



Contact management: Topic Tree

ADITO Software GmbH

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Screenshots

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



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Topic Tree



Overview

- With the help of the Topic Tree, it is possible to assign topics to Contexts (e.g., activities), which can be organized in a tree structure. A description (free text) can be stored for each of these topics.
- Therefore, datasets in these Contexts can be entered quickly and in a structured manner, and they can be analyzed (filtered) according to the topics; this analysis helps derive recommendations for subsequent actions. The analysis, based on the topics, can also take place in linked data records, e.g., company/contact, according to topics that were recorded in linked activities.
- A more efficient use of the Topic Tree is possible by utilizing Topic Tree Favorites or Topic Tree Presets. Here, all the most important topics are marked individually or by department to allow for quicker access or automatic entry.
- The defined Topic Tree Favorites are presented in all Contexts, in which a Topic Tree is being used. Topic tree Presets, on the other hand, can be defined per Context.
- Generally, it can also be controlled if topics are captured in the new creation or in the EditView.
- Topics can be automatically added to activities using document templates, and they can also be used to create tasks automatically.



Topic Tree Favorites

Why and how are Topic Tree Favorites used?

By using Topic Tree Favorites, you can reduce the time you would normally require to search through the possibly comprehensive Topic Tree, as the most important topics that you have already marked as Topic Tree Favorites are displayed.

When creating a new activity, for example, you can control whether the entire Topic Tree is displayed or only the Topic Tree Favorites.

In the „Topic Tree Configuration“, you can find all functions which manage a Topic Tree Favorite.

- Access to Topic Tree Configuration through the user settings
- Overview of individual and department-wide Topic Tree Favorites
- Creating, editing or deleting of max. 20 individual Topic Tree Favorites

Specialist administrators have additional functions, which can be found in the Context „Topic Tree Configuration“ (user settings) or in the Context „Topic Tree“ (menu group „Administration“).

- Overview over individual or department-wide Topic Tree Favorites
- Creating, editing or deleting of own, different or department-wide Topic Tree Favorites
- Creating of department-wide Topic Tree Favorites in the Context „Topic Tree“

Topic Tree Presets

Why and how are Topic Tree Presets used?

By using Topic Tree Presets, you define which often used topics can, e.g. be used in an activity. This means that when new topics are created, the system displays them as soon as a defined condition (e.g., a specific term in the subject) is entered in the activity.

In the „Topic Tree Configuration“, you can find all the functions to manage the Topic Tree Presets.

- Access to Topic Tree Configuration through the user settings
- Overview of individual and department-wide Topic Tree Presets
- Creation of individual Topic Tree Presets, depending on certain conditions (e.g. Presets are only required for visit reports) for the respective Contexts
- Editing or deleting of individual Topic Tree Presets

Specialist administrators have additional functions, which can be found in the Context „Topic Tree Configuration“ (user settings) or in the Context „Topic Tree“ (menu group „Administration“).

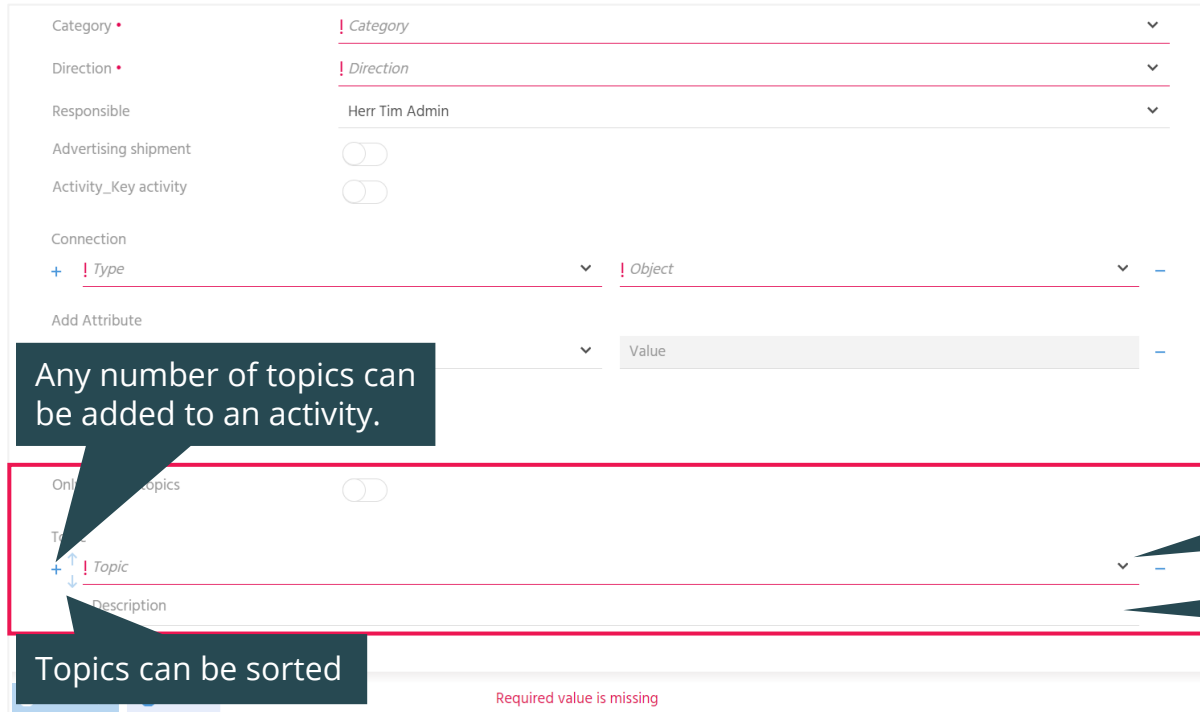
- Overview of individual and department-wide Topic Tree Presets
- Creating, editing or deleting of own, different or department-wide Topic Tree Presets
- Creating of department-wide Topic Tree Presets in the Context „Topic Tree“



**Use in the
activity**

Activity

Capturing topics



The screenshot shows the 'Activity' form in ADITO. It includes fields for 'Category', 'Direction', 'Responsible', 'Advertising shipment', and 'Activity_Key activity'. Below these is a 'Connection' section with a table for 'Type' and 'Object'. At the bottom, there is a table for 'Topics' with columns for 'Topic' and 'Description'. A red box highlights the 'Topics' table area. A red error message 'Required value is missing' is visible at the bottom of the form.

Type	Object
+	!

Topic	Description
+	!



The display of the area for capturing the topics can be controlled administratively in the EditView.

Any number of topics can be added to an activity.

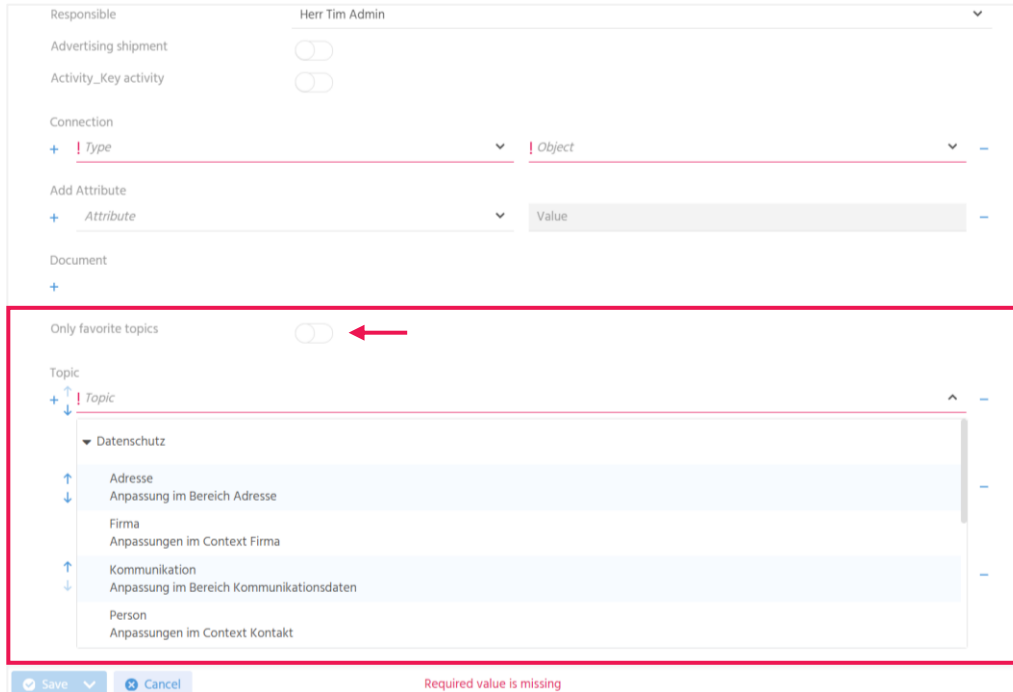
Every topic can only be selected once.

Topics can be sorted

Per topic, a description (free text) can be added.

Activity

Show complete Topic Tree



Responsible: Herr Tim Admin

Advertising shipment: ☐

Activity_Key activity: ☐

Connection: Type Object

Add Attribute: Attribute Value

Document:

Only favorite topics: ☐ 

Topic: Topic

- ▼ Datenschutz
 - ↑ ↓ Adresse Anpassung im Bereich Adresse
 - ↑ ↓ Firma Anpassungen im Context Firma
 - ↑ ↓ Kommunikation Anpassung im Bereich Kommunikationsdaten
 - ↑ ↓ Person Anpassungen im Context Kontakt

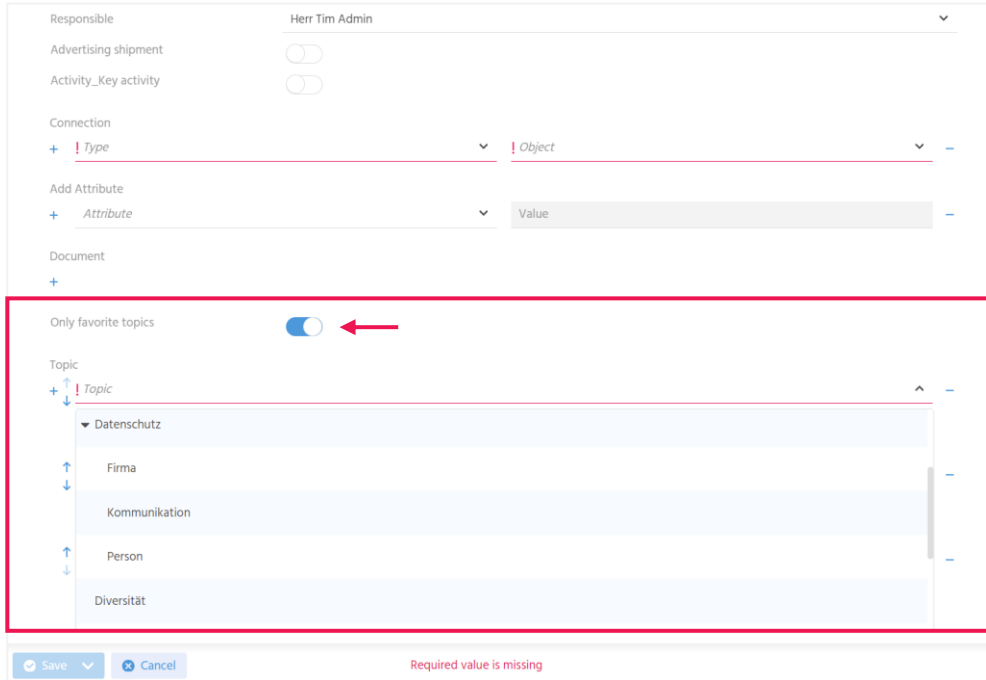
Required value is missing

- When the indicator „Only favorite topics“ is **inactive**, the complete Topic Tree gets displayed.
- Therefore, you can select every topic from the complete Topic Tree and capture it in the activity.



What if the selection of topics is empty?
The administrator controls which topics are used in which Contexts. If the selection is empty, there is no topic used in the activity.

Show Topic Tree Favorites



Responsible: Herr Tim Admin

Advertising shipment: ☐

Activity_Key activity: ☐

Connection:

Add Attribute:

Document:

Only favorite topics: ☒

Topic:

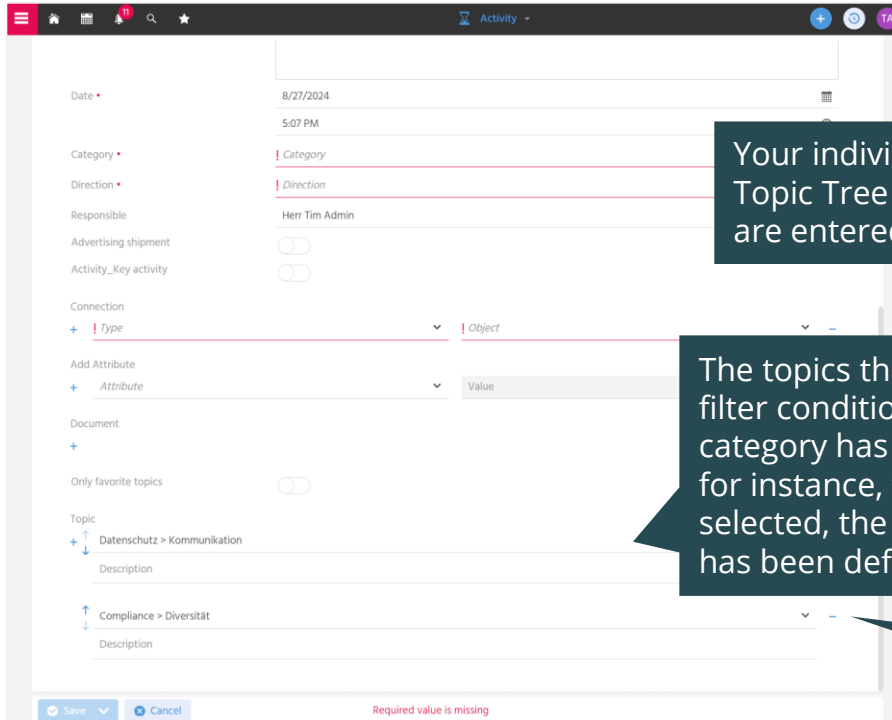
- Datenschutz
- Firma
- Kommunikation
- Person
- Diversität

Save Cancel Required value is missing

- If the indicator „Only favorite topics“ is **active**, the selection in the field „Topic“ only shows the Topic Tree Favorites.
- By that, you can only see your* Topic Tree Favorites and can select them to capture them in the activity.

* This means you can see here the individually created Topic Tree Favorites and the department-wide Topic Tree Favorites, which were created by a specialized administrator.
[Procedure for creating Topic Tree Favorites](#)

Topic Tree Presets



The screenshot shows the 'Activity' form in the ADITO system. The form includes fields for Date (8/27/2024), Time (5:07 PM), Category (with a red error bar), Direction (with a red error bar), Responsible (Hen Tim Admin), Advertising shipment (toggle), and Activity_Key activity (toggle). Below these is a 'Connection' section with a table-like structure for 'Type' and 'Object'. Further down is an 'Add Attribute' section with 'Attribute' and 'Value' columns. A 'Document' section has a '+' button. 'Only favorite topics' is a toggle. The 'Topic' section shows a tree structure with 'Datenschutz > Kommunikation' and 'Compliance > Diversität', each with a description field. At the bottom, there are 'Save' and 'Cancel' buttons, and a red error message 'Required value is missing'.

Your individually created Topic Tree Presets and department-wide Topic Tree Presets, which were created by a specialist administrator are entered here. [Process of creating Topic Tree Presets](#)

The topics that have been defined as Presets are added as soon as a filter condition has been fulfilled. For example, this occurs as soon as a category has been selected or a certain term is included in the title. If, for instance, the term in the title is removed or a different category is selected, the topic will also be removed. Presets for which no condition has been defined are displayed when the new creation is opened.

If a Preset topic is not required, it can be manually remove (minus button), hence it won't be saved.

Topic with automated creation of tasks

A topic can be configured in such a way that a task will be automatically created as soon as a topic gets selected. There are two possibilities:

- **The task gets created „silently“**, this means that you, who has created the topic, will not be aware of this, because the content of the tasks and the editor are already predefined. The task will be automatically linked:
 - With the activity, in which the topic has been selected.
 - With the contact or the company, for which the activity has been added for.
- **The task opens in the EditView and in a further browser tab.** You can add or adjust contents and possible editors. If you do not save the task, it will not be created. As soon as the task gets saved, it will be automatically linked:
 - With the activity, in which the topic has been selected for.
 - With the contact and the company, for which the activity has been added for.

Example: select a topic that creates a Silent Task, and then it connects with your activity. If this task is connected with the activity, additionally create another topic that also creates a task. If another browser tab opens, you can finalize and save it there. Therefore, in the end, two tasks are linked with your activity.

Topic with automated creation of tasks

Editing topics that trigger a task retrospectively in an activity (in the edit view):

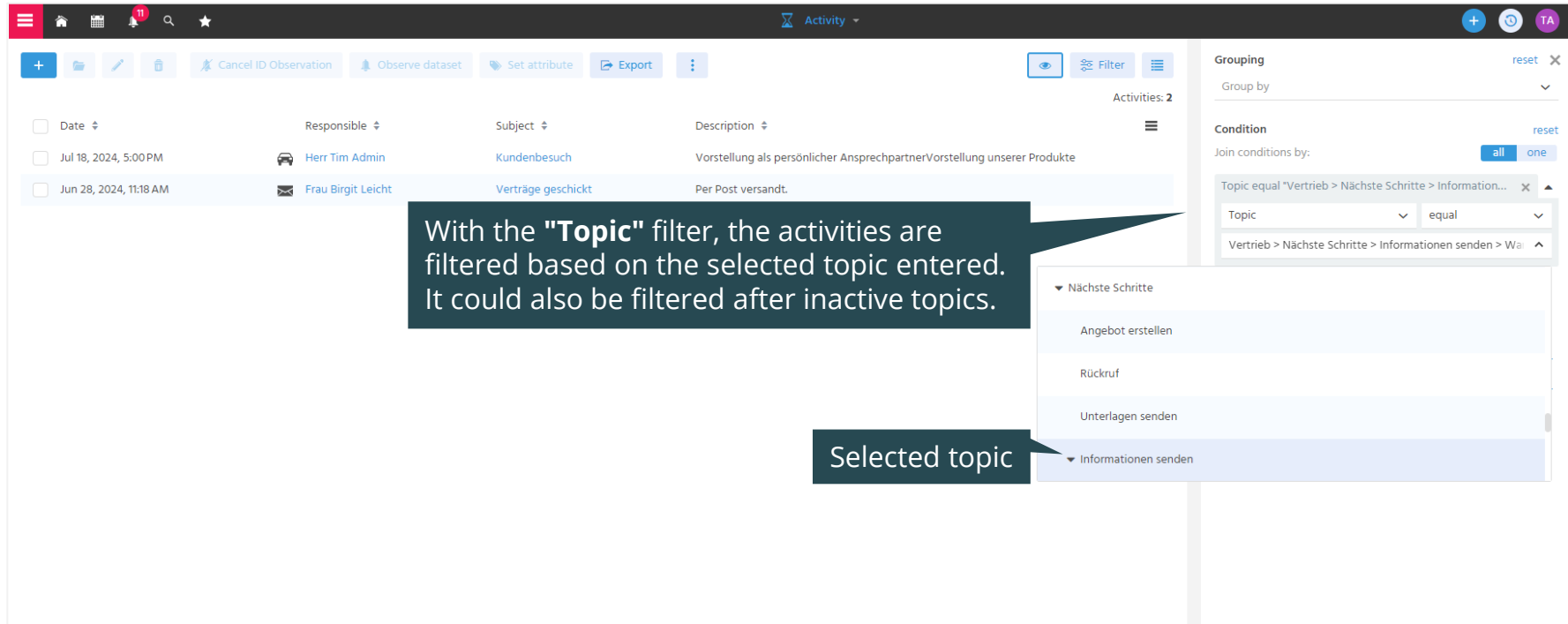
- **Add topic**
=> Task is created
- **Delete topic**
=> Task remains – Existing tasks are never automatically removed!
If a topic is deleted and then added again later, no new task will be created again from this topic.
Since topics cannot be entered twice, tasks cannot be created twice either.
- **Change topic**
 - Replace topic without task with topic with task => Task is created
 - Replace topic with task with topic without task => Task (initial topic) remains
 - Replace topic with task with topic with task => Task (initial topic) remains, task (new topic) is created

Topic is added in activity with the template

There are templates in the system, which speed up the process of adding a description into the activity. These templates can be added in „Topics“, which will be added in the activity, when the template is used.

- The sorting of the template and topic takes place in the Context „Document Template“.
- If topics become inactive at some point, they won't be used anymore.
- If topics are stored in several templates, they are inserted only once in the activity.

Topic Tree: filtering for topics



The screenshot shows the ADITO Activity interface. The main table displays activities with columns for Date, Responsible, Subject, and Description. The filter sidebar on the right shows a 'Condition' section with a 'Topic' filter set to 'equal'. A callout box explains that the 'Topic' filter filters activities based on the selected topic entered, and it can also be filtered after inactive topics.

Date	Responsible	Subject	Description
Jul 18, 2024, 5:00 PM	Herr Tim Admin	Kundenbesuch	Vorstellung als persönlicher AnsprechpartnerVorstellung unserer Produkte
Jun 28, 2024, 11:18 AM	Frau Birgit Leicht	Verträge geschickt	Per Post versandt.

With the **"Topic"** filter, the activities are filtered based on the selected topic entered. It could also be filtered after inactive topics.

Selected topic

Condition: Topic equal "Vertrieb > Nächste Schritte > Informationen..."

Topic: Vertrieb > Nächste Schritte > Informationen senden > Wai

Selected topic: Informationen senden

Topic Tree: filtering for topics and/or subtopics

The **“Topic (incl. sub-topics)”** filter is used to filter activities in which the selected topic **or** one of the sub-topics is included. You can also filter for inactive topics.

Date	Responsible	Subject
Jun 15, 2024, 2:00 AM	Herr Tim Admin	Abstimmung neuer Mes...
May 29, 2024, 10:55 AM	Frau Lisa Sommer	Messebesuch
Feb 17, 2024, 8:56 AM	Frau Lisa Sommer	Besuch auf der Messe
Jan 19, 2024, 10:37 AM	Frau Birgit Leicht	Anruf w Interesse an Produkt
Dec 27, 2022, 10:00 AM	Frau Susanne Lustig	Produktinteresse

Grouping

reset

Group by

Condition

reset

Join conditions by: all one

Topic (incl. Subtopics) equal "Vertrieb > Erstkon...

Topic (incl. Subtopics)

equal

Vertrieb > Erstkontakt

Erstkontakt

Produktinteresse

Warengruppe B

Produkt B1

Produkt B2

Selected topic

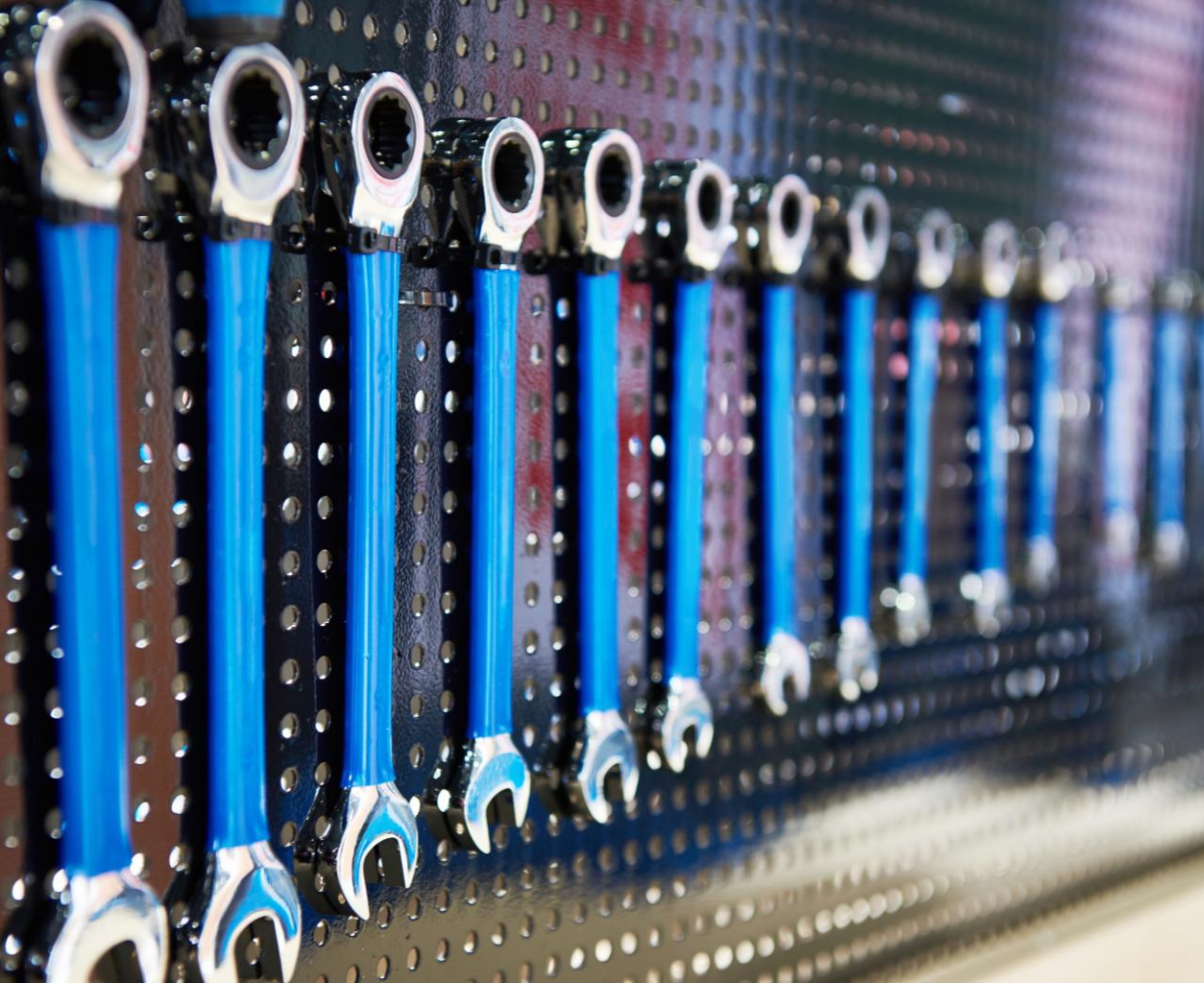
Subtopics

=Abteilungen > Geschäftsleitung

Thema (inkl. Unterthemen)(NULL)



These two filters **„Topic“** and **„TopicTree_Topic (incl. Subtropics)“** are available in the **Activity**, the **Company** and the **Contact**.



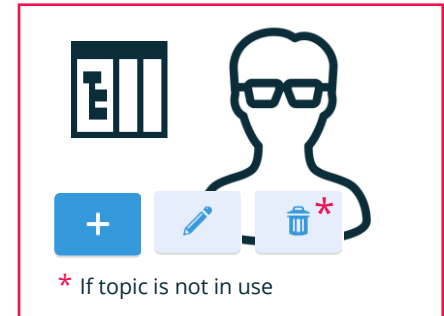
Context „Topic Tree“

Topic Tree

„Overview“

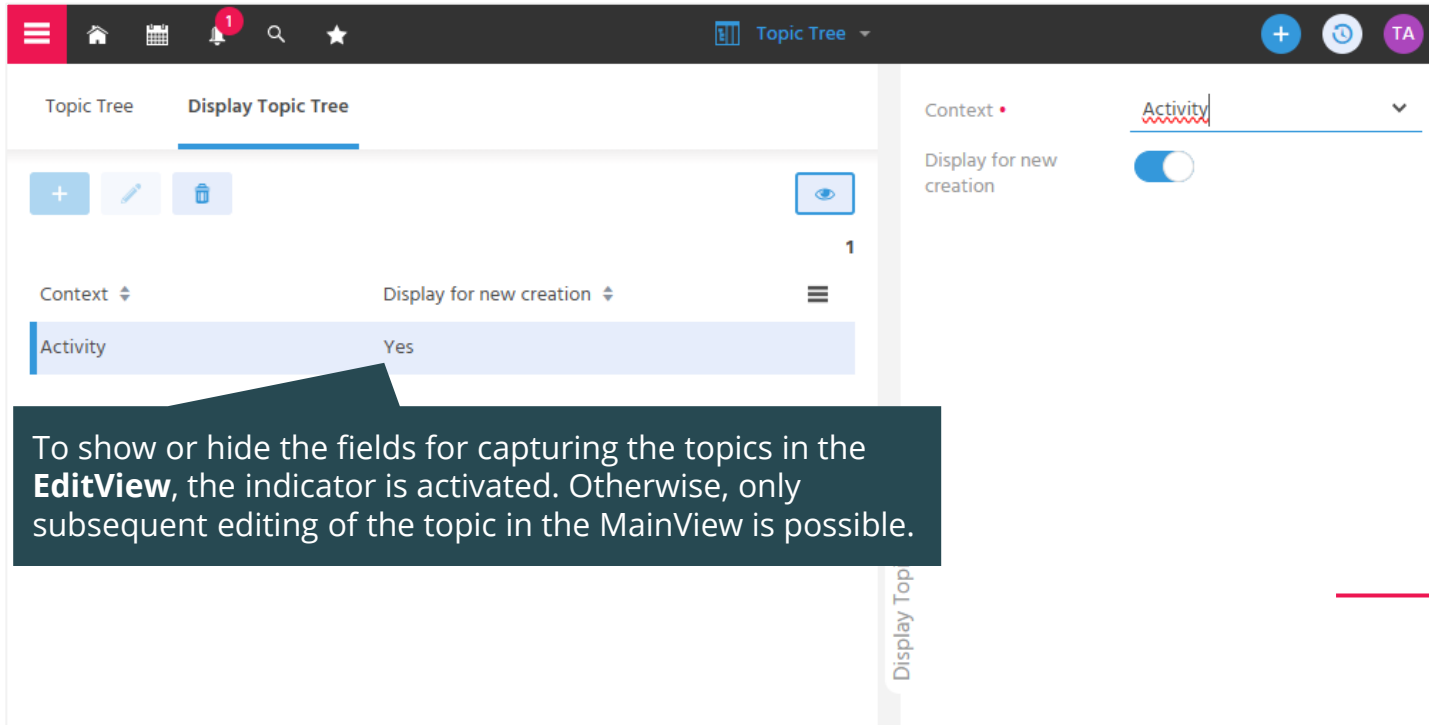
For the administrator, there are the following ToDo's in the **Context „Topic Tree“**:

- Control if the fields for capturing the topics or in the EditView of the activity should be displayed for the user or not.
- Creation and maintaining of a complex Topic Tree (6 levels, 3500 entries).
This allows them to enter technical requirements regarding structure and topics at any time.
- Definition, which topic should be used in which Context and therefore be presented in the topic selection.
- Definition of department-wide Topic Tree Favorites.
- Definition of department-wide Topic Tree Presets.



Display Topic Tree

Activating fields for capture in the EditView



Topic Tree **Display Topic Tree**

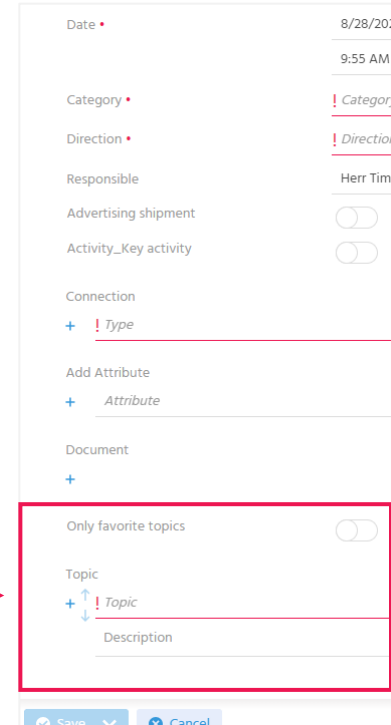
Context Display for new creation

Context	Display for new creation
Activity	Yes

1

Display Topic Tree

To show or hide the fields for capturing the topics in the **EditView**, the indicator is activated. Otherwise, only subsequent editing of the topic in the MainView is possible.



Date 8/28/2020
9:55 AM

Category ! Category

Direction ! Direction

Responsible Herr Tim

Advertising shipment ☐

Activity_Key activity ☐

Connection

+ ! Type

Add Attribute

+ Attribute

Document

+

Only favorite topics ☐

Topic

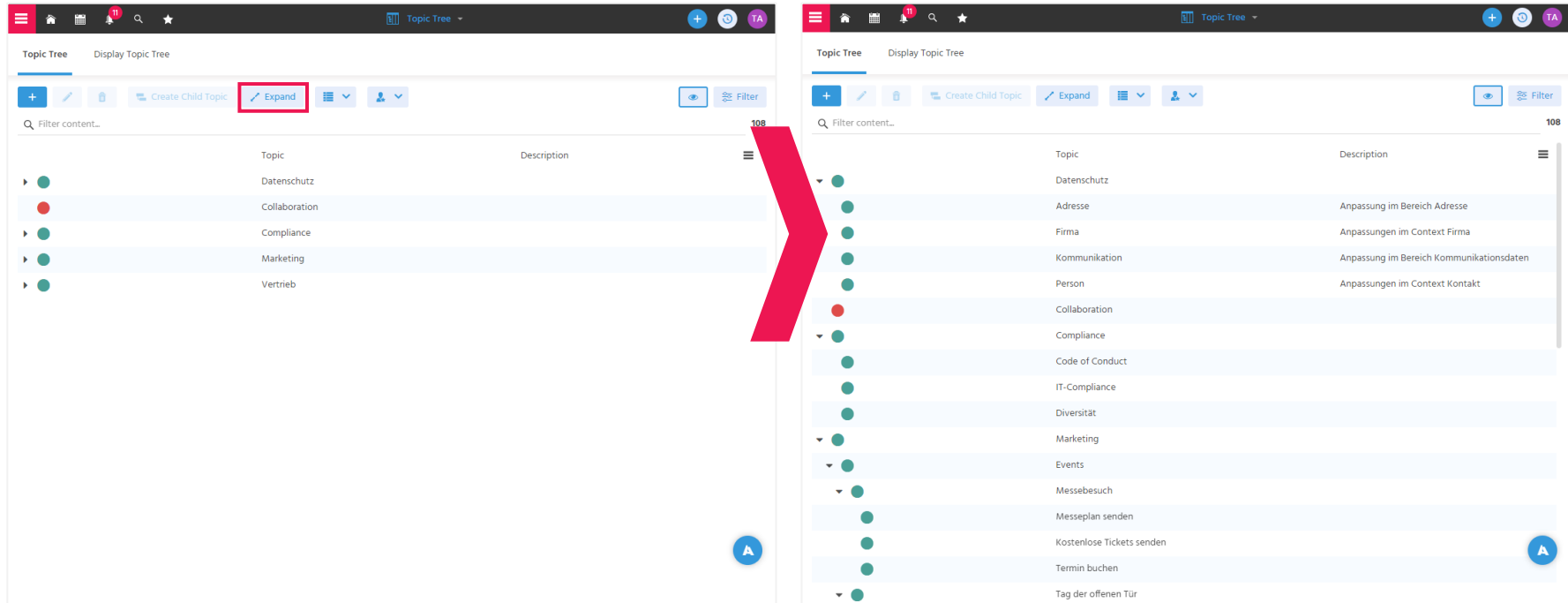
+ ! Topic

Description

Save Cancel

Configurating Topic Tree

Expanding the Topic Tree to view the complete structure



The image illustrates the process of expanding the Topic Tree in the ADITO interface. The left panel shows the initial state with a limited view of the tree structure. The right panel shows the result after clicking the 'Expand' button, revealing a more complete hierarchy of topics.

Initial State (Left Panel):

Topic	Description
Datenschutz	
Collaboration	
Compliance	
Marketing	
Vertrieb	

Expanded State (Right Panel):

Topic	Description
Datenschutz	
Adresse	Anpassung im Bereich Adresse
Firma	Anpassungen im Context Firma
Kommunikation	Anpassung im Bereich Kommunikationsdaten
Person	Anpassungen im Context Kontakt
Collaboration	
Compliance	
Code of Conduct	
IT-Compliance	
Diversität	
Marketing	
Events	
Messebesuch	
Messeplan senden	
Kostenlose Tickets senden	
Termin buchen	
Tag der offenen Tür	

Configurating Topic Tree

Creating a topic

Topic Tree

Display Topic Tree

Creates a new topic in the top level of the Topic Tree.

Collaboration

Compliance

Marketing

Vertrieb

Topic

Superordinate Topic

Superordinate Topic

Topic

! Topic

Description

Description

Active

Module

Tasks

Create T

Controls, in which Context the topic gets displayed in the selection.

- „Activity“ in order to be captured there.
- „Document Template“ in order to be added, so that the topic can be added into the activity, which uses the template.

Configuring Topic Tree

Create topic with task (1/2)

Controls if the task gets created automatically, or if the user has to intervene.

- **Silent: Active** – Task is created, as it is configured here.
- **Still: Inactive** – Task opens in the EditView (in another tab) and can be added by the user.

Subject line and description of the task

Task should be created as a single task for several editors.

Add **Attendees** (departments or contacts), to whom this task should be assigned for processing by inserting one or more fields using the plus button.

The screenshot shows a 'Create Task' configuration window. A red box highlights the 'Create Task' toggle switch, which is currently turned on. Below it are fields for 'Silent' (toggle), 'Subject' (text), and 'Description' (rich text editor with bold, italic, underline, strikethrough, and link buttons). A 'Topic Tree' sidebar is visible on the left. At the bottom, there is a 'Create single tasks' toggle (currently off), an 'Attendees' section with a plus button, and a red error message: 'Required value is missing Attendee required'. At the very bottom are 'Save' and 'Cancel' buttons.

Configurating Topic Tree

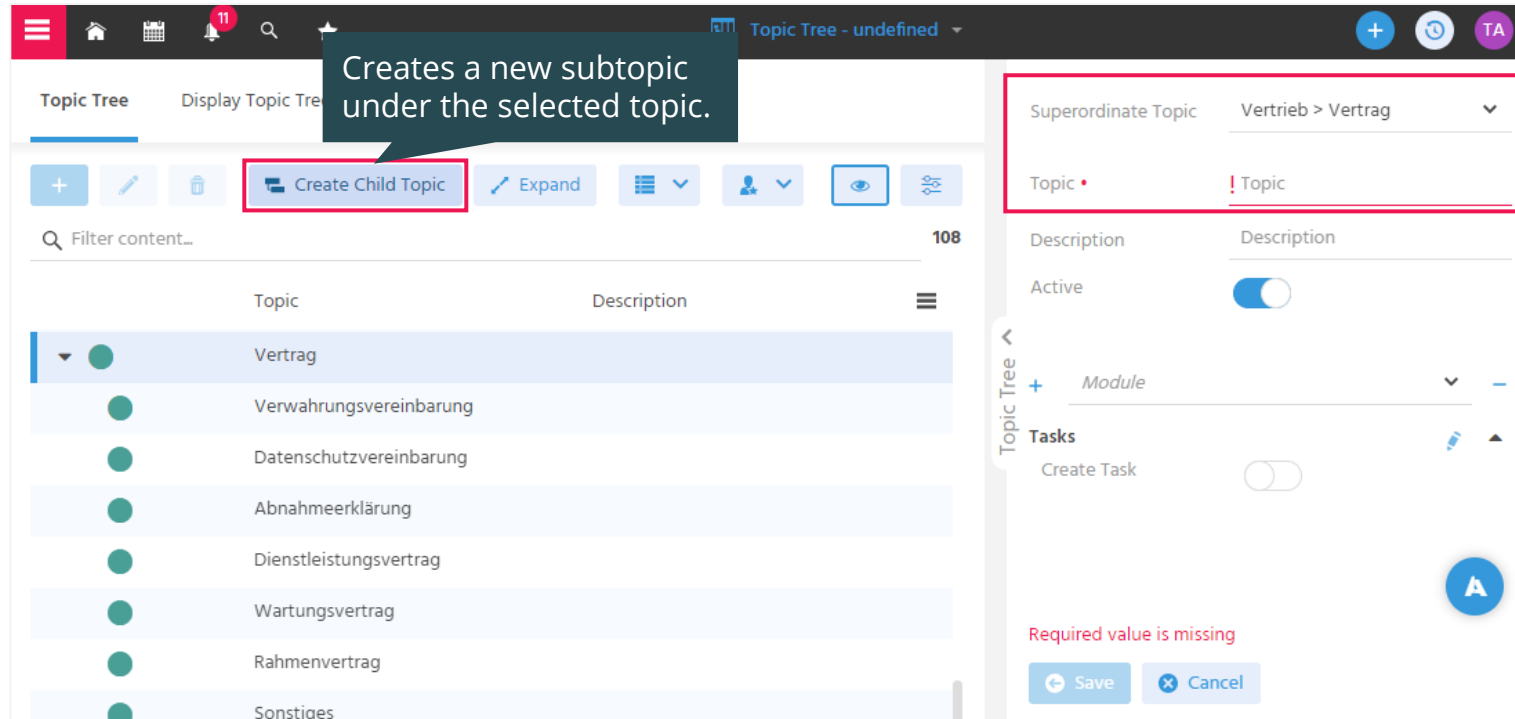
Create topic with task (2/2)

The following points are stored in the task and cannot be configured anymore:

- **Begin:** the current date and time will be entered here
- **Due on:** the date in seven days is set here
- **Status:** new
- **Priority:** normal
- **Requestor:** the editor of the activity who selected the topic that triggers the task is entered here
- **Private:** no
- **Connection:** the activity and the resulting task are connected (displayed in area „Connection“ in the corresponding Preview)

Configurating Topic Tree

Creating a subtopic



The screenshot displays the ADITO Topic Tree configuration interface. A dark blue callout box with white text states: "Creates a new subtopic under the selected topic." This callout points to the "Create Child Topic" button, which is highlighted with a red rectangle in the toolbar. The toolbar also includes buttons for adding, editing, deleting, expanding, and other actions. Below the toolbar is a table listing topics under the "Vertrieb" category. The "Vertrag" topic is selected. To the right, a configuration panel for the selected topic is shown, with a red rectangle highlighting the "Superordinate Topic" field, which is set to "Vertrieb > Vertrag". The "Topic" field is empty and marked with a red exclamation mark, indicating a required value is missing. The "Description" field is also empty. The "Active" toggle is turned on. At the bottom of the configuration panel, there are "Save" and "Cancel" buttons, with a red message "Required value is missing" above them.

Creates a new subtopic under the selected topic.

Topic Tree - undefined

Topic Tree Display Topic Tree

+ Create Child Topic Expand

Filter content... 108

Topic	Description
Vertrag	
Verwahrungsvereinbarung	
Datenschutzvereinbarung	
Abnahmeerklärung	
Dienstleistungsvertrag	
Wartungsvertrag	
Rahmenvertrag	
Sonstiges	

Superordinate Topic Vertrieb > Vertrag

Topic ! Topic

Description Description

Active ☒

Module

Tasks

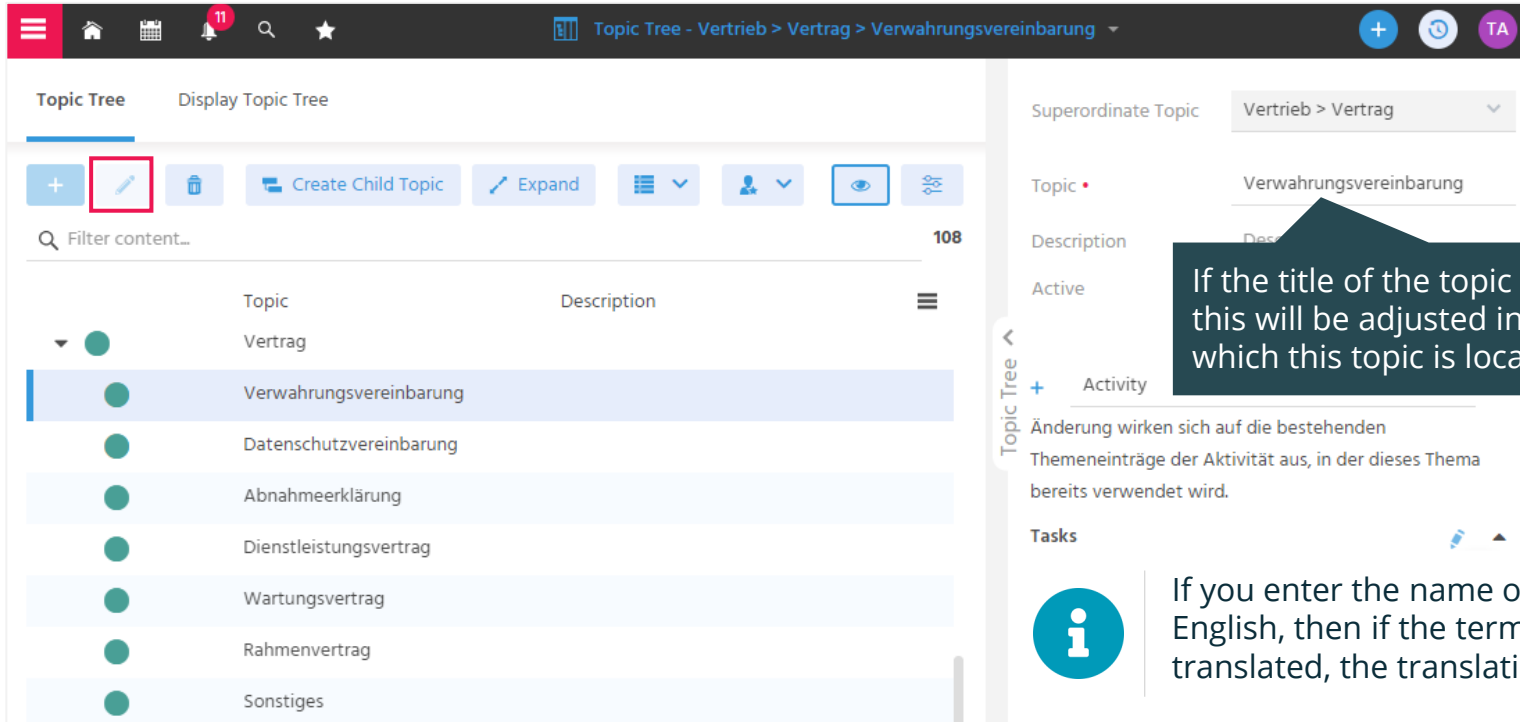
Create Task ☐

Required value is missing

Save Cancel

Configurating Topic Tree

Edit topic



Topic Tree - Vertrieb > Vertrag > Verwahrungsverbarung

Topic Tree Display Topic Tree

+ Edit Create Child Topic Expand Filter content... 108

Topic	Description
Vertrag	
Verwahrungsverbarung	
Datenschutzvereinbarung	
Abnahmeerklärung	
Dienstleistungsvertrag	
Wartungsvertrag	
Rahmenvertrag	
Sonstiges	

Superordinate Topic: Vertrieb > Vertrag

Topic: Verwahrungsverbarung

Description: ...

Active

Activity: Änderung wirken sich auf die bestehenden Themeneinträge der Aktivität aus, in der dieses Thema bereits verwendet wird.

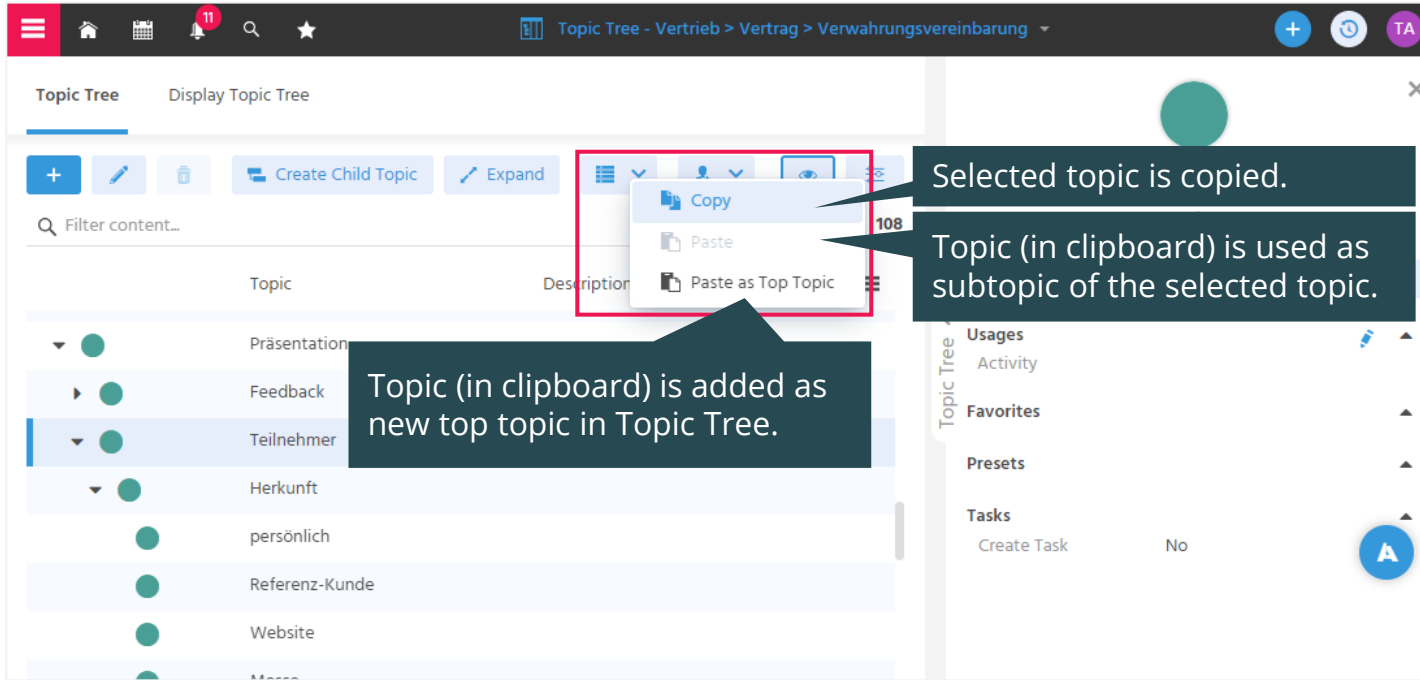
Tasks

If the title of the topic is changed, then this will be adjusted in the activities, in which this topic is located in.

If you enter the name of the topic in English, then if the term has already been translated, the translation will be used.

Configurating Topic Tree

Copy/add topics



The screenshot shows the ADITO Topic Tree interface. The breadcrumb path is "Topic Tree - Vertrieb > Vertrag > Verwahrungsverbarung". The "Topic Tree" tab is active, showing a list of topics. The "Teilnehmer" topic is selected. A context menu is open over the "Teilnehmer" topic, showing options: "Copy", "Paste", and "Paste as Top Topic".

Selected topic is copied.

Topic (in clipboard) is used as subtopic of the selected topic.

Topic (in clipboard) is added as new top topic in Topic Tree.

Topic	Description
Präsentation	
Feedback	
Teilnehmer	
Herkunft	
persönlich	
Referenz-Kunde	
Website	
Masse	

Usages

- Activity

Favorites

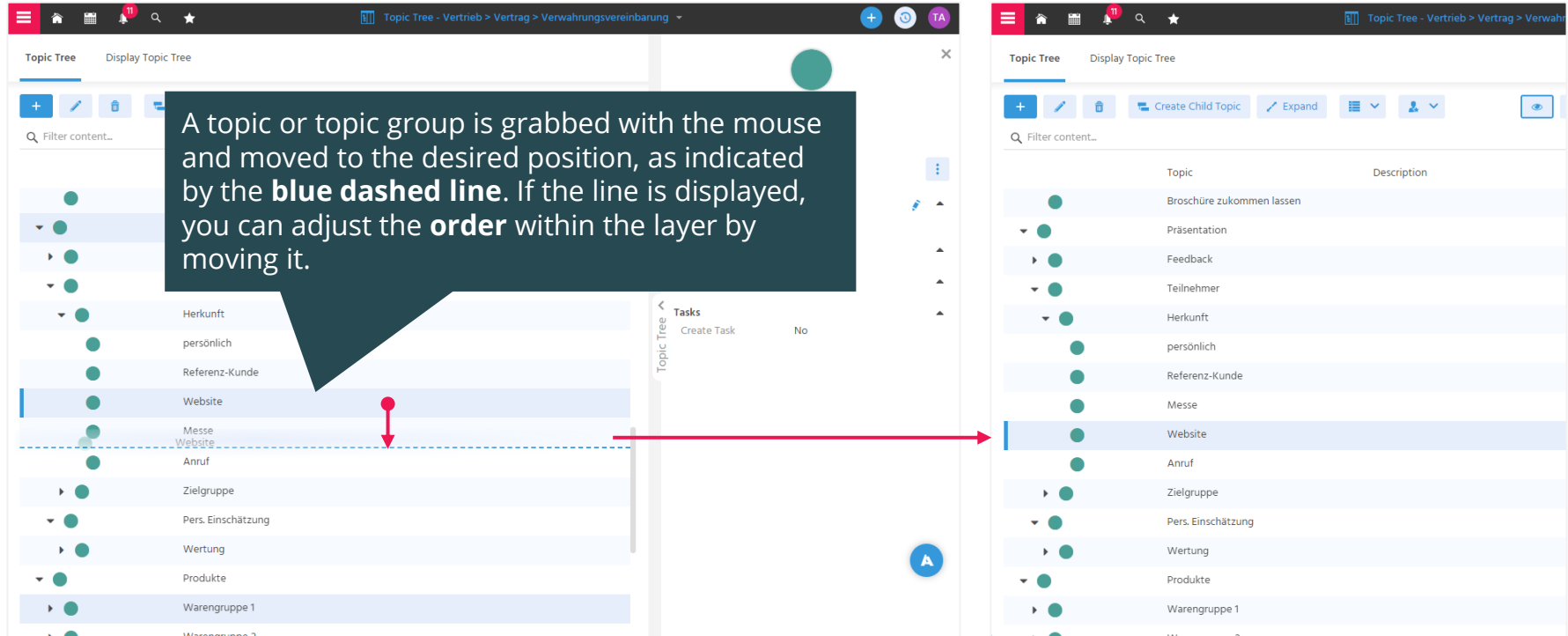
Presets

Tasks

- Create Task
- No

Configurating Topic Tree

Move topics – re-sort the order



A topic or topic group is grabbed with the mouse and moved to the desired position, as indicated by the **blue dashed line**. If the line is displayed, you can adjust the **order** within the layer by moving it.

Topic Tree - Vertrieb > Vertrag > Verwahrungsverbarung

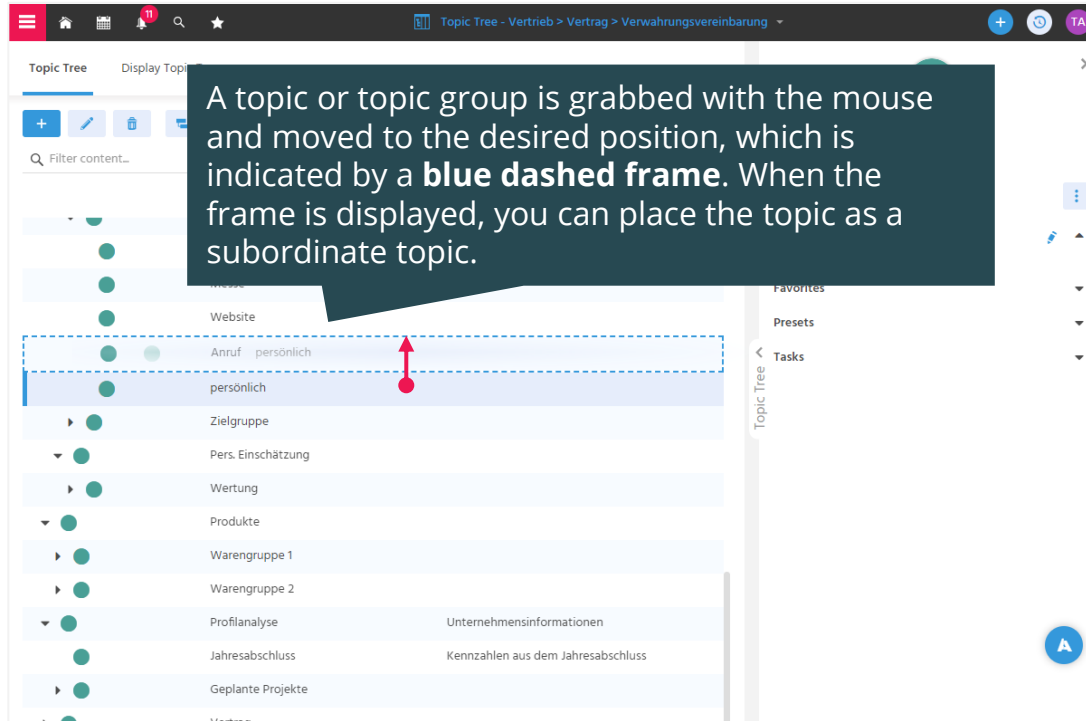
Topic Tree Display Topic Tree

Filter content...

Topic	Description
Broschüre zukommen lassen	
Präsentation	
Feedback	
Teilnehmer	
Herkunft	
persönlich	
Referenz-Kunde	
Messe	
Website	
Anruf	
Zielgruppe	
Pers. Einschätzung	
Wertung	
Produkte	
Warengruppe 1	
Warengruppe 2	

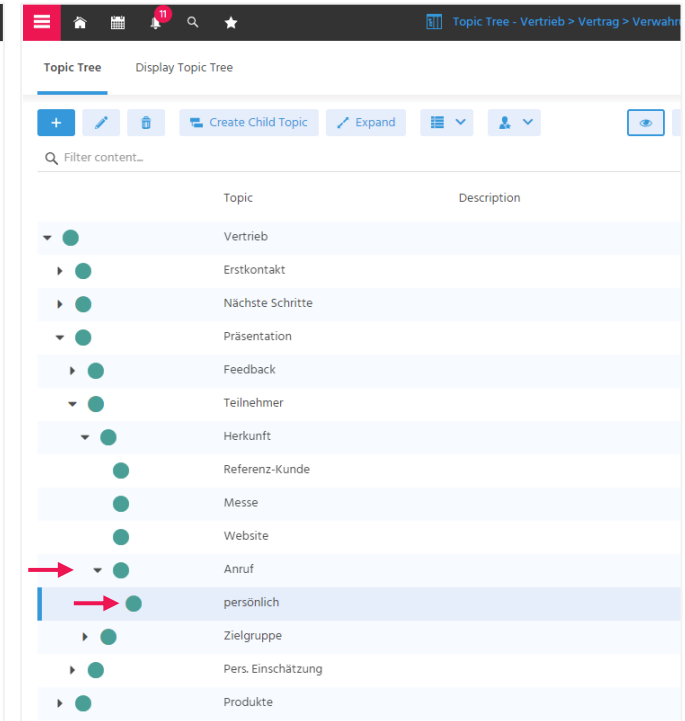
Configurating Topic Tree

Move topics – move subordinate levels



A topic or topic group is grabbed with the mouse and moved to the desired position, which is indicated by a **blue dashed frame**. When the frame is displayed, you can place the topic as a subordinate topic.

The screenshot shows the 'Topic Tree' interface with a sidebar on the left and a main content area. A topic named 'persönlich' is highlighted with a blue dashed frame, and a red arrow indicates it is being moved to a new position under the 'Anruf' topic.

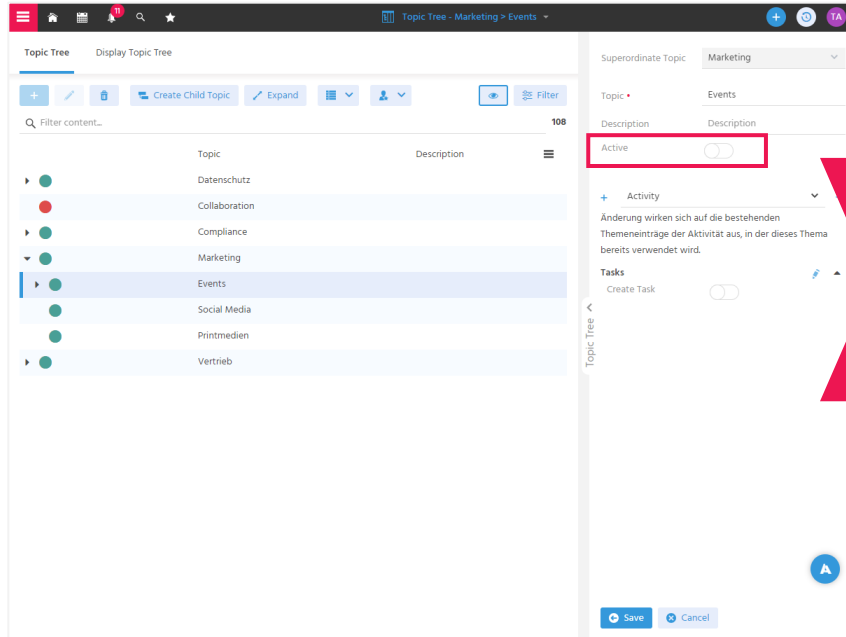


The screenshot shows the 'Topic Tree' interface after the move operation. The 'persönlich' topic is now a subordinate topic under 'Anruf'. Red arrows indicate the movement from the previous state.

Topic	Description
Vertrieb	
Erstkontakt	
Nächste Schritte	
Präsentation	
Feedback	
Teilnehmer	
Herkunft	
Referenz-Kunde	
Messe	
Website	
Anruf	
persönlich	
Zielgruppe	
Pers. Einschätzung	
Produkte	

Configuring Topic Tree

Settings topics as inactive



Superordinate Topic: Marketing

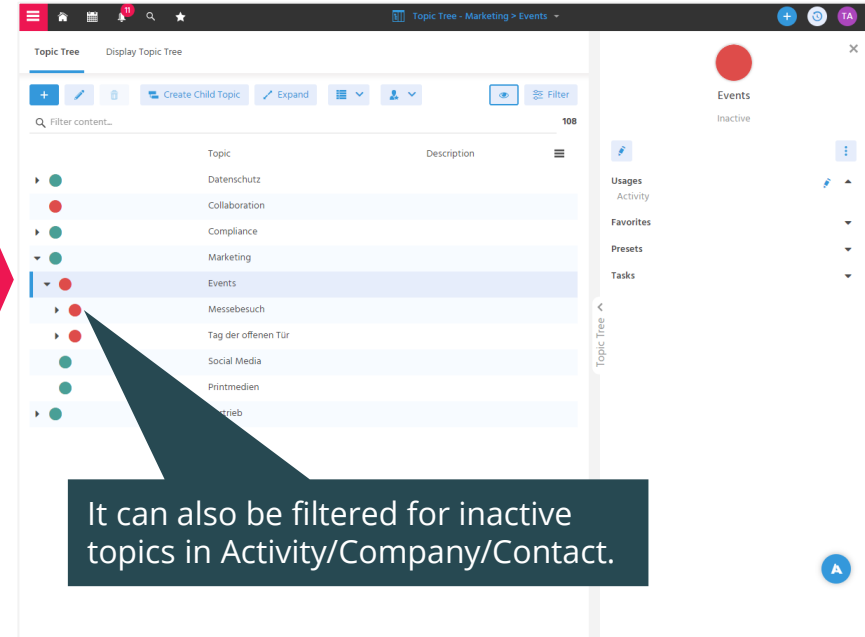
Topic: Events

Description: Active

Activity: Änderung wirken sich auf die bestehenden Themeneinträge der Aktivität aus, in der dieses Thema bereits verwendet wird.

Tasks: Create Task

Save Cancel



Superordinate Topic: Marketing

Topic: Events

Description: Inactive

Activity: Änderung wirken sich auf die bestehenden Themeneinträge der Aktivität aus, in der dieses Thema bereits verwendet wird.

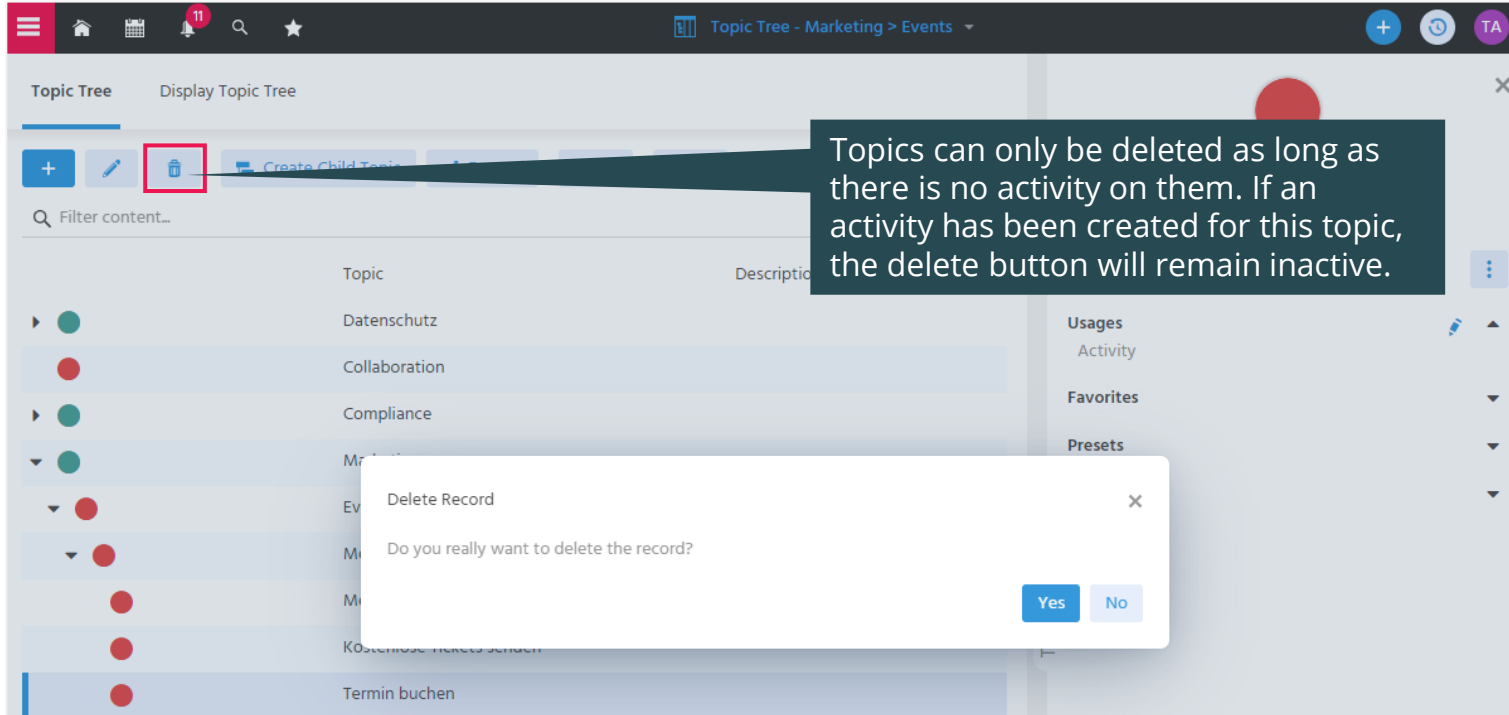
Tasks: Create Task

Save Cancel

It can also be filtered for inactive topics in Activity/Company/Contact.

Configuring Topic Tree

Deleting topics



The screenshot shows the ADITO Topic Tree interface. The top navigation bar includes a menu icon, home, calendar, notifications (11), search, and star icons. The breadcrumb trail is "Topic Tree - Marketing > Events". The main content area has a "Topic Tree" tab and a "Display Topic Tree" sub-tab. A red box highlights the delete icon (a trash can) in the toolbar. A callout box points to this icon with the text: "Topics can only be deleted as long as there is no activity on them. If an activity has been created for this topic, the delete button will remain inactive." Below the toolbar is a search bar labeled "Filter content...". The main table lists topics with columns for "Topic" and "Description". The topics listed are: Datenschutz, Collaboration, Compliance, and several entries under "Marketing" (e.g., "Marketing", "Event", "Marketing", "Marketing", "Kostenlose Newsletter", "Termin buchen"). A "Delete Record" dialog box is open in the foreground, asking "Do you really want to delete the record?" with "Yes" and "No" buttons.

Topics can only be deleted as long as there is no activity on them. If an activity has been created for this topic, the delete button will remain inactive.

Delete Record

Do you really want to delete the record?

Yes No

Defining topics as department-wide Favorites

The screenshot shows a web application interface for a 'Topic Tree'. The top navigation bar includes a hamburger menu, home, calendar, notifications (11), search, and a star icon. The breadcrumb path is 'Topic Tree - Marketing > Events'. Below the navigation bar, there are tabs for 'Topic Tree' and 'Display Topic Tree'. A toolbar contains icons for adding, editing, deleting, creating child topics, expanding, and a dropdown menu. A search bar labeled 'Filter content...' is present. A red circle with the number '1' highlights the 'Add favorite' button in the dropdown menu. The main content area is a table with columns 'Topic' and 'Description'. The table lists several topics, with 'Erstkontakt' selected. A red circle with the number '1' is also placed next to the 'Add favorite' button in the dropdown menu.

Topic	Description
Vertrieb	
Erstkontakt	
Produktinteresse	
Projektaussicht	
Bekannt durch	
Allgemein	
Nächste Schritte	
Präsentation	
Feedback	
Teilnehmer	
Herkunft	
Referenz-Kunde	

Defining topics as department-wide Favorites

This screenshot shows the 'Topic Tree' configuration window for the 'Erstkontakt' department. A modal dialog is open with the following settings:

- Kind:** Favorite
- Department:** Field staff
- Include child topics:** ☒

A red circle with the number '2' is placed next to the 'Include child topics' toggle. At the bottom right of the configuration panel, a red circle with the number '3' is placed next to the 'Save' button.

This screenshot shows the 'Topic Tree' view for the 'Erstkontakt' department. The 'Favorites' list is highlighted with a red box and contains the following items:

- Field staff
- Distribution

A callout box points to this list with the text: "Here you can see for which departments this favorite has been set for."

Defining topics as department-wide Favorites

User view

The screenshot shows a web application interface for creating or editing an activity. The top navigation bar includes a hamburger menu, home, calendar, notifications, search, and star icons, along with an 'Activity' dropdown and user profile icons. The main form contains the following fields:

- Category:** A dropdown menu with a red exclamation mark icon and a downward arrow.
- Direction:** A dropdown menu with a red exclamation mark icon and a downward arrow.
- Responsible:** A text field containing 'Frau Melanie Hueber' and a downward arrow.
- Advertising shipment:** A toggle switch.
- Activity_Key activity:** A toggle switch.
- Connection:** A section with a '+' icon, a 'Type' dropdown, and an 'Object' dropdown.
- Topic Tree:** A list of topics with expandable arrows. The visible topics are:
 - Vertrieb (expanded)
 - Erstkontakt (expanded)
 - Produktinteresse (expanded)
 - Warengruppe B (expanded)
 - Produkt B1

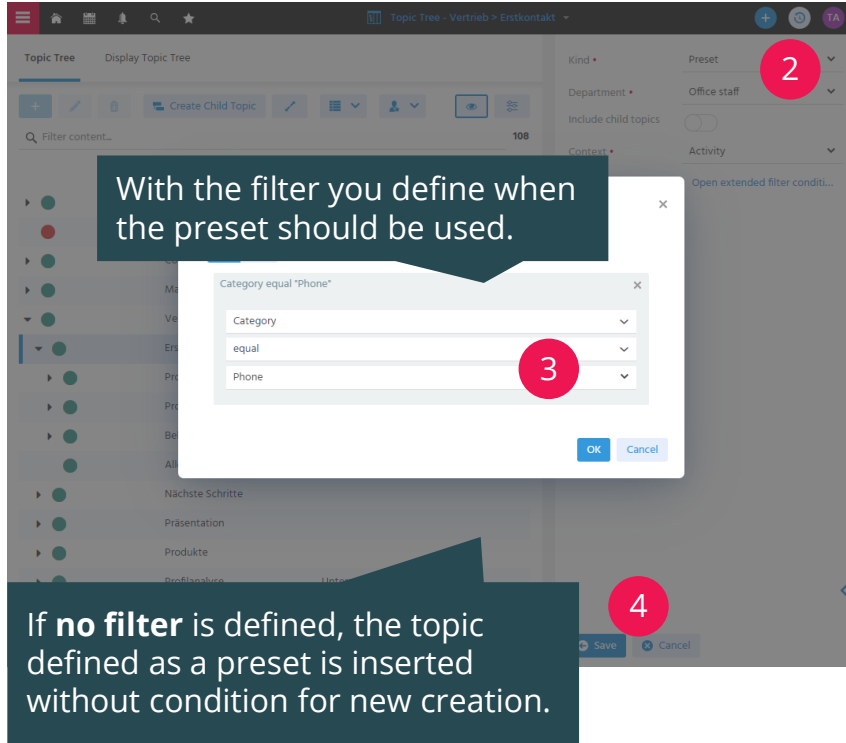
A dark blue speech bubble points to the 'Erstkontakt' topic in the Topic Tree, containing the text: 'While creating a new activity (EditView), the selection of topics in the defined Topic Tree Favorites for this department is displayed.'

Defining topics as department-wide Presets

The screenshot shows the 'Topic Tree' interface. At the top, there's a navigation bar with icons for home, calendar, notifications, search, and favorites. The breadcrumb path is 'Topic Tree - Vertrieb > Erstkontakt'. Below the navigation bar, there's a 'Topic Tree' section with a 'Display Topic Tree' toggle. A toolbar contains buttons for '+', edit, trash, 'Create Child Topic', 'Expand', a dropdown menu, and a user icon. A search bar labeled 'Filter content...' is also present. A red circle with the number '1' highlights the 'Add preset' button in a dropdown menu that appears when the user icon is clicked. The main area displays a list of topics with columns for 'Topic' and 'Description'. The 'Vertrieb' category is expanded, showing sub-topics like 'Erstkontakt', 'Produktinteresse', 'Projektaussicht', 'Bekannt durch', 'Allgemein', 'Nächste Schritte', and 'Präsentation'.

Topic	Description
Datenschutz	
Collaboration	
Compliance	
Marketing	
Vertrieb	
Erstkontakt	
Produktinteresse	
Projektaussicht	
Bekannt durch	
Allgemein	
Nächste Schritte	
Präsentation	

Defining topics as department-wide Presets



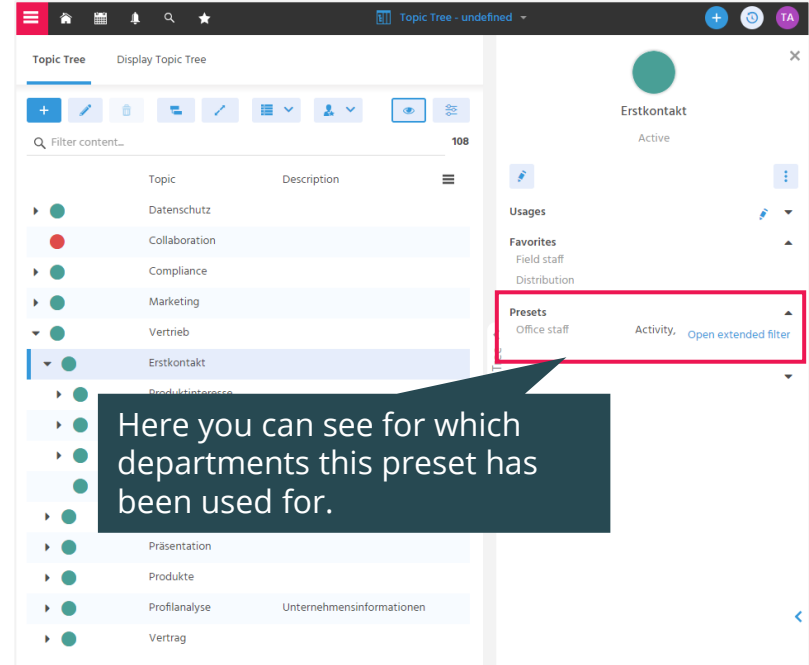
With the filter you define when the preset should be used.

Category equal "Phone"

Category
equal
Phone

OK Cancel

If **no filter** is defined, the topic defined as a preset is inserted without condition for new creation.



Topic Tree - undefined

Topic Tree Display Topic Tree

Filter content... 108

Topic	Description
Datenschutz	
Collaboration	
Compliance	
Marketing	
Vertrieb	
Erstkontakt	
Produktinteressen	
Präsentation	
Produkte	
Profilanalyse	Unternehmensinformationen
Vertrag	

Erstkontakt
Active

Usages

Favorites
Field staff
Distribution

Presets
Office staff
Activity, [Open extended filter](#)

Here you can see for which departments this preset has been used for.

Defining topics as department-wide Presets

User view

Category • Phone

Direction • ! Direction

Responsible Herr Tim Admin

Advertising shipment ☐

Key activity ☐

Connection

+ ! Type ! Object

Attribute

+ Attribute Value

Only favorite topics ☒

Topic

+ ↑ Vertrieb > Erstkontakt ↓

Description

+ ↑ Vertrieb > Erstkontakt > Bekannt durch ↓

Description

+ ↑ Topic ↓

Description

Document

Save Cancel

Required value is missing

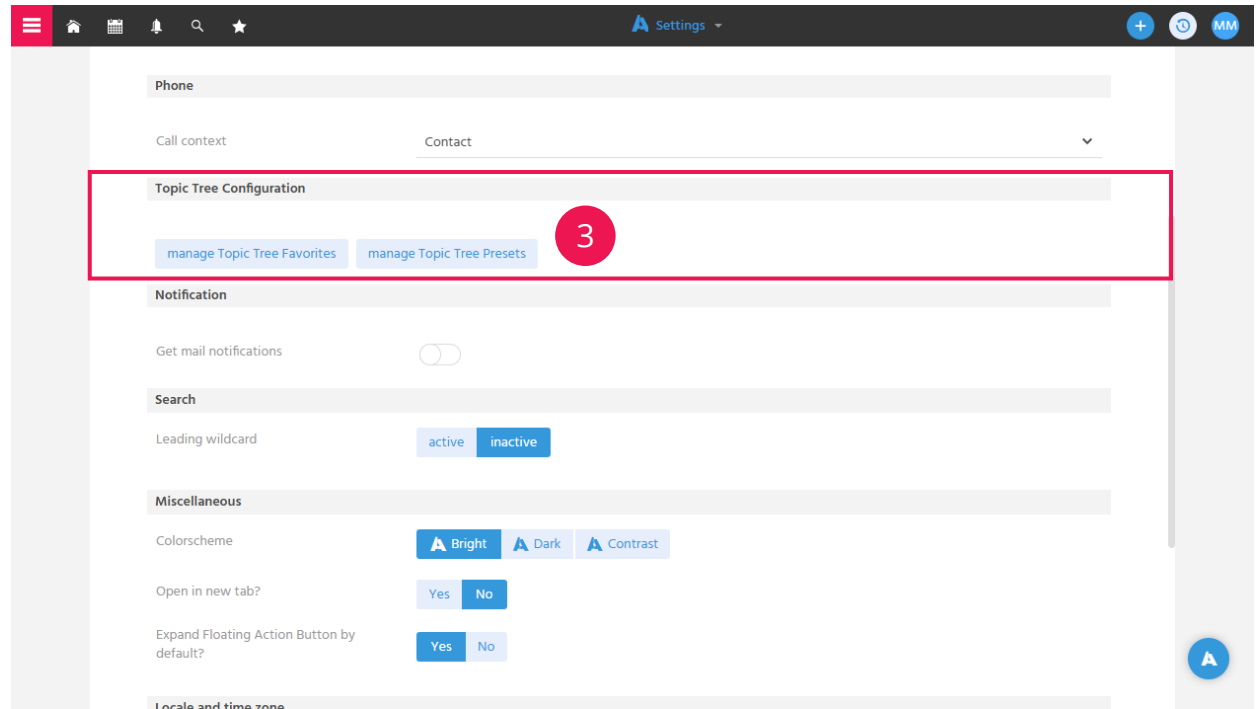
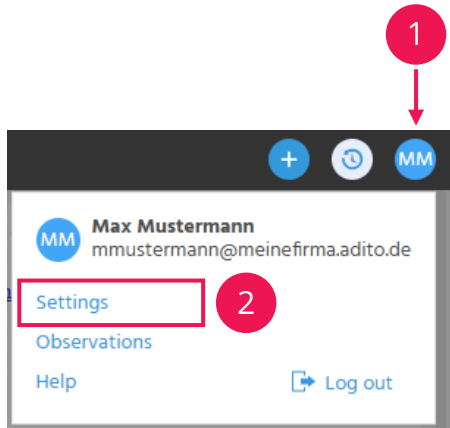
The topics defined as Presets are inserted as soon as the filter condition is met. For example, they are added as soon as a category is selected or certain terms are included in the title. If no condition is defined, these Presets are displayed when the new creation is opened.



Settings: Topic Tree Configuration

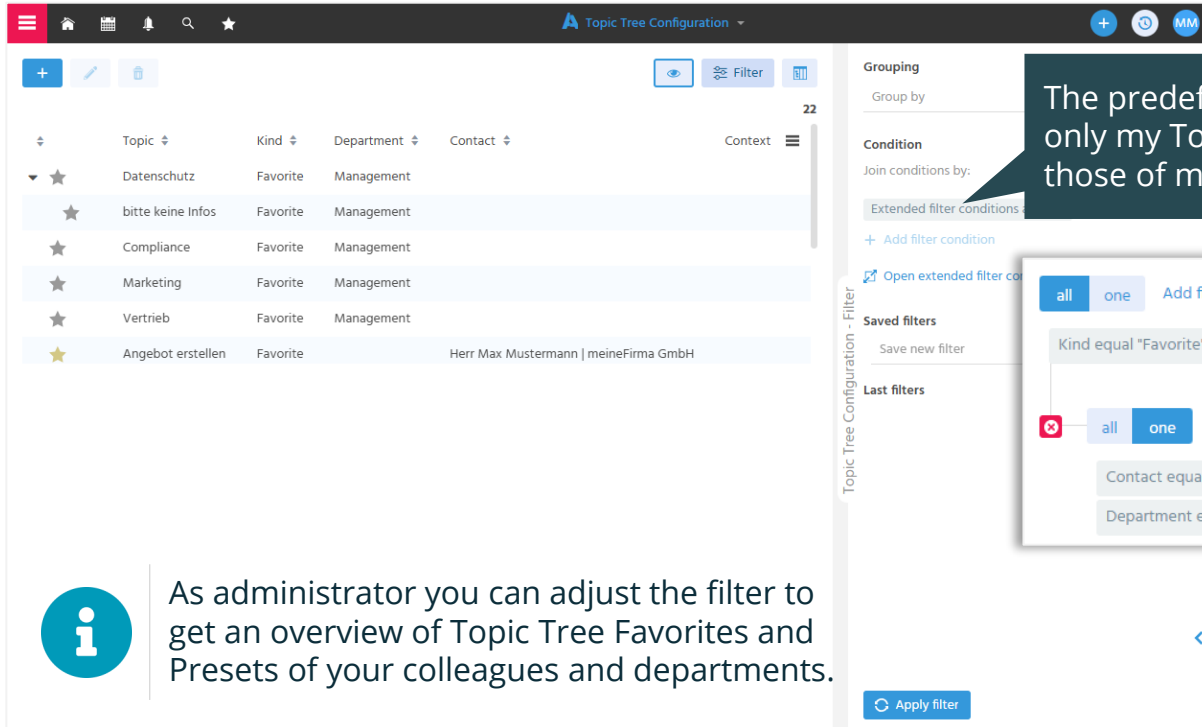
Setting: Topic Tree Configuration

Access to the configuration views



Topic Tree Configuration

FilterView: overview of Topic Tree Favorites



The screenshot shows the 'Topic Tree Configuration' interface. On the left, a table lists favorites with columns for Topic, Kind, Department, Contact, and Context. The table contains five entries, all marked as 'Favorite' and belonging to the 'Management' department. The last entry, 'Angebot erstellen', is highlighted with a yellow star and includes the contact 'Herr Max Mustermann | meineFirma GmbH'. On the right, the 'Filter' configuration panel is visible, showing 'Group by' and 'Condition' settings. A callout box points to the 'Condition' section, stating: 'The predefined filter specifies that only my Topic Tree Favorites and those of my department are displayed.' Below the table, an information icon (i) is followed by the text: 'As administrator you can adjust the filter to get an overview of Topic Tree Favorites and Presets of your colleagues and departments.'

Topic	Kind	Department	Contact	Context
Datenschutz	Favorite	Management		
bitte keine Infos	Favorite	Management		
Compliance	Favorite	Management		
Marketing	Favorite	Management		
Vertrieb	Favorite	Management		
Angebot erstellen	Favorite		Herr Max Mustermann meineFirma GmbH	

Grouping
Group by

Condition
Join conditions by:

Extended filter conditions

+ Add filter condition

Open extended filter configuration

Saved filters
Save new filter

Last filters

Apply filter

The predefined filter specifies that only my Topic Tree Favorites and those of my department are displayed.



As administrator you can adjust the filter to get an overview of Topic Tree Favorites and Presets of your colleagues and departments.

Topic Tree Configuration

FilterView: overview of Topic Tree Favorites

The screenshot shows the 'Topic Tree Configuration' interface. At the top, there's a navigation bar with icons for home, calendar, notifications, search, and favorites. Below this is a toolbar with '+', 'Filter', and 'Grouping' buttons. The main area displays a table of favorites with columns for Topic, Kind, Department, and Contact. The table lists several favorites, all of which are 'Favorite' kind and belong to the 'Management' department. A callout points to the first row, stating that department-wide favorites can only be deleted by the administrator. Another callout points to the last row, stating that individual favorites can be deleted one at a time. The interface also includes a 'reset' button for the grouping and an 'Apply filter' button at the bottom.

Topic	Kind	Department	Contact
Datenschutz	Favorite	Management	
bitte keine Infos	Favorite	Management	
Compliance	Favorite	Management	
Marketing	Favorite	Management	
Vertrieb	Favorite	Management	
Angebot erstellen	Favorite		Herr Max Mustermann meineFirma GmbH

department-wide Topic Tree Favorites can only be deleted by the administrator.

Individual Topic Tree Favorites can be deleted one at a time.

Topic Tree Configuration

Create Topic Tree Favorites

The screenshot displays the 'Topic Tree Configuration' interface. On the left, a table lists topics with columns for Topic, Kind, Department, Contact, and Context. A red circle with the number '1' highlights the '+' icon in the top-left corner of the table. On the right, a configuration panel is shown with a red circle with the number '2' highlighting the 'Kind' dropdown menu. Below the table, a red circle with the number '3' highlights the 'Save' button. At the bottom right, a summary section shows '17 Count', '3 Remaining count', and '20 Maximal count'.

Topic	Kind	Department	Contact	Context
Datenschutz	Favorite	Management		
bitte keine Infos	Favorite	Management		
Compliance	Favorite	Management		
Marketing	Favorite	Management		
Vertrieb	Favorite	Management		
Angebot erstellen	Favorite		Herr Max Mustermann meineFirma GmbH	

Topic Tree Configuration

17 Count 3 Remaining count 20 Maximal count

Save Cancel

You can define a topic, incl. its subtopics as Topic Tree Favorite.

You can define single topics as Topic Tree Favorite.

Topic Tree Configuration

As specialist administrator

You can create, edit and delete Topic Tree **Favorites** for

- yourself
- other contacts
- departments

The first screenshot shows the configuration for a 'Contact' favorite. The 'Object type' is 'Contact' and the 'Contact' is 'Herr Tim Admin | meineFirm'. The 'Include child topics' toggle is off. The 'Topic' is '! Topic'.

The second screenshot shows a list of contacts. The 'Object type' is 'Contact' and the 'Contact' is 'Birgit Leicht'. The list shows columns for Firstname, Lastname, and Department.

Firstname	Lastname	Department
Tim	Admin	IT
Birgit	Leicht	Distribution
Christian	Pabst	Distribution / Field sta
Franz	Müller	Marketing
Herbert	Obermeier	Management
Harold	Smith	Service

The third screenshot shows the configuration for a 'Department' favorite. The 'Object type' is 'Department' and the 'Department' is 'Field staff'. The 'Include child topics' toggle is off. The 'Topic' is 'Field staff'.

As user

You can create, edit and delete individual Topic Tree **Favorites**.

The screenshot shows the configuration for a 'Contact' favorite. The 'Object type' is 'Contact' and the 'Contact' is 'Frau Melanie Hueber | mein'. The 'Include child topics' toggle is off. The 'Topic' is 'Vertrieb > Erstkontakt > Pro'.

Topic Tree Configuration

Preview of Topic Tree Favorites

The screenshot displays the 'Topic Tree Configuration' interface. It features a table with columns for Topic, Kind, Department, Contact, and Context. The table lists several topics, including 'Marketing', 'Vertrieb', 'Angebot erstellen', 'Teilnehmer', 'Zielgruppe', and 'Nächste Schritte'. The 'Nächste Schritte' topic is highlighted. A callout box points to the 'Nächste Schritte' row, stating: 'Up to max. 20 topics can be set as individual Topic Tree Favorite.' Another callout box points to the 'Nächste Schritte' row, stating: 'Here it shows how many topics can still be defined as Topic Tree Favorite.' A third callout box points to the 'Nächste Schritte' row, stating: 'Here it shows how many topics have already been defined as Topic Tree Favorite.'

Topic	Kind	Department	Contact	Context
★ Marketing	Favorite	Management		
★ Vertrieb	Favorite	Management		
★ Angebot erstellen	Favorite		Herr Max Mustermann meineFirma G	
▼ ★ Teilnehmer	Favorite		Herr Max Mustermann meineFirma G	
▶ ★ Zielgruppe	Favorite		Herr Max Mustermann meineFirma G	
★ Nächste Schritte	Favorite		Herr Max Mustermann meineFirma G	

Up to max. 20 topics can be set as individual Topic Tree Favorite.

Here it shows how many topics can still be defined as Topic Tree Favorite.

Here it shows how many topics have already been defined as Topic Tree Favorite.

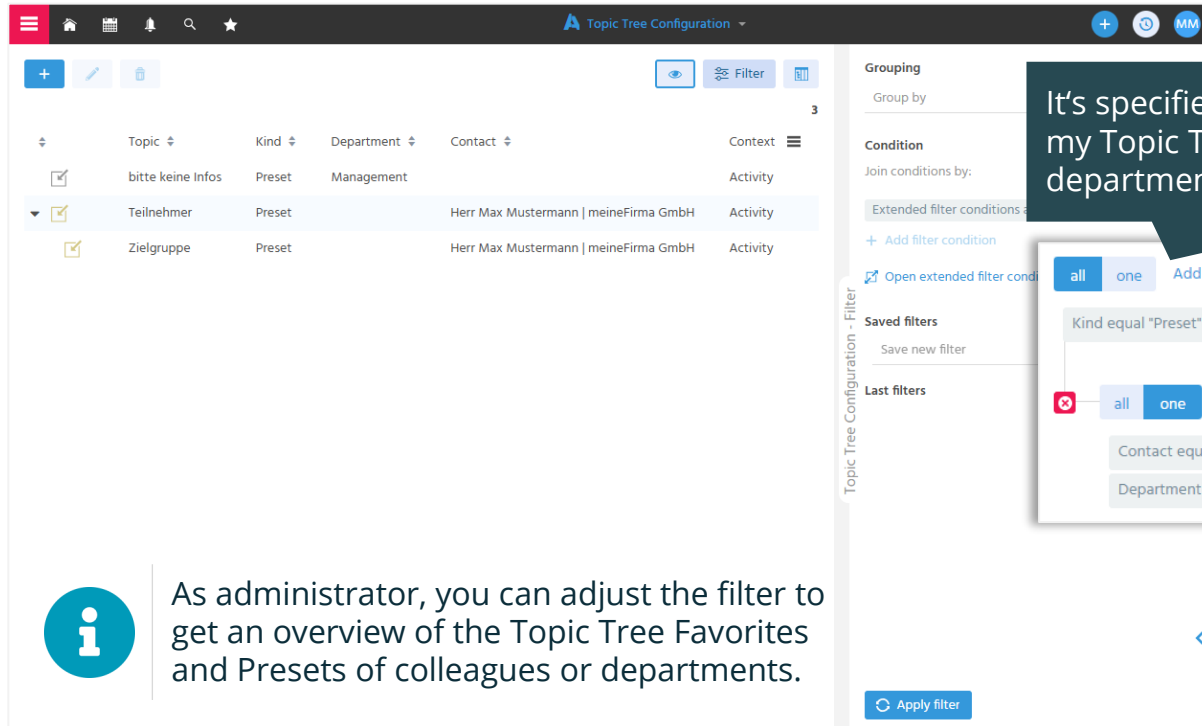
17 Count

3 Remaining count

20 Maximal count

Topic Tree Configuration

FilterView: overview of Topic Tree Presets



Topic	Kind	Department	Contact	Context
bitte keine Infos	Preset	Management		Activity
Teilnehmer	Preset	Herr Max Mustermann meineFirma GmbH		Activity
Zielgruppe	Preset	Herr Max Mustermann meineFirma GmbH		Activity

Grouping

Group by

Condition

Join conditions by:

Extended filter conditions

+ Add filter condition

Open extended filter condition

Saved filters

Save new filter

Last filters

Apply filter

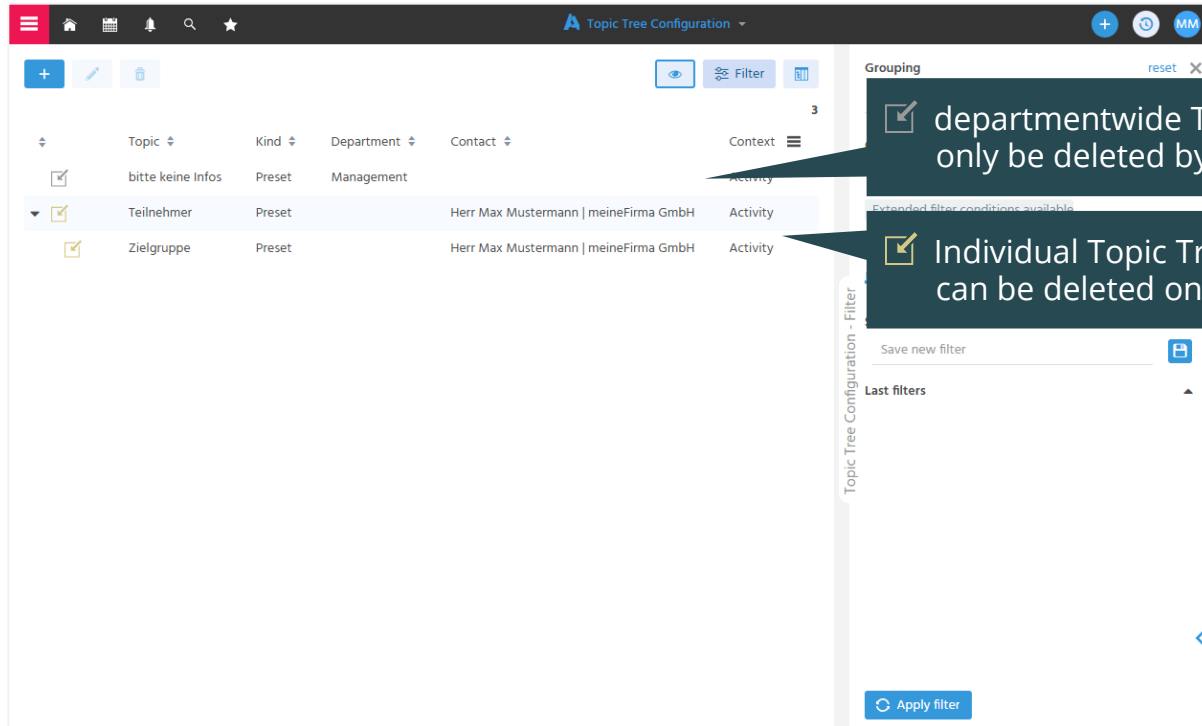
It's specified in the predefined filter that only my Topic Tree Presets and the one of my department are displayed.



As administrator, you can adjust the filter to get an overview of the Topic Tree Favorites and Presets of colleagues or departments.

Topic Tree Configuration

FilterView: overview of Topic Tree Presets



The screenshot displays the 'Topic Tree Configuration' interface. At the top, there is a navigation bar with icons for home, calendar, notifications, search, and favorites. Below this is a header bar with the title 'Topic Tree Configuration' and several action buttons (+, edit, delete, eye, filter, calendar). The main area contains a table with the following columns: Topic, Kind, Department, and Contact. The table lists three presets: 'bitte keine Infos', 'Teilnehmer', and 'Zielgruppe'. The 'Teilnehmer' preset is selected. To the right of the table, there is a 'Filter' button and a 'Grouping' section with a 'reset' button. Below the 'Filter' button, there is a 'Context' menu with options for 'Activity' and 'Extended filter conditions available'. At the bottom, there is a 'Save new filter' button and a 'Last filters' section.

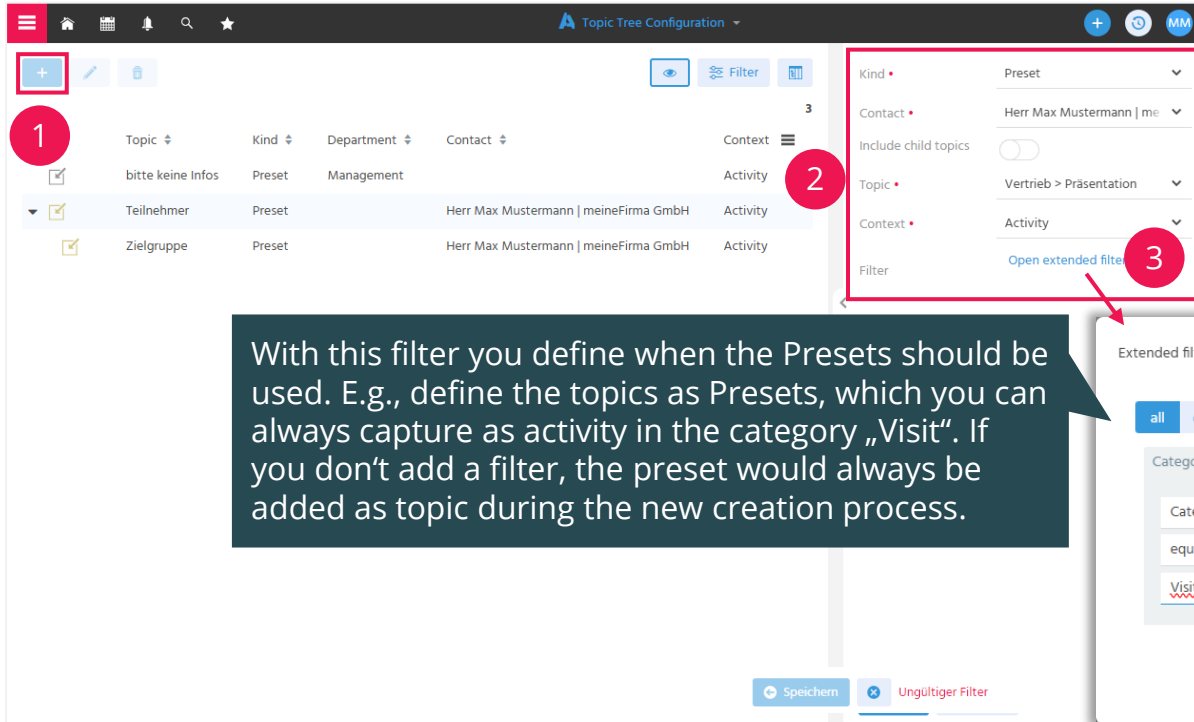
Topic	Kind	Department	Contact
bitte keine Infos	Preset	Management	
Teilnehmer	Preset	Herr Max Mustermann meineFirma GmbH	Activity
Zielgruppe	Preset	Herr Max Mustermann meineFirma GmbH	Activity

departmentwide Topic Tree Presets can only be deleted by the specialist administrator.

Individual Topic Tree Presets can be deleted one at a time.

Topic Tree Configuration

Create a Topic Tree Preset

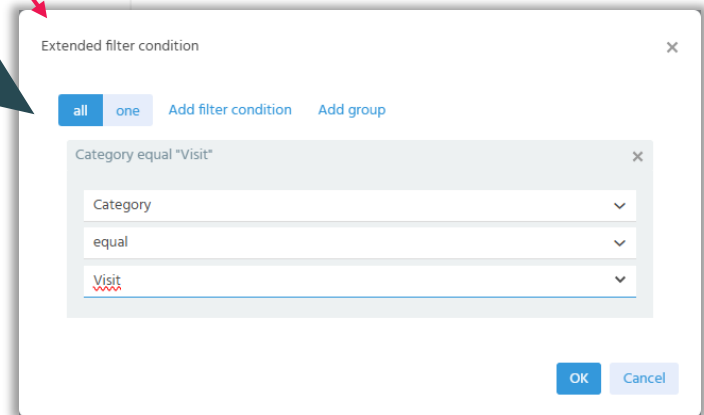


The screenshot shows the 'Topic Tree Configuration' interface. A table lists topics with columns for Topic, Kind, Department, Contact, Context, and Activity. Callout 1 points to the '+' button in the top left. Callout 2 points to the 'Filter' button in the top right. Callout 3 points to the 'Open extended filter' link in the right sidebar.

Topic	Kind	Department	Contact	Context	Activity
bitte keine Infos	Preset	Management			
Teilnehmer	Preset		Herr Max Mustermann meineFirma GmbH	Activity	Activity
Zielgruppe	Preset		Herr Max Mustermann meineFirma GmbH	Activity	Activity

Buttons at the bottom: Speichern, Ungültiger Filter.

With this filter you define when the Presets should be used. E.g., define the topics as Presets, which you can always capture as activity in the category „Visit“. If you don't add a filter, the preset would always be added as topic during the new creation process.



Extended filter condition

all one Add filter condition Add group

Category equal "Visit"

Category equal Visit

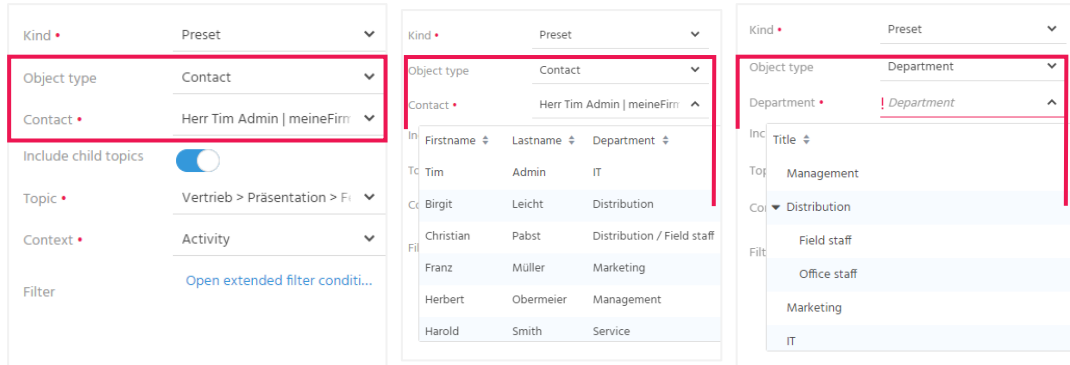
OK Cancel

Topic Tree Configuration

As specialist administrator

You can create, edit or delete Topic Tree **Presets** for

- yourself
- other contacts
- departments



The first screenshot shows the configuration for a 'Contact' preset. The 'Object type' is set to 'Contact' and the 'Contact' dropdown is open, showing 'Herr Tim Admin | meineFirm'. The 'Include child topics' toggle is turned on. The 'Topic' is 'Vertrieb > Präsentation > Fi' and the 'Context' is 'Activity'. A link to 'Open extended filter condi...' is visible.

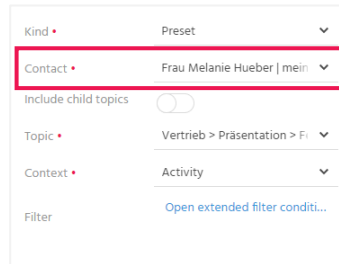
The second screenshot shows the configuration for a 'Contact' preset. The 'Object type' is set to 'Contact' and the 'Contact' dropdown is open, showing 'Herr Tim Admin | meineFirm'. Below, a table lists contacts with columns for Firstname, Lastname, and Department.

Firstname	Lastname	Department
Tim	Admin	IT
Birgit	Leicht	Distribution
Christian	Pabst	Distribution / Field staff
Franz	Müller	Marketing
Herbert	Obermeier	Management
Harold	Smith	Service

The third screenshot shows the configuration for a 'Department' preset. The 'Object type' is set to 'Department' and the 'Department' dropdown is open, showing '! Department'. Below, a list shows departments: Title, Management, Distribution, Field staff, Office staff, Marketing, and IT.

As user

You can create, edit or delete individual Topic Tree **Presets**.



The screenshot shows the configuration for a 'Contact' preset. The 'Object type' is set to 'Contact' and the 'Contact' dropdown is open, showing 'Frau Melanie Hueber | mein'. The 'Include child topics' toggle is turned off. The 'Topic' is 'Vertrieb > Präsentation > Fi' and the 'Context' is 'Activity'. A link to 'Open extended filter condi...' is visible.

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