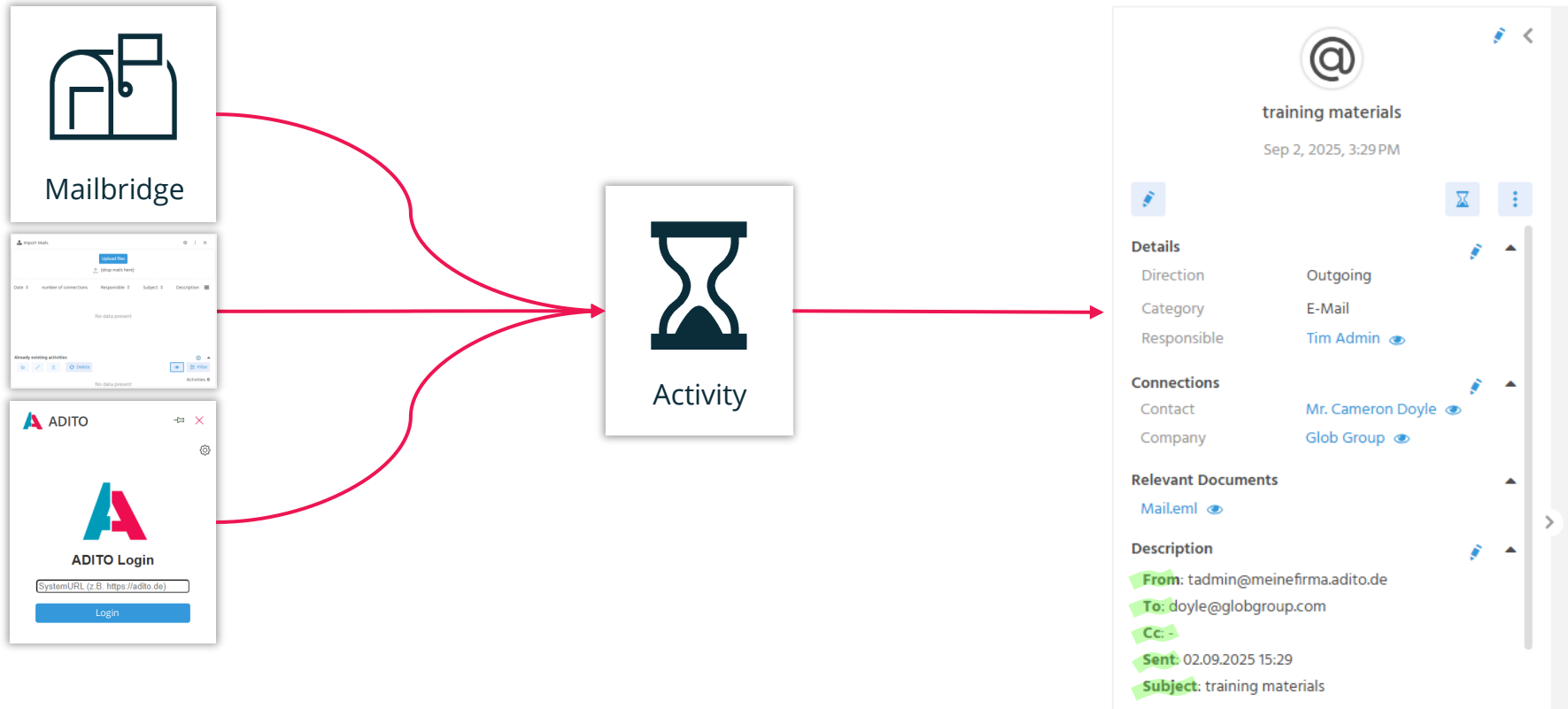
- Creation of letters
- Sending/receiving emails (via Activities Mailbridge, Import Dashlet, or Outlook Add-in)
- Sending out serial mails
- Step change in campaigns
- Editing a service ticket
- Or different processes (processes/actions), which are documented by an activity from the system

Explanation: When creating a letter, email, or serial mail, the dataset is automatically linked to the recipients. The activity can therefore also be found through the datasets (e.g., the “Activities” tab in the Company).

Activity: automatically record emails



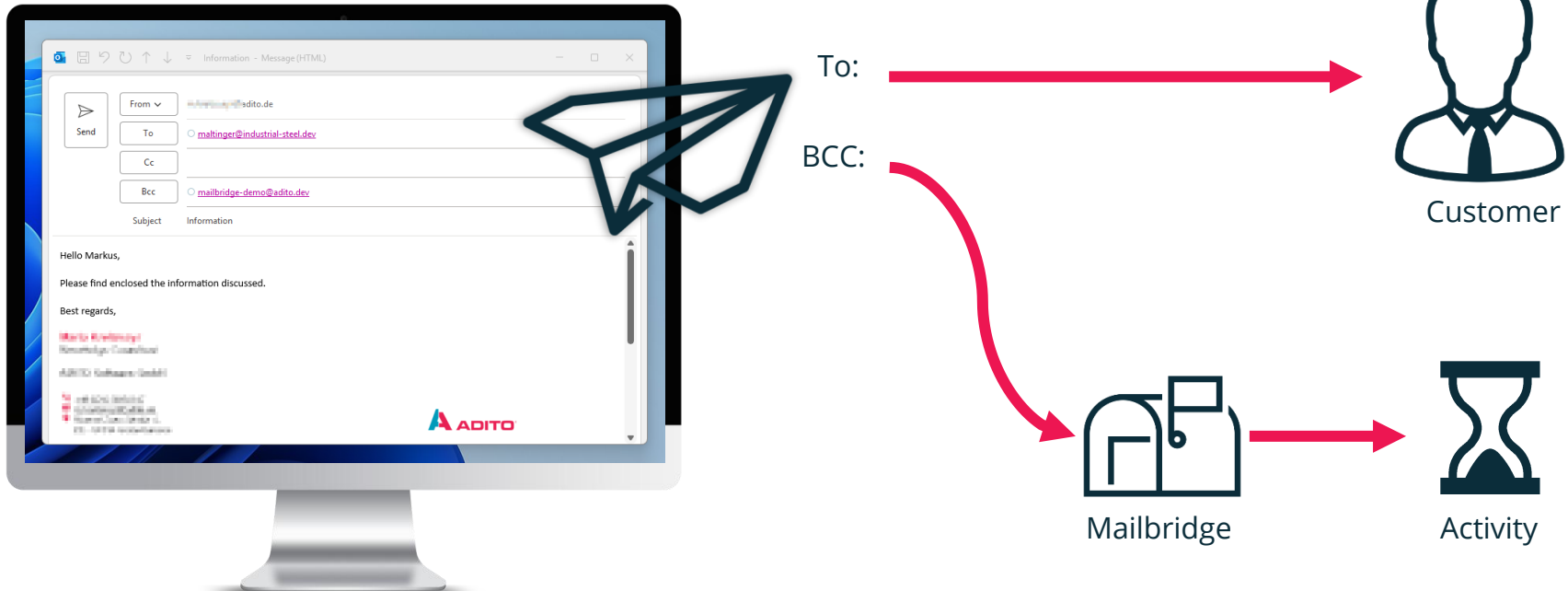
Activity: automatically record emails



Activity: automatically record emails

Outgoing email

When **sending** an email, the address of the Mailbridge will be added to the **BCC field**.



Activity: automatically record emails



Outlook Add-In

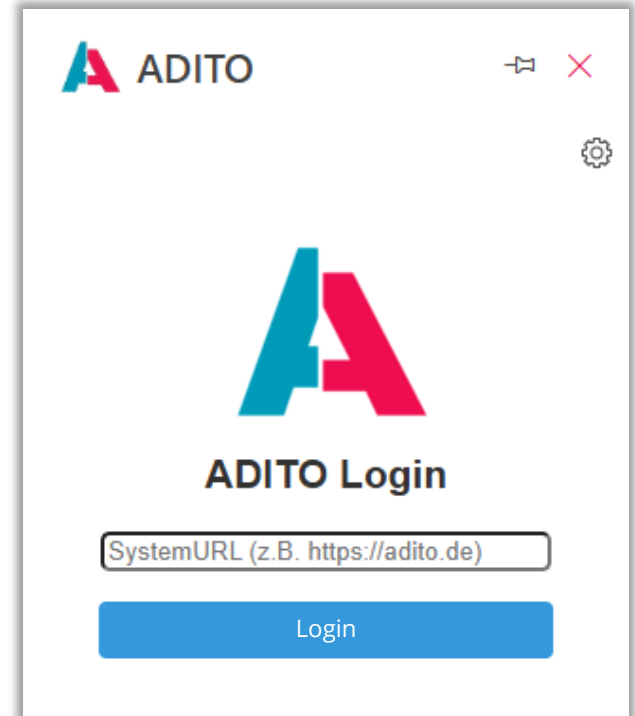
The ADITO Outlook Add-In integrates ADITO xRM functionality directly into Microsoft Outlook. It provides seamless access to business-relevant data from within Outlook, eliminating the need to switch applications.

The ADITO Outlook add-in enables you to:

- Display ADITO system data within the Outlook client.
- Open corresponding ADITO datasets in the ADITO client.
- Import (outgoing or incoming) emails directly from Outlook into the ADITO system.



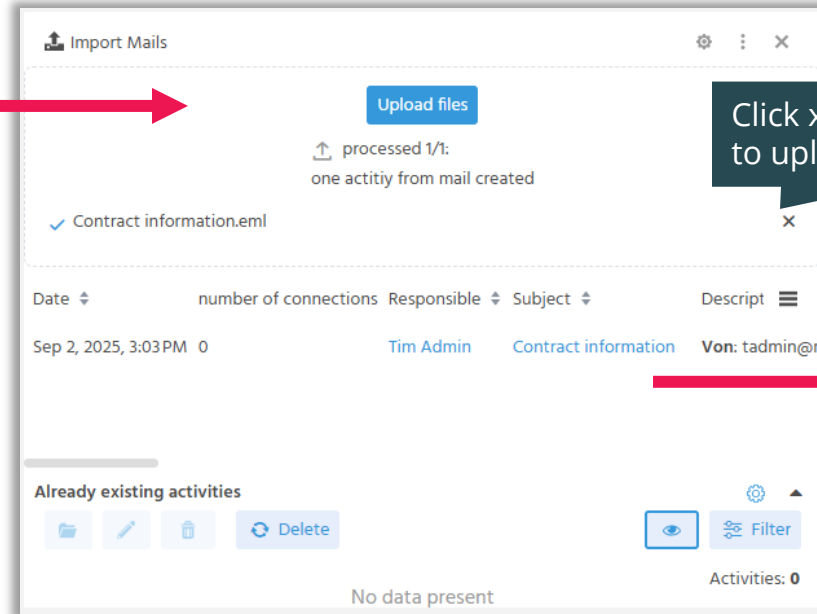
Information on **installation and use** can be found on the new help website.  [Installation and Usage | ADITO platform](#)



Activity: import mails

Dashlet "Import Mails"

The Dashlet "Import Mails" can be placed on the "My Dashboard" to enter (outgoing or incoming) emails as activity in ADITO.



Click x after each upload to upload the file again.

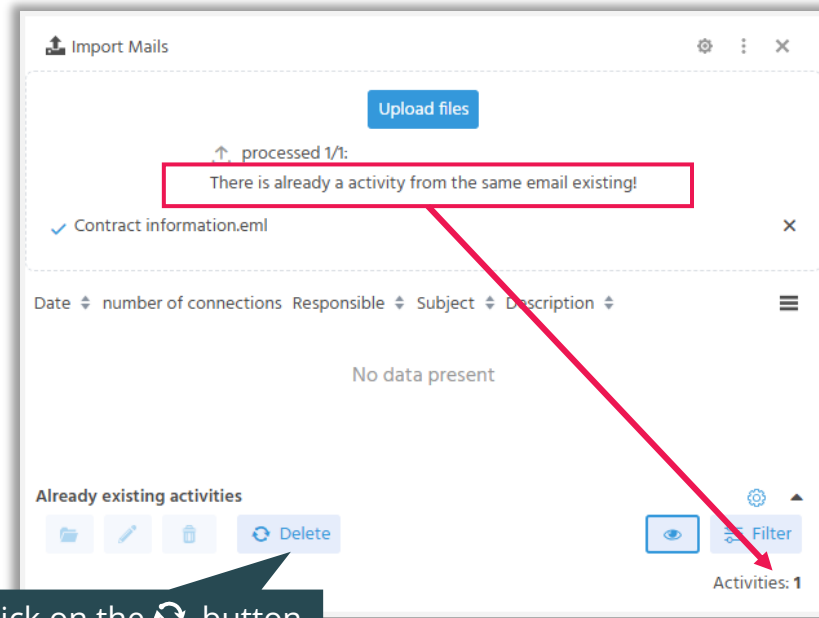


With Office 365, it is necessary to cache the mail on the desktop, for example, to drag it from there to the dashlet.

Activity: emails

Avoiding duplicates with activities from emails

- If an email has already been entered as an activity, it is displayed in the dashlet in the "Existing Activities" area and can be opened for further processing.
- If the email is received in the mail bridge a second time, the duplicate is discarded.



Click on the  button to update the view.

Activity: import emails

Please note:

Possible file formats for import:

- EML
- MSG (converted to EML during upload)

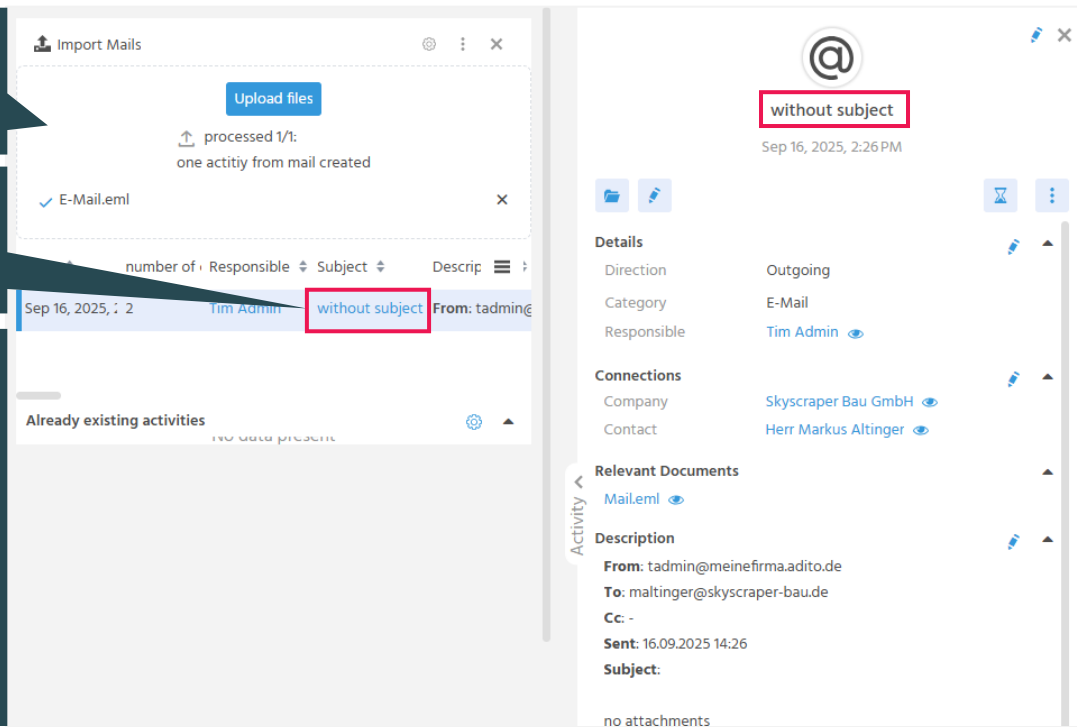
If the email subject line is missing, the activity will be created with the subject line "without subject."

If **invalid file formats** are imported, a message will be displayed:

E-mail processing error

During processing the e-mail an error has occurred.
Please contact an administrator.

OK



The screenshot displays the ADITO interface. On the left, the 'Import Mails' dialog is open, showing an 'Upload files' button and a status message: 'processed 1/1: one activity from mail created'. Below this, a table lists imported activities. The first entry is dated 'Sep 16, 2025, 12:26 PM' and has a subject line 'without subject' highlighted with a red box. The right sidebar shows the details of this activity, including a red box around the '@' icon and the text 'without subject'. The 'Details' section shows 'Direction: Outgoing', 'Category: E-Mail', and 'Responsible: Tim Admin'. The 'Connections' section lists 'Company: Skyscraper Bau GmbH' and 'Contact: Herr Markus Altinger'. The 'Relevant Documents' section shows 'MailEml'. The 'Description' section shows 'From: tadmin@meinefirma.adito.de', 'To: maltinger@skyscraper-bau.de', 'Cc: -', 'Sent: 16.09.2025 14:26', and 'Subject:'. At the bottom, it states 'no attachments'.

Activity: emails

Sender-receiver link

- For **external senders** and **internal recipients** who are recorded in the system,
 - a link to the external sender is created
 - the internal recipient becomes the importer and will be added as Responsible
- For **internal senders** and **external recipients** that are recorded in the system
 - creates a link to the external recipient
 - the internal sender is the importer and is listed as the responsible party

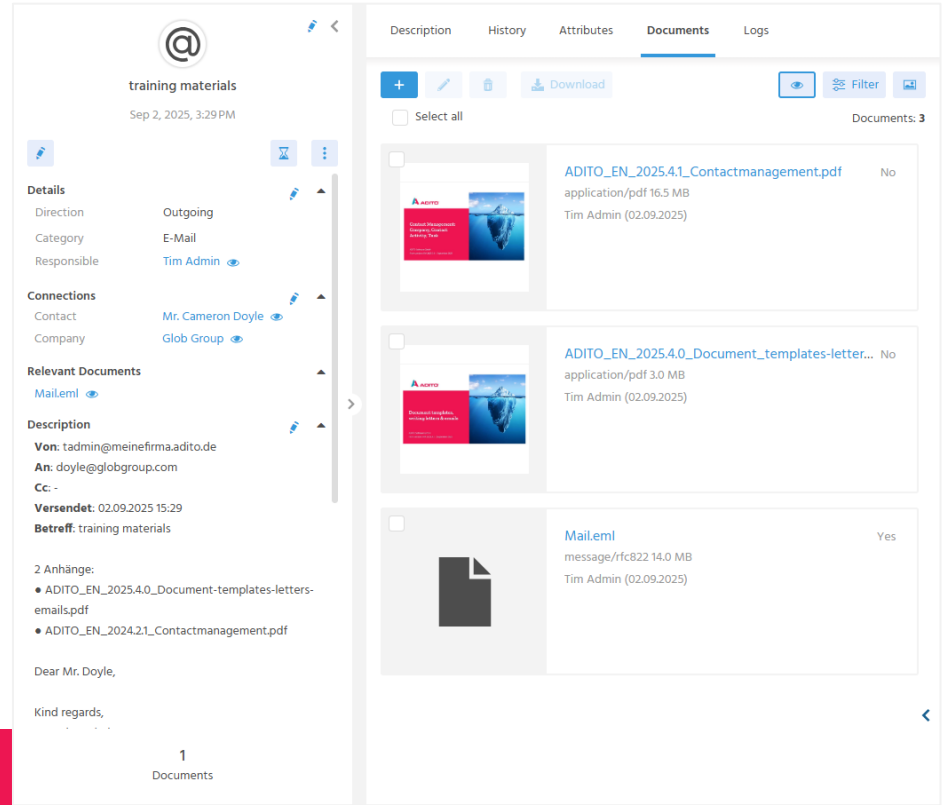
Who is who?

- **Sender**
 - **Extern** = external contact (at an external company or private), who is recorded in the system
 - **Intern** = employee (at my company) who is recorded in the system
- **Recipient**
 - **Extern** = external contact (at an external company or private), who is recorded in the system
 - **Intern** = employee (at my company) who is recorded in the system
- **Importer** = employee (at my company), who is recorded in the system

Activity: email

Email attachment in tab “Documents” in the activity

If emails with attachments are recorded as activity (by Mailbridge or the Import Dashlet), the attachments will be automatically added in the tab “Documents” next to the EML file.



The screenshot displays the ADITO interface for an email activity. On the left, the email details are shown, including the subject "training materials", date "Sep 2, 2025, 3:29 PM", and sender "tadmin@meinefirma.adito.de". The email body contains a greeting and two attachments: "ADITO_EN_2025.4.0_Document-templates-letters-emails.pdf" and "ADITO_EN_2024.2.1_Contactmanagement.pdf".

On the right, the "Documents" tab is active, showing a list of attachments. The first two are PDF files: "ADITO_EN_2025.4.1_Contactmanagement.pdf" (16.5 MB) and "ADITO_EN_2025.4.0_Document_templates-letter..." (3.0 MB). The third attachment is a "Mail.eml" file (14.0 MB) marked as "Yes".

Document	Size	Marked as Document
ADITO_EN_2025.4.1_Contactmanagement.pdf	16.5 MB	No
ADITO_EN_2025.4.0_Document_templates-letter...	3.0 MB	No
Mail.eml	14.0 MB	Yes

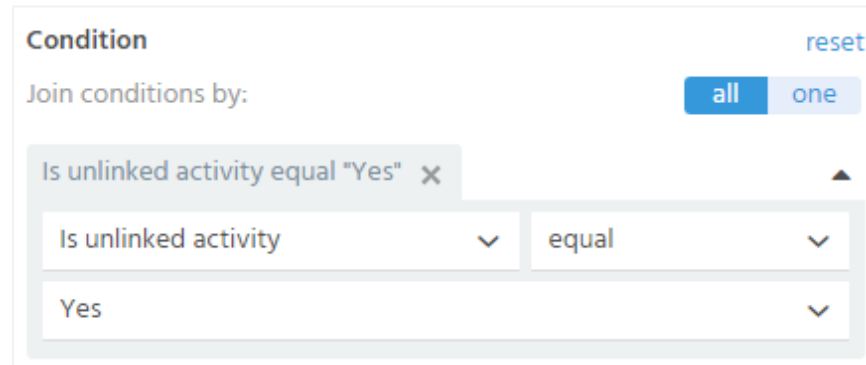
Activity

Recipient/sender address won't be recognized

If the recipient/sender address cannot be assigned during import, an **unlinked activity** is created. This can be [linked manually](#).

You can find these unlinked activities with help of the filter "Is unlinked activity" in the FilterView of the activities.

This allows you to clean them up.



The screenshot shows a filter configuration window titled "Condition". It includes a "reset" button in the top right corner. Below the title, it says "Join conditions by:" followed by two buttons: "all" (highlighted in blue) and "one". The main filter area contains a single condition: "Is unlinked activity equal 'Yes'". This condition is displayed in a light gray box with a close button (X) on the right. Below this box, there are three dropdown menus: the first is labeled "Is unlinked activity", the second is labeled "equal", and the third is labeled "Yes". Each dropdown menu has a downward arrow icon on its right side.

Category: system

Activities with the category "System" were created by processes/activities and should document specific processes. These activities created by the system should not be able to be edited or deleted by standard users.

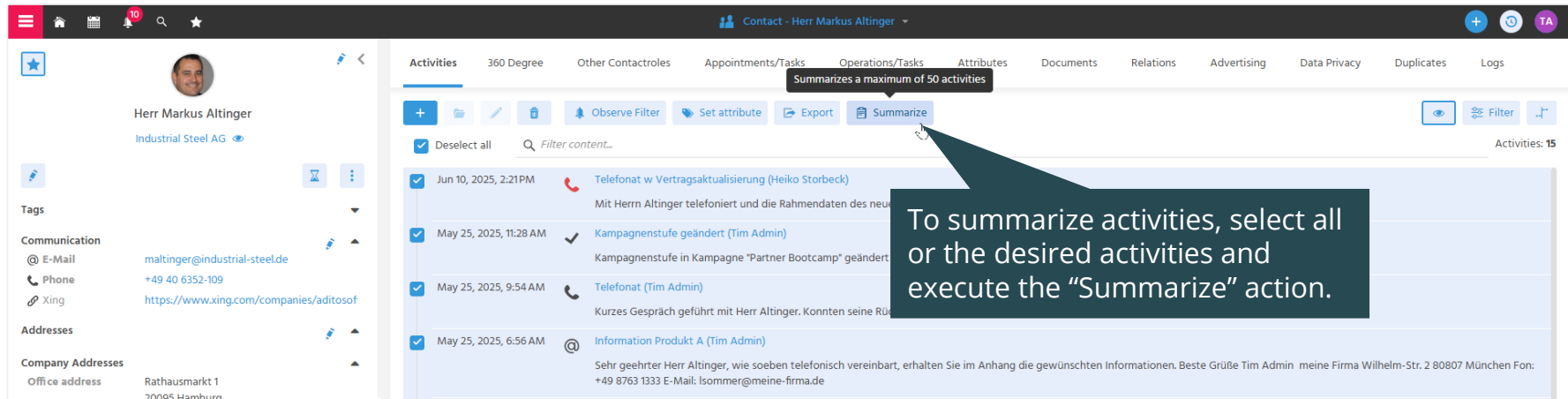
- The value "System" in the EditView is not available for the default user.
- Activities with the category "System" can only be deleted by or edited by users with the role "administrator".
- Filtering and grouping according to the category "System" is possible.

Activity

Summarize activities supported by AI



To use the AI function for summarizing activities, **the AI modules must be used**.
If the AI modules are not used, the “Summarize” button will not be displayed in the “Activities” tab.



The screenshot shows the ADITO interface for a contact named 'Herr Markus Altinger' from 'Industrial Steel AG'. The 'Activities' tab is active, displaying a list of activities. The 'Summarize' button is highlighted, and a tooltip indicates it 'Summarizes a maximum of 50 activities'. A callout box explains that to summarize activities, one should select all or the desired activities and execute the 'Summarize' action.

Activity	Date/Time	Details
✓ Jun 10, 2025, 2:21PM	Telefonat w Vertragsaktualisierung (Heiko Storbeck)	Mit Herrn Altinger telefoniert und die Rahmendaten des neu...
✓ May 25, 2025, 11:28 AM	Kampagnenstufe geändert (Tim Admin)	Kampagnenstufe in Kampagne "Partner Bootcamp" geändert
✓ May 25, 2025, 9:54 AM	Telefonat (Tim Admin)	Kurzes Gespräch geführt mit Herr Altinger. Konnten seine Rü...
✓ May 25, 2025, 6:56 AM	Information Produkt A (Tim Admin)	Sehr geehrter Herr Altinger, wie soeben telefonisch vereinbart, erhalten Sie im Anhang die gewünschten Informationen. Beste Grüße Tim Admin meine Firma Wilhelm-Str. 2 80807 München Fon: +49 8763 1333 E-Mail: Isommer@meine-firma.de

The screenshot displays the 'Summarization' interface with the following components and callouts:

- Period:** 30.10.2024 - 10.06.2025
- Activities:** 15 activities, including 2 approvals, 1 contact form, 2 emails, 1 letter, 6 phone calls, 1 system activity, and 2 visits
- Content:**
 - Language:** Choose langu... (dropdown)
 - Format:** Paragraph (dropdown)
 - Text Styling:** A1, A2, A3, A4, A5, A6, A7, A8, A9, A10, A11, A12, A13, A14, A15, A16, A17, A18, A19, A20, A21, A22, A23, A24, A25, A26, A27, A28, A29, A30, A31, A32, A33, A34, A35, A36, A37, A38, A39, A40, A41, A42, A43, A44, A45, A46, A47, A48, A49, A50, A51, A52, A53, A54, A55, A56, A57, A58, A59, A60, A61, A62, A63, A64, A65, A66, A67, A68, A69, A70, A71, A72, A73, A74, A75, A76, A77, A78, A79, A80, A81, A82, A83, A84, A85, A86, A87, A88, A89, A90, A91, A92, A93, A94, A95, A96, A97, A98, A99, A100, A101, A102, A103, A104, A105, A106, A107, A108, A109, A110, A111, A112, A113, A114, A115, A116, A117, A118, A119, A120, A121, A122, A123, A124, A125, A126, A127, A128, A129, A130, A131, A132, A133, A134, A135, A136, A137, A138, A139, A140, A141, A142, A143, A144, A145, A146, A147, A148, A149, A150, A151, A152, A153, A154, A155, A156, A157, A158, A159, A160, A161, A162, A163, A164, A165, A166, A167, A168, A169, A170, A171, A172, A173, A174, A175, A176, A177, A178, A179, A180, A181, A182, A183, A184, A185, A186, A187, A188, A189, A190, A191, A192, A193, A194, A195, A196, A197, A198, A199, A200, A201, A202, A203, A204, A205, A206, A207, A208, A209, A210, A211, A212, A213, A214, A215, A216, A217, A218, A219, A220, A221, A222, A223, A224, A225, A226, A227, A228, A229, A230, A231, A232, A233, A234, A235, A236, A237, A238, A239, A240, A241, A242, A243, A244, A245, A246, A247, A248, A249, A250, A251, A252, A253, A254, A255, A256, A257, A258, A259, A260, A261, A262, A263, A264, A265, A266, A267, A268, A269, A270, A271, A272, A273, A274, A275, A276, A277, A278, A279, A280, A281, A282, A283, A284, A285, A286, A287, A288, A289, A290, A291, A292, A293, A294, A295, A296, A297, A298, A299, A300, A301, A302, A303, A304, A305, A306, A307, A308, A309, A310, A311, A312, A313, A314, A315, A316, A317, A318, A319, A320, A321, A322, A323, A324, A325, A326, A327, A328, A329, A330, A331, A332, A333, A334, A335, A336, A337, A338, A339, A340, A341, A342, A343, A344, A345, A346, A347, A348, A349, A350, A351, A352, A353, A354, A355, A356, A357, A358, A359, A360, A361, A362, A363, A364, A365, A366, A367, A368, A369, A370, A371, A372, A373, A374, A375, A376, A377, A378, A379, A380, A381, A382, A383, A384, A385, A386, A387, A388, A389, A390, A391, A392, A393, A394, A395, A396, A397, A398, A399, A400, A401, A402, A403, A404, A405, A406, A407, A408, A409, A410, A411, A412, A413, A414, A415, A416, A417, A418, A419, A420, A421, A422, A423, A424, A425, A426, A427, A428, A429, A430, A431, A432, A433, A434, A435, A436, A437, A438, A439, A440, A441, A442, A443, A444, A445, A446, A447, A448, A449, A450, A451, A452, A453, A454, A455, A456, A457, A458, A459, A460, A461, A462, A463, A464, A465, A466, A467, A468, A469, A470, A471, A472, A473, A474, A475, A476, A477, A478, A479, A480, A481, A482, A483, A484, A485, A486, A487, A488, A489, A490, A491, A492, A493, A494, A495, A496, A497, A498, A499, A500, A501, A502, A503, A504, A505, A506, A507, A508, A509, A510, A511, A512, A513, A514, A515, A516, A517, A518, A519, A520, A521, A522, A523, A524, A525, A526, A527, A528, A529, A530, A531, A532, A533, A534, A535, A536, A537, A538, A539, A540, A541, A542, A543, A544, A545, A546, A547, A548, A549, A550, A551, A552, A553, A554, A555, A556, A557, A558, A559, A560, A561, A562, A563, A564, A565, A566, A567, A568, A569, A570, A571, A572, A573, A574, A575, A576, A577, A578, A579, A580, A581, A582, A583, A584, A585, A586, A587, A588, A589, A590, A591, A592, A593, A594, A595, A596, A597, A598, A599, A600, A601, A602, A603, A604, A605, A606, A607, A608, A609, A610, A611, A612, A613, A614, A615, A616, A617, A618, A619, A620, A621, A622, A623, A624, A625, A626, A627, A628, A629, A630, A631, A632, A633, A634, A635, A636, A637, A638, A639, A640, A641, A642, A643, A644, A645, A646, A647, A648, A649, A650, A651, A652, A653, A654, A655, A656, A657, A658, A659, A660, A661, A662, A663, A664, A665, A666, A667, A668, A669, A670, A671, A672, A673, A674, A675, A676, A677, A678, A679, A680, A681, A682, A683, A684, A685, A686, A687, A688, A689, A690, A691, A692, A693, A694, A695, A696, A697, A698, A699, A700, A701, A702, A703, A704, A705, A706, A707, A708, A709, A710, A711, A712, A713, A714, A715, A716, A717, A718, A719, A720, A721, A722, A723, A724, A725, A726, A727, A728, A729, A730, A731, A732, A733, A734, A735, A736, A737, A738, A739, A740, A741, A742, A743, A744, A745, A746, A747, A748, A749, A750, A751, A752, A753, A754, A755, A756, A757, A758, A759, A760, A761, A762, A763, A764, A765, A766, A767, A768, A769, A770, A771, A772, A773, A774, A775, A776, A777, A778, A779, A780, A781, A782, A783, A784, A785, A786, A787, A788, A789, A790, A791, A792, A793, A794, A795, A796, A797, A798, A799, A800, A801, A802, A803, A804,

Summarize activities supported by AI

Subject

Summary of 30.10.2024 - 10.06.2025

Template

Template

Description

Choose langu...

Paragraph

AI

A²

A

B

I

U

Source

HI

Mr. Altinger has been in contact regarding our products, expressing interest and enthusiasm. Several discussions, including phone calls and visits, have taken place to clarify questions and discuss contract details. A product presentation with positive feedback on design and pricing. Additional materials, such as brochures, have been sent. The next steps are pending the signing of a non-disclosure agreement, indicating progress toward a potential collaboration.

AI created

Date

8/7/2025

Category

Note

Direction

Internal

Responsible

Tim Admin

Key activity

Save

Cancel

The new activity view opens.

The description ends with the addition "AI created," so that it is clear that the text was generated by AI.

The system presets "Note" as the category.



Task

Task

Definition

Tasks help passing on open tasks:

- A person/group is assigned a task to work on

Tasks will be directly created from a dataset (company, contact, activity, etc.) and are linked to it. Generally, the task is displayed in a separate tab. If there is an underlying activity, the task can be seen in the “History” tab.



Group tasks, single tasks & confidential tasks

- Tasks can have a due date, a status and a priority.
- Tasks can be assigned to **several users** comparable to a **task pool**. As soon as the editor sets it to completed, the task is completed for everyone.
- Tasks can be assigned to **several people** as an **independent task**, so that each registered editor receives the task as an independent individual task. This must be set when creating a new task.
- If no editor nor department has been selected, the requestor will be automatically entered as editor.
- **Confidential tasks** with the indicator “private” can only be viewed by the requestor and the editor/s.

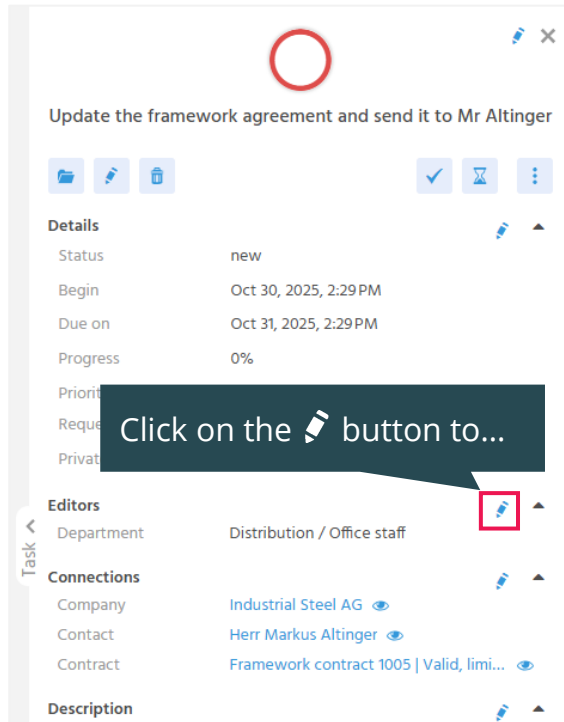
Task

Priority and due date are presented with colors and icons

Due date \ Priority				
	None	Low	Normal	High
Not due Begin time (date/time) is in the future and before the due date				
Due Begin time has been reached/exceeded, but is still before the due date				
Overdue Begin date and due date have been reached/exceeded				

Task

Adding editors in the Preview



Update the framework agreement and send it to Mr Altinger

Details

Status	new
Begin	Oct 30, 2025, 2:29 PM
Due on	Oct 31, 2025, 2:29 PM
Progress	0%
Priority	
Request	
Private	

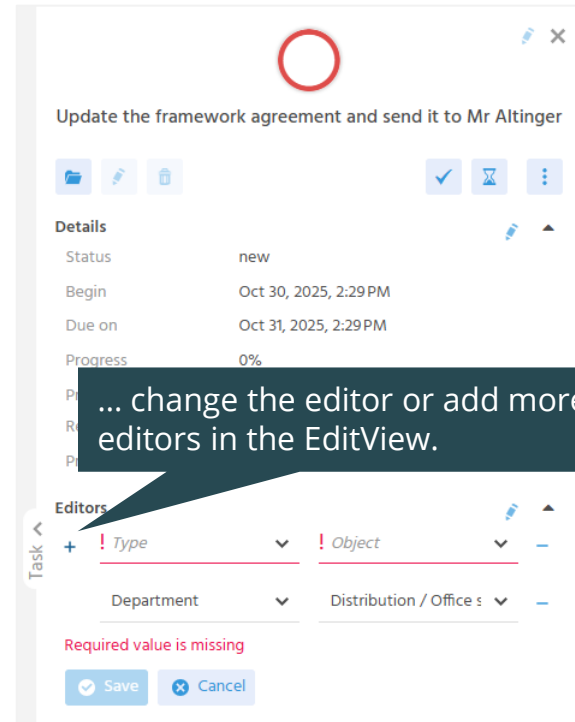
Editors

Department	Distribution / Office staff
------------	-----------------------------

Connections

Company	Industrial Steel AG
Contact	Herr Markus Altinger
Contract	Framework contract 1005 Valid, limi...

Description



Update the framework agreement and send it to Mr Altinger

Details

Status	new
Begin	Oct 30, 2025, 2:29 PM
Due on	Oct 31, 2025, 2:29 PM
Progress	0%
Priority	
Request	
Private	

Editors

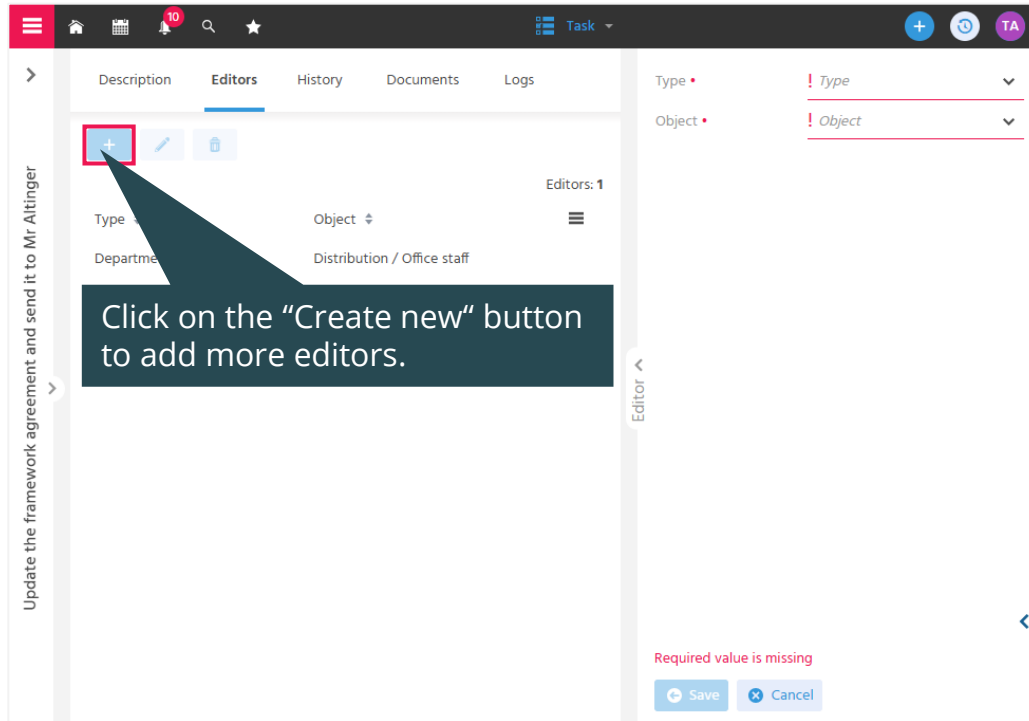
Type	Object
Department	Distribution / Office s

Required value is missing

Save Cancel

Task

Adding editors in the tab "Editors"



Update the framework agreement and send it to Mr. Altinger

Task

Description Editors History Documents Logs

+ Create new

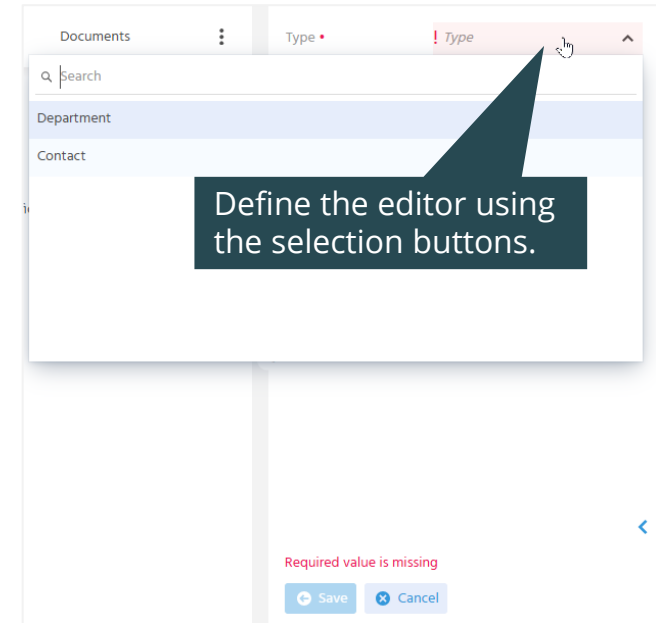
Editors: 1

Type • Object •

Distribution / Office staff

Required value is missing

Save Cancel



Documents

Type •

Search

Department

Contact

Define the editor using the selection buttons.

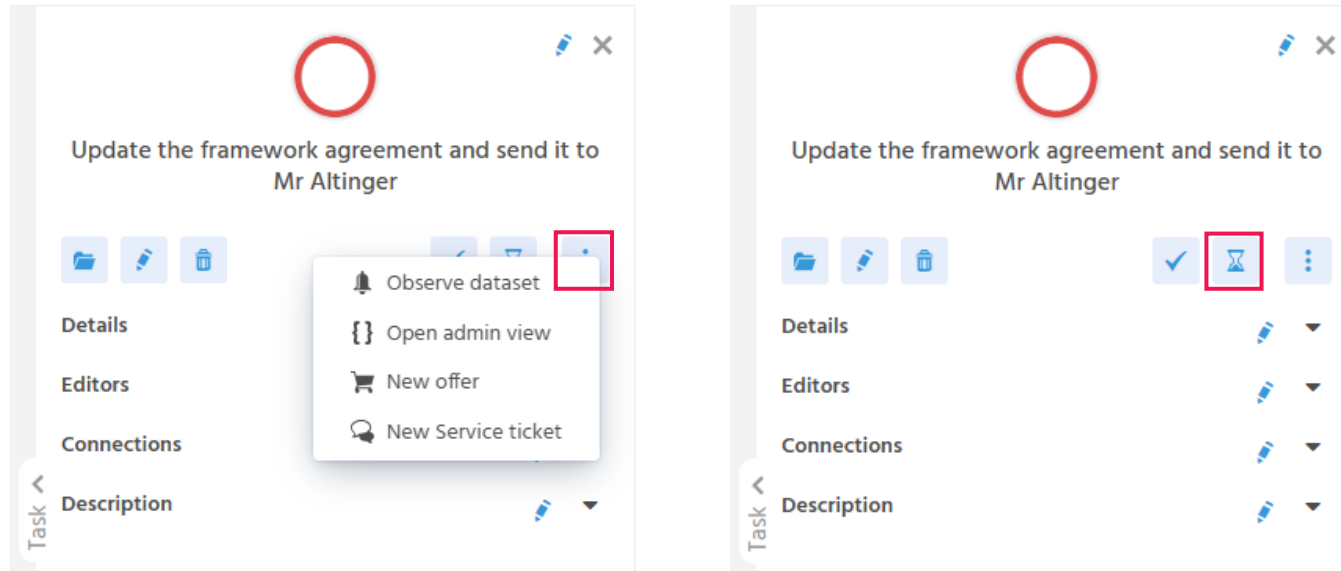
Required value is missing

Save Cancel

Task

Tab “History”: Link with service tickets or activities

- Service tickets or subsequent activities can be created for a task.
- These links can be seen in the “History” tab.



Task

Use Cases

When using tasks, there are various use cases:

- Where can I see my tasks that I have to work on?
 - [In the FilterView “Tasks”](#)
 - [In Dashlet “Appointment/Tasks”](#)
- Where can I see if someone has finished the task that I have created for them?
 - [Observations of tasks with me as requestor](#)
- How can I take over tasks of somebody else?
 - [In the FilterView Tasks, you can adjust the filter](#)
(taking into account the authorization concept)
- ...

Task

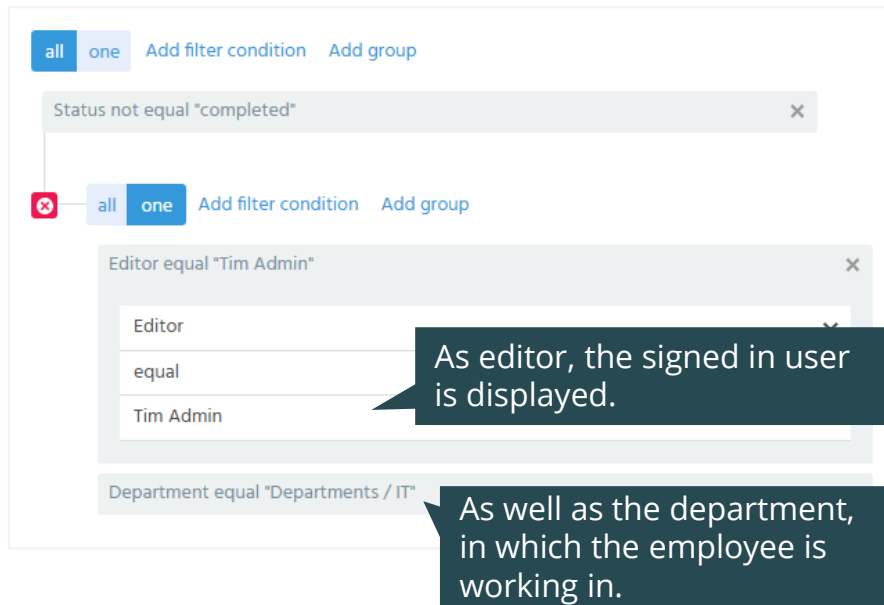
Overview for editors

Each editor receives its own tasks and the tasks from the “pool” using **predefined filters**. This will be used...

- In the **Dashlet “My tasks”** and
- In the **FilterView** of the Context “Tasks”.

Tasks with the status “completed” are not displayed anymore. When the filter is removed, you can also view the completed tasks once again.

If the department (Sales) additionally separated (office and external staff), the filter on the “Sales” department provides all tasks that have been set for internal sales, field sales or directly for sales.



The screenshot displays the ADITO filter configuration interface. It features two main filter conditions, each with a header bar containing 'all' and 'one' buttons, and links for 'Add filter condition' and 'Add group'.

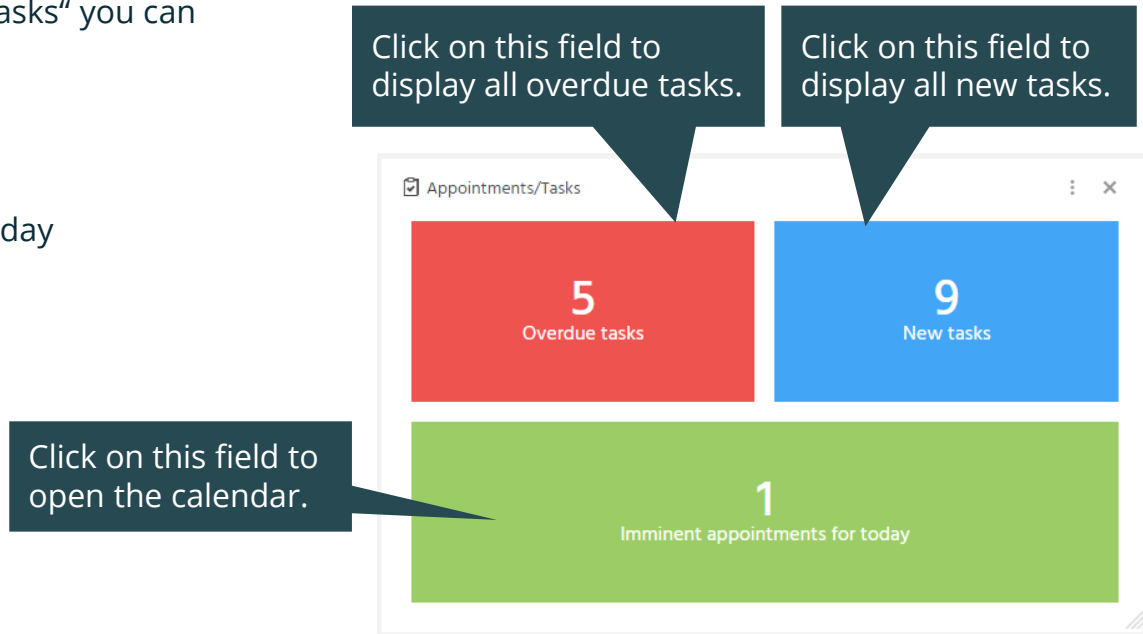
- The first filter condition is titled 'Status not equal "completed"'. It has a red 'X' icon on the left and a close 'X' button on the right.
- The second filter condition is titled 'Editor equal "Tim Admin"'. It also has a red 'X' icon on the left and a close 'X' button on the right. Below the title, there is a table with three rows: 'Editor', 'equal', and 'Tim Admin'. A callout points to the 'Editor' row, stating: 'As editor, the signed in user is displayed.'
- A third filter condition is partially visible at the bottom, titled 'Department equal "Departments / IT"'. A callout points to this title, stating: 'As well as the department, in which the employee is working in.'

Task

Overview for editors

With the Dashlet “Appointments/Tasks” you can see the followig:

- Overdue tasks
- New tasks (status “new”)
- Imminent appointments for today



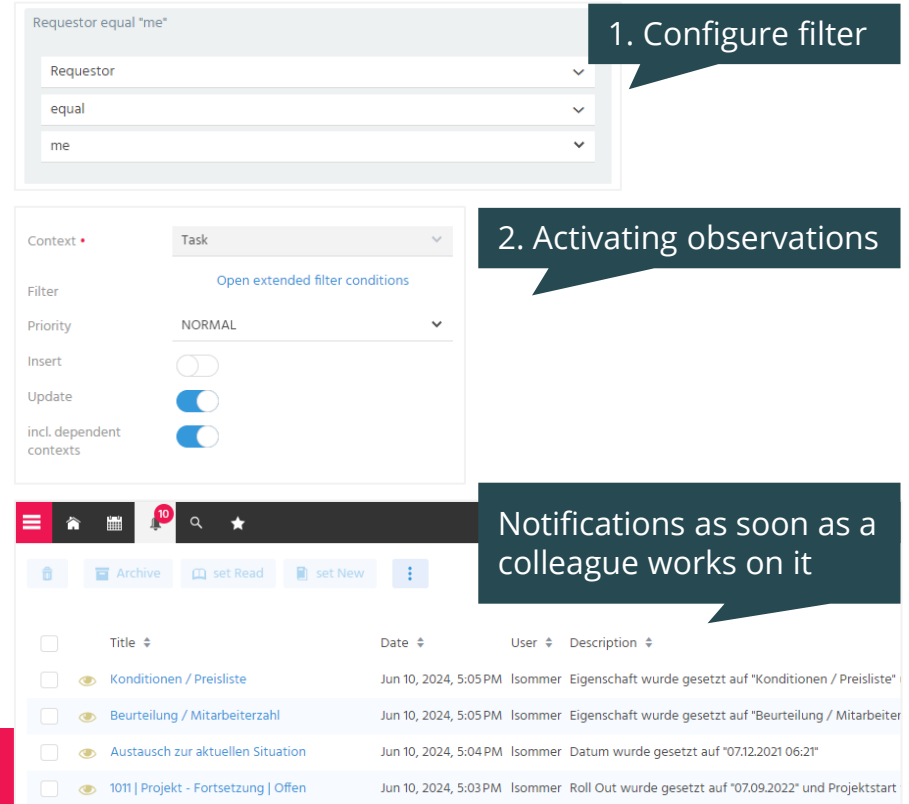
Task

Were the tasks completed?

To keep an eye on whether tasks that you have assigned to other users have been completed, use the Observation function.

To do this, create the filter “Requester equals ME (or your user name)” in the tasks and observe this filter. You will then receive a notification as soon as the status, progress or description is edited or the agent completes the task.

Tip: Create a dashlet for this purpose.



1. Configure filter

2. Activating observations

Notifications as soon as a colleague works on it

Requestor equal "me"

Requestor
equal
me

Context • Task
Filter
Priority NORMAL
Insert
Update
incl. dependent contexts

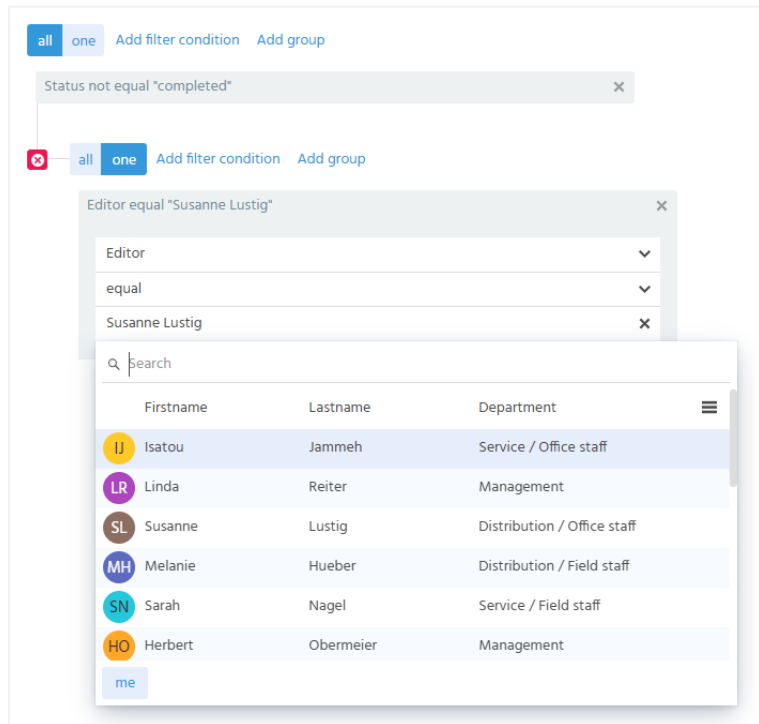
Open extended filter conditions

Title	Date	User	Description
Konditionen / Preisliste	Jun 10, 2024, 5:05 PM	Isommer	Eigenschaft wurde gesetzt auf "Konditionen / Preisliste"
Beurteilung / Mitarbeiterzahl	Jun 10, 2024, 5:05 PM	Isommer	Eigenschaft wurde gesetzt auf "Beurteilung / Mitarbeiterzahl"
Austausch zur aktuellen Situation	Jun 10, 2024, 5:04 PM	Isommer	Datum wurde gesetzt auf "07.12.2021 06:21"
1011 Projekt - Fortsetzung Offen	Jun 10, 2024, 5:03 PM	Isommer	Roll Out wurde gesetzt auf "07.09.2022" und Projektstart

Task

Taking over tasks from a different editor

If tasks need to be taken over by another editor (e.g., in the event of illness, etc.), you can filter for this.



The screenshot shows the ADITO task filter interface. At the top, there are buttons for 'all' and 'one', and links for 'Add filter condition' and 'Add group'. Below this, a filter condition is set: 'Status not equal "completed"'. A second filter condition is added: 'Editor equal "Susanne Lustig"'. A search dropdown is open, showing a list of users with their initials, first name, last name, and department. The user 'Susanne Lustig' is highlighted.

	Firstname	Lastname	Department
IJ	Isatou	Jammeh	Service / Office staff
LR	Linda	Reiter	Management
SL	Susanne	Lustig	Distribution / Office staff
MH	Melanie	Hueber	Distribution / Field staff
SN	Sarah	Nagel	Service / Field staff
HO	Herbert	Obermeier	Management
me			



Whether tasks can be accessed by colleagues must be considered on a project-specific basis, as the authorization concepts must be taken into account.

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Einzigartige Beziehungen