



External Work

ADITO Academy

As of version 2024.2.2 | 03.02.2025





Screenshots

The UX design of ADITO is continuously optimised for you. Therefore, there may be deviations in the screenshots.

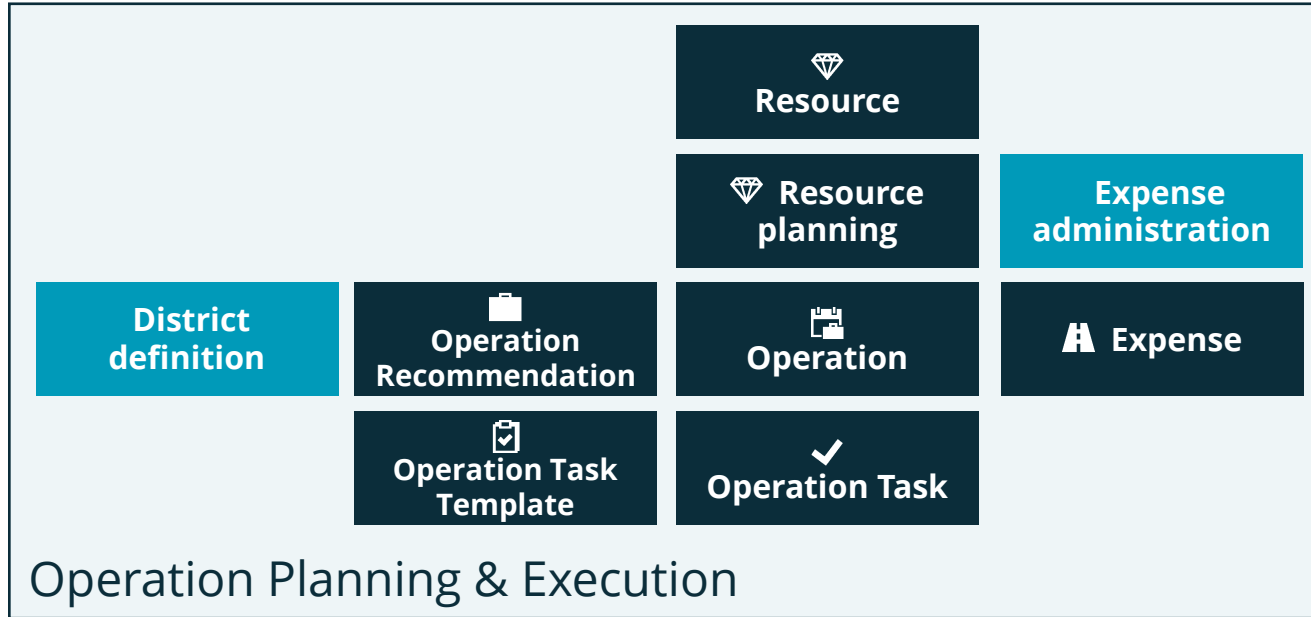




Agenda

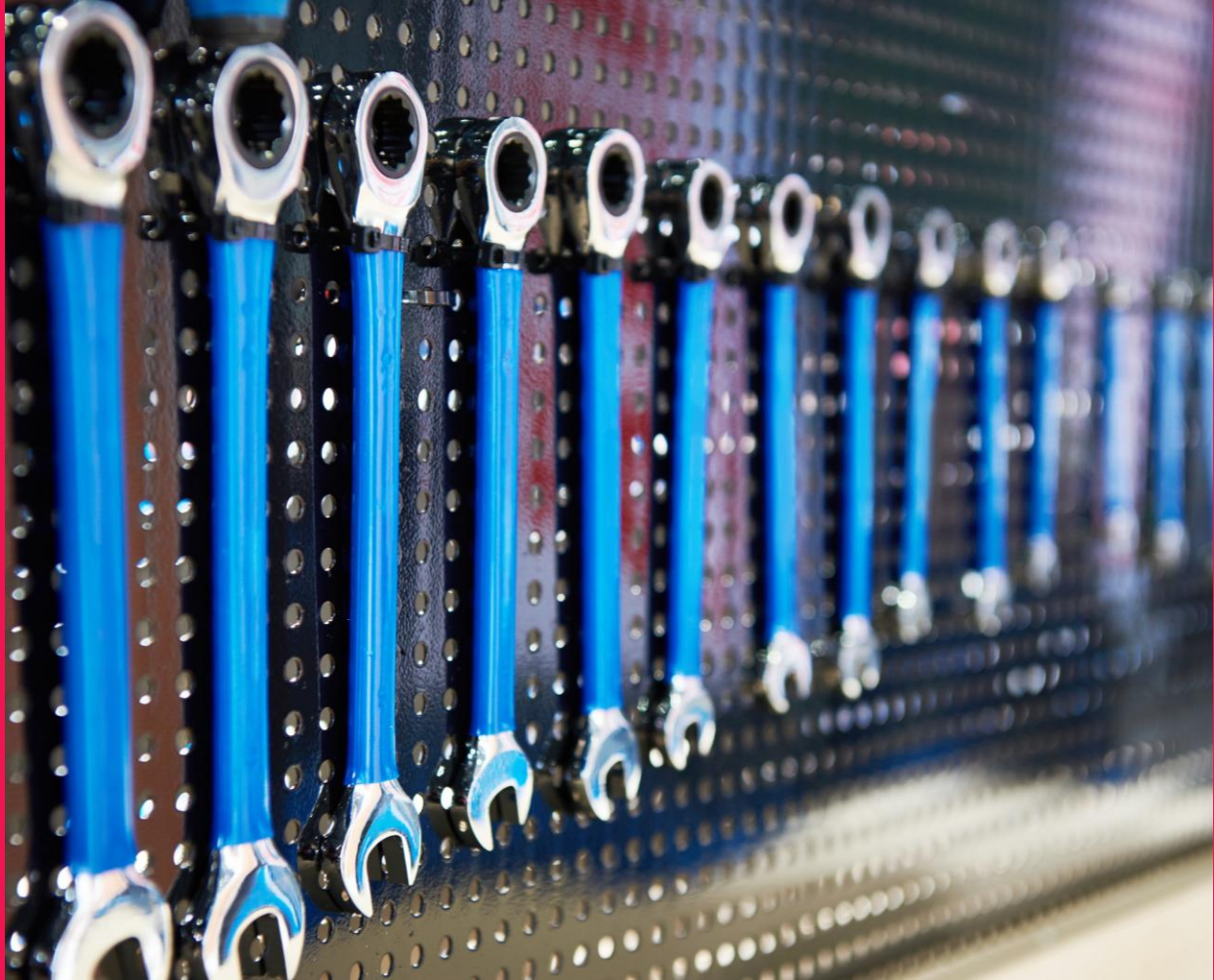
- [Overview External Work Menu Group](#)
- [Resource](#)
- [Resource planning](#)
- [Operation Recommendation](#)
- [Operation](#)
- [Operation Task](#)
- [Operation Task Template](#)
- [Expense report](#)

„External work“ menu group

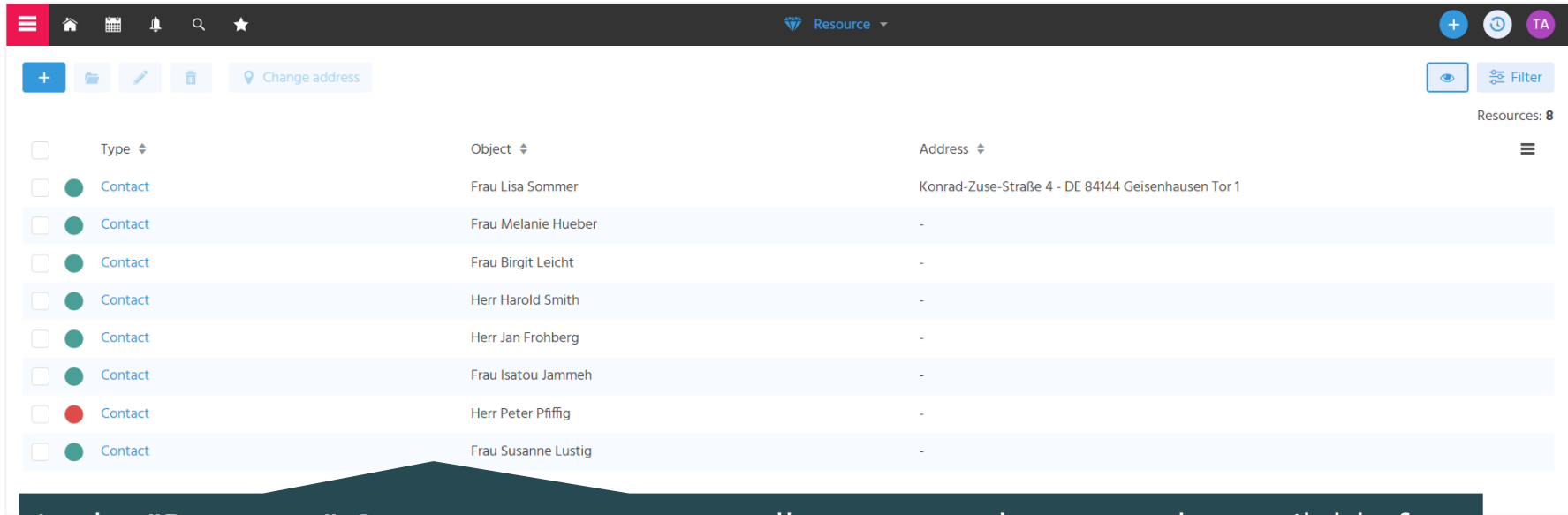


■ Specialist administration: Occasional addition/adjustment ■ „Daily“ in use by user

Resource



Resource



The screenshot shows the ADITO Resource management interface. At the top, there is a navigation bar with icons for home, calendar, notifications, search, and favorites. The main header area includes a 'Resource' dropdown menu and user profile icons. Below this is a toolbar with buttons for adding (+), folders, editing (pencil), deleting (trash), and changing address. A 'Filter' button is also present. The main content area displays a table of resources. Each row has a checkbox, a status indicator (green or red circle), a 'Type' dropdown, an 'Object' column, and an 'Address' column. The table shows 8 resources, with 7 being active (green circle) and 1 being inactive (red circle). The bottom right corner of the interface shows 'Resources: 8' and a menu icon.

☐	Type ▾	Object ▾	Address ▾
☐	● Contact	Frau Lisa Sommer	Konrad-Zuse-Straße 4 - DE 84144 Geisenhausen Tor 1
☐	● Contact	Frau Melanie Hueber	-
☐	● Contact	Frau Birgit Leicht	-
☐	● Contact	Herr Harold Smith	-
☐	● Contact	Herr Jan Froberg	-
☐	● Contact	Frau Isatou Jammeh	-
☐	● Contact	Herr Peter Pfiffig	-
☐	● Contact	Frau Susanne Lustig	-

In the "Resource" Context, you can enter all resources that are to be available for resource planning. These can be employees, as in the example, but also company vehicles, tools, etc. Active resources are indicated by the green circle, inactive resources by the red circle.

Add resource



+

📁

✎

📄

📍 Change address

👁️

🔍 Filter

Resources: 8

☰

☐	Type ↕	Object ↕	Address ↕
☐	Contact	Frau Lisa Sommer	Konrad-Zuse-Straße 4 - DE 84144 Geisenhausen Tor 1
☐	Contact	Frau Melanie Hueber	-
☐	Contact	Frau Birgit Leicht	-
☐	Contact	Herr Harold Smith	-
☐	Contact	Herr Jan Froberg	-
☐	Contact	Frau Isatou Jammeh	-
☐	Contact	Herr Peter Pfiffig	-
☐	Contact	Frau Susanne Lustig	-

Active ☒

Type • Contact ▼

Person • ! Person ▼

Address source Address source ▼

Address Address

+ Monday ▼

08:00 ▼ 17:00 ▼

Tuesday ▼

08:00 ▼ 17:00 ▼

Wednesday ▼

08:00 ▼ 17:00 ▼

Thursday ▼

Required value is missing

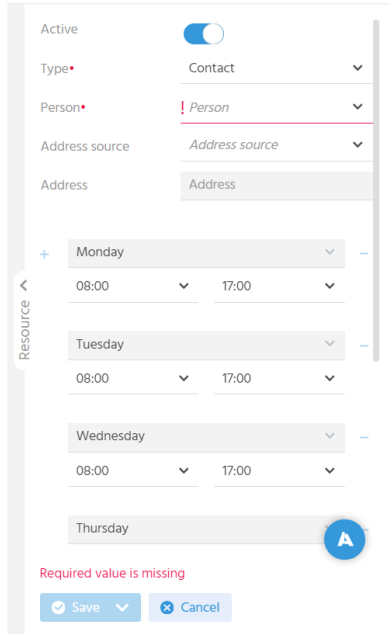
✓ Save ▼

✗ Cancel



Resource

Add resource



Active

Inactive resources cannot be selected for operations and appointments, and they are not displayed in resource planning. In addition, you cannot create new attributes and timetracking entries for inactive resources.

Type

Select what type of resource it is, e.g. employees (contact), company vehicle.

Person

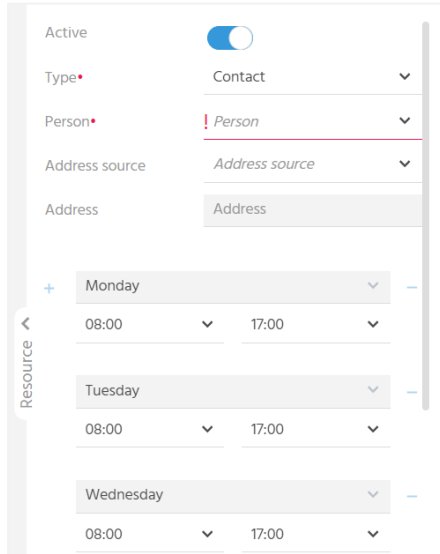
Depending on the selected resource type, the field name is adjusted here and the associated objects are available, e.g. the contacts, vehicles stored in the CRM.



Which **resource types** are available for selection must be defined via customizing.

Resource

Add resource



Address source

Here you can choose whether to display the address of the logged-in user, the resource or the resource's company.

Address

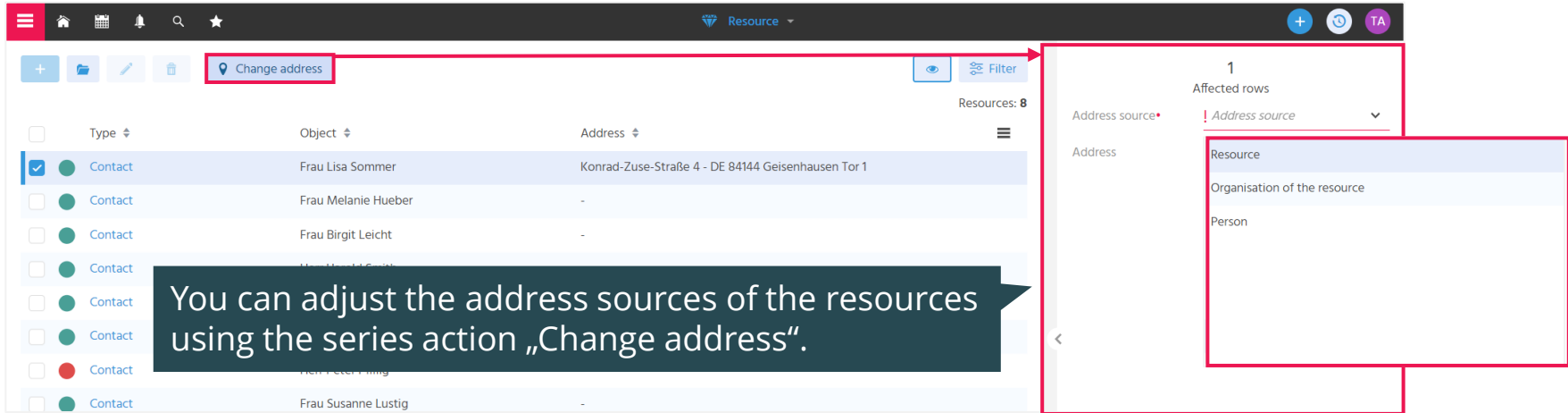
The address that you have selected under "Address source" is displayed here, provided that an address is stored with the address source. This address is used as the start and end address during route planning.

Working times

Define the periods during which a resource can be booked. For example, for employees, enter the regular working times of the employee.



The „**Working times from/to**“ can be preset via parameters in the project.



You can adjust the address sources of the resources using the series action „Change address“.

The users for whom the start/end address was updated will receive a notification about it.

The address of your resource dataset has been changed

Admin changed the
address of your...

23/02/2024, 09:16

Resource



Change address

If the address source change cannot be performed, you will get a message for what reasons the change failed:

- Company has no standard address
- User has no default address
- User has no company



Resource

Delete resource

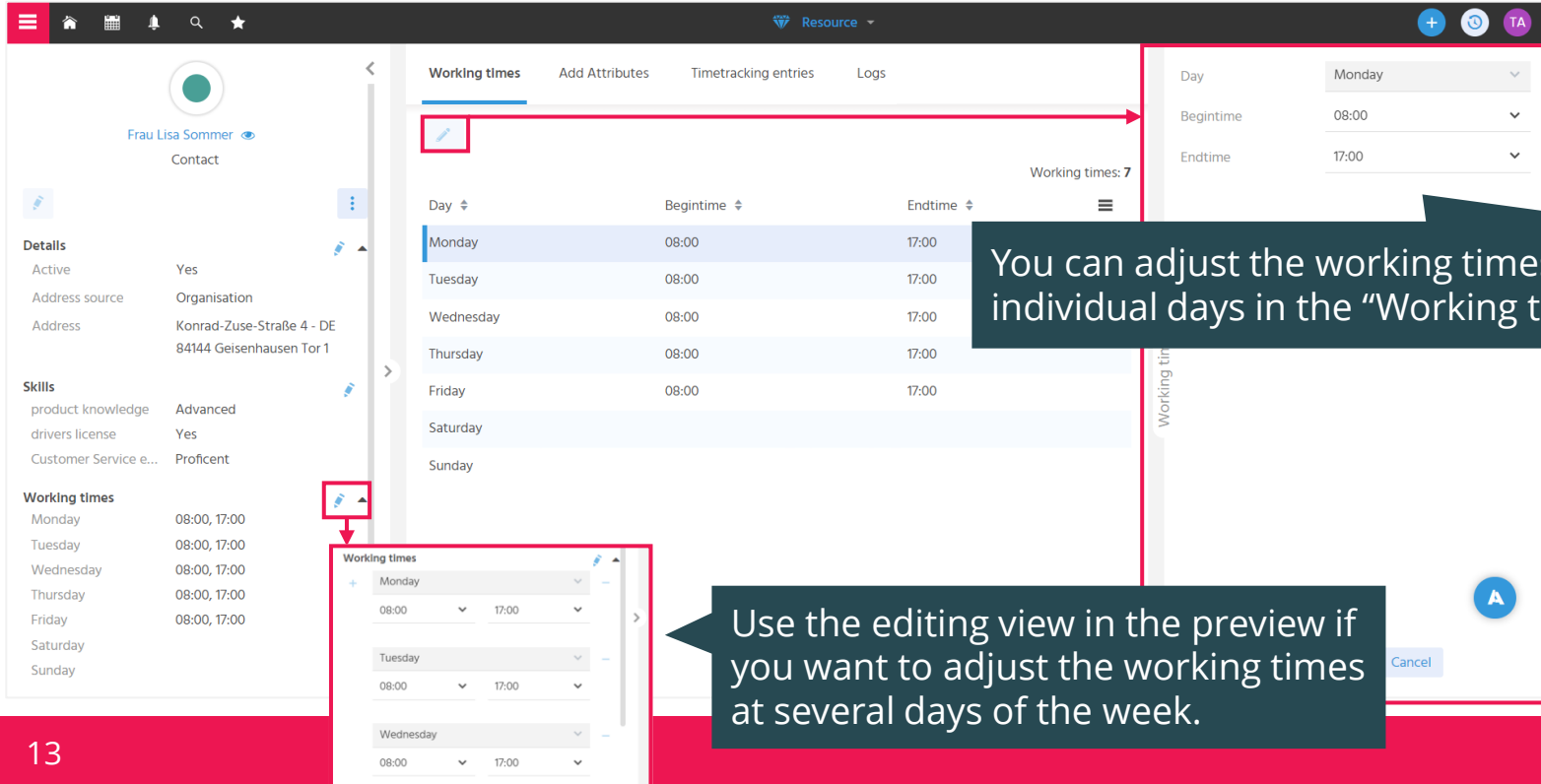
You can delete a resource only if there is no entry for the resource in resource planning yet.

Inactive resources are marked by a red circle. Active resources have a green circle.



Type	Object	Address
☒ Contact	Frau Lisa Sommer	Konrad-Zuse-Straße 4 - DE 84144 Geisenhausen Tor 1
☐ Contact	Frau Melanie Hueber	-
☐ Contact	Frau Birgit Leicht	-
☐ Contact	Herr Harold Smith	-
☐ Contact	Herr Jan Frohberg	-
☐ Contact	Frau Isatou Jammeh	-
☐ Contact	Herr Peter Pfiffig	-
☐ Contact		

Adjust Working times



The screenshot displays the ADITO Resource management interface. On the left, a sidebar shows the resource's profile for 'Frau Lisa Sommer', including contact details, skills, and a summary of working times. The main area is titled 'Working times' and contains a table of weekly schedules. A red box highlights an edit icon in the top-left corner of the table, with a red arrow pointing to a detailed editing panel on the right. Another red box highlights an edit icon in the sidebar, with a red arrow pointing to a preview of the working times table at the bottom. Two callout boxes provide instructions on how to adjust working times.

Day	Begin time	End time
Monday	08:00	17:00
Tuesday	08:00	17:00
Wednesday	08:00	17:00
Thursday	08:00	17:00
Friday	08:00	17:00
Saturday		
Sunday		

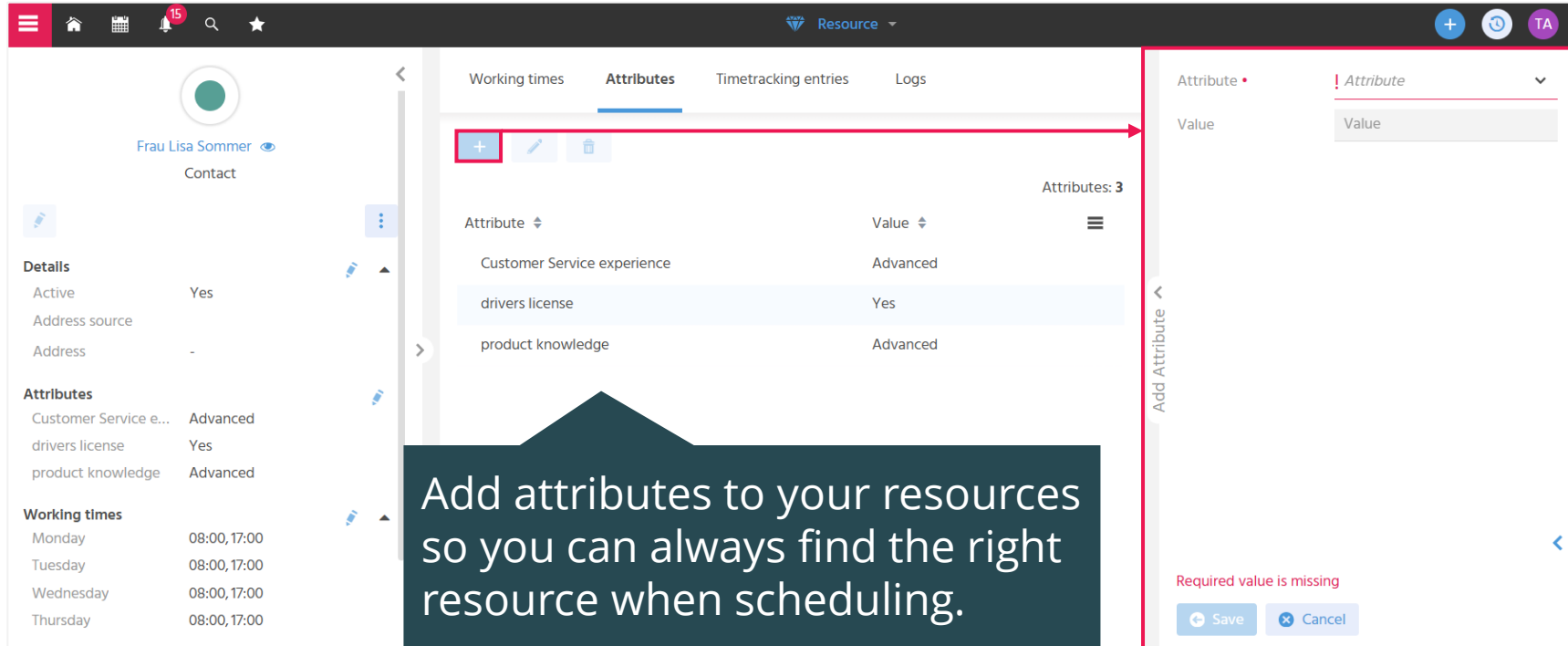
Working times: 7

Callout 1: You can adjust the working times for individual days in the "Working times" tab.

Callout 2: Use the editing view in the preview if you want to adjust the working times at several days of the week.

Resource

Add attributes



The screenshot shows the ADITO Resource management interface. On the left, a sidebar displays the resource profile for 'Frau Lisa Sommer', including details like 'Active' status and 'Address source'. The main area is divided into tabs: 'Working times', 'Attributes', 'Timetracking entries', and 'Logs'. The 'Attributes' tab is active, showing a table of existing attributes for the resource. A red box highlights the '+' button in the top left of the attributes table, and a red arrow points from it to a modal window on the right. The modal window is titled 'Add Attribute' and contains a form with two fields: 'Attribute' and 'Value'. The 'Attribute' field has a red exclamation mark icon and the text '! Attribute'. The 'Value' field is empty. Below the form, a red error message states 'Required value is missing'. At the bottom of the modal are 'Save' and 'Cancel' buttons.

Attribute	Value
Customer Service experience	Advanced
drivers license	Yes
product knowledge	Advanced

Attributes: 3

Add Attribute

Attribute • ! Attribute

Value

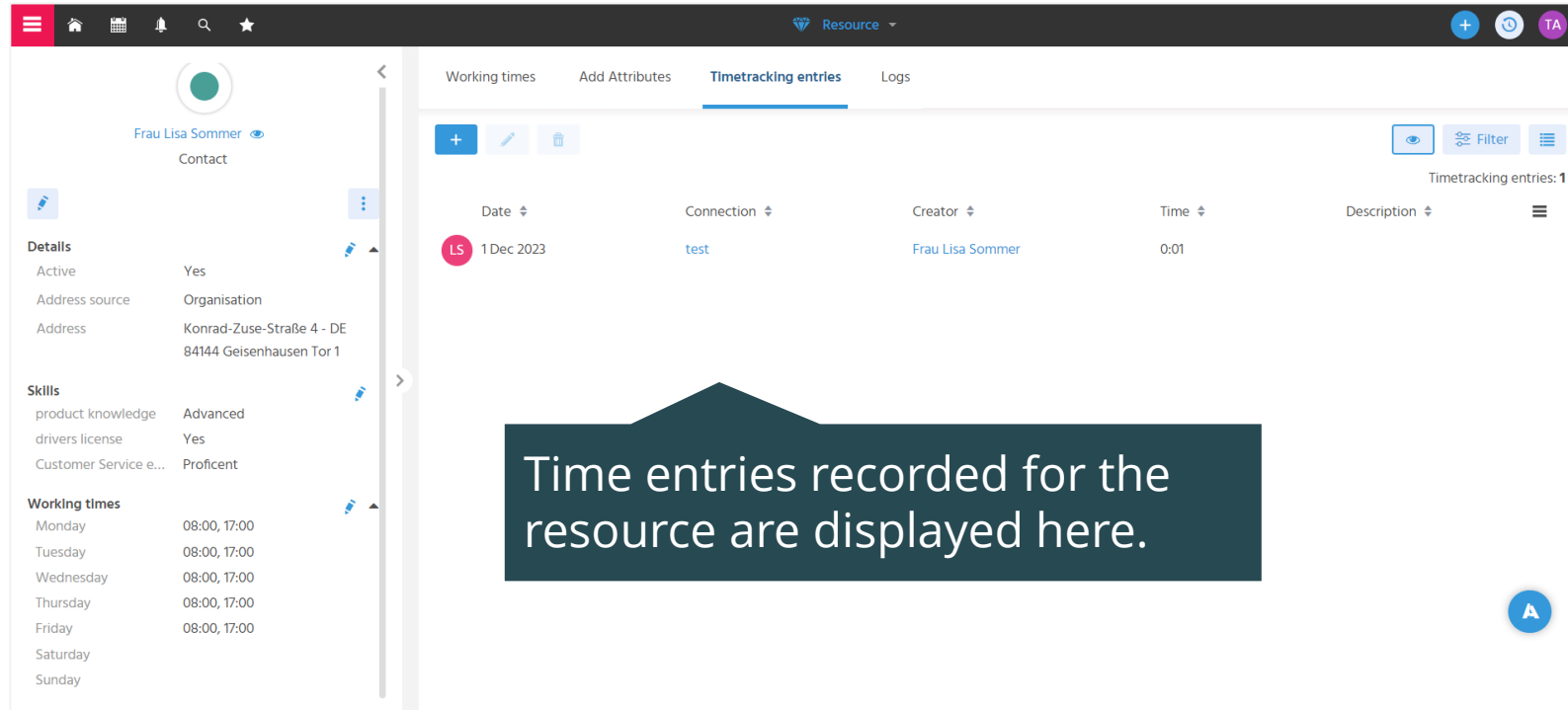
Value

Required value is missing

Save Cancel

Add attributes to your resources so you can always find the right resource when scheduling.

Timetracking entries tab



The screenshot shows the ADITO interface for a resource named 'Frau Lisa Sommer'. The left sidebar contains details about the resource, including contact information and skills. The main area displays the 'Timetracking entries' tab, which shows a table of recorded time entries. A dark blue callout box is overlaid on the table, stating: 'Time entries recorded for the resource are displayed here.'

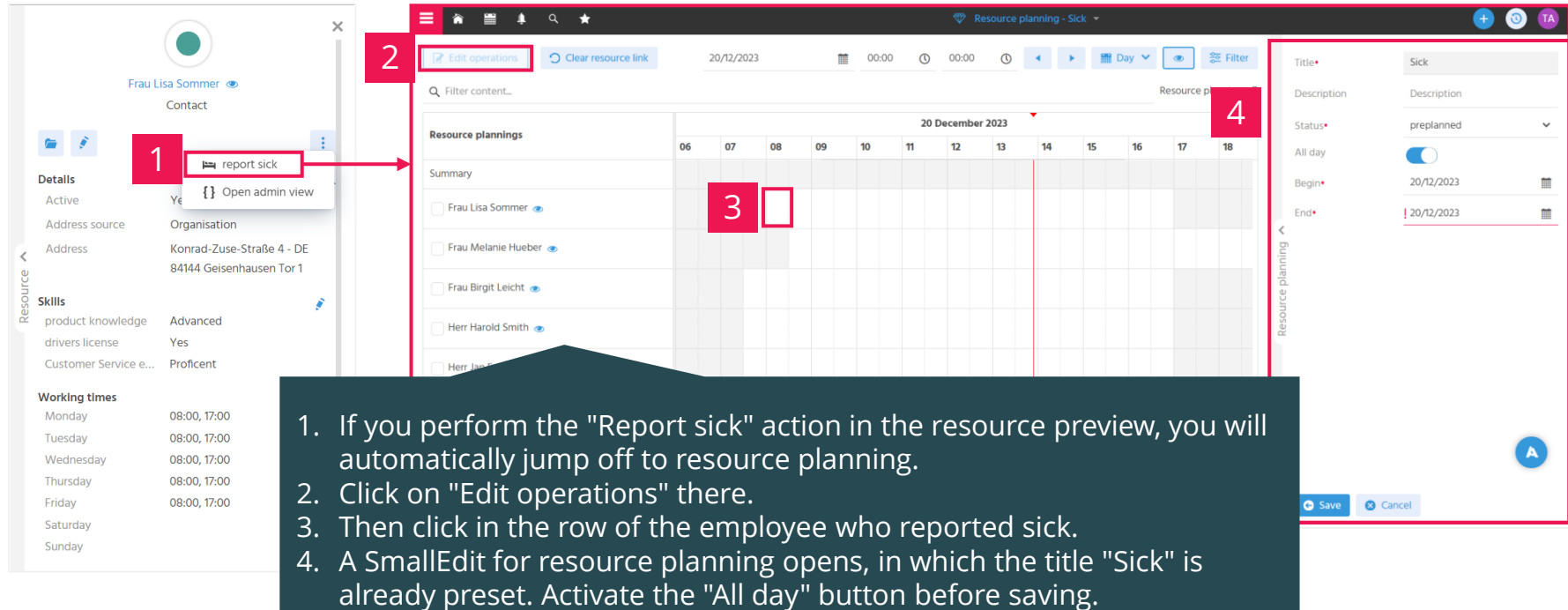
Resource Details:

- Contact:** Frau Lisa Sommer
- Details:**
 - Active: Yes
 - Address source: Organisation
 - Address: Konrad-Zuse-Straße 4 - DE 84144 Geisenhausen Tor 1
- Skills:**
 - product knowledge: Advanced
 - drivers license: Yes
 - Customer Service e...: Proficient
- Working times:**
 - Monday: 08:00, 17:00
 - Tuesday: 08:00, 17:00
 - Wednesday: 08:00, 17:00
 - Thursday: 08:00, 17:00
 - Friday: 08:00, 17:00
 - Saturday: 08:00, 17:00
 - Sunday: 08:00, 17:00

Timetracking entries:

Date	Connection	Creator	Time	Description
1 Dec 2023	test	Frau Lisa Sommer	0:01	

Employee reports sick



The screenshot illustrates the process of reporting an employee sick in the ADITO Resource planning system. It is divided into two main panels: a resource preview on the left and a resource planning calendar on the right.

Resource Preview (Left Panel):

- 1** A red box highlights the "report sick" button in the "Details" section.
- 2** A red box highlights the "Edit operations" button in the top navigation bar of the resource planning view.

Resource Planning (Right Panel):

- 3** A red box highlights the row for "Frau Lisa Sommer" in the "Resource plannings" table.
- 4** A red box highlights the "Sick" title in the "Title" field of the "SmallEdit" form on the right.

Resource Planning Table:

Resource plannings	06	07	08	09	10	11	12	13	14	15	16	17	18
Summary													
☐ Frau Lisa Sommer													
☐ Frau Melanie Hueber													
☐ Frau Birgit Leicht													
☐ Herr Harold Smith													
☐ Herr Jack													

SmallEdit Form (Right Panel):

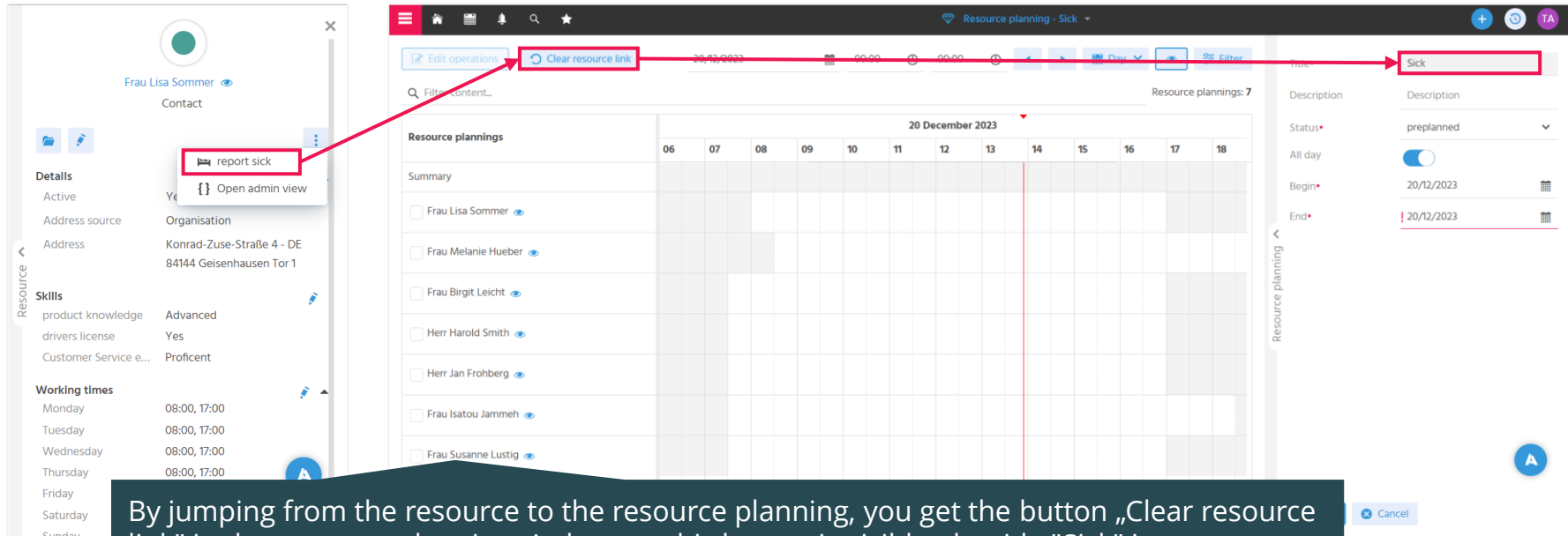
- Title:** Sick
- Description:** Description
- Status:** preplanned
- All day:** ☒
- Begin:** 20/12/2023
- End:** 20/12/2023

Instructions:

1. If you perform the "Report sick" action in the resource preview, you will automatically jump off to resource planning.
2. Click on "Edit operations" there.
3. Then click in the row of the employee who reported sick.
4. A SmallEdit for resource planning opens, in which the title "Sick" is already preset. Activate the "All day" button before saving.

Resource

Employee reports sick



The screenshot displays the ADITO interface. On the left, the 'Resource' panel shows details for 'Frau Lisa Sommer'. A red box highlights the 'report sick' button. A red arrow points from this button to the 'Clear resource link' button in the 'Resource planning' view. The 'Resource planning' view shows a calendar for '20 December 2023'. A red box highlights the 'Clear resource link' button. Another red arrow points from this button to the 'Sick' status in the 'Resource planning' view. The 'Sick' status is highlighted with a red box. The 'Resource planning' view also shows a list of resources and their status for the day.

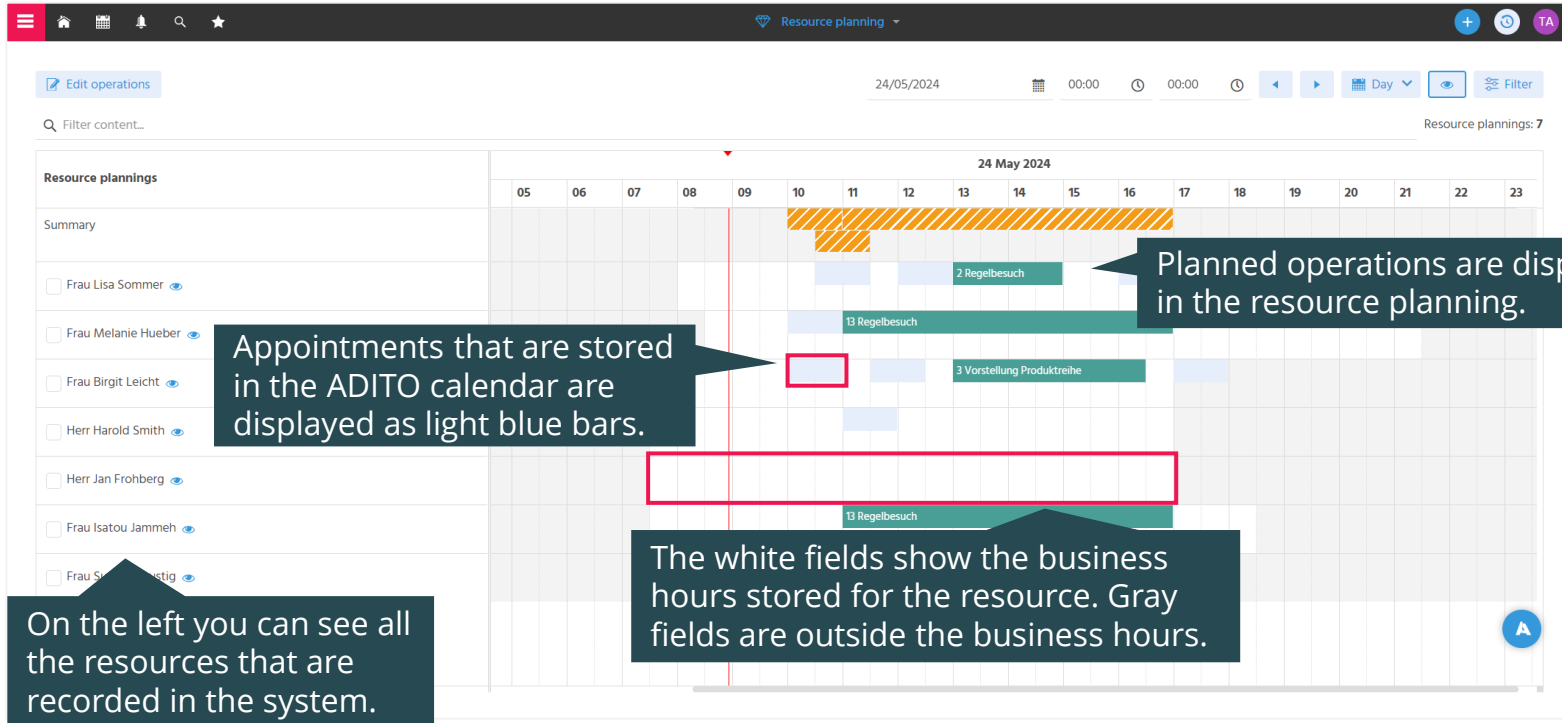
By jumping from the resource to the resource planning, you get the button „Clear resource link“ in the resource planning. As long as this button is visible, the title "Sick" is automatically preassigned when you want to plan an operation. To remove the link, click the button.

Resource planning



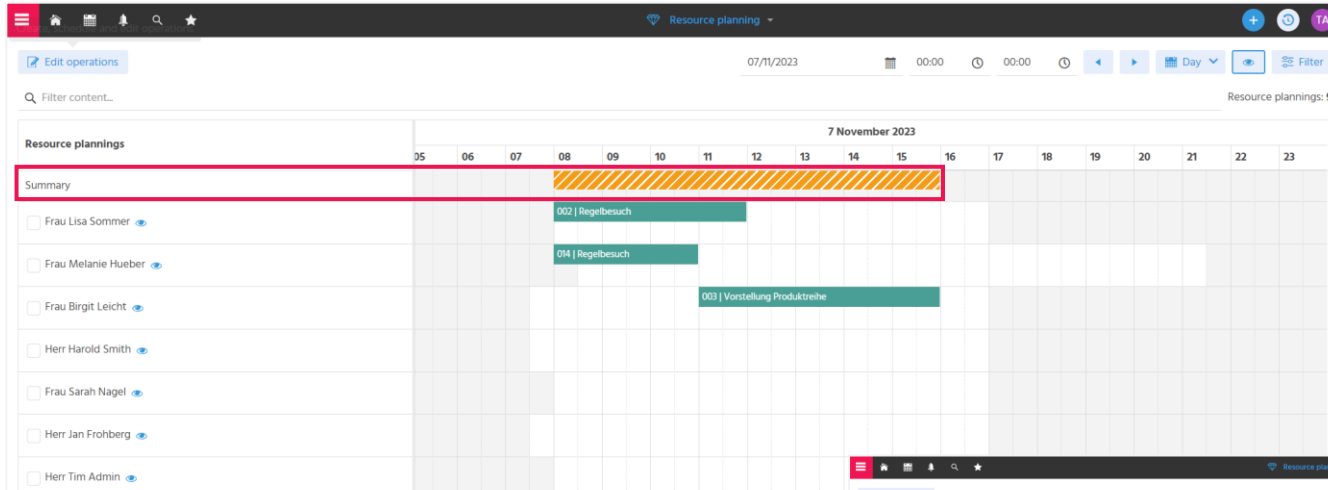
Resource planning

Structure

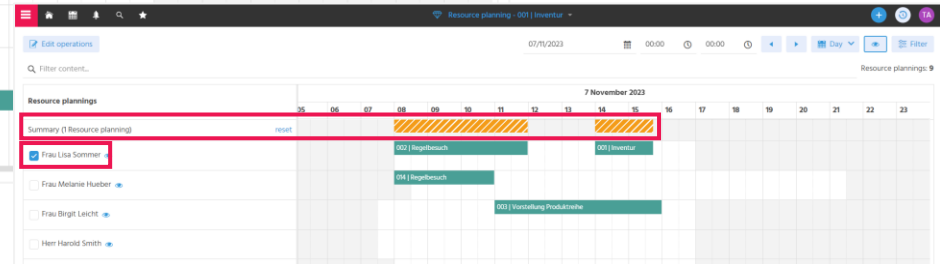


Resource planning

Summary

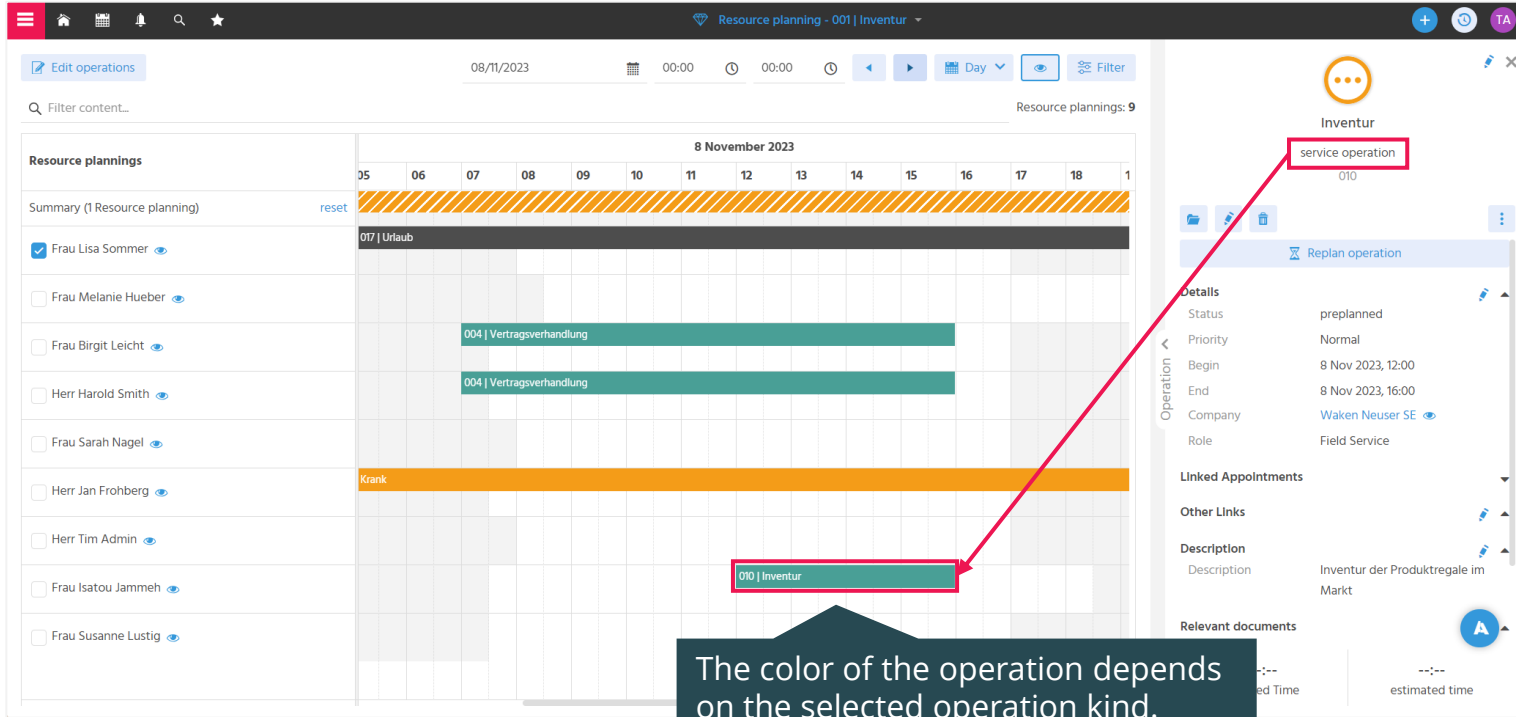


The white-orange shaded bar in the Summary row shows the intersection of scheduled operations in the current view. If you select resources, the bar shows only the time spans of the associated operations.



Resource planning

Coloring for operations



The screenshot displays the ADITO Resource planning interface. The main view is a Gantt chart for the date 08/11/2023, showing resource planning for 09:00 to 00:00. The chart is divided into columns for each hour. A list of resources is on the left, including Frau Lisa Sommer, Frau Melanie Hueber, Frau Birgit Leicht, Herr Harold Smith, Frau Sarah Nagel, Herr Jan Froberg, Herr Tim Admin, Frau Isatou Jammeh, and Frau Susanne Lustig. The chart shows various operations: a yellow hatched bar for '007 | Urlaub' (sick leave) from 09:00 to 18:00, two green bars for '004 | Vertragsverhandlung' (contract negotiation) from 12:00 to 16:00, and a yellow bar for 'Krank' (sick) from 09:00 to 18:00. A red box highlights the '010 | Inventur' (inventory) operation, which is colored green. A red arrow points from this box to the 'service operation' label in the details panel on the right. The details panel shows the 'Inventur' operation (010) with a status of 'preplanned', priority 'Normal', and a description 'Inventur der Produktregale im Markt'. The 'Relevant documents' section shows 'Inventur der Produktregale im Markt'.

Resource planning - 001 | Inventur

08/11/2023

09:00 00:00

Day

Filter

Resource plannings: 9

8 November 2023

05 06 07 08 09 10 11 12 13 14 15 16 17 18 1

Summary (1 Resource planning)

reset

☒ Frau Lisa Sommer

☐ Frau Melanie Hueber

☐ Frau Birgit Leicht

☐ Herr Harold Smith

☐ Frau Sarah Nagel

☐ Herr Jan Froberg

☐ Herr Tim Admin

☐ Frau Isatou Jammeh

☐ Frau Susanne Lustig

007 | Urlaub

004 | Vertragsverhandlung

004 | Vertragsverhandlung

Krank

010 | Inventur

Inventur

service operation

010

Replan operation

Details

Status preplanned

Priority Normal

Begin 8 Nov 2023, 12:00

End 8 Nov 2023, 16:00

Company Waken Neuser SE

Role Field Service

Linked Appointments

Other Links

Description Inventur der Produktregale im Markt

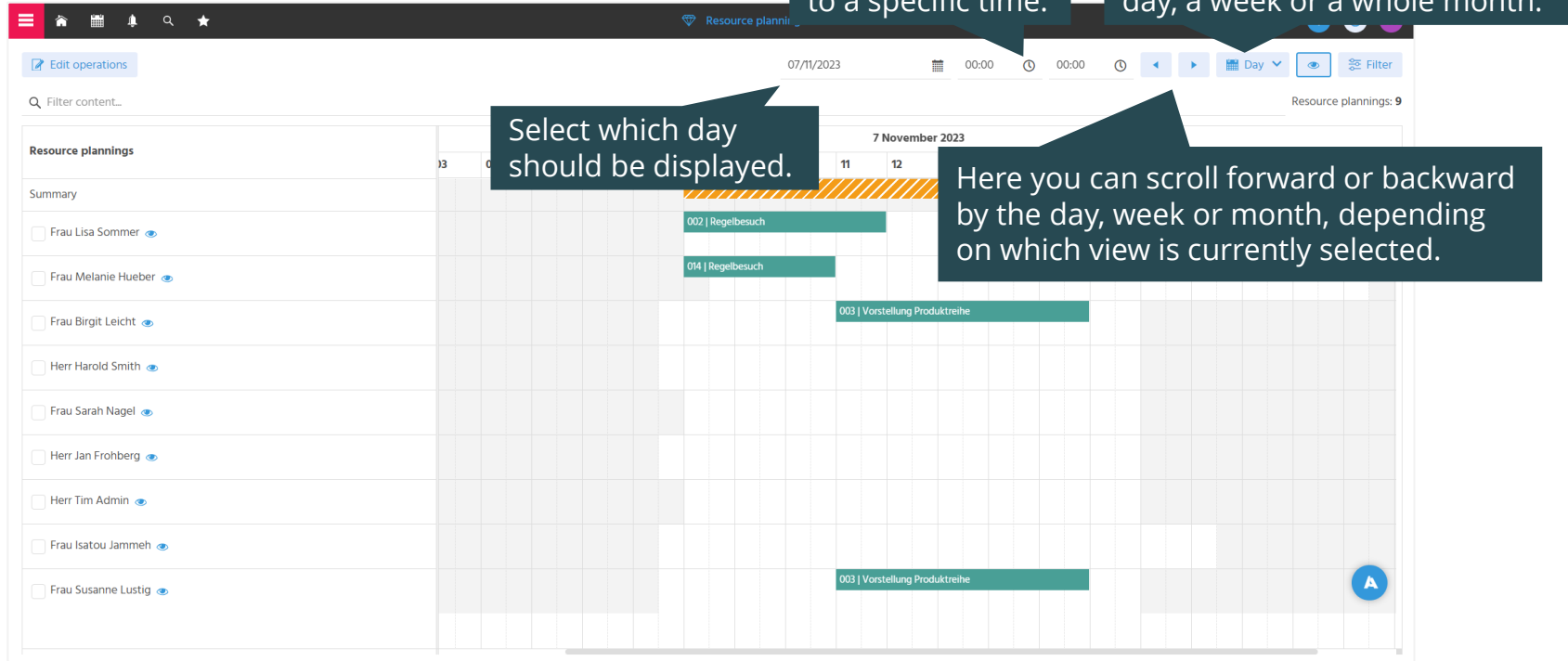
Relevant documents

estimated time

The color of the operation depends on the selected operation kind.

Resource planning

Set view



The screenshot shows the ADITO Resource planning interface. On the left, a list of resources is displayed under the heading "Resource plannings". The main area is a Gantt chart showing tasks for "7 November 2023".

Callouts provide instructions on how to set the view:

- Restrict the view to a specific time.** Points to the date and time selection area at the top right of the main view.
- Choose whether to display a day, a week or a whole month.** Points to the view selector (Day, Week, Month) at the top right of the main view.
- Select which day should be displayed.** Points to the date selection area at the top of the main view.
- Here you can scroll forward or backward by the day, week or month, depending on which view is currently selected.** Points to the navigation arrows at the top right of the main view.

The resource list on the left includes:

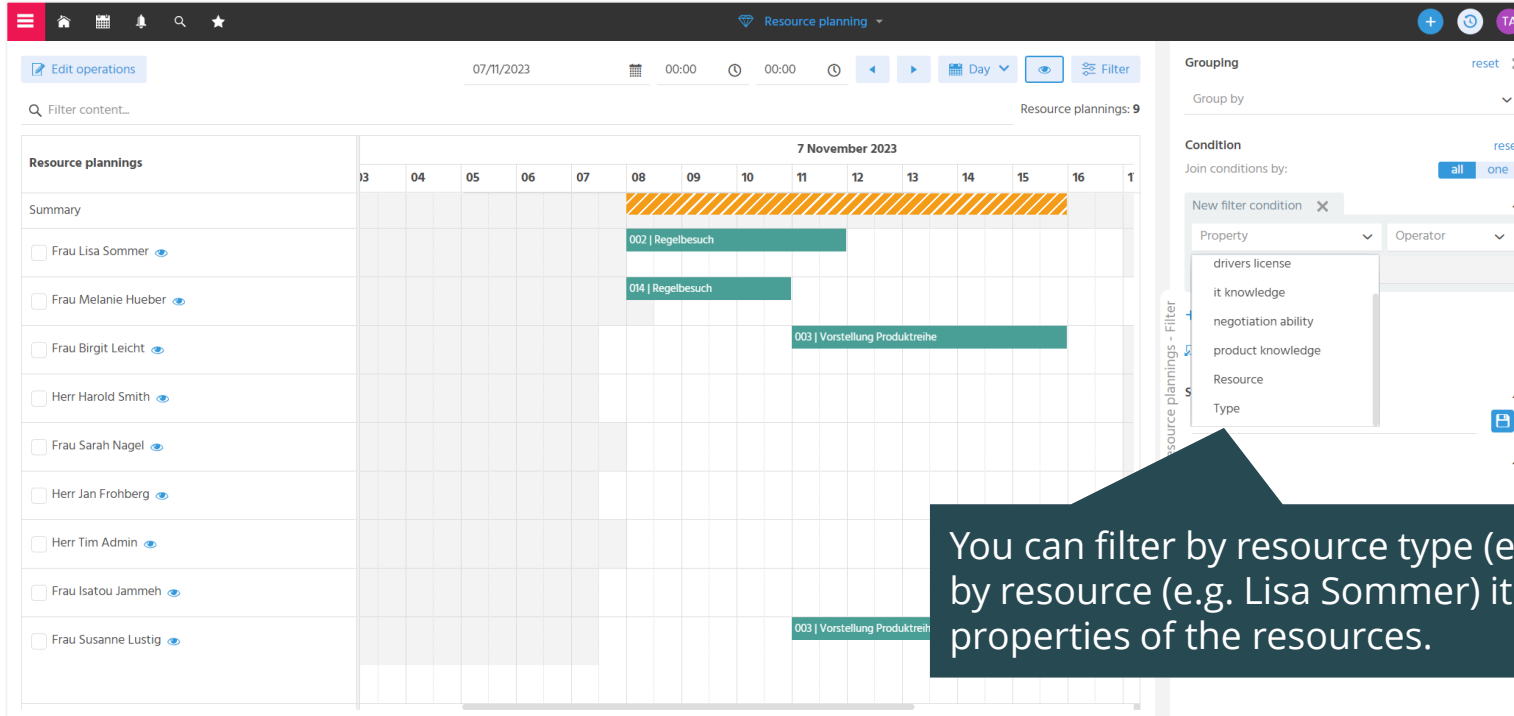
- Frau Lisa Sommer
- Frau Melanie Hueber
- Frau Birgit Leicht
- Herr Harold Smith
- Frau Sarah Nagel
- Herr Jan Froberg
- Herr Tim Admin
- Frau Isatou Jammeh
- Frau Susanne Lustig

The Gantt chart shows tasks for "7 November 2023":

- 002 | Regelbesuch
- 014 | Regelbesuch
- 003 | Vorstellung Produktreihe
- 003 | Vorstellung Produktreihe

Resource planning

Filter

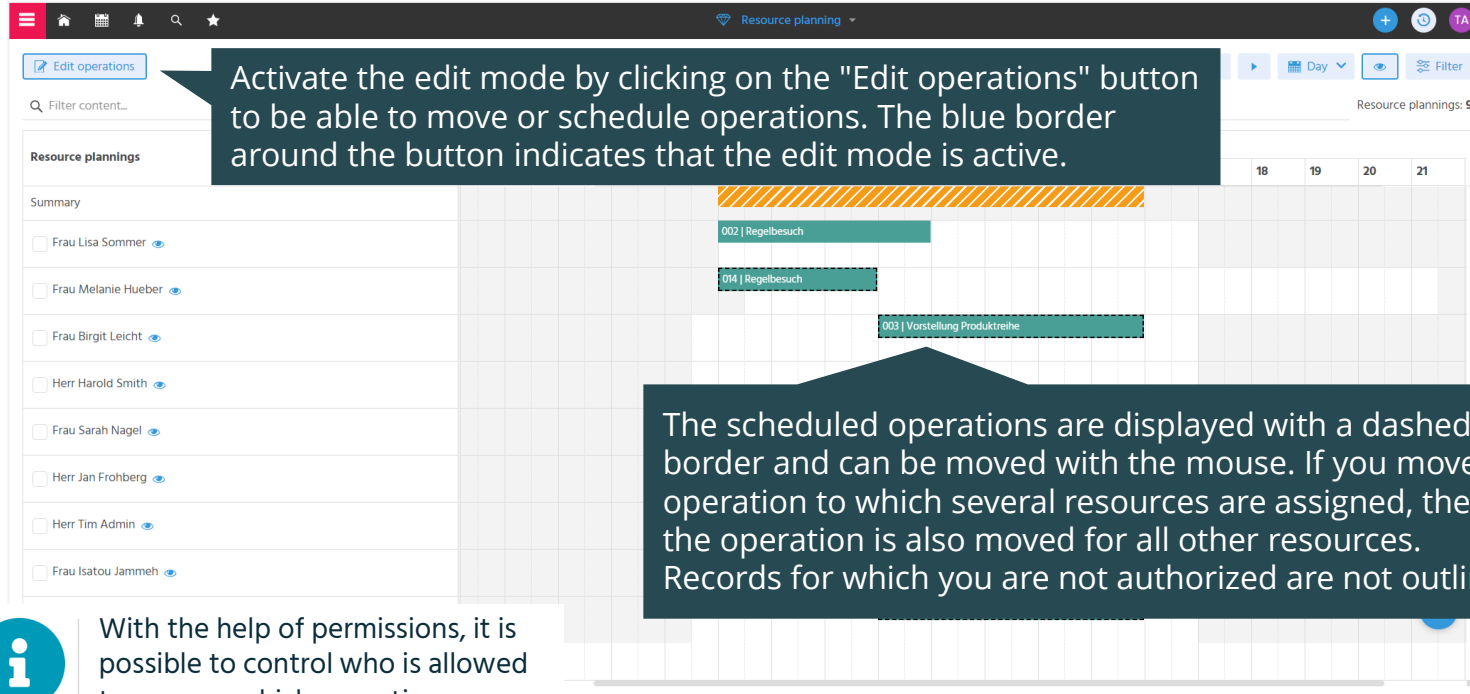


The screenshot displays the ADITO Resource planning interface. The main area shows a Gantt chart for the week of 07/11/2023. The chart has columns for days 03 to 17. A summary row shows a yellow hatched bar from 08 to 16. Below the summary, a list of resources is shown with checkboxes and eye icons: Frau Lisa Sommer, Frau Melanie Hueber, Frau Birgit Leicht, Herr Harold Smith, Frau Sarah Nagel, Herr Jan Froberg, Herr Tim Admin, Frau Isatou Jammeh, and Frau Susanne Lustig. The Gantt chart shows several tasks: '002 | Regelbesuch' (08-11), '014 | Regelbesuch' (08-10), '003 | Vorstellung Produktreihe' (11-15), and '003 | Vorstellung Produktreihe' (16-17). The right sidebar contains a 'Filter' panel with a 'Grouping' section (Group by: reset), a 'Condition' section (Join conditions by: all, one, reset), and a 'New filter condition' section. The 'New filter condition' section has a 'Property' dropdown menu with options: drivers license, it knowledge, negotiation ability, product knowledge, Resource, and Type. The 'Type' option is highlighted. A dark blue callout box points to the 'Type' option in the dropdown menu.

You can filter by resource type (e.g. Contact), by resource (e.g. Lisa Sommer) itself or by the properties of the resources.

Resource planning

Edit mode



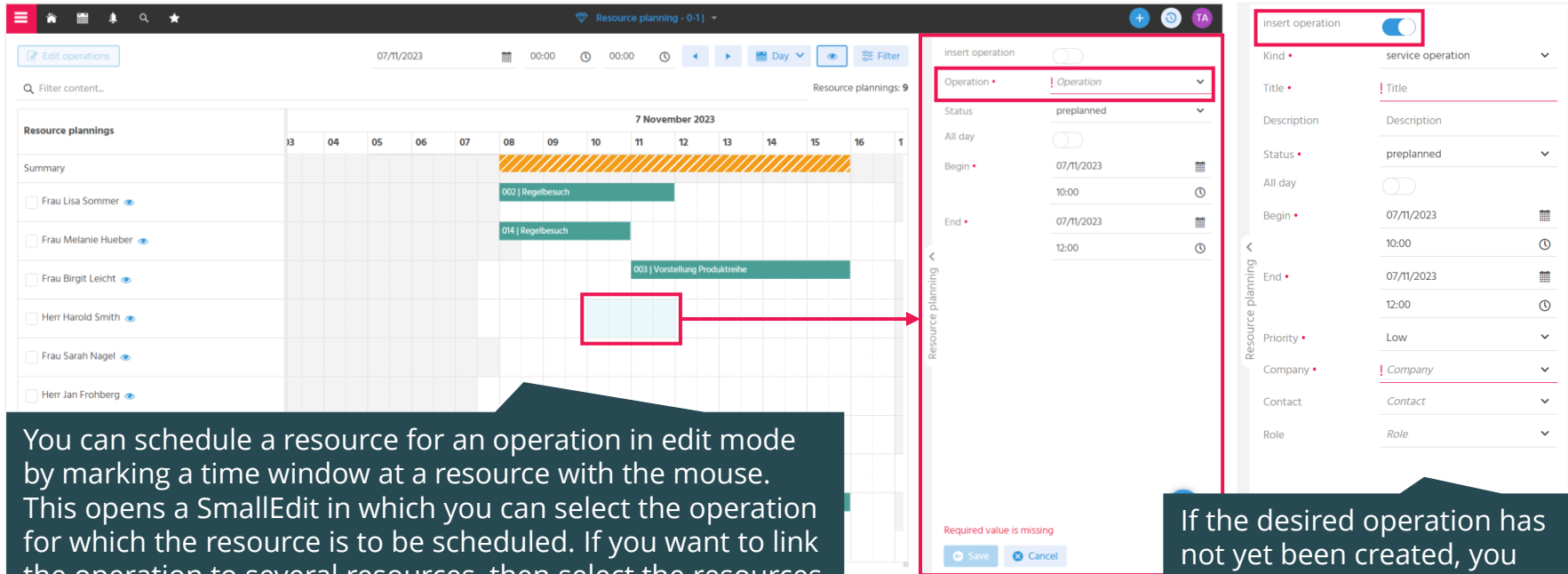
Activate the edit mode by clicking on the "Edit operations" button to be able to move or schedule operations. The blue border around the button indicates that the edit mode is active.

The scheduled operations are displayed with a dashed border and can be moved with the mouse. If you move an operation to which several resources are assigned, then the operation is also moved for all other resources. Records for which you are not authorized are not outlined.

With the help of permissions, it is possible to control who is allowed to process which operation.

Resource planning

Edit mode - Assign operation

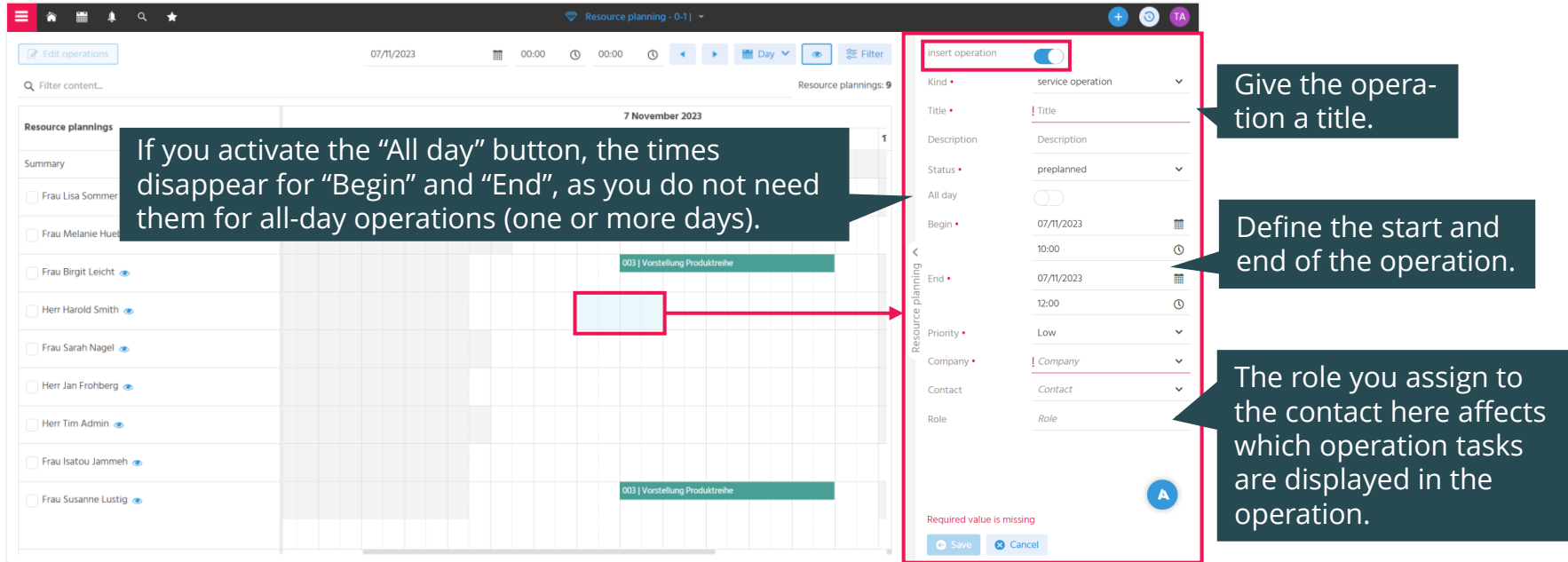


You can schedule a resource for an operation in edit mode by marking a time window at a resource with the mouse. This opens a SmallEdit in which you can select the operation for which the resource is to be scheduled. If you want to link the operation to several resources, then select the resources before you select the time window for a resource.

If the desired operation has not yet been created, you can do this in the SmallEdit.

Resource planning

Edit Mode - Assign operation/Create new operation



If you activate the "All day" button, the times disappear for "Begin" and "End", as you do not need them for all-day operations (one or more days).

Give the operation a title.

Define the start and end of the operation.

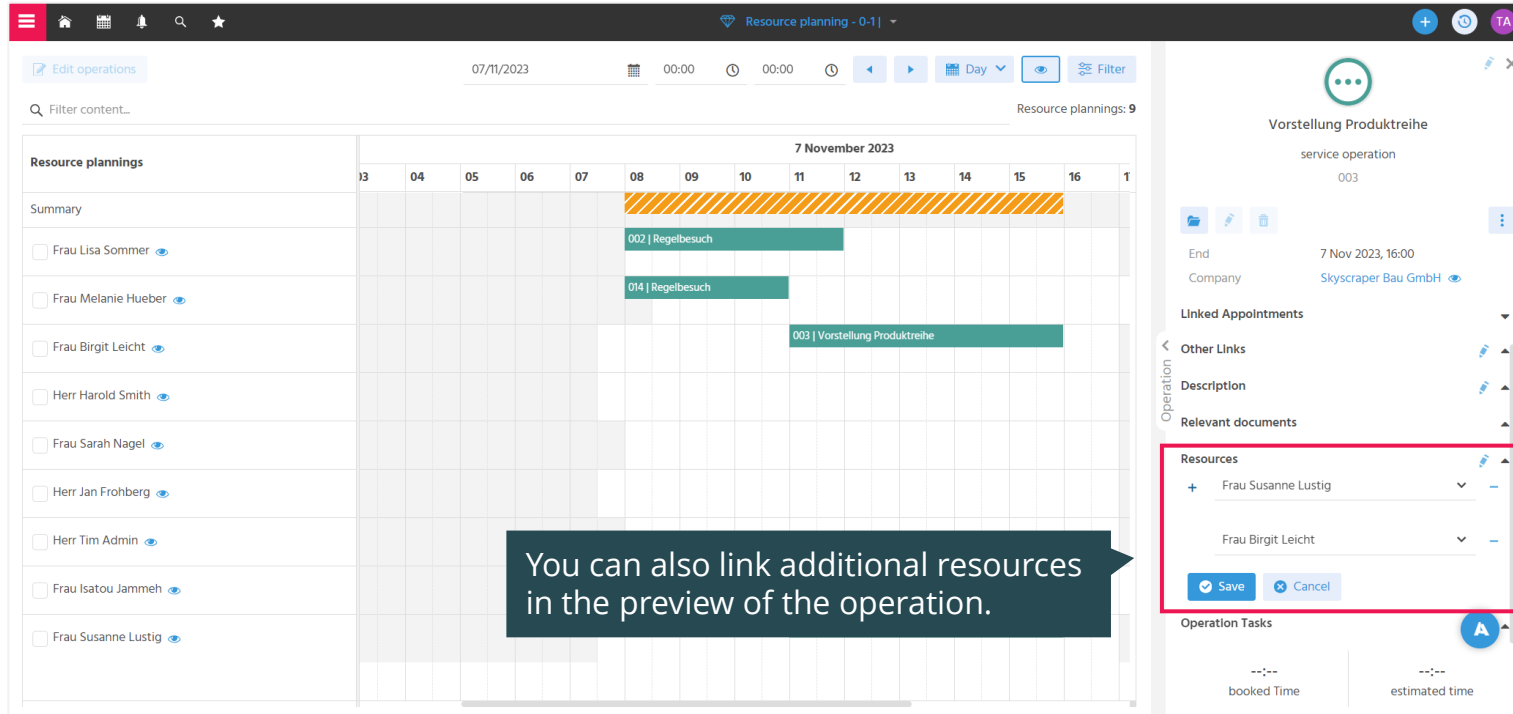
The role you assign to the contact here affects which operation tasks are displayed in the operation.

Required value is missing

Save Cancel

Resource planning

Add resources via operation preview



The screenshot displays the ADITO Resource planning interface. The main area shows a calendar view for 7 November 2023, with a grid of days from 03 to 17. A summary row shows a yellow hatched bar from 08 to 16. Below the calendar, a list of resources is shown, including Frau Lisa Sommer, Frau Melanie Hueber, Frau Birgit Leicht, Herr Harold Smith, Frau Sarah Nagel, Herr Jan Froberg, Herr Tim Admin, Frau Isatou Jammeh, and Frau Susanne Lustig. The right-hand sidebar contains an 'Operation preview' panel for 'Vorstellung Produktreihe' (service operation 003). The 'Resources' section in the sidebar is highlighted with a red box, showing a list of resources: 'Frau Susanne Lustig' and 'Frau Birgit Leicht'. Below this list are 'Save' and 'Cancel' buttons. A dark blue callout box with white text is overlaid on the calendar, stating: 'You can also link additional resources in the preview of the operation.'

Operation Recommendation



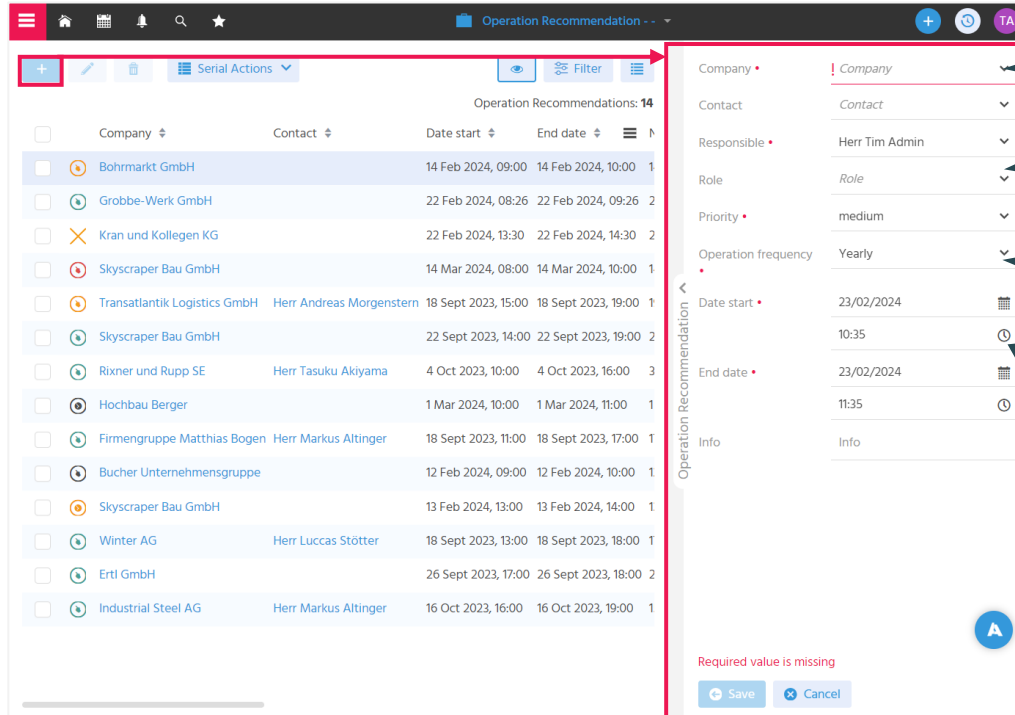
Operation Recommendation

What do you use Operation Recommendations for?

- The Operation Recommendation is **not** yet a **fixed date in the calendar**, but is used for **scheduling purposes**.
- Operation Recommendations can be created manually or automatically.
- You use **automatically created Operation Recommendations** if you have fixed supervisors for certain districts for which Operation Recommendation are to be created with regular intervals.
- You use **manually created Operation Recommendations** if you want to create Operation Recommendations for a company outside a defined district.

Operation Recommendation

Create Operation Recommendation manually



	Company	Contact	Date start	End date	
☐	Bohrmarkt GmbH		14 Feb 2024, 09:00	14 Feb 2024, 10:00	1
☐	Grobbe-Werk GmbH		22 Feb 2024, 08:26	22 Feb 2024, 09:26	2
☐	Kran und Kollegen KG		22 Feb 2024, 13:30	22 Feb 2024, 14:30	2
☐	Skyscraper Bau GmbH		14 Mar 2024, 08:00	14 Mar 2024, 10:00	1
☐	Transatlantik Logistics GmbH	Herr Andreas Morgenstern	18 Sept 2023, 15:00	18 Sept 2023, 19:00	1
☐	Skyscraper Bau GmbH		22 Sept 2023, 14:00	22 Sept 2023, 19:00	2
☐	Rixner und Rupp SE	Herr Tasuku Akiyama	4 Oct 2023, 10:00	4 Oct 2023, 16:00	3
☐	Hochbau Berger		1 Mar 2024, 10:00	1 Mar 2024, 11:00	1
☐	Firmengruppe Matthias Bogen	Herr Markus Altinger	18 Sept 2023, 11:00	18 Sept 2023, 17:00	1
☐	Bucher Unternehmensgruppe		12 Feb 2024, 09:00	12 Feb 2024, 10:00	1
☐	Skyscraper Bau GmbH		13 Feb 2024, 13:00	13 Feb 2024, 14:00	1
☐	Winter AG	Herr Luccas Stötter	18 Sept 2023, 13:00	18 Sept 2023, 18:00	1
☐	Ertl GmbH		26 Sept 2023, 17:00	26 Sept 2023, 18:00	2
☐	Industrial Steel AG	Herr Markus Altinger	16 Oct 2023, 16:00	16 Oct 2023, 19:00	1

Operation Recommendation

Company • Company

Contact Contact

Responsible • Herr Tim Admin

Role Role

Priority • medium

Operation frequency • Yearly

Date start • 23/02/2024

End date • 23/02/2024

Info Info

Required value is missing

Save Cancel

Company where the operation takes place.

In which role is the responsible person on the road, e.g. service technician.

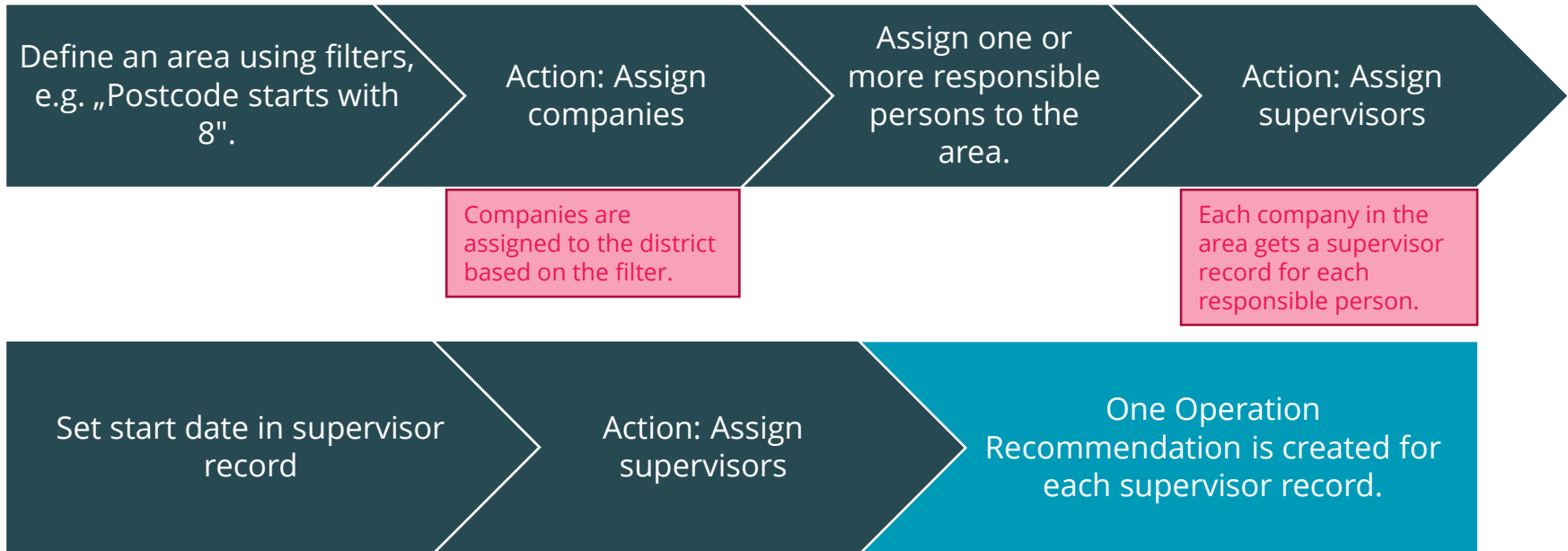
At what frequency should the responsible person visit the company.

Start date and time: Start of the 1st operation
End date and time: End of 1st operation

Based on the start date and the Operation Frequency, all further Operation Recommendations are calculated.

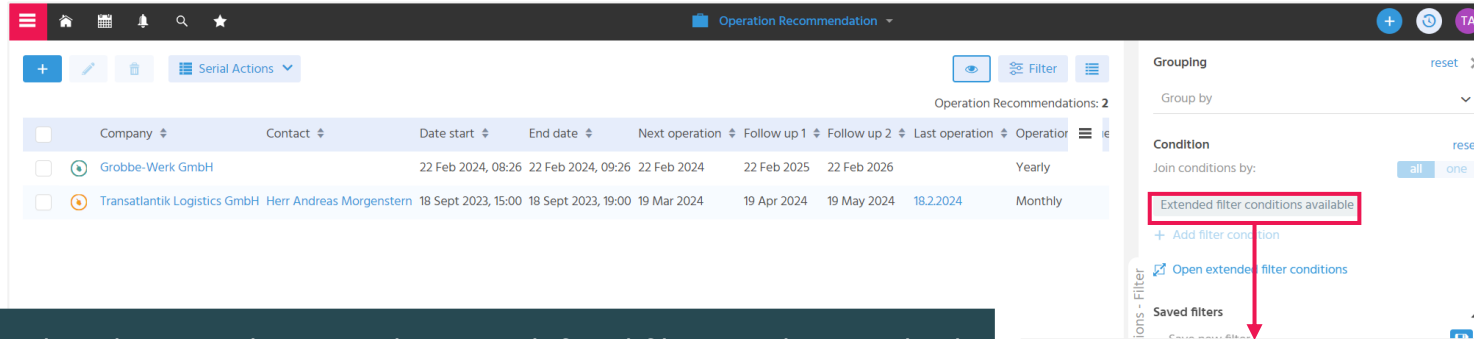
Excursion into the district definition

Create Operation Recommendation automatically



Operation Recommendation

Predefined filters



The screenshot shows the ADITO Operation Recommendation interface. The main table displays recommendations with columns for Company, Contact, Date start, End date, Next operation, Follow up 1, Follow up 2, Last operation, and Operation. Two entries are visible: Grobbe-Werk GmbH and Transatlantik Logistik GmbH. The right sidebar shows the 'Filter' panel with 'Grouping' and 'Condition' sections. A red box highlights the text 'Extended filter conditions available' in the 'Condition' section, with an arrow pointing to the 'Open extended filter conditions' link.

	Company	Contact	Date start	End date	Next operation	Follow up 1	Follow up 2	Last operation	Operation
☐	Grobbe-Werk GmbH		22 Feb 2024, 08:26	22 Feb 2024, 09:26	22 Feb 2024	22 Feb 2025	22 Feb 2026		Yearly
☐	Transatlantik Logistik GmbH	Herr Andreas Morgenstern	18 Sept 2023, 15:00	18 Sept 2023, 19:00	19 Mar 2024	19 Apr 2024	19 May 2024	18.2.2024	Monthly

In the Filterview there are three predefined filters in the standard:

- **"Next operation less than ..."**, so that only the Operation Recommendations of the next four weeks are displayed.
- **"Responsible is empty"** to see the Operation Recommendations for which no responsible has been stored yet.
- **"Responsible equal *Username*"** to display the Operation Recommendations for which one is responsible.



The screenshot shows the ADITO filter configuration interface. It displays three predefined filters in a list, each with a red 'X' icon and a close button. The filters are: 'Next operation less than "Mar 22, 2024"', 'Responsible is empty', and 'Responsible equal "Herr Tim Admin"'. The interface also includes buttons for 'all', 'one', 'Add filter condition', and 'Add group'.

Operation Recommendation

Structure of the filter view

Serial Actions

Operation period

Follow-up appointments based on Operation Frequency.

Frequency, how often the company should be visited by the person responsible in this role.

Priority given to the operation.

Operation Recommendations: 14

☐	Company	Contact	Date start	End date	Next operation	Follow up 1	Follow up 2	Last operation	Operation frequency	Address	Responsible	Role	Priority
☐	Bohrmarkt GmbH		14 Feb 2024, 09:00	14 Feb 2024, 10:00	14 Feb 2024	14 May 2024	14 Aug 2024	14.2.2024		Grünberger Straße 33 - DE 10245 Berlin	Frau Sarah Nagel	Field Service	very high
☐	Grobbe-Werk GmbH		22 Feb 2024, 08:26	22 Feb 2024, 09:26	22 Feb 2024	22 Feb 2025	22 Feb 2026		Yearly	Regensburger Straße 65 - DE 85055 Ingolstadt	Herr Tim Admin		medium
☐	Kran und Kollegen KG		22 Feb 2024, 13:30	22 Feb 2024, 14:30	22 Feb 2024	22 May 2024	22 Aug 2024		Quarterly	Alter Wall 12 - DE 20457 Hamburg	Herr Harold Smith	Field Service	very high
☐	Skyscraper Bau GmbH		14 Mar 2024, 08:00	14 Mar 2024, 10:00	14 Mar 2024	14 Sept 2024	15 Mar 2025		Semiannually	Rathausallee 50 - DE 22846 Norderstedt	Frau Melanie Hueber		critical
☐	Transatlantik Logistics GmbH	Herr Andreas Morgenstern	18 Sept 2023, 15:00	18 Sept 2023, 19:00	19 Mar 2024	19 Apr 2024	19 May 2024	18.2.2024	Monthly	Fallenbrunnen 3 - DE 88045 Friedrichshafen	Herr Tim Admin		high
☐	Skyscraper Bau GmbH		22 Sept 2023, 14:00	22 Sept 2023, 19:00	21 Mar 2024	21 Jun 2024	21 Sept 2024		Quarterly	Rathausallee 50 - DE 22846 Norderstedt	Herr Christian Pabst		medium
☐	Rixner und Rupp SE	Herr Tasuku Akiyama	4 Oct 2023, 10:00	4 Oct 2023, 16:00	3 Apr 2024	3 Oct 2024	4 Apr 2025		Semiannually	Schloßfreiheit 1A - DE 19288 Ludwigslust	Herr Tim Admin		medium
☐	Hochbau Berger		1 Mar 2024, 10:00	1 Mar 2024, 11:00	1 Jun 2024	1 Sept 2024	1 Dec 2024		Quarterly	Hauptstraße 39 - DE 10827 Berlin	Herr Christian Pabst	Field Service	low
☐	Firmengruppe Matthias Bogen	Herr Markus Altinger	18 Sept 2023, 11:00	18 Sept 2023, 17:00	17 Jun 2024	17 Sept 2024	17 Dec 2024		Quarterly	Pfeilstraße 7 - DE 28217 Bremen	Herr Tim Admin		medium
☐	Bucher Unternehmensgruppe		12 Feb 2024, 09:00	12 Feb 2024, 10:00	12 Feb 2024	12 Feb 2025	12 Aug 2025			Schiffgraben 5 - DE 30159 Hannover	Herr Harold Smith		low
☐	Ertl GmbH		26 Sept 2023, 13:00	26 Sept 2023, 18:00	17 Sept 2024	18 Sept 2025				Norderstedt			very high
☐	Industrial Steel AG	Herr Markus Altinger	16 Oct 2023, 16:00	16 Oct 2023, 19:00	15 Oct 2024	16 Oct 2025				7 Karlsruhe			medium
☐										4 Frankfurt			medium
☐										Hamburg	Frau Melanie Hueber		medium

Company and contact at which the operation takes place.

Next Operation

Date on which the person responsible had last visited the company in this role. Click on the date to open the corresponding operation.

Role in which the responsible person is traveling.

Operation Recommendation

Icons in the filter view

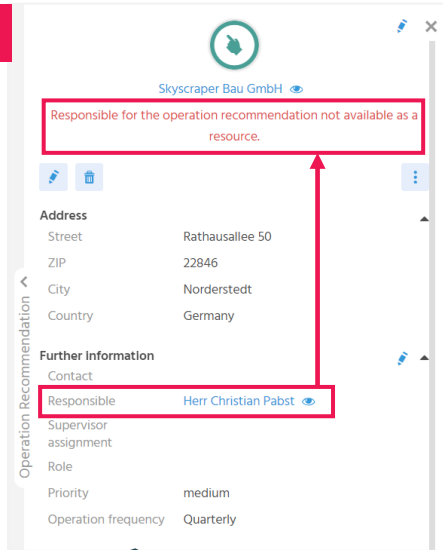
-  ▪ The **hand** is displayed for **manually created Operation Recommendations**
-  ▪ The **clock** is displayed for **automatically created Operation Recommendations**
-  ▪ The **X** is displayed for **inactive Operation Recommendations**, i.e. when "Rule active = No" at the supervisor record (in the District Definition).

-  ▪ Prio **"critical"** = **"red"** icon
-  ▪ Prio **"very high"** = **"yellow"** icon
-  ▪ Prio **"high"** = **"yellow"** icon
-  ▪ Prio **"medium"** = **"green"** icon
-  ▪ Prio **"low"** = Icon **"black"**

Operation Recommendation

Create responsible person as resource

1



Skyscraper Bau GmbH

Responsible for the operation recommendation not available as a resource.

Address

Street Rathausallee 50

ZIP 22846

City Norderstedt

Country Germany

Further Information

Contact

Responsible Herr Christian Pabst

Supervisor assignment

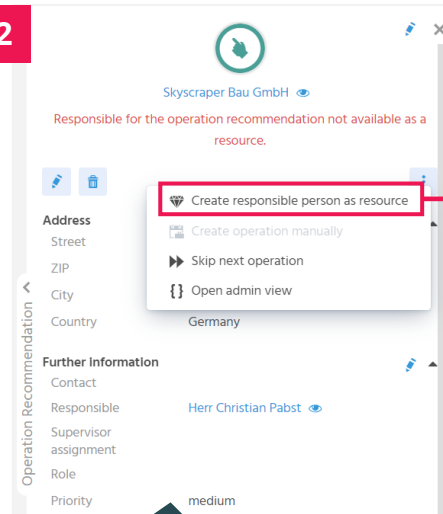
Role

Priority medium

Operation frequency Quarterly

If the responsible person is not yet created as a resource, the system informs about it.

2



Skyscraper Bau GmbH

Responsible for the operation recommendation not available as a resource.

Further actions

- Create responsible person as resource
- Create operation manually
- Skip next operation
- Open admin view

Address

Street Rathausallee 50

ZIP 22846

City Norderstedt

Country Germany

Further Information

Contact

Responsible Herr Christian Pabst

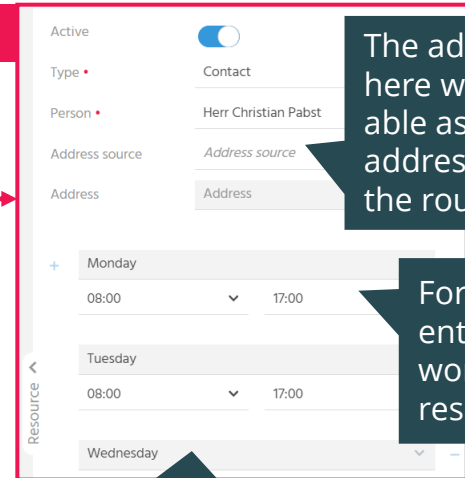
Supervisor assignment

Role

Priority medium

In this case, you will find the action "Create responsible person as resource" in the „Further actions“.

3



Active ☐

Type Contact

Person Herr Christian Pabst

Address source Address source

Address Address

Monday

08:00 17:00

Tuesday

08:00 17:00

Wednesday

The address you select here will later be available as the start/end address when planning the route.

For business hours, enter the regular working hours of the responsible person.

As soon as you execute the action, a SmallEdit opens, with which you can create the responsible as a resource.

Operation Recommendation



Action "Create operation manually" vs. serial action "Generate operation"

Operation Recommendations include start time as well as end time.

Action "Create operation manually"

Use this action if you want to change the "Next operation" date and/or start and end date from the Operation Recommendation for the operation.

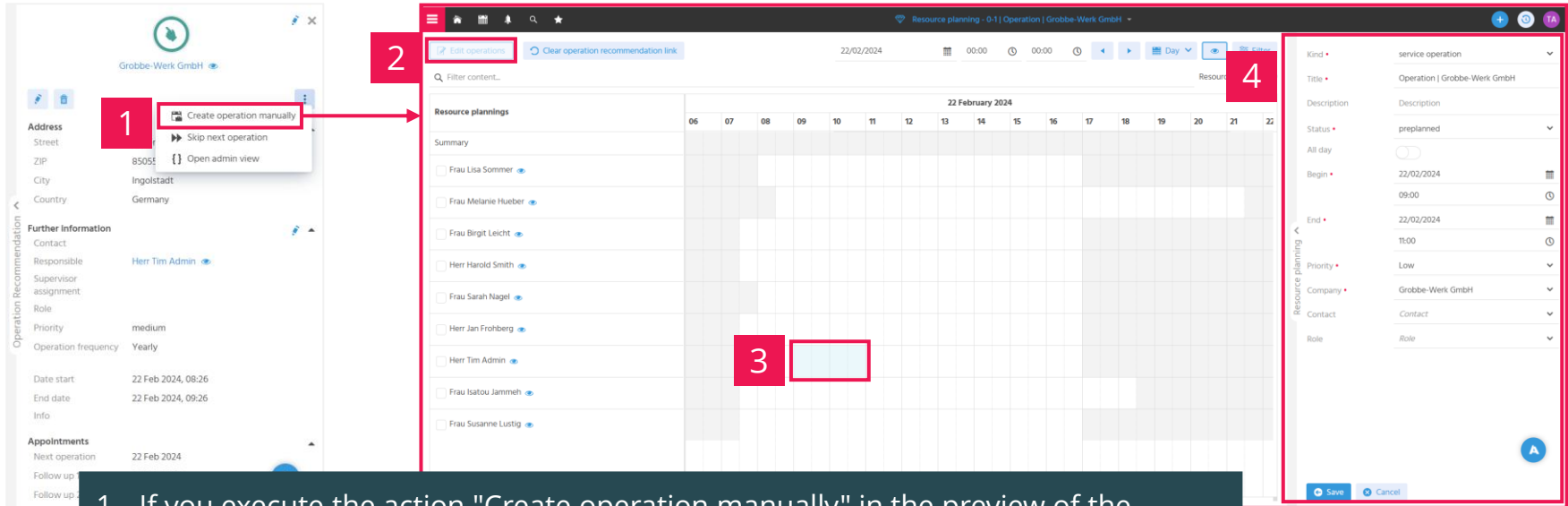
Serial action "Generate operation"

You use this action if you want to transfer the "Next operation" date as well as the start and end time from the Operation Recommendation for the operation unchanged.



Operation Recommendation

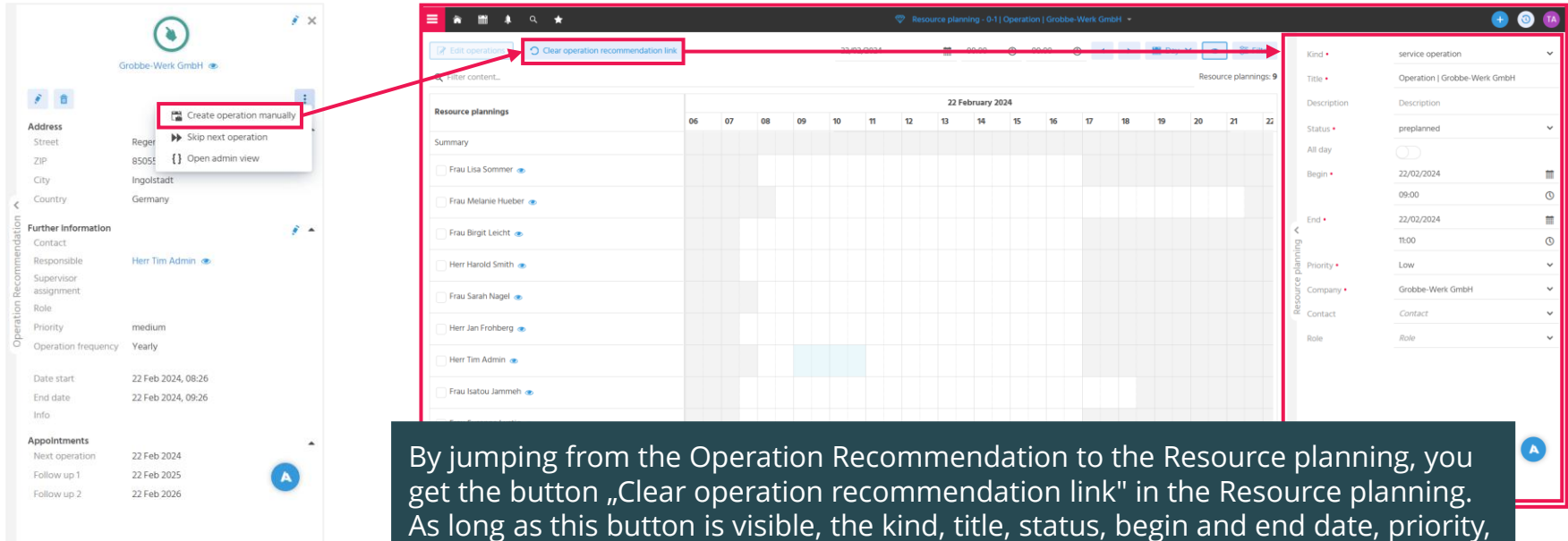
Create operation manually



1. If you execute the action "Create operation manually" in the preview of the Operation Recommendation, you automatically jump off to resource planning.
2. Click on "Edit operations" there.
3. Then mark the operation period for the employee performing the operation.
4. A SmallEdit for resource planning opens, in which the kind, title, status, start and end date, priority, company and contact (sometimes) are already preassigned.

Operation Recommendation

Create operation manually



The screenshot illustrates the workflow for creating an operation manually. On the left, the 'Operation Recommendation' sidebar is visible, with the 'Create operation manually' button highlighted. A red arrow points from this button to the 'Clear operation recommendation link' button in the 'Resource planning' view. The 'Resource planning' view shows a calendar for February 22, 2024, with a list of resource planners on the left and a detailed form on the right. The form contains the following information:

- Kind: service operation
- Title: Operation | Grobbe-Werk GmbH
- Description: Description
- Status: preplanned
- All day: ☐
- Begin: 22/02/2024 09:00
- End: 22/02/2024 11:00
- Priority: Low
- Company: Grobbe-Werk GmbH
- Contact: Contact
- Role: Role

By jumping from the Operation Recommendation to the Resource planning, you get the button „Clear operation recommendation link" in the Resource planning. As long as this button is visible, the kind, title, status, begin and end date, priority, company and, under circumstances, contact are automatically preassigned when you plan an operation. To remove the link, click on the button.

Operation Recommendation

Generate operation

Operation Recommendation

Serial Actions

2

Generate operation

Skip next operation

<

If you select an Operation Recommendation and perform the **"Generate operation"** action, an operation will be created immediately and you will receive a notification from the system.

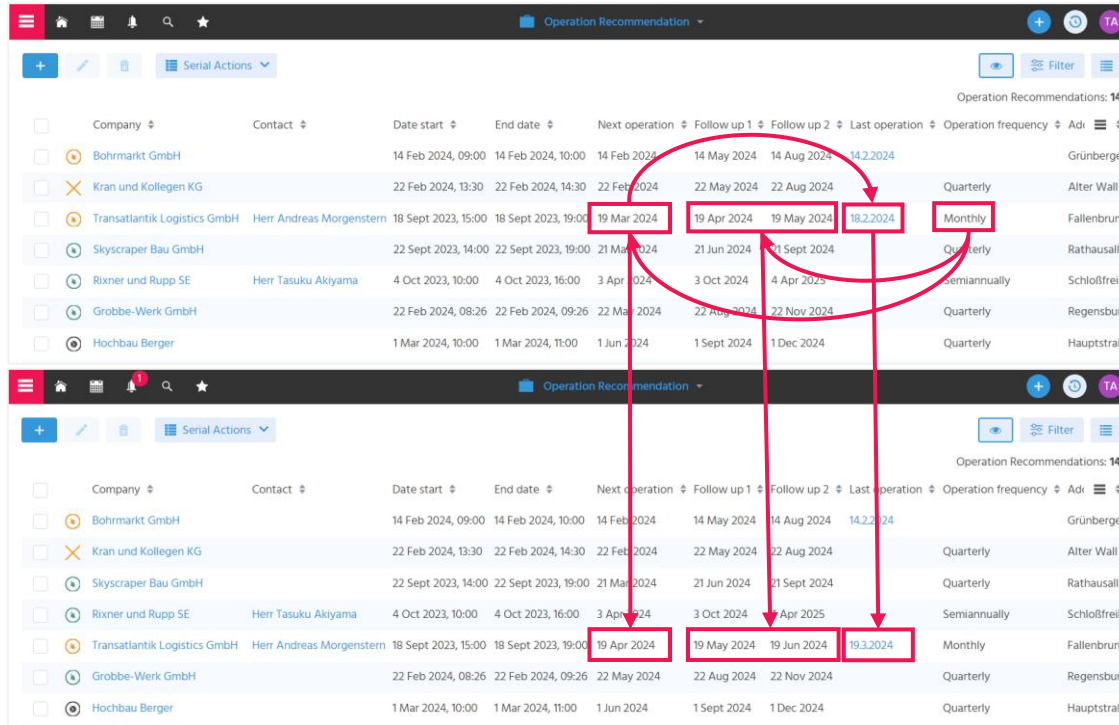
Calculation of the operation recommendation dates

The dates of 1 operation recommendations were...

23/02/2024, 11:32

Operation Recommendation

Generate operation/create operation manually



Operation Recommendations: 14

	Company	Contact	Date start	End date	Next operation	Follow up 1	Follow up 2	Last operation	Operation frequency	Adi
☐	Bohrmarkt GmbH		14 Feb 2024, 09:00	14 Feb 2024, 10:00	14 Feb 2024	14 May 2024	14 Aug 2024	14.2.2024		Grünberge
☐	Kran und Kollegen KG		22 Feb 2024, 13:30	22 Feb 2024, 14:30	22 Feb 2024	22 May 2024	22 Aug 2024		Quarterly	Alter Wall
☐	Transatlantik Logistics GmbH	Herr Andreas Morgenstern	18 Sept 2023, 15:00	18 Sept 2023, 19:00	19 Mar 2024	19 Apr 2024	19 May 2024	18.2.2024	Monthly	Fallenbrunn
☐	Skyscraper Bau GmbH		22 Sept 2023, 14:00	22 Sept 2023, 19:00	21 Mar 2024	21 Jun 2024	21 Sept 2024		Quarterly	Rathausallk
☐	Rixner und Rupp SE	Herr Tasuku Akiyama	4 Oct 2023, 10:00	4 Oct 2023, 16:00	3 Apr 2024	3 Oct 2024	4 Apr 2025		Semiannually	Schloßfreit
☐	Grobbe-Werk GmbH		22 Feb 2024, 08:26	22 Feb 2024, 09:26	22 Mar 2024	22 Aug 2024	22 Nov 2024		Quarterly	Regensburg
☐	Hochbau Berger		1 Mar 2024, 10:00	1 Mar 2024, 11:00	1 Jun 2024	1 Sept 2024	1 Dec 2024		Quarterly	Hauptstraße

Operation Recommendations: 14

	Company	Contact	Date start	End date	Next operation	Follow up 1	Follow up 2	Last operation	Operation frequency	Adi
☐	Bohrmarkt GmbH		14 Feb 2024, 09:00	14 Feb 2024, 10:00	14 Feb 2024	14 May 2024	14 Aug 2024	14.2.2024		Grünberge
☐	Kran und Kollegen KG		22 Feb 2024, 13:30	22 Feb 2024, 14:30	22 Feb 2024	22 May 2024	22 Aug 2024		Quarterly	Alter Wall
☐	Skyscraper Bau GmbH		22 Sept 2023, 14:00	22 Sept 2023, 19:00	21 Mar 2024	21 Jun 2024	21 Sept 2024		Quarterly	Rathausallk
☐	Rixner und Rupp SE	Herr Tasuku Akiyama	4 Oct 2023, 10:00	4 Oct 2023, 16:00	3 Apr 2024	3 Oct 2024	4 Apr 2025		Semiannually	Schloßfreit
☐	Transatlantik Logistics GmbH	Herr Andreas Morgenstern	18 Sept 2023, 15:00	18 Sept 2023, 19:00	19 Apr 2024	19 May 2024	19 Jun 2024	19.3.2024	Monthly	Fallenbrunn
☐	Grobbe-Werk GmbH		22 Feb 2024, 08:26	22 Feb 2024, 09:26	22 May 2024	22 Aug 2024	22 Nov 2024		Quarterly	Regensburg
☐	Hochbau Berger		1 Mar 2024, 10:00	1 Mar 2024, 11:00	1 Jun 2024	1 Sept 2024	1 Dec 2024		Quarterly	Hauptstraße

When you create an operation, the date from the "Next operation" column is copied to the "Last operation" column in the Operation Recommendation.

The "Next operation" and follow-up appointments are recalculated based on the specified operation frequency.

Operation Recommendation



Skip next operation

The screenshot shows the ADITO interface with the 'Serial Actions' menu open. The 'Skip next operation' option is highlighted with a red box. Below the menu, a table lists various companies and their operation schedules. The 'Next operation' column for 'Skyscraper Bau GmbH' is highlighted with a red box, showing '21 Mar 2024'.

Company	Contact	Date start	End date	Next operation	Follow up 1	Follow up 2	Last operation	Operation frequency	Adi
Bohrmarkt GmbH		14 Feb 2024, 09:00	14 Feb 2024, 10:00	14 Feb 2024	14 May 2024	14 Aug 2024	14.2.2024		Grünberge
Kran und Kollegen KG		22 Feb 2024, 13:30	22 Feb 2024, 14:30	22 Feb 2024	22 May 2024	22 Aug 2024		Quarterly	Alter Wall
Skyscraper Bau GmbH		22 Sept 2023, 14:00	22 Sept 2023, 19:00	21 Mar 2024	21 Jun 2024	21 Sept 2024		Quarterly	Rathausalk
Rixner und Rupp SE	Herr Tasuku Akiyama	4 Oct 2023, 10:00	4 Oct 2023, 16:00	3 Apr 2024	3 Oct 2024	4 Apr 2025		Semiannually	Schloßfreit
Transatlantik Logistics GmbH	Herr Andreas Morgenstern	18 Sept 2023, 15:00	18 Sept 2023, 19:00	19 Apr 2024	19 May 2024	19 Jun 2024	19.3.2024	Monthly	Fallenbrun
Grobbe-Werk GmbH		22 Feb 2024, 08:26	22 Feb 2024, 09:26	22 May 2024	22 Aug 2024	22 Nov 2024			
Hochbau Berger		1 Mar 2024, 10:00	1 Mar 2024, 11:00	1 Jun 2024	1 Sept 2024	1 Dec 2024			

Skip the „Next operation“ with the associated action if **you do not want to keep this appointment and do not want to create an operation for it. You will receive a notification about the recalculation.**

The screenshot shows the ADITO interface with the 'Next operation' date for 'Skyscraper Bau GmbH' highlighted with a red box, showing '21 Jun 2024'. A red arrow points from the '21 Mar 2024' date in the previous screenshot to this date.

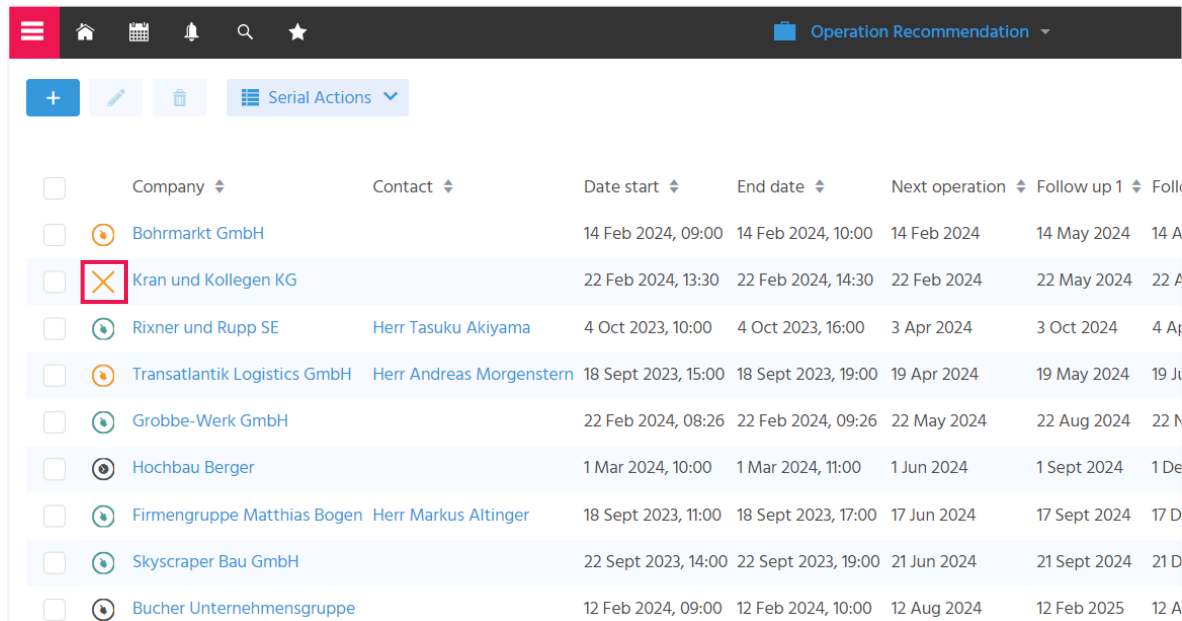
Company	Contact	Date start	End date	Next operation	Follow up 1	Follow up 2	Last operation	Operation frequency	Adi
Bohrmarkt GmbH		14 Feb 2024, 09:00	14 Feb 2024, 10:00	14 Feb 2024	14 May 2024	14 Aug 2024	14.2.2024		Grünberge
Kran und Kollegen KG		22 Feb 2024, 13:30	22 Feb 2024, 14:30	22 Feb 2024	22 May 2024	22 Aug 2024		Quarterly	Alter Wall
Rixner und Rupp SE	Herr Tasuku Akiyama	4 Oct 2023, 10:00	4 Oct 2023, 16:00	3 Apr 2024	3 Oct 2024	4 Apr 2025		Semiannually	Schloßfreit
Transatlantik Logistics GmbH	Herr Andreas Morgenstern	18 Sept 2023, 15:00	18 Sept 2023, 19:00	19 Apr 2024	19 May 2024	19 Jun 2024	19.3.2024	Monthly	Fallenbrun
Grobbe-Werk GmbH		22 Feb 2024, 08:26	22 Feb 2024, 09:26	22 May 2024	22 Aug 2024	22 Nov 2024			
Hochbau Berger		1 Mar 2024, 10:00	1 Mar 2024, 11:00	1 Jun 2024	1 Sept 2024	1 Dec 2024			
Firmengruppe Matthias Bogen	Herr Markus Altlinger	18 Sept 2023, 11:00	18 Sept 2023, 17:00	17 Jun 2024	17 Sept 2024	17 Dec 2024			
Skyscraper Bau GmbH		22 Sept 2023, 14:00	22 Sept 2023, 19:00	21 Jun 2024	21 Sept 2024	21 Dec 2024			
Bucher Unternehmensgruppe		12 Feb 2024, 09:00	12 Feb 2024, 10:00	12 Aug 2024	12 Feb 2025	12 Aug 2025			
Skyscraper Bau GmbH		13 Feb 2024, 13:00	13 Feb 2024, 14:00	13 Aug 2024	13 Feb 2025	13 Aug 2025			
Skyscraper Bau GmbH		14 Mar 2024, 08:00	14 Mar 2024, 10:00	14 Sept 2024	15 Mar 2025	15 Sept 2025			

Calculation of the operation recommendation dates

The dates of 1 operation recommendations were...
23/02/2024, 11:50

Operation Recommendation

Rule active



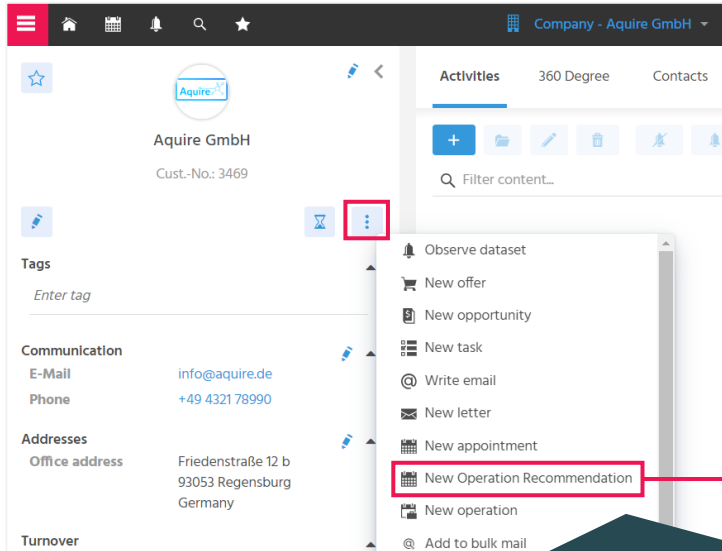
☐	Company	Contact	Date start	End date	Next operation	Follow up 1	Follow up 2
☐	 Bohrmarkt GmbH		14 Feb 2024, 09:00	14 Feb 2024, 10:00	14 Feb 2024	14 May 2024	14 Aug 2024
☐	 Kran und Kollegen KG		22 Feb 2024, 13:30	22 Feb 2024, 14:30	22 Feb 2024	22 May 2024	22 Aug 2024
☐	 Rixner und Rupp SE	Herr Tasuku Akiyama	4 Oct 2023, 10:00	4 Oct 2023, 16:00	3 Apr 2024	3 Oct 2024	4 Apr 2025
☐	 Transatlantik Logistics GmbH	Herr Andreas Morgenstern	18 Sept 2023, 15:00	18 Sept 2023, 19:00	19 Apr 2024	19 May 2024	19 Jun 2024
☐	 Grobbe-Werk GmbH		22 Feb 2024, 08:26	22 Feb 2024, 09:26	22 May 2024	22 Aug 2024	22 Nov 2024
☐	 Hochbau Berger		1 Mar 2024, 10:00	1 Mar 2024, 11:00	1 Jun 2024	1 Sept 2024	1 Dec 2024
☐	 Firmengruppe Matthias Bogen	Herr Markus Altinger	18 Sept 2023, 11:00	18 Sept 2023, 17:00	17 Jun 2024	17 Sept 2024	17 Dec 2024
☐	 Skyscraper Bau GmbH		22 Sept 2023, 14:00	22 Sept 2023, 19:00	21 Jun 2024	21 Sept 2024	21 Dec 2024
☐	 Bucher Unternehmensgruppe		12 Feb 2024, 09:00	12 Feb 2024, 10:00	12 Aug 2024	12 Feb 2025	12 Aug 2025

If the button "Rule active" is „No" for the supervisor record in the District Definition, then (when the supervisor records are reassigned) the **Operation Recommendation is set to Inactive**, recognizable by the X icon.

This function is used when the supervisor is absent for some time, but is basically still responsible as a supervisor, e.g. the supervisor is on parental leave.

Operation Recommendation

Operation Recommendation from the company or a contact



Operation Recommendation

Company • Aquire GmbH

Contact • Contact

Responsible • Herr Tim Admin

Role • Role

Priority • medium

Operation frequency • Yearly

Date start • 23/02/2024

End date • 23/02/2024

Info

Save Cancel

Execute the action "New Operation Recommendation". This opens a SmallEdit, which you can use to create the Operation Recommendation.

Operation Recommendation

Operation Recommendation from the company or a contact

Operation Recommendation

<

Company •	Aquire GmbH	▼
Contact	Contact	▼
Responsible •	Herr Tim Admin	▼
Role	Role	▼
Priority •	medium	▼
Operation frequency •	Yearly	▼
Date start •	23/02/2024	📅
	12:00	🕒
End date •	23/02/2024	📅
	13:00	🕒
Info	Info	

ⓘ

Save Cancel

Select the **contact** you want to visit:

- Only the contacts of the selected company will be displayed.
- When entering from a contact, this contact is preset.

You enter the **priority** manually here. It is not adjusted automatically and must be changed manually if necessary.

For the operation frequency, select the intervals at which the company should be visited.

For the **Start Date**, specify the date on which the 1st operation is to take place and the time at which the operation will begin.

For the **End Date**, specify the date and the time the 1st operation ends.

Operation Recommendation

General info



- You cannot delete automatically created Operation Recommendations, but you can delete manually created ones.
- It makes sense to always check the "Next date" in advance, as it can automatically fall on a Sunday or holiday.

Operation



Operation

Create operation

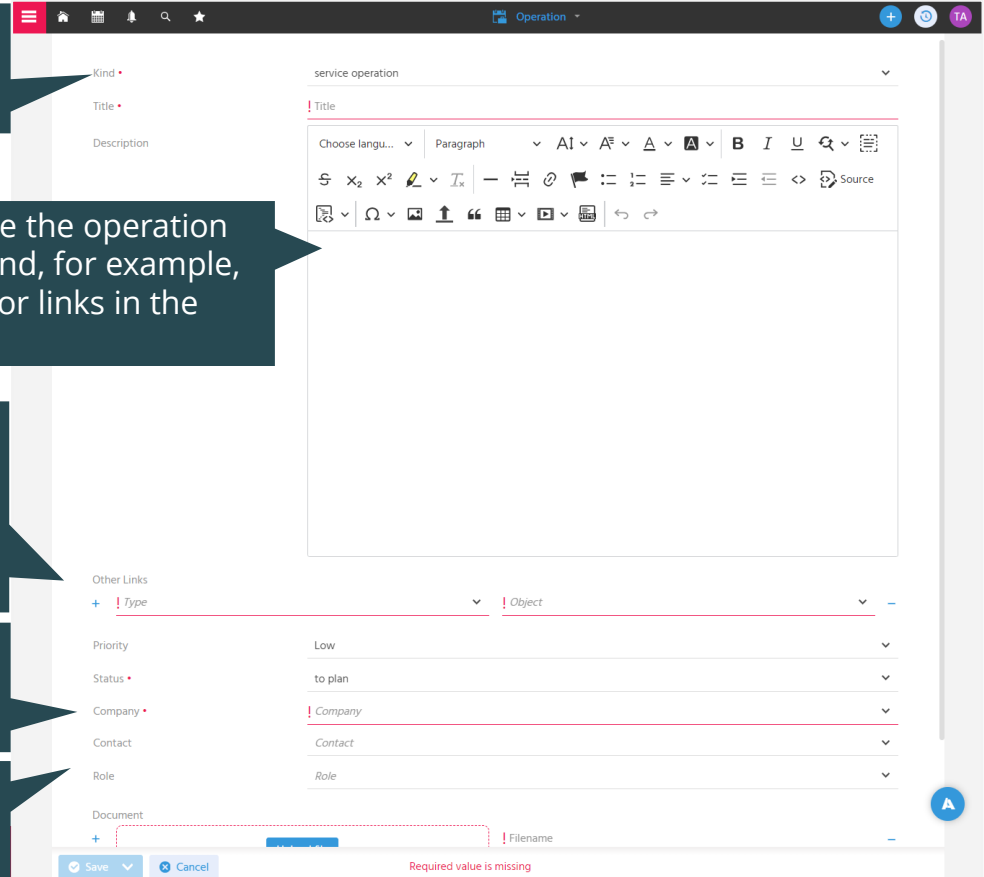
Select what kind of operation it is, e.g. service operation.

You can describe the operation in more detail and, for example, include images or links in the description.

Link the operation to other data sets, e.g. to a product.
Links to offers, opportunities or service tickets created under "Other links" do not cause the operation to be displayed in these data records in the "Operations/tasks" tab.

Select at which company the operation should take place and, if necessary, the contact who will be your contact person.

Assign a role to the operation, e.g. service technician. This assignment will later influence the displayed operation tasks.



The screenshot shows the 'Create operation' form in the ADITO application. The form is titled 'service operation' and has a 'Title' field. Below the title is a rich text editor for the 'Description' field, which includes a toolbar with various formatting options like bold, italic, underline, and link. The form also includes fields for 'Other Links', 'Priority' (set to 'Low'), 'Status' (set to 'to plan'), 'Company' (set to 'Company'), 'Contact' (set to 'Contact'), 'Role' (set to 'Role'), and 'Document' (with a 'Filename' field). At the bottom, there are 'Save' and 'Cancel' buttons, and a red error message 'Required value is missing' is displayed.

Filter view

+

📁

✎

🗑️

📍 Open Route

👁️

🔍 Filter

📅

Operations: 16

☐	Number	Title	Kind	Begin	End	Priority	Status	Organisation	Contact	amount of tasks	Role
☐	2023 - CW 46 (12)										
☐	001	Inventur	service operation	14 Nov 2023, 12:00	14 Nov 2023, 14:00	Low	preplanned	Bohrmarkt GmbH	Frau Maria Vogel	5	Field Service
☐	002	Regelbesuch	service operation	15 Nov 2023, 08:00	15 Nov 2023, 12:00	Low	planned	Ertl GmbH		0	Account Manager
☐	003	Vorstellung Produktreihe	service operation	15 Nov 2023, 11:00	15 Nov 2023, 16:00	Low	preplanned	Skyscraper Bau GmbH		0	
☐	004	Vertragsverhandlung	service operation	16 Nov 2023, 07:00	16 Nov 2023, 16:00	Low	planned	Skyscraper Bau GmbH		0	
☐	007	Inspektion Kassensystem	service operation	17 Nov 2023, 07:00	17 Nov 2023, 10:00	Low	preplanned	Bohrmarkt GmbH		7	
☐	008	Inspektion Lasermesser	service operation	17 Nov 2023, 15:00	17 Nov 2023, 16:00	Low	preplanned	Skyscraper Bau GmbH		0	
☐	010	Inventur	service operation	16 Nov 2023, 12:00	16 Nov 2023, 16:00	Normal	preplanned	Waken Neuser SE		0	
☐	013	Regelbesuch	service operation	17 Nov 2023, 11:00	17 Nov 2023, 14:00	Normal	preplanned	Bohrmarkt GmbH		0	Manager
☐	014	Regelbesuch	service operation	15 Nov 2023, 08:00							
☐	015	Inventur	service operation	14 Nov 2023, 08:00							
☐	017	Inspektion Scanner	service operation	17 Nov 2023, 11:00							
☐	018	Handscanner tauschen	service operation	17 Nov 2023, 15:00							
☐	2023 - CW 47 (2)										
☐	2024 - CW 33 (1)										
☐	2024 - CW 41 (1)										

Grouping

calendar week

Group by

Condition

Join conditions by:

all one

Kind equal "service operation"

Begin greater than "15 Oct 2023"

Begin greater than

15/10/2023

+ Add filter condition

🔗 Open extended filter conditions

Saved filters

Save new filter

list filters

calendar week] =service operation, >15 Oct 2023

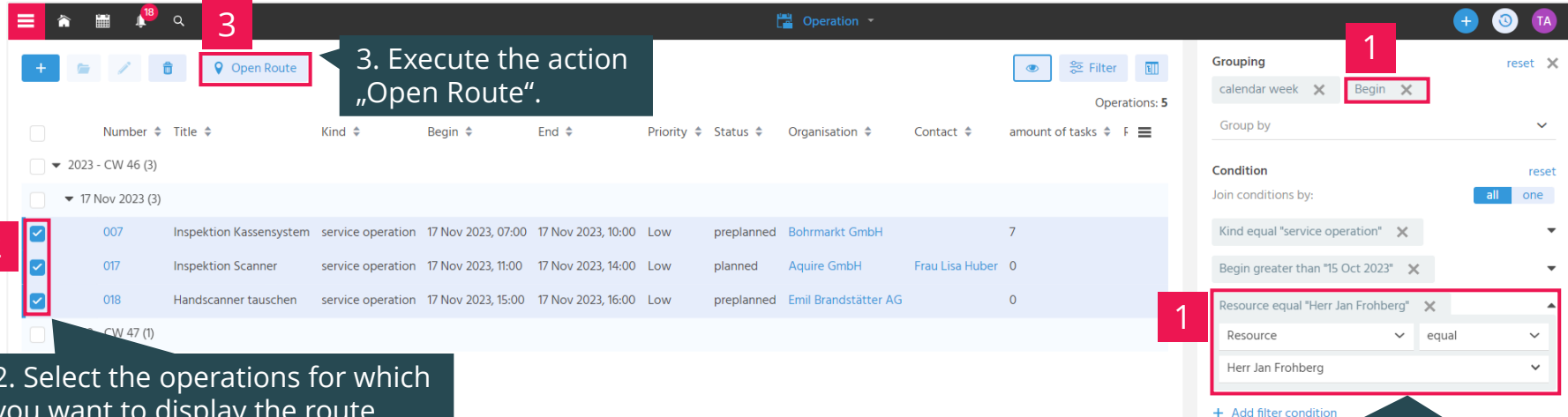
calendar week] =service operation

service operation, >15 Oct 2023

Group by "Calendar week" and store the condition „Begin greater than yesterday" to get the operations clearly displayed.

Operation

Serial action – Open Route



3. Execute the action „Open Route“.

2. Select the operations for which you want to display the route.

1. Additionally, group by “Begin” and filter by a resource if you want to display the daily route for a specific resource.

	Number	Title	Kind	Begin	End	Priority	Status	Organisation	Contact	amount of tasks
	2023 - CW 46 (3)									
	17 Nov 2023 (3)									
☒	007	Inspektion Kassensystem	service operation	17 Nov 2023, 07:00	17 Nov 2023, 10:00	Low	preplanned	Bohrmarkt GmbH		7
☒	017	Inspektion Scanner	service operation	17 Nov 2023, 11:00	17 Nov 2023, 14:00	Low	planned	Aquire GmbH	Frau Lisa Huber	0
☒	018	Handscanner tauschen	service operation	17 Nov 2023, 15:00	17 Nov 2023, 16:00	Low	preplanned	Emil Brandstätter AG		0
	CW 47 (1)									



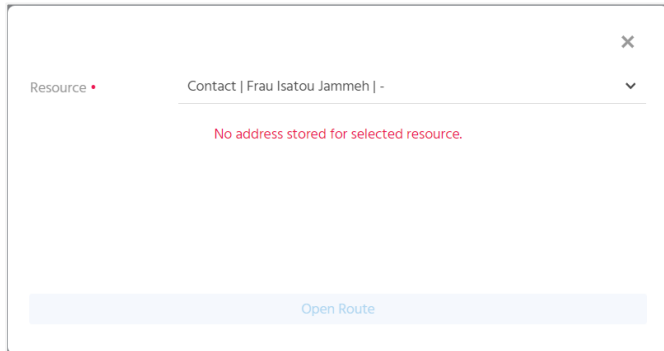
You can select a maximum of 100 operations for the "Open Route" action.

Operation

Serial action – Open Route

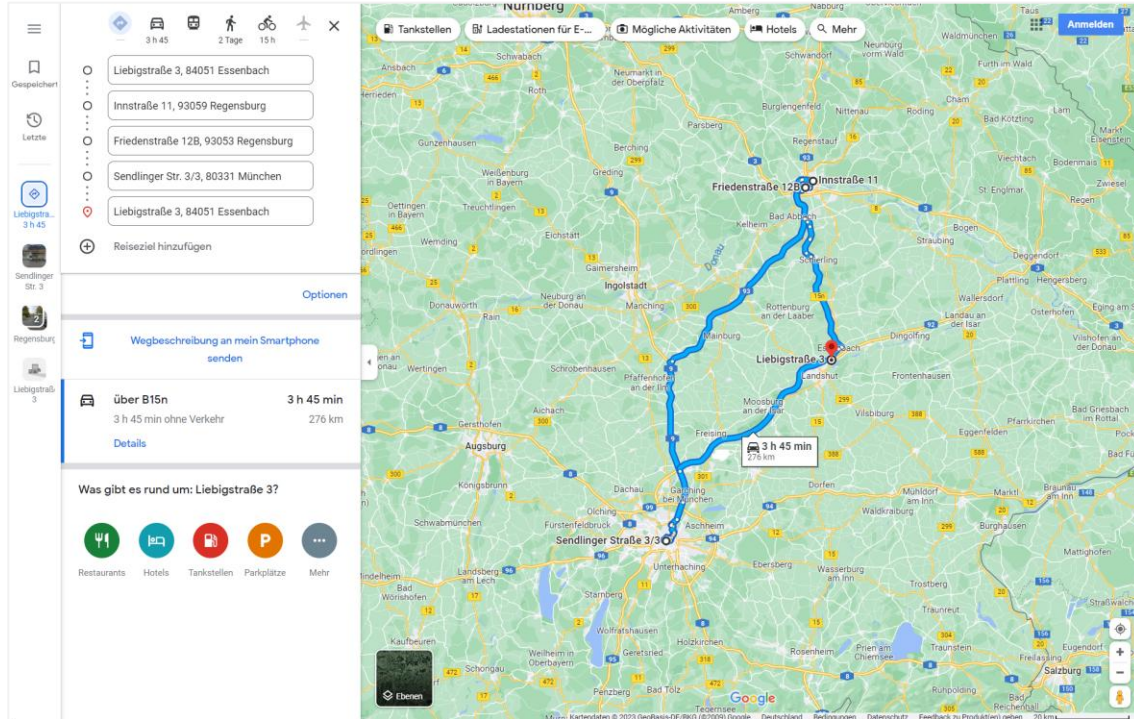


An overlay opens in which the logged-in user is selected as a resource and the resources stored for the selected operations are displayed for selection. The selection determines which start and end address is to be used for route planning.



If no address is stored at the selected resource, you cannot open the route planning.

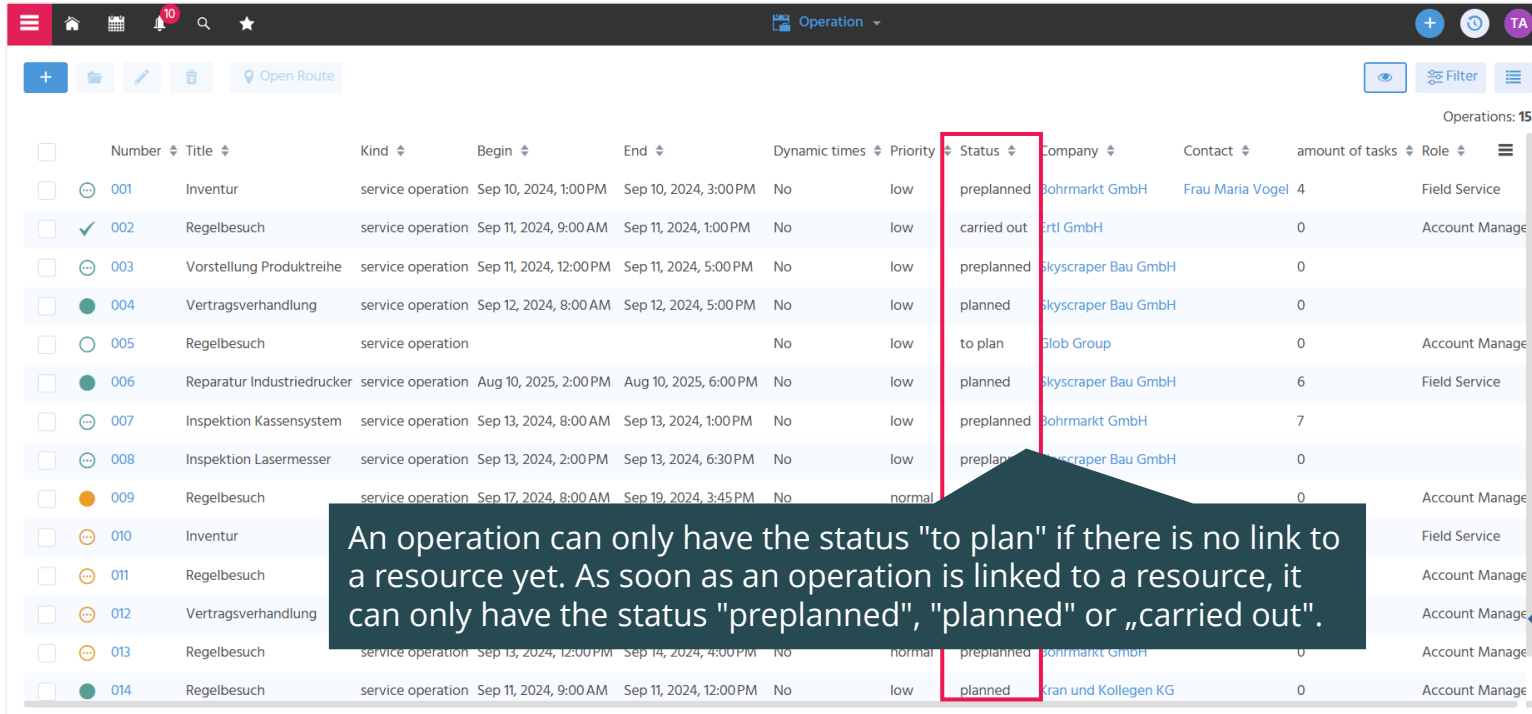
Serial action – Open Route



The serial action "Open Route" opens Google Maps. There, the route is built according to the following logic:

- The address of the logged-in user is taken as the start and end address.
- The route is displayed in the order of the operations, i.e. the assignment with the earliest time at "Start" is approached first, then the assignment with the next time, and so on.

Status



	Number	Title	Kind	Begin	End	Dynamic times	Priority	Status	Company	Contact	amount of tasks	Role
☐	001	Inventur	service operation	Sep 10, 2024, 1:00 PM	Sep 10, 2024, 3:00 PM	No	low	preplanned	Bohrmarkt GmbH	Frau Maria Vogel	4	Field Service
☒	002	Regelbesuch	service operation	Sep 11, 2024, 9:00 AM	Sep 11, 2024, 1:00 PM	No	low	carried out	Ertl GmbH		0	Account Manager
☐	003	Vorstellung Produktreihe	service operation	Sep 11, 2024, 12:00 PM	Sep 11, 2024, 5:00 PM	No	low	preplanned	Skyscraper Bau GmbH		0	
☐	004	Vertragsverhandlung	service operation	Sep 12, 2024, 8:00 AM	Sep 12, 2024, 5:00 PM	No	low	planned	Skyscraper Bau GmbH		0	
☐	005	Regelbesuch	service operation			No	low	to plan	Glob Group		0	Account Manager
☐	006	Reparatur Industriedrucker	service operation	Aug 10, 2025, 2:00 PM	Aug 10, 2025, 6:00 PM	No	low	planned	Skyscraper Bau GmbH		6	Field Service
☐	007	Inspektion Kassensystem	service operation	Sep 13, 2024, 8:00 AM	Sep 13, 2024, 1:00 PM	No	low	preplanned	Bohrmarkt GmbH		7	
☐	008	Inspektion Lasermesser	service operation	Sep 13, 2024, 2:00 PM	Sep 13, 2024, 6:30 PM	No	low	preplanned	Skyscraper Bau GmbH		0	
☐	009	Regelbesuch	service operation	Sep 17, 2024, 8:00 AM	Sep 19, 2024, 3:45 PM	No	normal				0	Account Manager
☐	010	Inventur										Field Service
☐	011	Regelbesuch										Account Manager
☐	012	Vertragsverhandlung										Account Manager
☐	013	Regelbesuch	service operation	Sep 13, 2024, 12:00 PM	Sep 14, 2024, 4:00 PM	No	normal	preplanned	Bohrmarkt GmbH		0	Account Manager
☐	014	Regelbesuch	service operation	Sep 11, 2024, 9:00 AM	Sep 11, 2024, 12:00 PM	No	low	planned	Kran und Kollegen KG		0	Account Manager

An operation can only have the status "to plan" if there is no link to a resource yet. As soon as an operation is linked to a resource, it can only have the status "preplanned", "planned" or "carried out".

Icons

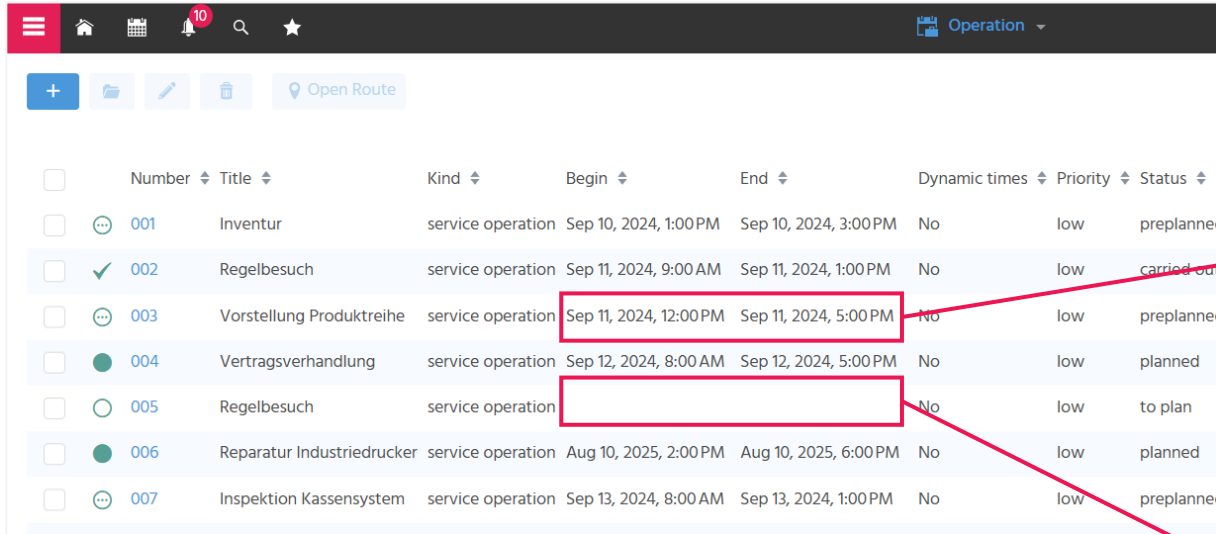
Priority

Status

	None	Low	Normal	High
To plan				
Preplanned				
Planned				
Carried out				

Operation

Filter view

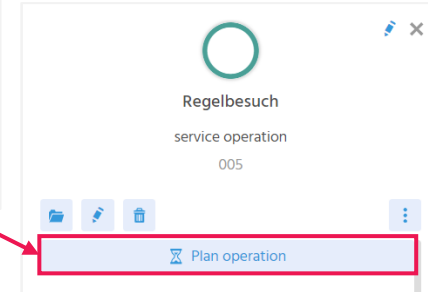


☐	Number	Title	Kind	Begin	End	Dynamic times	Priority	Status
☐	001	Inventur	service operation	Sep 10, 2024, 1:00 PM	Sep 10, 2024, 3:00 PM	No	low	preplanned
☒	002	Regelbesuch	service operation	Sep 11, 2024, 9:00 AM	Sep 11, 2024, 1:00 PM	No	low	carried out
☐	003	Vorstellung Produktreihe	service operation	Sep 11, 2024, 12:00 PM	Sep 11, 2024, 5:00 PM	No	low	preplanned
☐	004	Vertragsverhandlung	service operation	Sep 12, 2024, 8:00 AM	Sep 12, 2024, 5:00 PM	No	low	planned
☐	005	Regelbesuch	service operation			No	low	to plan
☐	006	Reparatur Industriedrucker	service operation	Aug 10, 2025, 2:00 PM	Aug 10, 2025, 6:00 PM	No	low	planned
☐	007	Inspektion Kassensystem	service operation	Sep 13, 2024, 8:00 AM	Sep 13, 2024, 1:00 PM	No	low	preplanned



Vorstellung Produktreihe
service operation
003

Replan operation



Regelbesuch
service operation
005

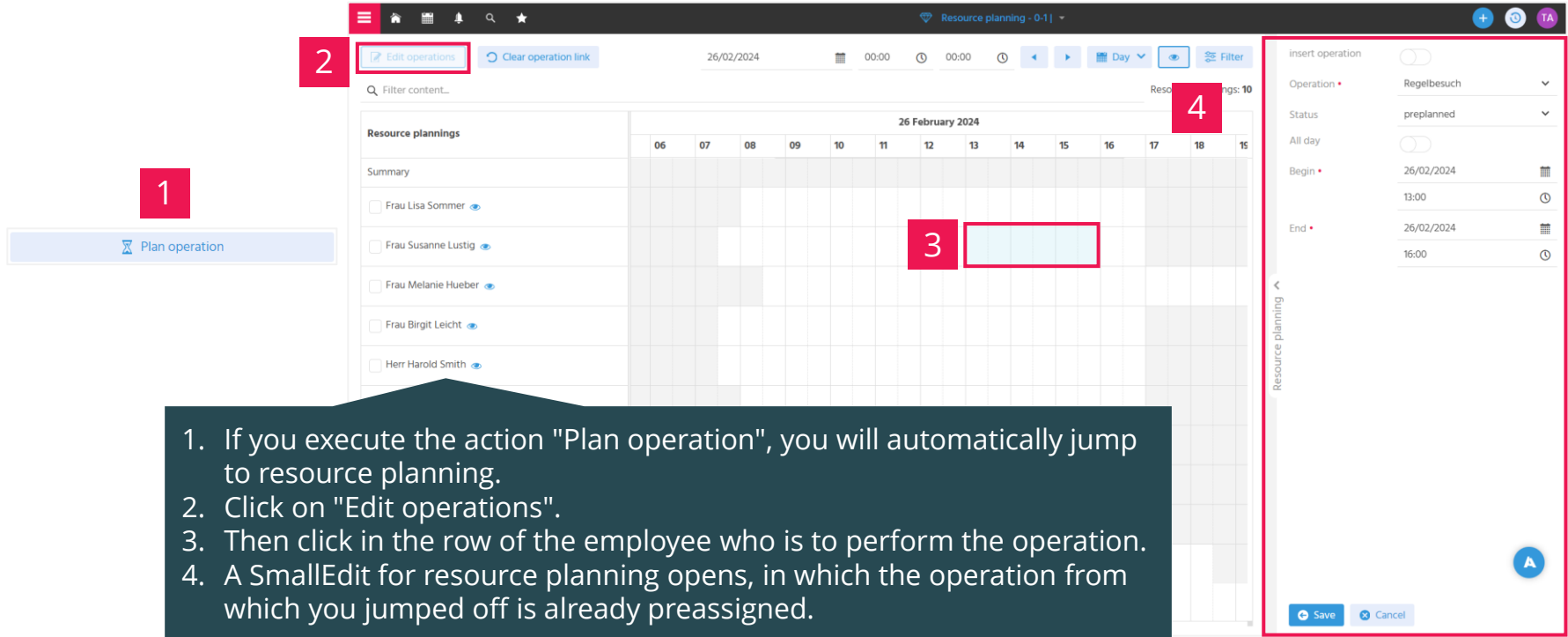
Plan operation

For operations where the **begin and end have not yet** been defined, you will find the „**Plan operation**“ button in the preview.

If **data** is already **available**, you will find the button "**Replan operation**".

Operation

Plan operation



The screenshot shows the ADITO Resource planning interface. A sidebar on the left contains a 'Plan operation' button, highlighted with a red box and the number 1. The main area displays a resource planning grid for 26 February 2024. The grid lists employees: Frau Lisa Sommer, Frau Susanne Lustig, Frau Melanie Hueber, Frau Birgit Leicht, and Herr Harold Smith. A red box and the number 3 highlight the row for Frau Susanne Lustig. The grid shows a preassigned operation for Frau Susanne Lustig on 26/02/2024 from 13:00 to 16:00. A red box and the number 4 highlight the 'Edit operations' button in the top left of the grid. A red box and the number 2 highlight the 'Edit operations' button in the top left of the grid. A red box and the number 4 highlight the 'Edit operations' button in the top left of the grid. A red box and the number 4 highlight the 'Edit operations' button in the top left of the grid.

1. If you execute the action "Plan operation", you will automatically jump to resource planning.
2. Click on "Edit operations".
3. Then click in the row of the employee who is to perform the operation.
4. A SmallEdit for resource planning opens, in which the operation from which you jumped off is already preassigned.

Operation

Plan operation

insert operation ☐

Operation • Regelbesuch ▼

Status preplanned ▼

All day ☐

Begin • 26/02/2024 

13:00 

End • 26/02/2024 

16:00 

Resource planning <

insert operation ☐

Operation • Regelbesuch ▼

Status preplanned ▼

All day ☒

Begin • 26/02/2024 

End • ! 26/02/2024 

Resource planning <



For technical reasons, operations can only be scheduled until 23:45 (11:45 p.m.).

If you activate the "All day" button, then the time is hidden in the „Begin" and "End" fields. In order to be able to plan operations lasting several days, the "End" field remains visible.

Operation

Plan operation

Resource planning

insert operation

☐

Operation •

Regelbesuch

▼

Status

preplanned

▼

All day

☐

Begin •

26/02/2024

📅

13:00

🕒

End •

26/02/2024

📅

16:00

🕒

Resource planning

insert operation

☒

Kind •

service operation

Title •

! Title

▼

Description

Description

Status •

preplanned

▼

All day

☒

Begin •

26/02/2024

📅

End •

! 26/02/2024

📅

Priority •

Low

▼

Company •

! Company

▼

Contact

Contact

▼

Role

Role

▼

Activate the „insert operation“ button if you want to plan a new operation instead of the originally selected one. This will show you all the fields you need to create a new operation.

Operation

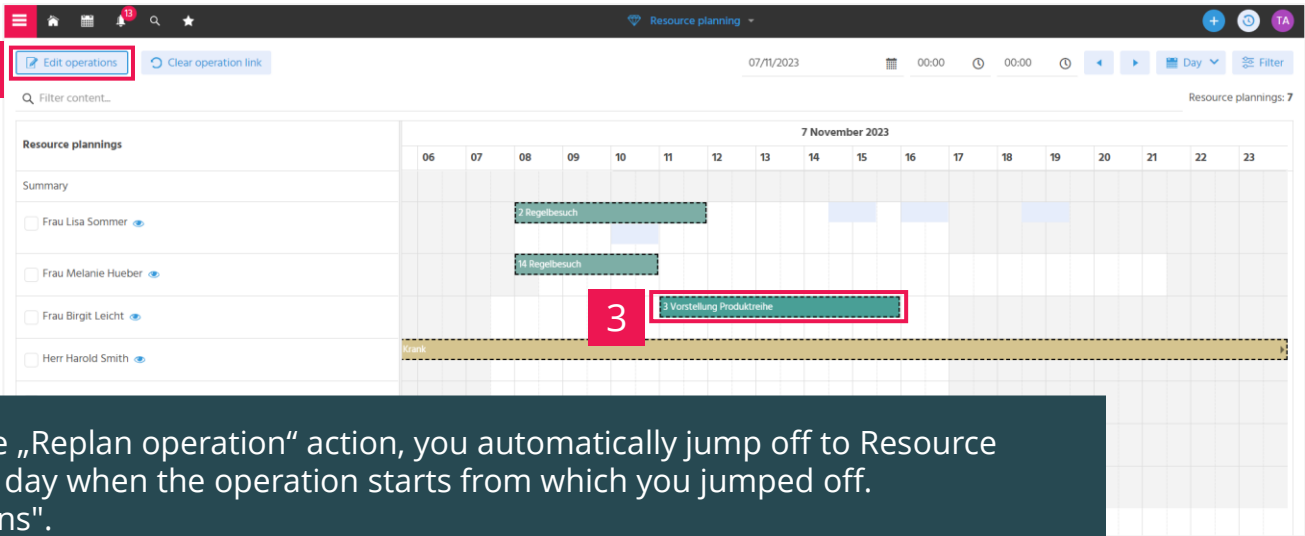
Replan operation

1

⌚ Replan operation

2

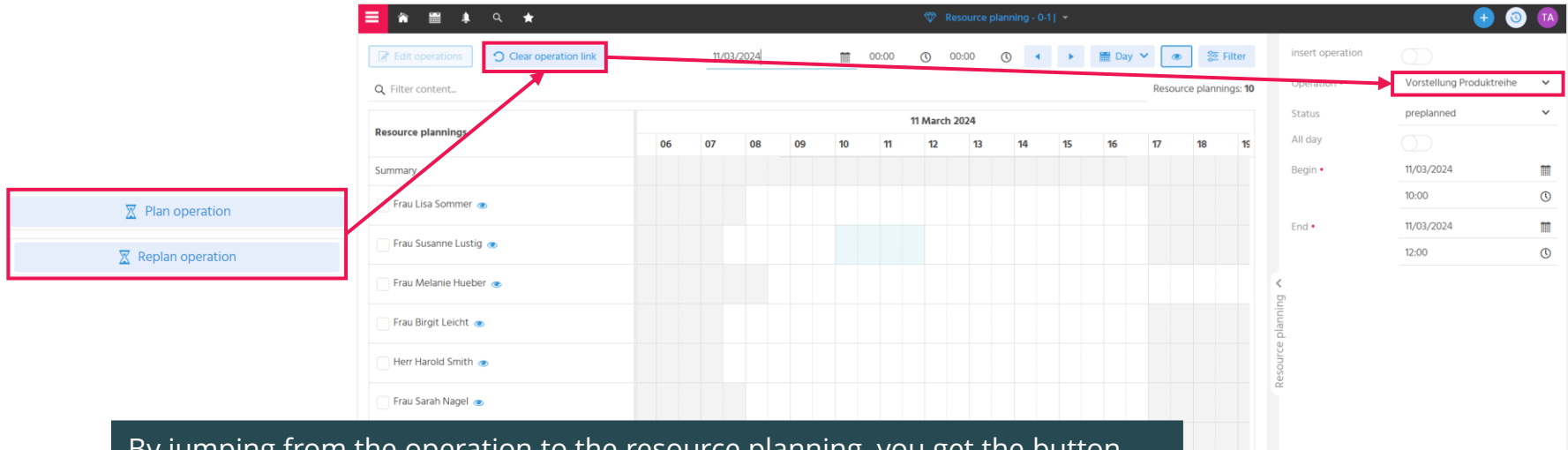
3



1. When you perform the „Replan operation“ action, you automatically jump off to Resource planning. It shows the day when the operation starts from which you jumped off.
2. Click on "Edit operations".
3. Now you can move the operation with the mouse or drag it bigger or smaller. The operation from which you have jumped is displayed in the same color as always, the other operations are displayed in a slightly paler color so that you can see which operation you have jumped from.

Operation

Plan/Replan Operation

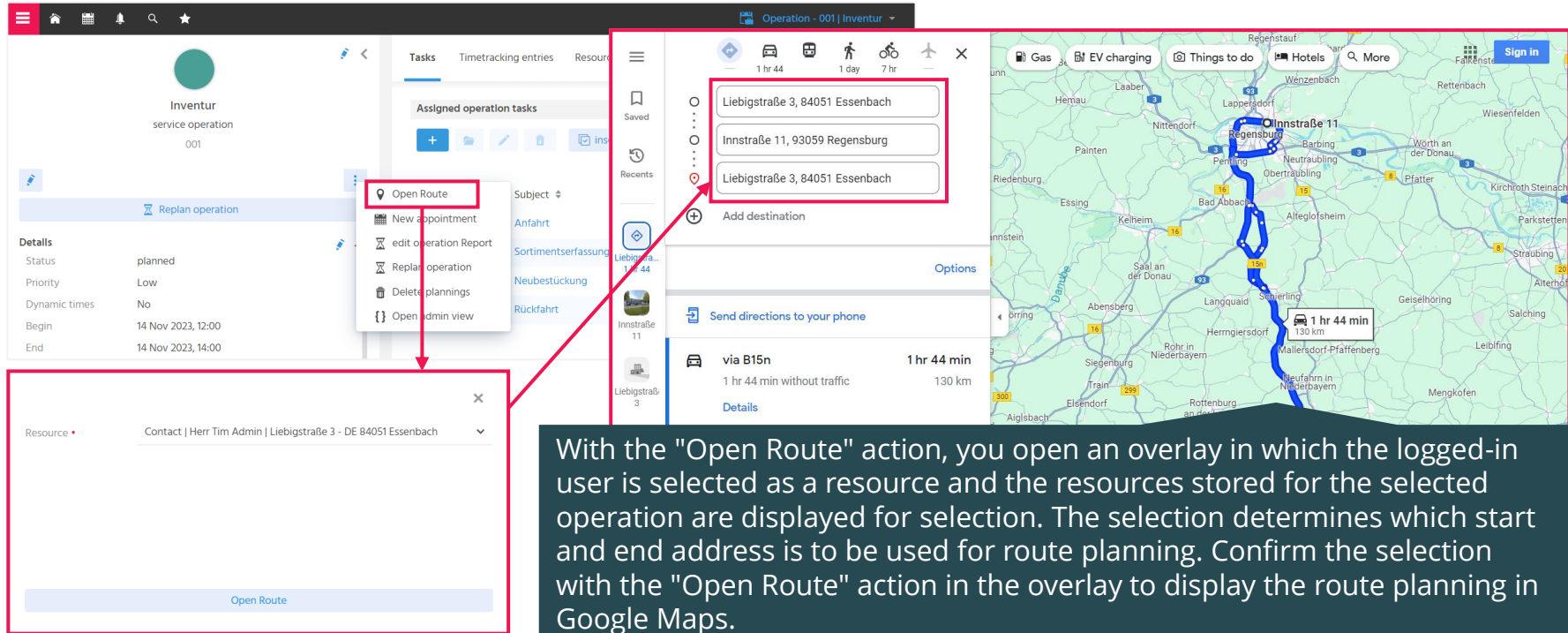


The screenshot shows the ADITO Resource planning interface. On the left, a sidebar contains two buttons: "Plan operation" and "Replan operation", both highlighted with a red box. A red arrow points from the "Replan operation" button to the "Clear operation link" button in the top toolbar, which is also highlighted with a red box. Another red arrow points from the "Clear operation link" button to the "Operation" dropdown menu on the right, which is also highlighted with a red box. The main area displays a resource planning grid for "11 March 2024" with resources listed on the left and time slots on the top. The right sidebar shows the "insert operation" form with fields for "Operation" (set to "Vorstellung Produktreihe"), "Status" (set to "preplanned"), "All day" (unchecked), "Begin" (11/03/2024 10:00), and "End" (11/03/2024 12:00).

By jumping from the operation to the resource planning, you get the button „Clear operation link“ in the resource planning. As long as this button is visible, the operation from which you jumped off will be automatically preassigned in the SmallEdit, provided that you schedule the operation at another resource. To break the link, click the button.

Operation

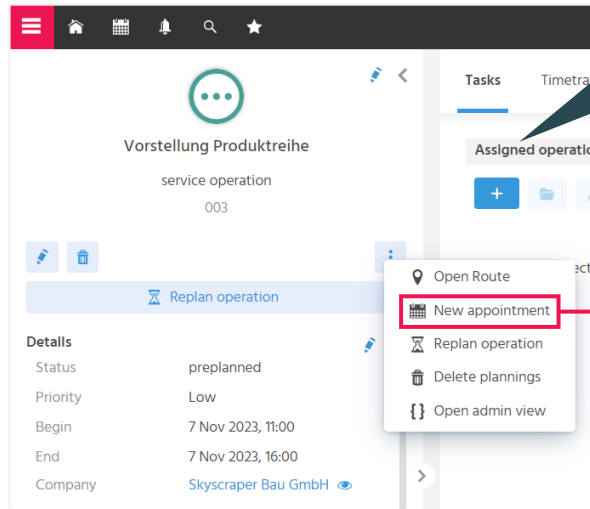
Further actions - Open route



The screenshot illustrates the 'Open Route' functionality in the ADITO application. On the left, the 'Inventur' service operation (001) is shown with details like status (planned), priority (low), and dates (14 Nov 2023). A context menu is open over the 'Replan operation' button, with 'Open Route' highlighted. Below this, a resource selection overlay shows 'Herr Tim Admin | Liebigstraße 3 - DE 84051 Essenbach' as the selected resource. A red arrow points from the 'Open Route' button to the route planning overlay on the right. This overlay displays a list of addresses: 'Liebigstraße 3, 84051 Essenbach', 'Innstraße 11, 93059 Regensburg', and 'Liebigstraße 3, 84051 Essenbach'. The route is visualized on a map, showing a path from Regensburg to Essenbach. The estimated travel time is 1 hr 44 min (130 km) via B15n. A text box at the bottom of the overlay states: 'With the "Open Route" action, you open an overlay in which the logged-in user is selected as a resource and the resources stored for the selected operation are displayed for selection. The selection determines which start and end address is to be used for route planning. Confirm the selection with the "Open Route" action in the overlay to display the route planning in Google Maps.'

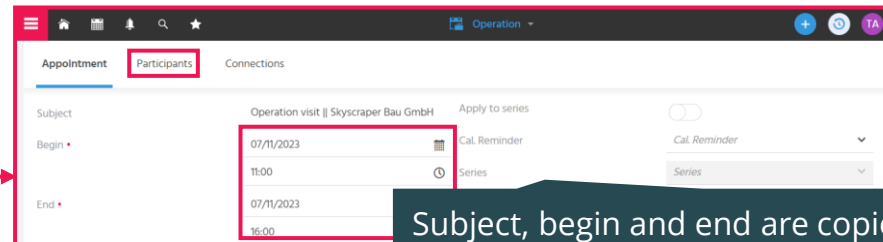
Operation

Preview - Further actions

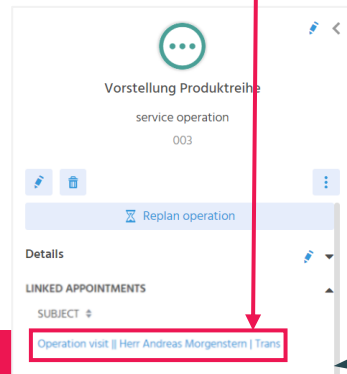


The action "New appointment" is only active,

- when the operation time (begin and end) is planned and
- no appointment has been created yet for the operation.



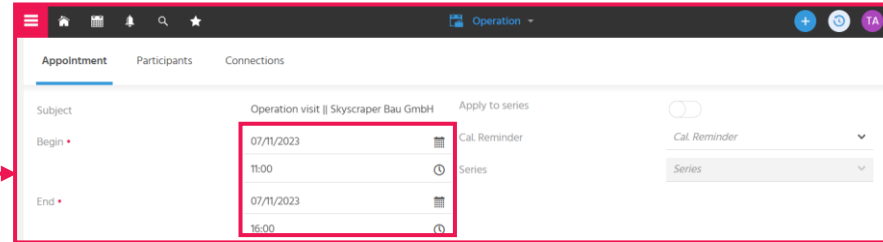
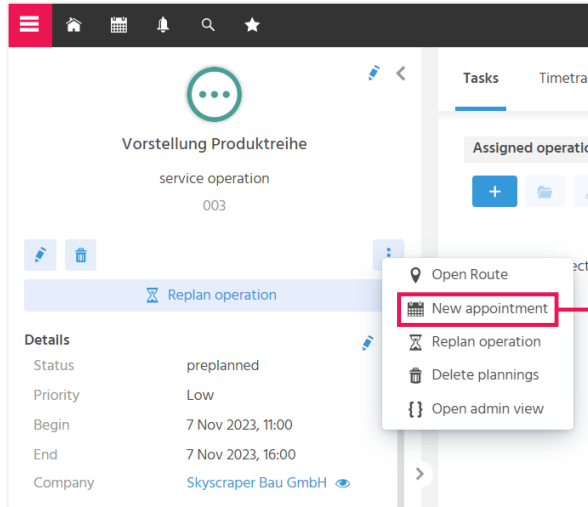
Subject, begin and end are copied from the operation to the appointment. Contacts that are linked as a resource in the operation are transferred to the "Participants" tab.



The appointment is stored as a link in the preview of the operation.

Operation

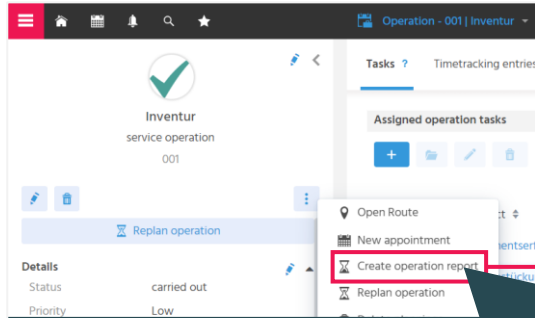
Preview - Further actions



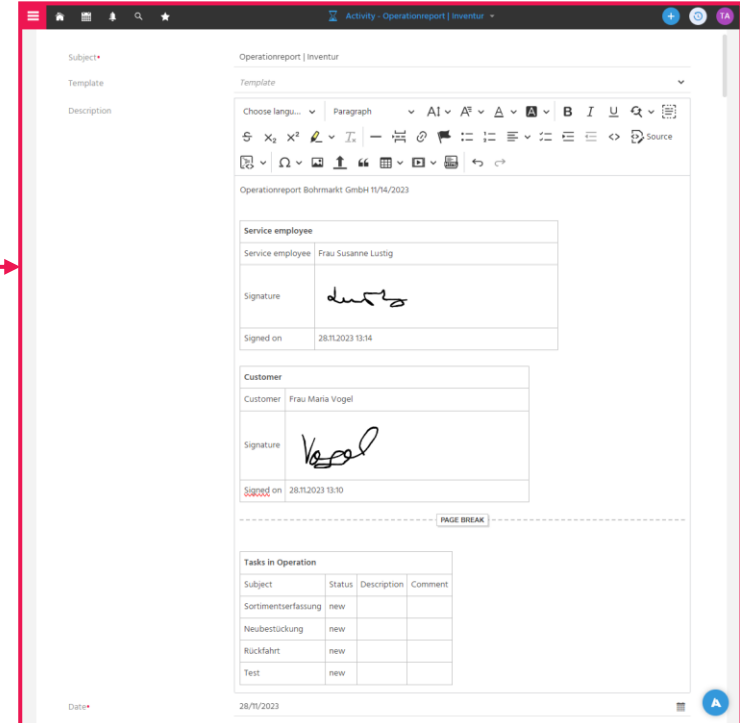
The appointment is used to display the operation in the calendar and to have the option of displaying it via Exchange in the calendar used daily, such as Outlook. If you change the begin and end dates in the appointment, the operation is moved to the date and time specified in the appointment.

Operation

Preview - Further actions



You can only execute the "Create operation report" action if the operation is today or is in the past and if the status of the operation is "planned" or "carried out". This sets the status of the operation to „carried out" (if it was "planned") and opens the activity creation view. In the activity, various fields such as "Subject", "Date" and "Category" are already pre-filled.



The screenshot shows the 'Operationreport' form in the ADITO application. The form is titled 'Operationreport | Inventur' and includes a 'Template' dropdown. The 'Description' field is pre-filled with 'Operationreport Bohrmarkt GmbH 11/14/2023'. The form contains several sections:

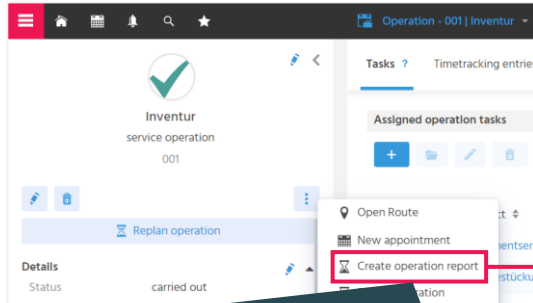
- Service employee:** Service employee: Frau Susanne Lustig, Signature: [Handwritten Signature], Signed on: 28.11.2023 13:14.
- Customer:** Customer: Frau Maria Vogel, Signature: [Handwritten Signature], Signed on: 28.11.2023 13:10.
- Tasks in Operation:** A table with columns: Subject, Status, Description, Comment.

Subject	Status	Description	Comment
Sortimentverfassung	new		
Neubestückung	new		
Rückfahrt	new		
Test	new		

The bottom of the form shows the date '28/11/2023' and a 'PAGE BREAK' indicator.

Operation

Preview - Further actions

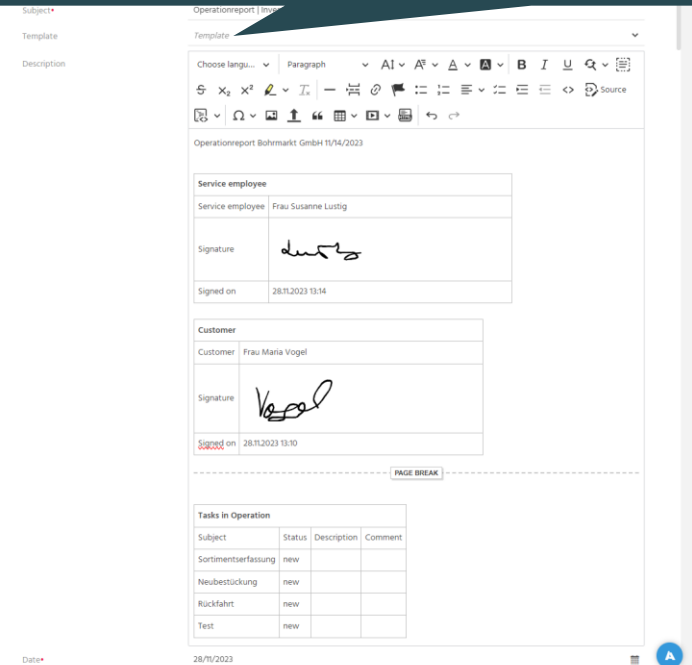


In the description field, a standard template is inserted in which

- the signatures from the "Reporting" tab are displayed
- all operation tasks belonging to the operation, their status and the descriptions that are stored with the operation tasks are displayed.

In the "Comment" column, the employee who creates the operation report can store information regarding the operation tasks.

If you do not want to use the standard template, you can select a different template. Templates of the type "Text modular" and with the classification "Operation report" are displayed here.



The screenshot shows the 'Operationreport' form in ADITO. The form includes a rich text editor for the description field, which contains a standard template. The template includes fields for Service employee, Customer, and Tasks in Operation.

Service employee

Service employee	Frau Susanne Lustig
Signature	
Signed on	28.11.2023 13:14

Customer

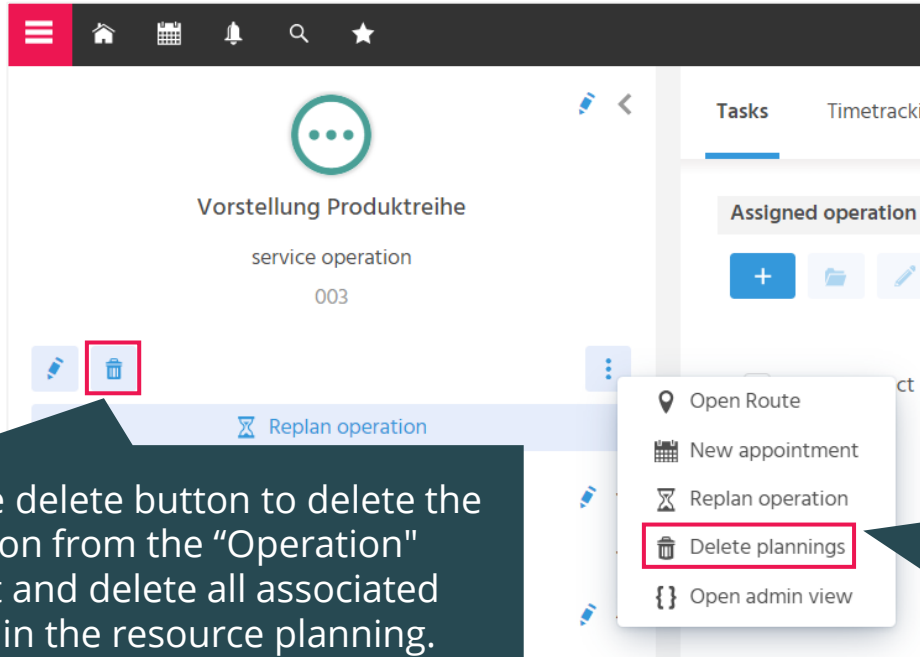
Customer	Frau Maria Vogel
Signature	
Signed on	28.11.2023 13:10

Tasks in Operation

Subject	Status	Description	Comment
Sortimentserfassung	new		
Neubestückung	new		
Rückfahrt	new		
Test	new		

Operation

Preview - Further actions



Use the delete button to delete the operation from the "Operation" context and delete all associated entries in the resource planning.

Use the "Delete plannings" action to delete all entries for this operation in the resource planning. The data record in the "Operation" context is retained. The action is only active if entries exist.

Operation tasks

007 | Inspektion Kassensystem

Operation - 007 | Inspektion Kassensystem

Tasks | Timetracking entries | Resource | Reporting | Activities | Attributes | Receipts | Documents | Logs

Assigned operation tasks

	Subject	Operation	Status	Priority	estimated time	booked time
☐	Jahresinspektion KF782-2	Inspektion Kassensystem	new	Low	2:15	
☐	Inspektion Kasse 1	Inspektion Kassensystem	new	Low		
☐	Sichtprüfung	Inspektion Kassensystem	new	Low		
☐	Fehler auslesen	Inspektion Kassensystem	new	Low		
☐	Inspektion Kasse 2	Inspektion Kassensystem	new	Low		
☐	Fehler auslesen	Inspektion Kassensystem	new	Low		

Not assigned operation tasks

	Subject	Operation	Status	Priority	estimated time	booked time	Service_Due Date	Optional	Contact	Company	Role	Serial	Assign directly
☐	Vorstellung neue Produktreihe		new	Normal	2:15		May 1, 2024	No		Bohrmarkt GmbH	Account Manager	No	No

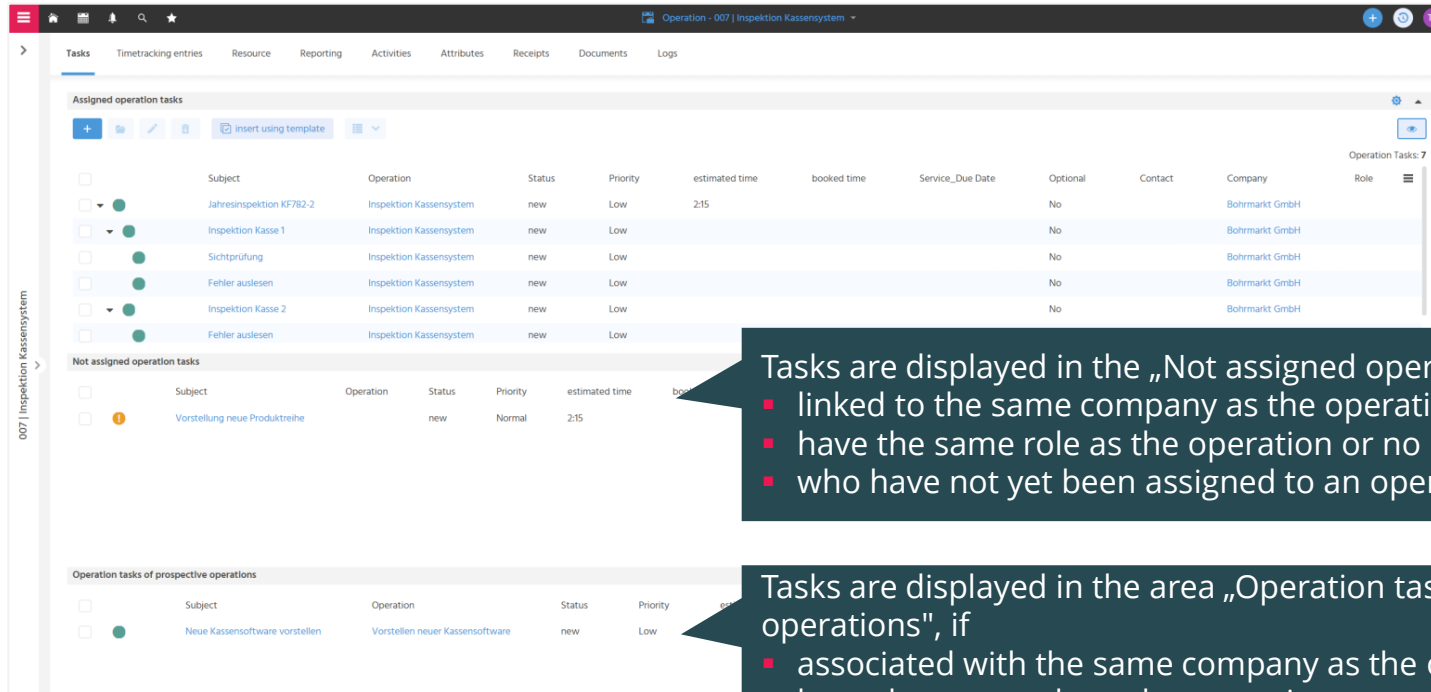
Operation tasks of prospective operations

	Subject	Operation	Status	Priority	estimated time	booked time	Service_Due Date	Optional	Contact	Company	Role
☐	Neue Kassensoftware vorstellen	Vorstellen neuer Kassensoftware	new	Low				No		Bohrmarkt GmbH	

Operation tasks in the area „Assigned operation tasks“ are assigned to the operation. The company and the contact are taken over from the operation into the operation task as soon as the operation task is assigned. Tasks with subtasks can be created.

Operation

Operation tasks



Assigned operation tasks											
	Subject	Operation	Status	Priority	estimated time	booked time	Service Due Date	Optional	Contact	Company	Role
☐	Jahresinspektion KF782-2	Inspektion Kassensystem	new	Low	2:15			No		Bohrmarkt GmbH	
☐	Inspektion Kasse 1	Inspektion Kassensystem	new	Low				No		Bohrmarkt GmbH	
☐	Sichtprüfung	Inspektion Kassensystem	new	Low				No		Bohrmarkt GmbH	
☐	Fehler auslesen	Inspektion Kassensystem	new	Low				No		Bohrmarkt GmbH	
☐	Inspektion Kasse 2	Inspektion Kassensystem	new	Low				No		Bohrmarkt GmbH	
☐	Fehler auslesen	Inspektion Kassensystem	new	Low				No		Bohrmarkt GmbH	

Not assigned operation tasks											
	Subject	Operation	Status	Priority	estimated time	booked time	Service Due Date	Optional	Contact	Company	Role
☐	Vorstellung neue Produktreihe		new	Normal	2:15						

Operation tasks of prospective operations											
	Subject	Operation	Status	Priority	estimated time	booked time	Service Due Date	Optional	Contact	Company	Role
☐	Neue Kassensoftware vorstellen	Vorstellen neuer Kassensoftware	new	Low							

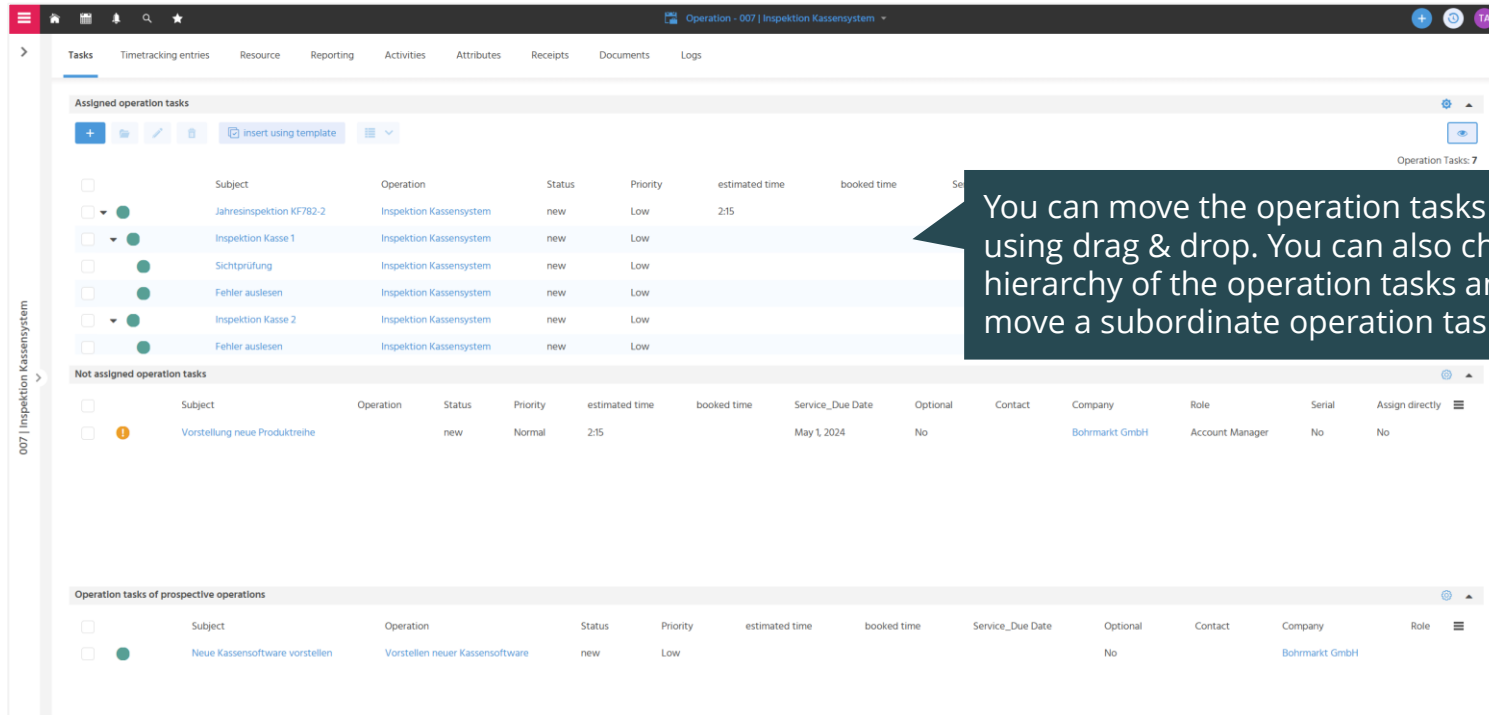
Tasks are displayed in the „Not assigned operation tasks" area, if

- linked to the same company as the operation,
- have the same role as the operation or no role and
- who have not yet been assigned to an operation.

Tasks are displayed in the area „Operation tasks of prospective operations", if

- associated with the same company as the operation
- have the same role as the operation or no role and
- who have already been assigned to a future operation.

Operation tasks



007 | Inspektion Kassensystem

Operation - 007 | Inspektion Kassensystem

Tasks Timetracking entries Resource Reporting Activities Attributes Receipts Documents Logs

Assigned operation tasks

insert using template

Operation Tasks: 7

Subject	Operation	Status	Priority	estimated time	booked time
Jahresinspektion KF782-2	Inspektion Kassensystem	new	Low	2:15	
Inspektion Kasse 1	Inspektion Kassensystem	new	Low		
Sichtprüfung	Inspektion Kassensystem	new	Low		
Fehler auslesen	Inspektion Kassensystem	new	Low		
Inspektion Kasse 2	Inspektion Kassensystem	new	Low		
Fehler auslesen	Inspektion Kassensystem	new	Low		

Not assigned operation tasks

Subject	Operation	Status	Priority	estimated time	booked time	Service_Due Date	Optional	Contact	Company	Role	Serial	Assign directly
Vorstellung neue Produktreihe		new	Normal	2:15		May 1, 2024	No		Bohmarkt GmbH	Account Manager	No	No

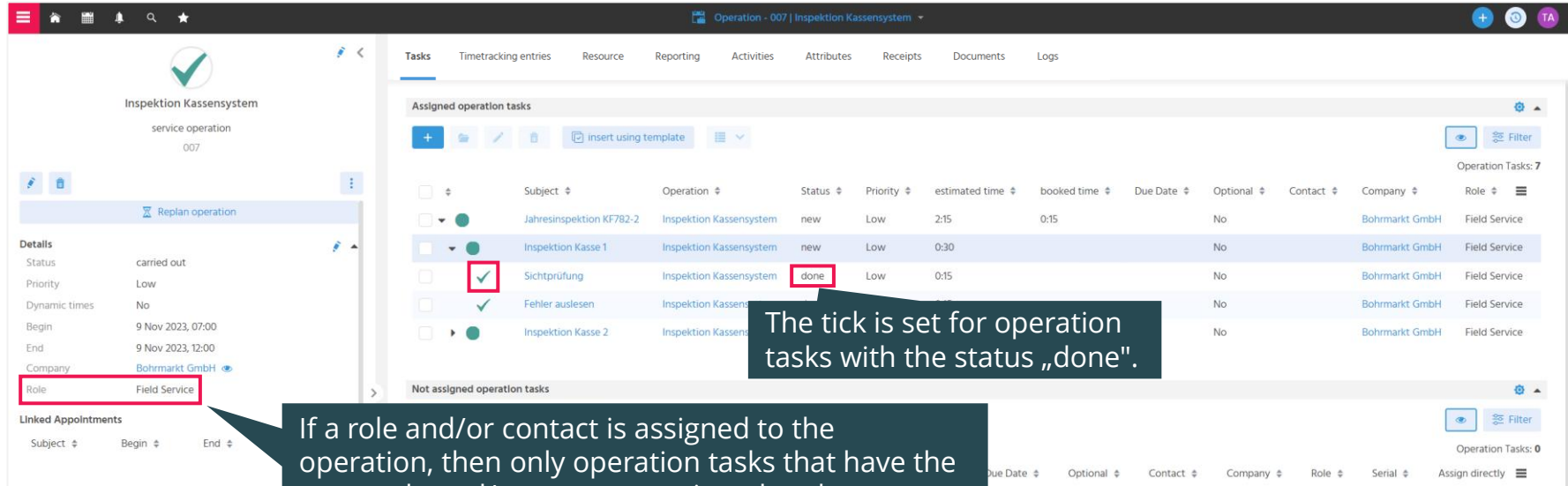
Operation tasks of prospective operations

Subject	Operation	Status	Priority	estimated time	booked time	Service_Due Date	Optional	Contact	Company	Role
Neue Kassensoftware vorstellen	Vorstellen neuer Kassensoftware	new	Low				No		Bohmarkt GmbH	

You can move the operation tasks within an area using drag & drop. You can also change the hierarchy of the operation tasks and, for example, move a subordinate operation task up a level.

Operation

Operation tasks



Inspektion Kassensystem
service operation
007

Details

Status: carried out
Priority: Low
Dynamic times: No
Begin: 9 Nov 2023, 07:00
End: 9 Nov 2023, 12:00
Company: Bohrmart GmbH
Role: Field Service

Linked Appointments

Subject	Begin	End
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Tasks

Assigned operation tasks

Subject	Operation	Status	Priority	estimated time	booked time	Due Date	Optional	Contact	Company	Role
Jahresinspektion KF782-2	Inspektion Kassensystem	new	Low	2:15	0:15		No		Bohrmarkt GmbH	Field Service
Inspektion Kasse 1	Inspektion Kassensystem	new	Low	0:30			No		Bohrmarkt GmbH	Field Service
Sichtprüfung	Inspektion Kassensystem	done	Low	0:15			No		Bohrmarkt GmbH	Field Service
Fehler auslesen	Inspektion Kassensystem						No		Bohrmarkt GmbH	Field Service
Inspektion Kasse 2	Inspektion Kassensystem						No		Bohrmarkt GmbH	Field Service

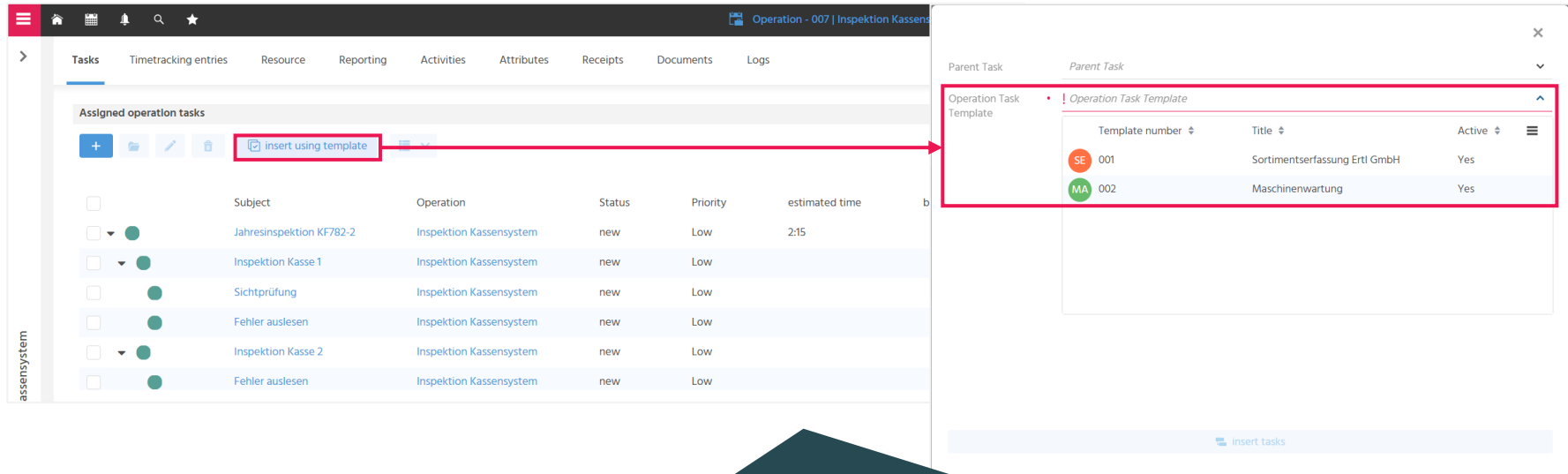
Not assigned operation tasks

Operation Tasks: 7

Operation Tasks: 0

Operation

Actions for the operation tasks



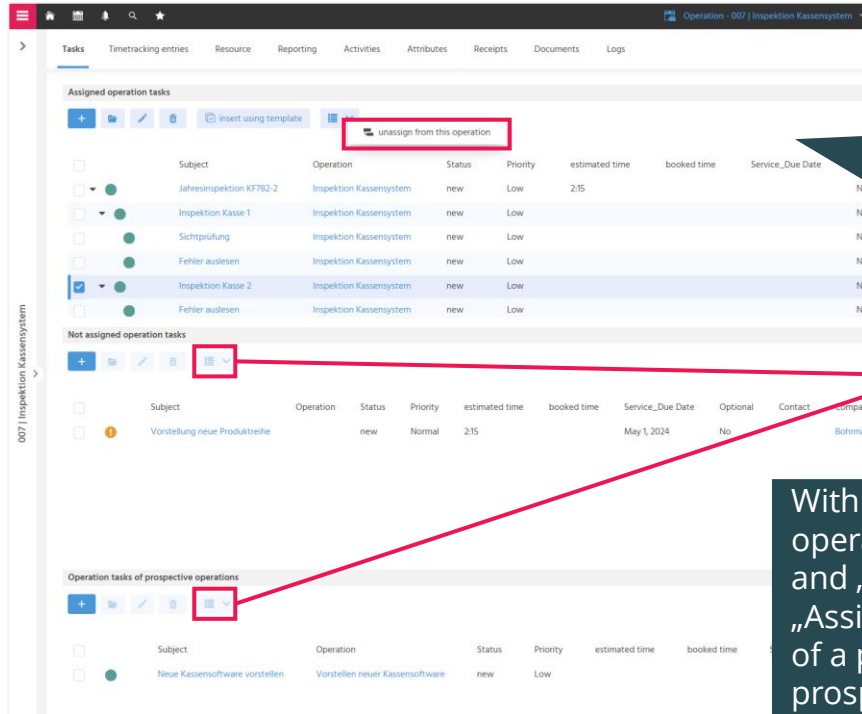
The screenshot displays the ADITO interface for managing operation tasks. The main table, titled 'Assigned operation tasks', lists tasks with columns for Subject, Operation, Status, Priority, and estimated time. A red box highlights the 'insert using template' button in the table's toolbar. A red arrow points from this button to the 'Operation Task Template' dialog, which is open on the right. The dialog shows a list of templates with columns for Template number, Title, and Active status.

Template number	Title	Active
SE 001	Sortimentserfassung Ertl GmbH	Yes
MA 002	Maschinenwartung	Yes

You can use the "Insert using template" action to select an operation task template. The tasks from the selected template are transferred to the operation.

Operation

Actions for the operation tasks



007 | Inspektion Kassensystem

Tasks Timetracking entries Resource Reporting Activities Attributes Receipts Documents Logs

Assigned operation tasks

unassign from this operation

Subject	Operation	Status	Priority	estimated time	booked time	Service_Due Date
Jahresinspektion KF782-2	Inspektion Kassensystem	new	Low	2:15		No
Inspektion Kasse 1	Inspektion Kassensystem	new	Low			No
Sichtprüfung	Inspektion Kassensystem	new	Low			No
Fehler auslesen	Inspektion Kassensystem	new	Low			No
Inspektion Kasse 2	Inspektion Kassensystem	new	Low			No
Fehler auslesen	Inspektion Kassensystem	new	Low			No

Not assigned operation tasks

assign to this operation

Subject	Operation	Status	Priority	estimated time	booked time	Service_Due Date	Optional	Contact	Company
Vorstellung neue Produktreihe		new	Normal	2:15		May 1, 2024	No		Bohmer

Operation tasks of prospective operations

assign to this operation

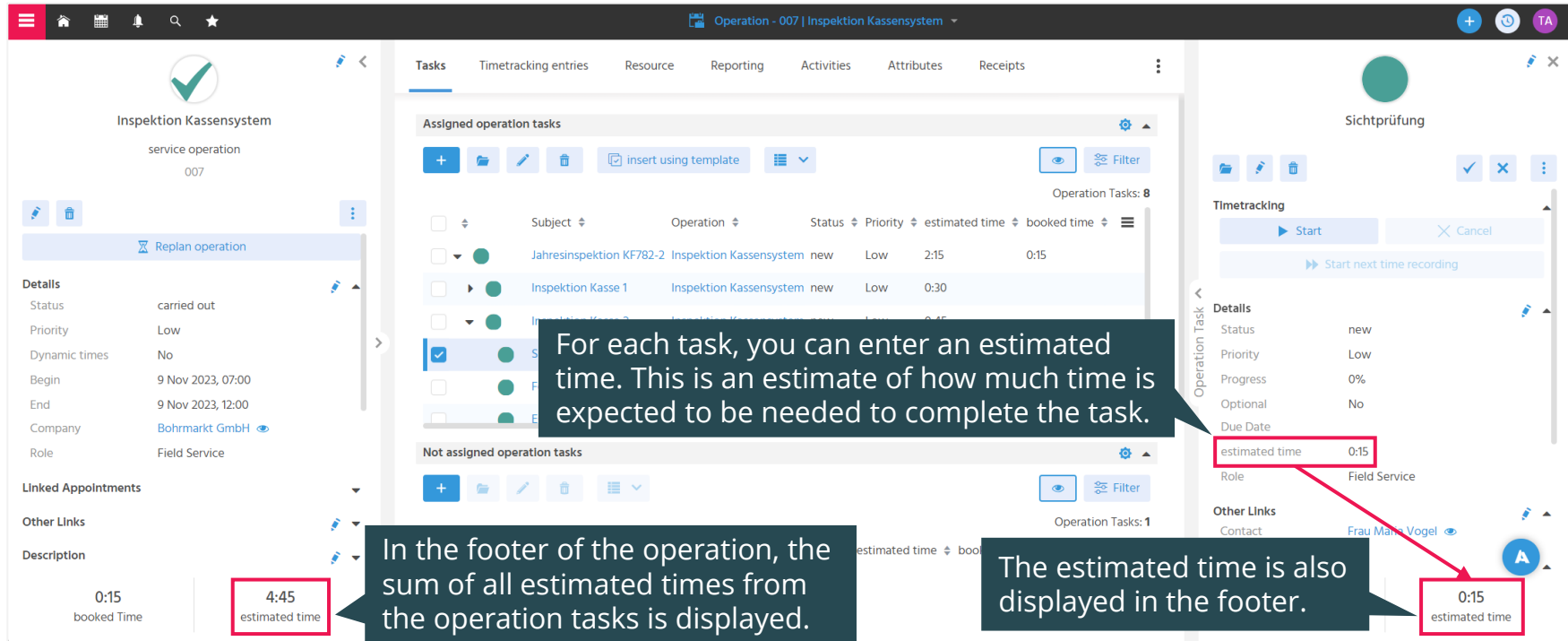
Subject	Operation	Status	Priority	estimated time	booked time
Neue Kassensoftware vorstellen	Vorstellen neuer Kassensoftware	new	Low		

With the help of the action „unassign from this operation“ you can remove operation tasks from the operation, i.e. move them from the area "Assigned operation tasks" to the area „Not assigned operation tasks“.

With the action "Assign to this operation" you can move operation tasks from the areas „Not assigned operation tasks" and „Operation tasks of prospective operations" to the area „Assigned operation tasks". If you transfer **all operation tasks** of a prospective operation to the currently open operation, the prospective operation is deleted.

Operation

Time estimation for operation tasks



The screenshot displays the ADITO software interface for managing operations. The main window is titled "Operation - 007 | Inspektion Kassensystem". The left sidebar shows details for the operation, including its status (carried out), priority (Low), and estimated time (0:15). The main area is divided into two sections: "Assigned operation tasks" and "Not assigned operation tasks". The "Assigned operation tasks" section contains a table with columns for Subject, Operation, Status, Priority, estimated time, and booked time. The table lists three tasks: "Jahresinspektion KF782-2", "Inspektion Kasse 1", and "Inspektion Kasse 2". The "Not assigned operation tasks" section is currently empty. The right sidebar shows the "Sichtprüfung" (View Inspection) section, which includes a "Timetracking" section with "Start" and "Cancel" buttons, and a "Details" section with fields for Status, Priority, Progress, Optional, Due Date, and Role. The "estimated time" field in the "Details" section is highlighted with a red box and labeled "0:15".

Inspektion Kassensystem
service operation
007

Replan operation

Details

- Status: carried out
- Priority: Low
- Dynamic times: No
- Begin: 9 Nov 2023, 07:00
- End: 9 Nov 2023, 12:00
- Company: Bohrmart GmbH
- Role: Field Service

Linked Appointments

Other Links

Description

0:15
booked Time

4:45
estimated time

Assigned operation tasks

Subject	Operation	Status	Priority	estimated time	booked time
Jahresinspektion KF782-2	Inspektion Kassensystem	new	Low	2:15	0:15
Inspektion Kasse 1	Inspektion Kassensystem	new	Low	0:30	
Inspektion Kasse 2	Inspektion Kassensystem	new	Low	0:15	

Not assigned operation tasks

Operation Tasks: 8

Operation Tasks: 1

Sichtprüfung

Timetracking

Start Cancel

Start next time recording

Details

- Status: new
- Priority: Low
- Progress: 0%
- Optional: No
- Due Date:
- estimated time: 0:15
- Role: Field Service

Other Links

Contact: Frau Maria Vogel

0:15
estimated time

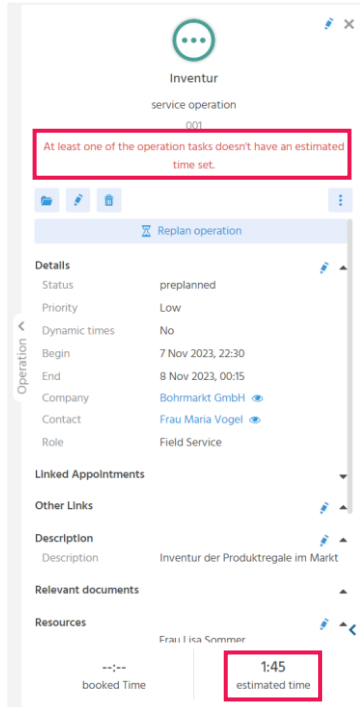
For each task, you can enter an estimated time. This is an estimate of how much time is expected to be needed to complete the task.

In the footer of the operation, the sum of all estimated times from the operation tasks is displayed.

The estimated time is also displayed in the footer.

Operation

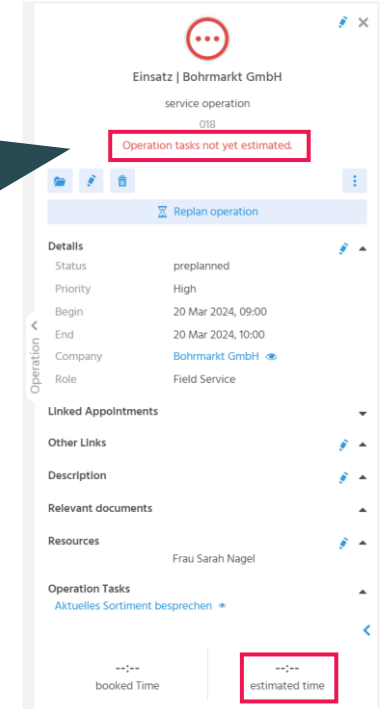
Note in preview



The screenshot shows the 'Operation' preview for 'Inventur' (service operation 001). A red box highlights a note: 'At least one of the operation tasks doesn't have an estimated time set.' The 'Details' section shows: Status: preplanned, Priority: Low, Dynamic times: No, Begin: 7 Nov 2023, 22:30, End: 8 Nov 2023, 00:15, Company: Bohrmart GmbH, Contact: Frau Maria Vogel, Role: Field Service. The 'Linked Appointments' and 'Other Links' sections are empty. The 'Description' is 'Inventur der Produktregale im Markt'. The 'Relevant documents' and 'Resources' sections are empty. The ' booked Time' is '1:45' and the ' estimated time' is '1:45'.

If there is at least one task in the operation for which no time estimate has been stored, a note is displayed in the operation preview. This makes it clear that the estimated time displayed in the operation is not yet complete.

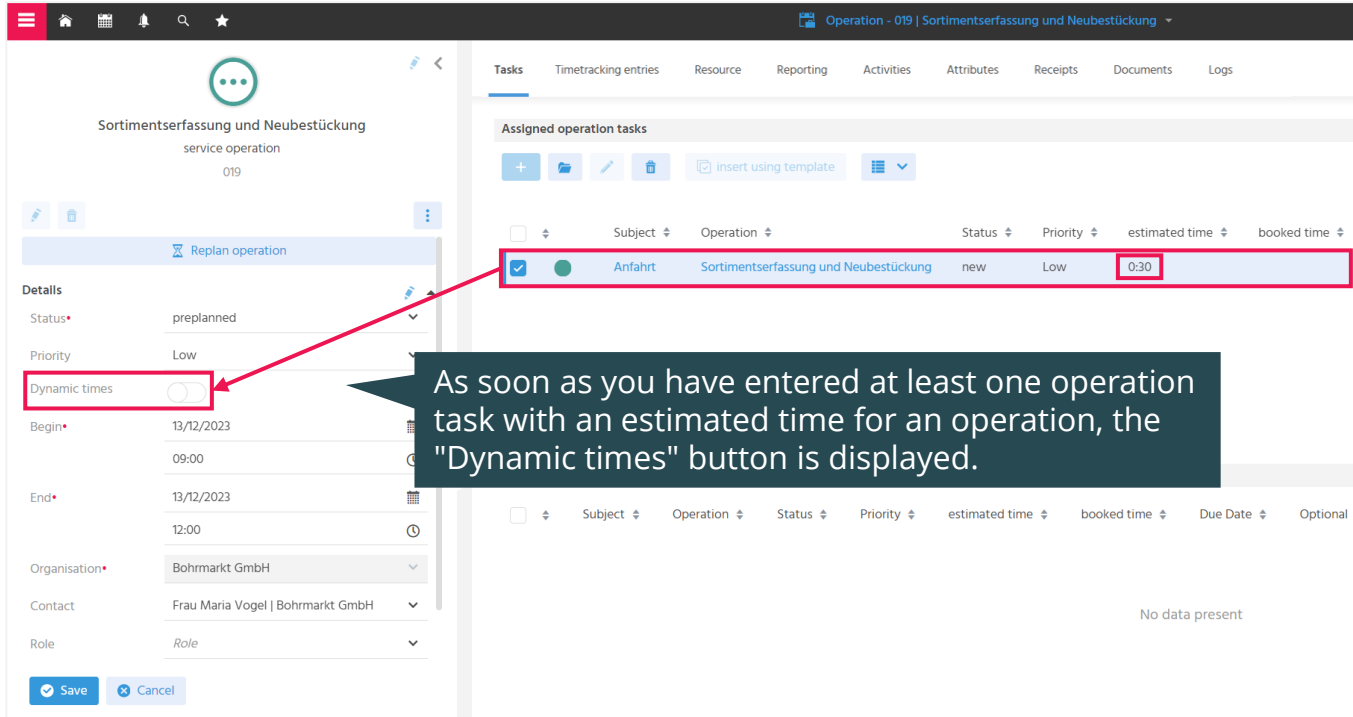
If no time estimate has been entered for any operation task so far, the note „Operation task not yet estimated" will be displayed.



The screenshot shows the 'Operation' preview for 'Einsatz | Bohrmart GmbH' (service operation 018). A red box highlights a note: 'Operation tasks not yet estimated.' The 'Details' section shows: Status: preplanned, Priority: High, Begin: 20 Mar 2024, 09:00, End: 20 Mar 2024, 10:00, Company: Bohrmart GmbH, Role: Field Service. The 'Linked Appointments' and 'Other Links' sections are empty. The 'Description' is empty. The 'Relevant documents' and 'Resources' sections are empty. The ' booked Time' is empty and the ' estimated time' is empty.

Operation

Dynamic times



The screenshot displays the ADITO software interface for managing operations. On the left, the 'Details' section for 'Sortimentserfassung und Neubestückung' (019) is visible. The 'Dynamic times' toggle is highlighted with a red box. A red arrow points from this toggle to a task entry in the 'Assigned operation tasks' table. The task entry is also highlighted with a red box and shows an estimated time of '0:30'. A text box explains that the 'Dynamic times' button is displayed as soon as at least one operation task with an estimated time is entered.

Sortimentserfassung und Neubestückung
service operation
019

Replan operation

Details

Status: preplanned

Priority: Low

Dynamic times: ☐

Begin: 13/12/2023 09:00

End: 13/12/2023 12:00

Organisation: Bohrmarkt GmbH

Contact: Frau Maria Vogel | Bohrmarkt GmbH

Role: Role

Save Cancel

Operation - 019 | Sortimentserfassung und Neubestückung

Tasks Timetracking entries Resource Reporting Activities Attributes Receipts Documents Logs

Assigned operation tasks

+ insert using template

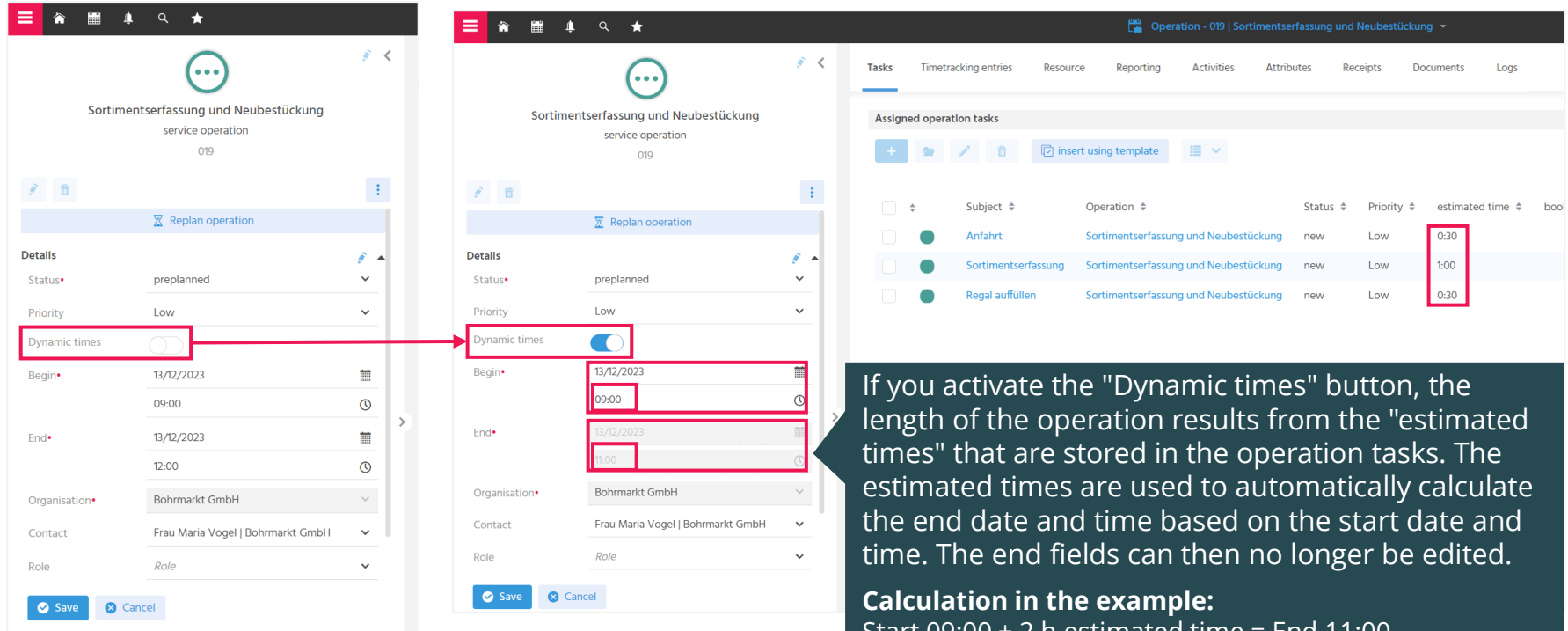
	Subject	Operation	Status	Priority	estimated time	booked time
☒	Anfahrt	Sortimentserfassung und Neubestückung	new	Low	0:30	

No data present

As soon as you have entered at least one operation task with an estimated time for an operation, the "Dynamic times" button is displayed.

Operation

Dynamic times



The screenshot illustrates the process of activating 'Dynamic times' for an operation. On the left, the 'Details' section shows the 'Dynamic times' toggle being switched on. A red arrow points from this toggle to the 'Dynamic times' toggle in the middle panel, which is now active. The 'Begin' and 'End' time fields are highlighted with red boxes, showing the start time of 09:00 and the end time of 11:00. On the right, the 'Assigned operation tasks' table shows the estimated times for each task, with the 'estimated time' column highlighted by a red box.

	Subject	Operation	Status	Priority	estimated time
☐	Anfahrt	Sortimentserfassung und Neubestückung	new	Low	0:30
☐	Sortimentserfassung	Sortimentserfassung und Neubestückung	new	Low	1:00
☐	Regal auffüllen	Sortimentserfassung und Neubestückung	new	Low	0:30

If you activate the "Dynamic times" button, the length of the operation results from the "estimated times" that are stored in the operation tasks. The estimated times are used to automatically calculate the end date and time based on the start date and time. The end fields can then no longer be edited.

Calculation in the example:
Start 09:00 + 2 h estimated time = End 11:00

Operation

Dynamic times



☰

🏠

📅

🔔

🔍

★

⋮

Sortimentserfassung und Neubestückung
service operation
019

🔧

📄

⌚ Replan operation

Details

Status

preplanned

▼

Priority

Low

▼

Begin

13/12/2023

📅

09:00

🕒

End

13/12/2023

📅

09:30

🕒

Organisation

Bohrmarkt GmbH

▼

Contact

Frau Maria Vogel | Bohrmarkt GmbH

▼

Role

Role

▼

✓ Save

✕ Cancel

Operation - 019 | Sortimentserfassung und Neubestückung

Tasks

Timetracking entries

Resource

Reporting

Activities

Attributes

Receipts

Documents

Logs

Assigned operation tasks

+

📄

✎

🗑️

📄 Insert using template

📄 ▼

☐

Subject

Operation

Status

Priority

estimated time

booked time

Due Date

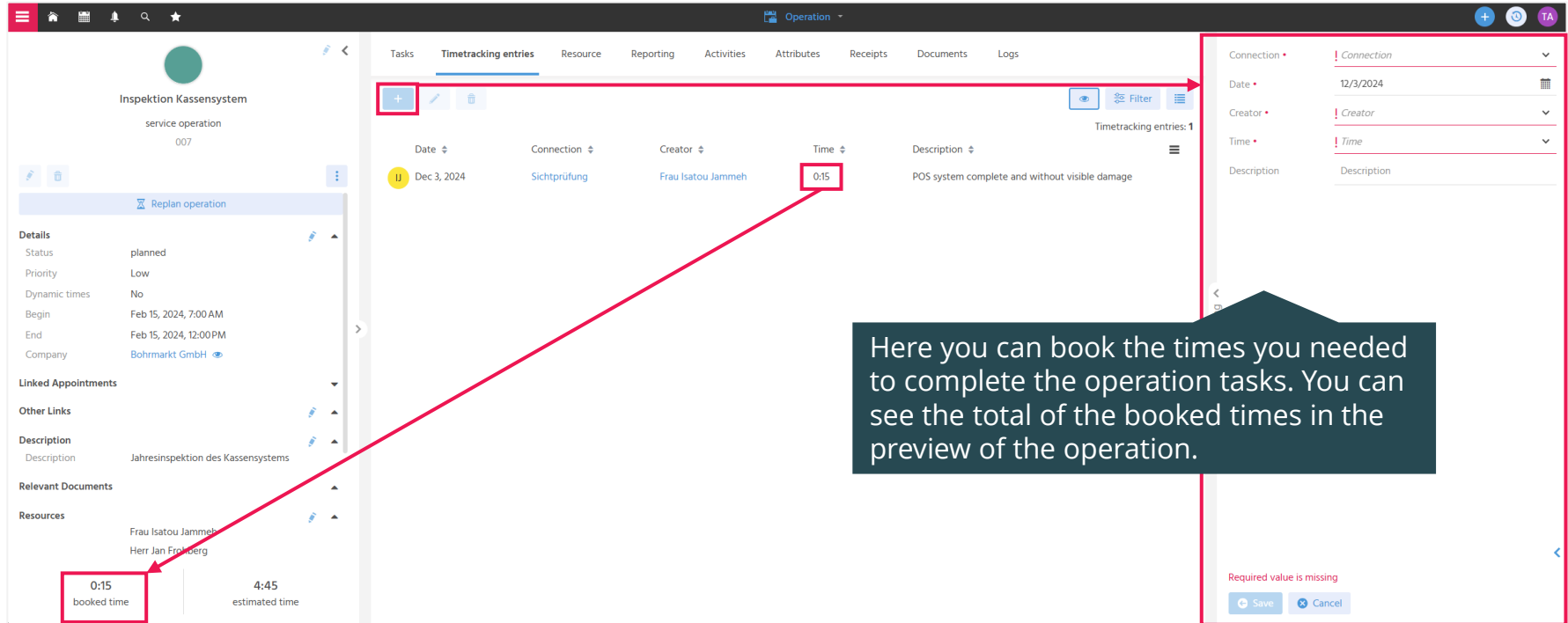
ta present

If the operation tasks are removed or the estimated times are removed in all operation tasks, the end date and time can be edited manually again and the "Dynamic time" button is no longer visible.



Operation

„Timetracking entries“ tab



Inspektion Kassensystem
service operation
007

Replan operation

Details

- Status: planned
- Priority: Low
- Dynamic times: No
- Begin: Feb 15, 2024, 7:00 AM
- End: Feb 15, 2024, 12:00 PM
- Company: Bohrmart GmbH

Linked Appointments

Other Links

Description

Description: Jahresinspektion des Kassensystems

Relevant Documents

Resources

- Frau Isatou Jammeh
- Herr Jan Froberg

0:15 booked time

4:45 estimated time

Date	Connection	Creator	Time	Description
Dec 3, 2024	Sichtprüfung	Frau Isatou Jammeh	0:15	POS system complete and without visible damage

Timetracking entries: 1

Connection: ! Connection

Date: 12/3/2024

Creator: ! Creator

Time: ! Time

Description: Description

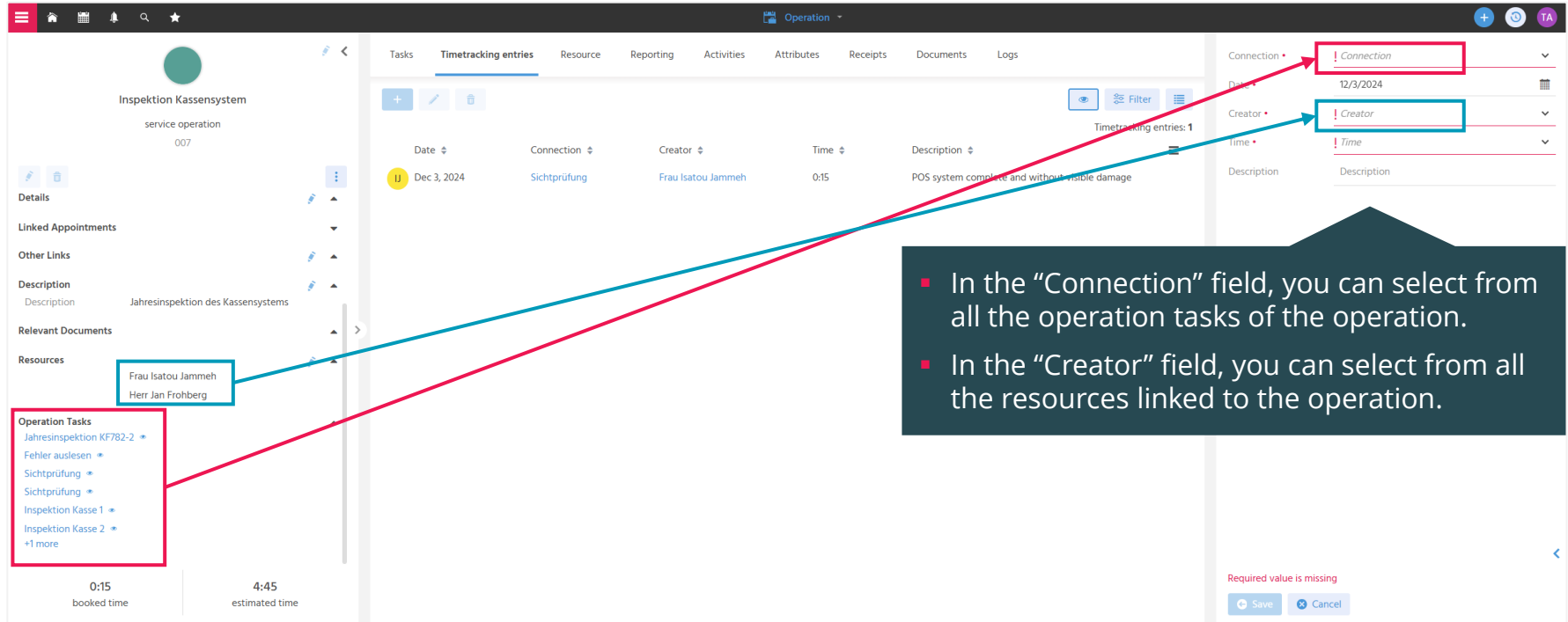
Required value is missing

Save Cancel

Here you can book the times you needed to complete the operation tasks. You can see the total of the booked times in the preview of the operation.

Operation

„Timetracking entries“ tab



The screenshot displays the ADITO application interface for managing operations. The main section shows the 'Timetracking entries' tab with a table of entries. The table has columns for Date, Connection, Creator, Time, and Description. A single entry is visible for Dec 3, 2024, with the connection 'Sichtprüfung', creator 'Frau Isatou Jammeh', and time '0:15'. The description is 'POS system complete and without visible damage'.

On the left sidebar, the 'Inspektion Kassensystem' (007) is selected. Under 'Resources', a list of 'Operation Tasks' is shown, including 'Jahresinspektion KF782-2', 'Fehler auslesen', 'Sichtprüfung', 'Sichtprüfung', 'Inspektion Kasse 1', 'Inspektion Kasse 2', and '+1 more'. A red box highlights this list, and a red arrow points from it to the 'Connection' field in the form on the right.

Below the 'Resources' section, a list of resources is shown: 'Frau Isatou Jammeh' and 'Herr Jan Froberg'. A blue box highlights this list, and a blue arrow points from it to the 'Creator' field in the form on the right.

The form on the right has fields for 'Connection', 'Date', 'Creator', 'Time', and 'Description'. The 'Connection' field is highlighted with a red box, and the 'Creator' field is highlighted with a blue box. A red arrow points from the 'Connection' field to the 'Date' field, and a blue arrow points from the 'Creator' field to the 'Time' field.

A dark blue callout box contains the following text:

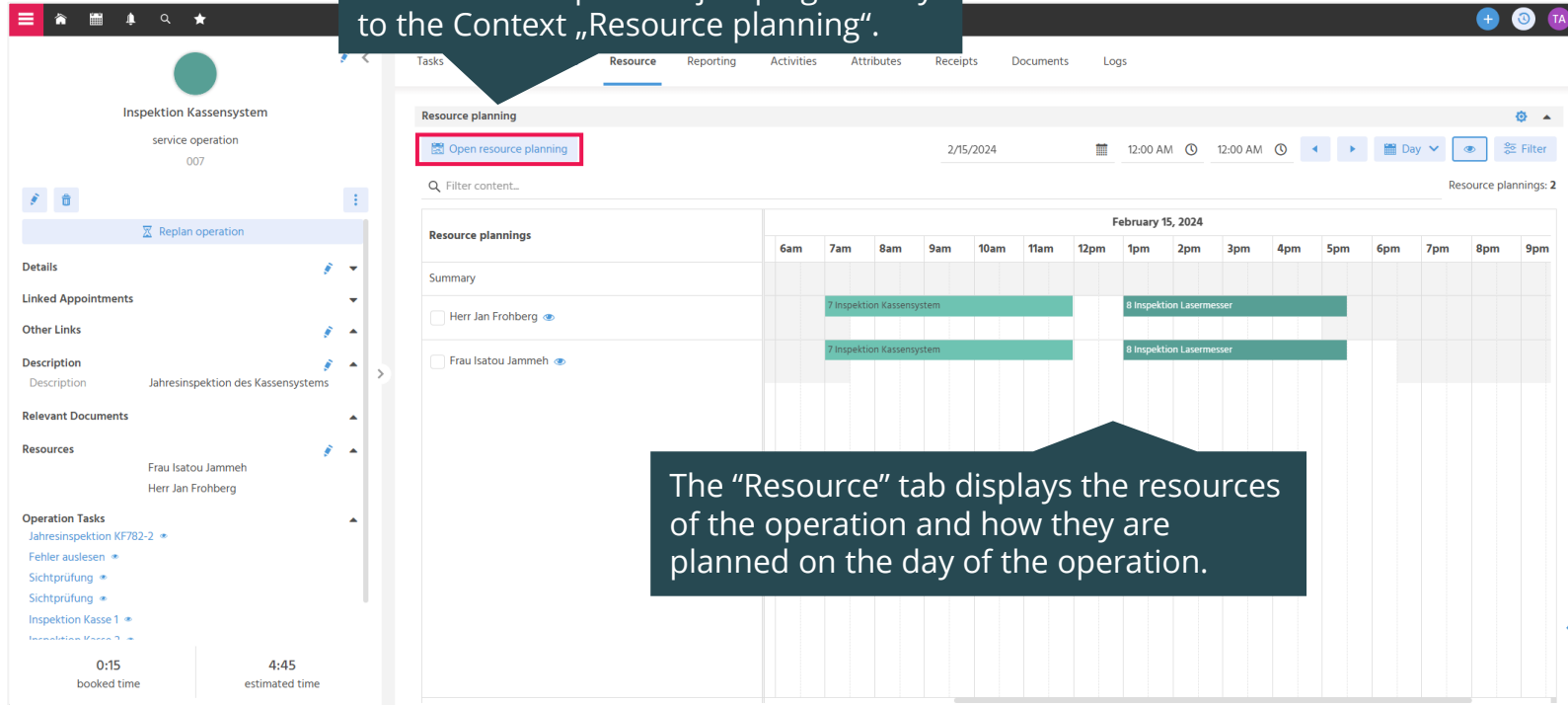
- In the "Connection" field, you can select from all the operation tasks of the operation.
- In the "Creator" field, you can select from all the resources linked to the operation.

At the bottom right, there is a message 'Required value is missing' and buttons for 'Save' and 'Cancel'.

Operation

„Resource“ tab

You have the option of jumping directly to the Context „Resource planning“.



The screenshot displays the ADITO interface with the 'Resource' tab selected. On the left, a sidebar shows details for 'Inspektion Kassensystem' (service operation 007), including a 'Replan operation' button and a list of resources: Frau Isatou Jammeh and Herr Jan Froberg. The main area shows the 'Resource planning' section with a button 'Open resource planning' highlighted by a red box. Below this is a calendar view for February 15, 2024, showing resource assignments for two people: Herr Jan Froberg and Frau Isatou Jammeh. Both are assigned to '7 Inspektion Kassensystem' from 7am to 12pm and '8 Inspektion Lasermesser' from 1pm to 5pm. The calendar grid shows time slots from 6am to 9pm.

Resource planning

[Open resource planning](#)

2/15/2024 12:00 AM 12:00 AM Day Filter

Filter content...

Resource plannings: 2

February 15, 2024

Resource	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	4pm	5pm	6pm	7pm	8pm	9pm
Herr Jan Froberg		7 Inspektion Kassensystem	7 Inspektion Kassensystem	7 Inspektion Kassensystem	7 Inspektion Kassensystem	7 Inspektion Kassensystem	7 Inspektion Kassensystem	8 Inspektion Lasermesser	8 Inspektion Lasermesser	8 Inspektion Lasermesser	8 Inspektion Lasermesser	8 Inspektion Lasermesser				
Frau Isatou Jammeh		7 Inspektion Kassensystem	7 Inspektion Kassensystem	7 Inspektion Kassensystem	7 Inspektion Kassensystem	7 Inspektion Kassensystem	7 Inspektion Kassensystem	8 Inspektion Lasermesser	8 Inspektion Lasermesser	8 Inspektion Lasermesser	8 Inspektion Lasermesser	8 Inspektion Lasermesser				

The "Resource" tab displays the resources of the operation and how they are planned on the day of the operation.

Operation

„Reporting“ tab

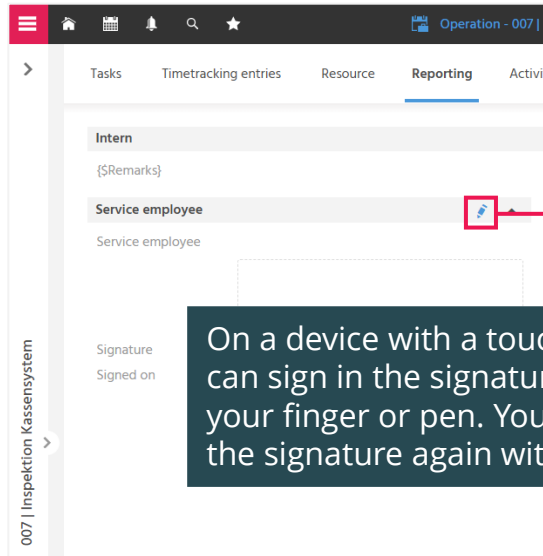
A screenshot of the ADITO software interface, specifically the 'Reporting' tab for 'Operation - 007 | Inspektion Kassensystem'. The interface has a dark top bar with navigation icons and a sidebar on the left labeled '007 | Inspektion Kassensystem'. The main content area has a tabbed interface with 'Reporting' selected. It contains two main sections: 'Intern' and 'Customer'. The 'Intern' section has a 'Service employee' field with a dropdown arrow and a 'Signature' field with a 'Signed on' timestamp. The 'Customer' section has a 'Contact person' field with a dropdown arrow and a 'Signature' field with a 'Signed on' timestamp. Both sections have large dashed boxes for signatures.

In the "Reporting" tab, you can **enter a comment**, e.g. on how the operation was carried out. The service employee on site and the customer's contact person can **confirm the operation with their signature**. Comments and signatures are displayed in the operation report. **Once the operation report has been created**, the signatures can no longer be deleted.



Operation

„Reporting“ tab

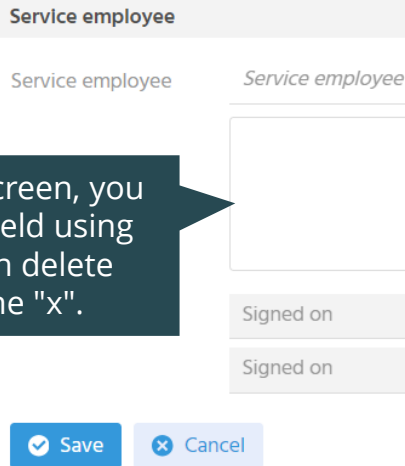


The screenshot shows the ADITO Reporting tab interface. The top navigation bar includes icons for home, calendar, notifications, search, and favorites, along with the text 'Operation - 007'. Below this, a horizontal menu contains 'Tasks', 'Timetracking entries', 'Resource', 'Reporting' (selected), and 'Activities'. The main content area is divided into sections: 'Intern' with a '{Remarks}' field, 'Service employee' with a 'Service employee' field, and 'Signature' with a 'Signed on' field. A red box highlights the 'Service employee' field, and a red arrow points from it to a larger, detailed view of the same field on the right.

In edit mode, you can select which service employee should sign. The employees who are stored as a resource at the operation are available.

On a device with a touchscreen, you can sign in the signature field using your finger or pen. You can delete the signature again with the "x".

The "Signed on" fields are automatically filled with the current date and time when saving.

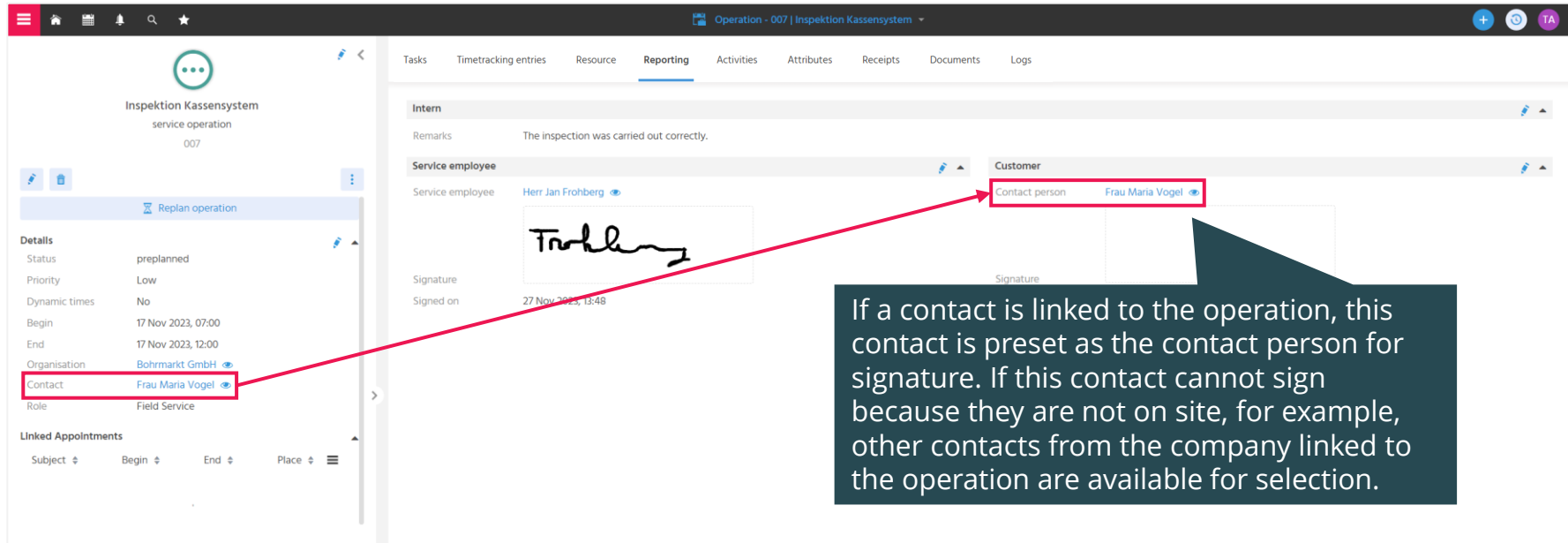


This detailed view shows the 'Service employee' field in edit mode. It features a dropdown menu with a red box around the selection arrow. Below the dropdown is a large signature field with a blue 'x' icon for deletion. At the bottom, there are two 'Signed on' fields, each with a calendar icon. At the very bottom, there are 'Save' and 'Cancel' buttons.

Type	Object	Address
Contact	Herr Jan Froberg	-
Contact	Frau Isatou Jammeh	-

Operation

„Reporting“ tab



Inspektion Kassensystem
service operation
007

Replan operation

Details

- Status: preplanned
- Priority: Low
- Dynamic times: No
- Begin: 17 Nov 2023, 07:00
- End: 17 Nov 2023, 12:00
- Organisation: Bohrmarkt GmbH
- Contact: Frau Maria Vogel
- Role: Field Service

Linked Appointments

Subject	Begin	End	Place
---------	-------	-----	-------

Tasks Timetracking entries Resource **Reporting** Activities Attributes Receipts Documents Logs

Intern

Remarks: The inspection was carried out correctly.

Service employee: Herr Jan Froberg

Signature: [Handwritten Signature]

Signed on: 27 Nov 2023, 13:48

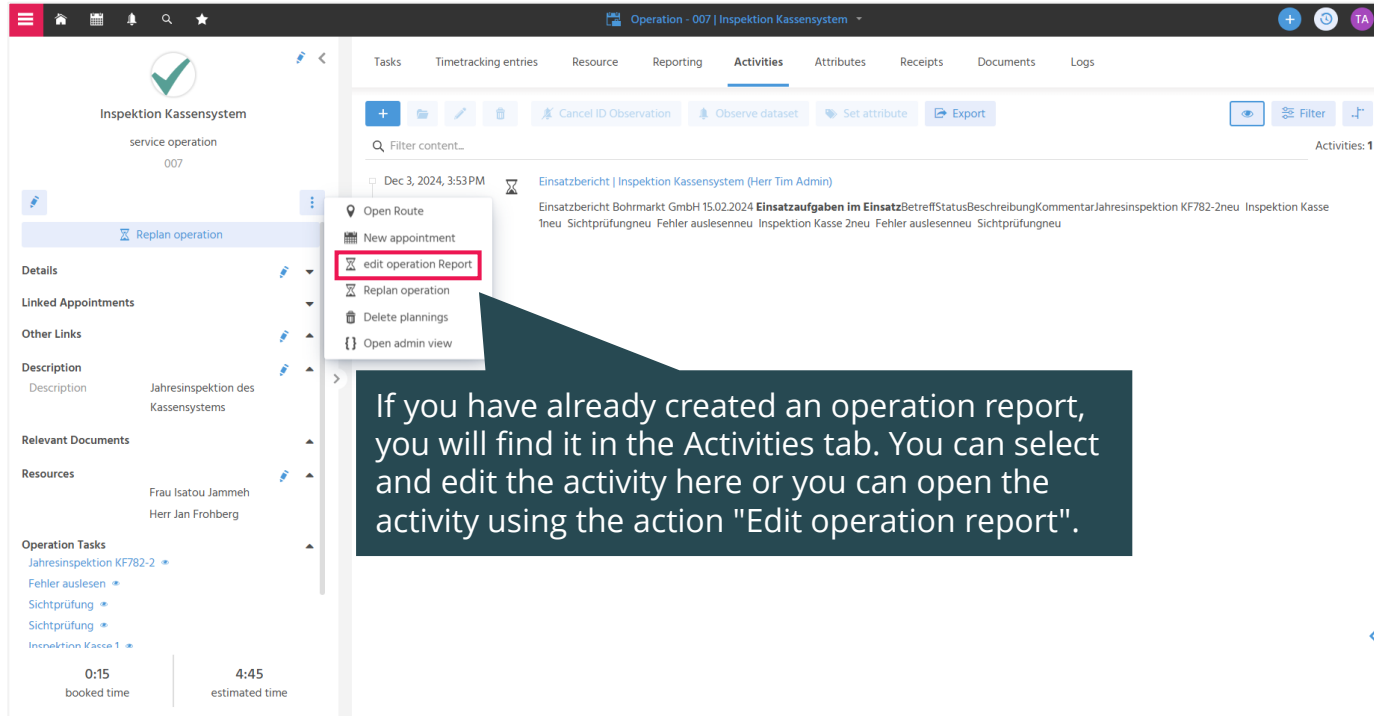
Customer

Contact person: Frau Maria Vogel

If a contact is linked to the operation, this contact is preset as the contact person for signature. If this contact cannot sign because they are not on site, for example, other contacts from the company linked to the operation are available for selection.

Operation

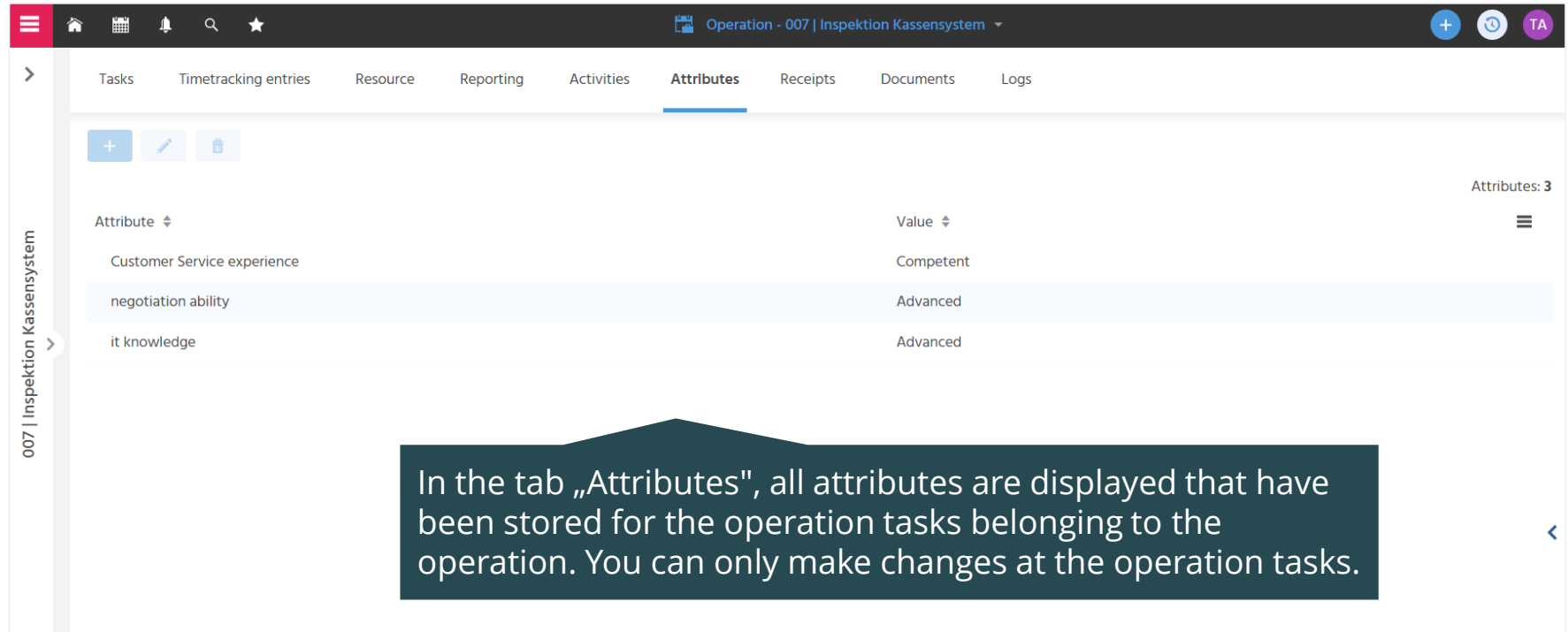
„Activities“ tab



The screenshot displays the ADITO interface for the 'Inspektion Kassensystem' operation. The left sidebar shows the operation details, including a 'Replan operation' button. A context menu is open over the 'Replan operation' button, with the option 'edit operation Report' highlighted. The main area shows the 'Activities' tab, which lists activities for the operation. The first activity is 'Einsatzbericht | Inspektion Kassensystem (Herr Tim Admin)', dated Dec 3, 2024, 3:53 PM. The activity description is 'Einsatzbericht Bohrmart GmbH 15.02.2024 Einsatzaufgaben im EinsatzBetreffStatusBeschreibungKommentarJahresinspektion KF782-2neu Inspektion Kasse 1neu Sichtprüfungneu Fehler auslesenneu Inspektion Kasse 2neu Fehler auslesenneu Sichtprüfungneu'. The bottom of the sidebar shows the operation tasks, including 'Jahresinspektion KF782-2', 'Fehler auslesen', 'Sichtprüfung', and 'Interaktion Kasse 1'. The bottom of the main area shows the booked time (0:15) and estimated time (4:45).

If you have already created an operation report, you will find it in the Activities tab. You can select and edit the activity here or you can open the activity using the action "Edit operation report".

„Attributes“ tab



The screenshot shows the ADITO application interface. At the top, a dark navigation bar contains icons for home, calendar, notifications, search, and favorites, along with the breadcrumb 'Operation - 007 | Inspektion Kassensystem'. On the right of this bar are buttons for adding (+), refreshing (circular arrow), and a user profile (TA). Below the navigation bar is a horizontal menu with tabs: Tasks, Timetracking entries, Resource, Reporting, Activities, **Attributes** (selected), Receipts, Documents, and Logs. The 'Attributes' tab displays a table with two columns: 'Attribute' and 'Value'. The table contains three entries: 'Customer Service experience' with value 'Competent', 'negotiation ability' with value 'Advanced', and 'it knowledge' with value 'Advanced'. Above the table are icons for adding (+), editing (pencil), and deleting (trash). On the right side of the table, it says 'Attributes: 3' and a hamburger menu icon. On the left side of the screen, a vertical sidebar shows the breadcrumb '007 | Inspektion Kassensystem' with a right-pointing arrow.

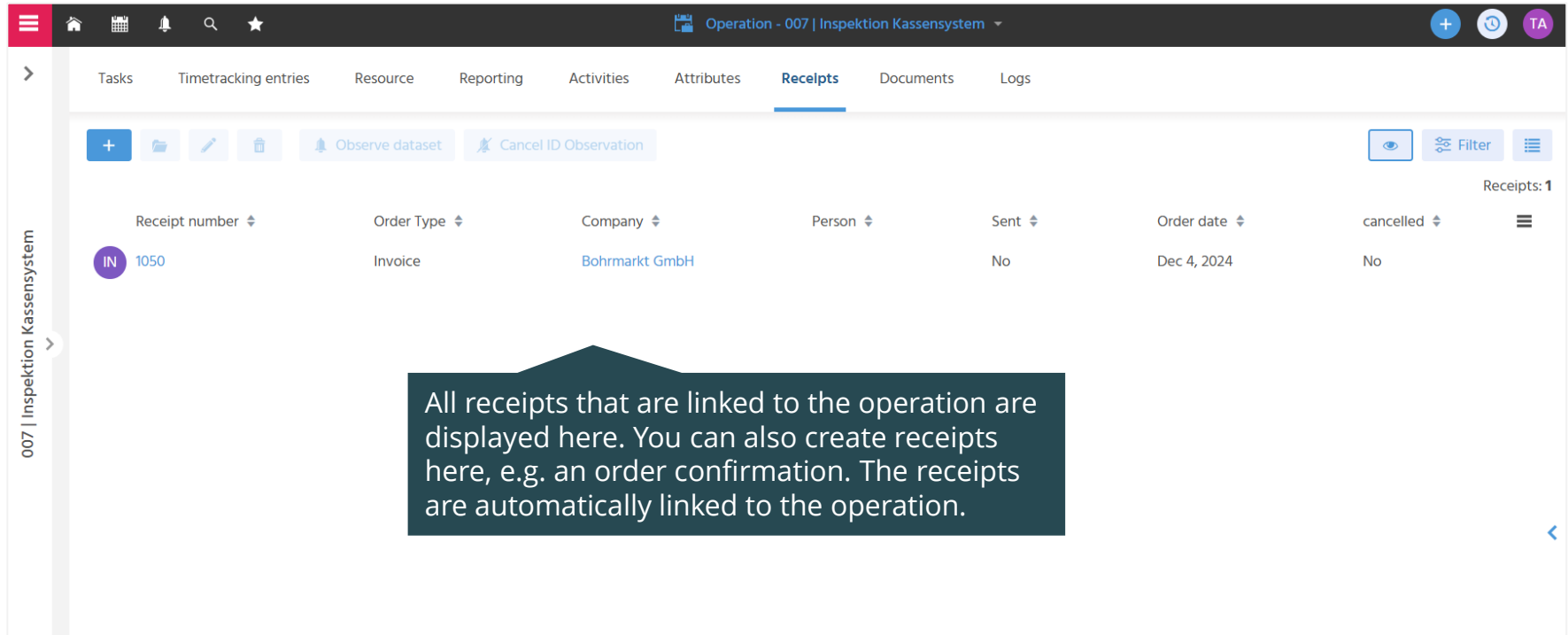
Attribute	Value
Customer Service experience	Competent
negotiation ability	Advanced
it knowledge	Advanced

Attributes: 3

In the tab „Attributes“, all attributes are displayed that have been stored for the operation tasks belonging to the operation. You can only make changes at the operation tasks.

Operation

„Receipts“ tab



The screenshot displays the ADITO application interface. At the top, a dark header bar contains navigation icons (home, calendar, notifications, search, star) and the current context 'Operation - 007 | Inspektion Kassensystem'. Below this, a horizontal menu shows various tabs: Tasks, Timetracking entries, Resource, Reporting, Activities, Attributes, Receipts (selected), Documents, and Logs. The 'Receipts' tab is active, showing a table of receipt data. The table has columns for Receipt number, Order Type, Company, Person, Sent, Order date, and cancelled. A single receipt is listed with the number 1050, Order Type 'Invoice', Company 'Bohrmarkt GmbH', and Order date 'Dec 4, 2024'. The 'cancelled' status is 'No'. A dark blue callout box is overlaid on the table, providing information about the receipts.

007 | Inspektion Kassensystem

Operation - 007 | Inspektion Kassensystem

Tasks Timetracking entries Resource Reporting Activities Attributes **Receipts** Documents Logs

+ [icon] [icon] [icon] [icon] Observe dataset Cancel ID Observation [icon] Filter [icon]

Receipts: 1

Receipt number	Order Type	Company	Person	Sent	Order date	cancelled
IN 1050	Invoice	Bohrmarkt GmbH		No	Dec 4, 2024	No

All receipts that are linked to the operation are displayed here. You can also create receipts here, e.g. an order confirmation. The receipts are automatically linked to the operation.

Excursion in company, contact, service ticket



Create Operation Task

The screenshot displays the ADITO interface with two overlapping windows. The top window shows a list of companies with columns for Picture, Name, Customercode, Classification, and Email. A context menu is open over the 'Aquire GmbH' entry, with 'Create operation task' highlighted. The bottom window shows the detail view for 'Aquire GmbH' (Cust.-No.: 3469), including contact information and turnover data. A context menu is open over the 'New operation' entry, with 'Create operation task' highlighted. A red box highlights the 'Create operation task' option in both menus, with arrows pointing to the 'ASSIGN OPERATION' dialog box on the right.

ASSIGN OPERATION

GENERAL

Affected rows 1

CHOOSE OPERATION

insert operation ☐

SUPERORDINATE TASK

insert group task ☐

TASKS

+ ! Subject new

Low 0%

Description ☐ Optional

Due date estimated ti...

Type Object

Contact

Save

The action "Create operation task" can be found for company, contact and service ticket in the preview (Further actions) and, for contact and company, in the filter view as a serial action. When you execute the action, a SmallEdit opens in which you can create an operation task. In the service ticket the task is linked and an activity is created that documents the creation of the operation task.



Excursion in company, contact, service ticket



Tab „Operations/Tasks

The screenshot displays the ADITO software interface, specifically the 'Operations/Tasks' tab. The interface is divided into several sections:

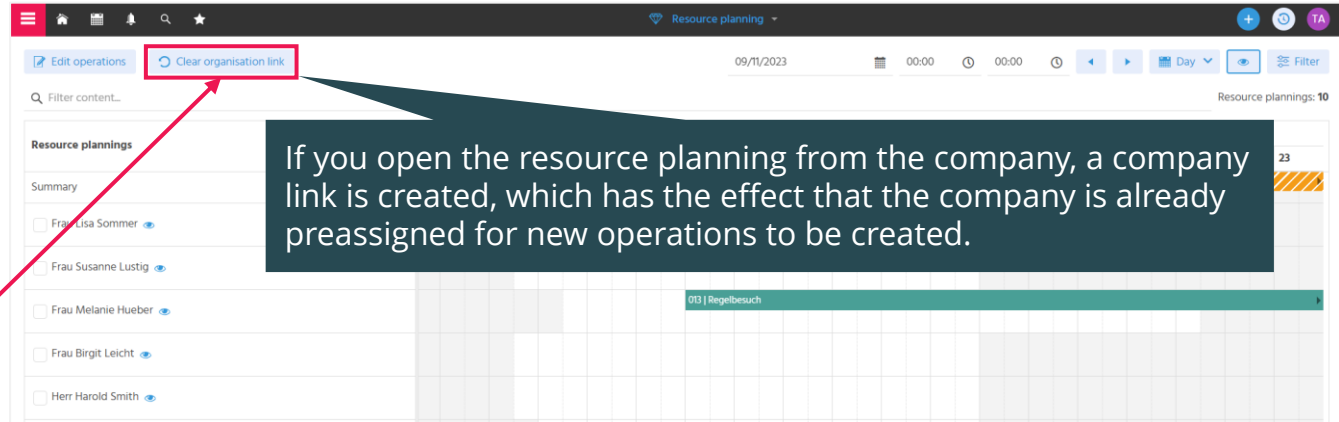
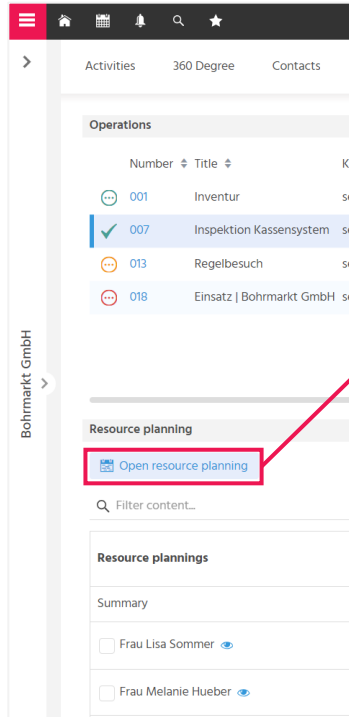
- Top Navigation Bar:** Contains various tabs including 'Activities', '360 Degree', 'Contacts', 'Planning', 'Conditions', 'Appointments/Tasks', 'Operations/Tasks' (selected), 'Attributes', 'Documents', 'Relations', 'Supervision', 'Web visits', 'Checklist entries', and 'Advertising'.
- Operations Table:** Lists tasks with columns: Number, Title, Kind, Begin, End, Priority, Status, and Bohn. The table shows several tasks, including 'Inspektion Kassensystem' and 'Einsatz | Bohnmarkt GmbH'.
- Operation Tasks Table:** Lists tasks with columns: Subject, Operation, Status, Priority, estimated time, and booked time. The table shows tasks like 'Anfahrt', 'Neue Produktreihe vorstellen', 'Aktuelles Sortiment besprechen', 'Jahresinspektion KF782-2', 'Inspektion Kasse 1', 'Inspektion Kasse 2', 'Neubestückung', 'Rückfahrt', and 'Sortimentserfassung'.
- Resource planning section:** Includes a calendar view for November 2023, showing resource assignments for various staff members (Frau Lisa Sommer, Frau Melanie Hueber, Frau Sarah Nagel, Herr Jan Froberg).

In the company, the contact and the service ticket, you can view the operations, operation tasks and the associated resource planning belonging to the respective data record.



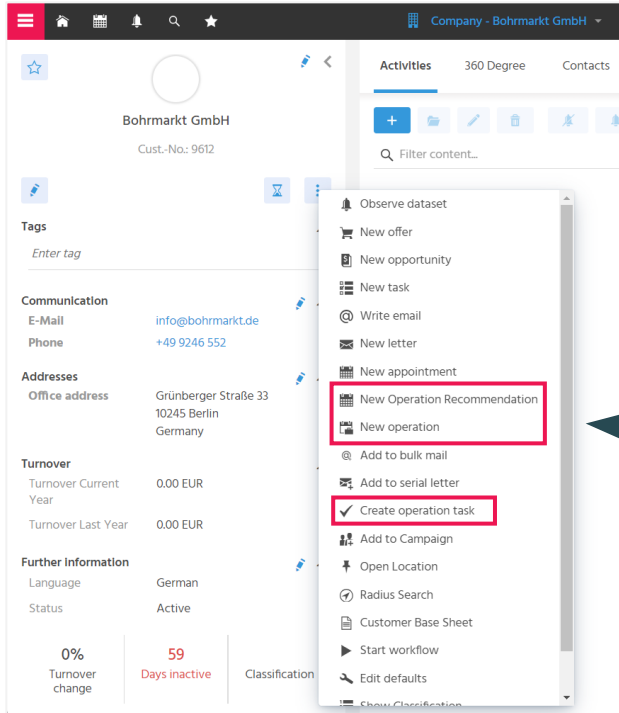
Excursion into the company

Tab „Operations/Tasks“



Excursion into the company

Further actions



The screenshot displays the ADITO interface for a company profile of 'Bohrmarkt GmbH'. The company details include 'Cust.-No.: 9612', 'E-Mail: info@bohrmarkt.de', 'Phone: +49 9246 552', and 'Office address: Grünberger Straße 33, 10245 Berlin, Germany'. The 'Turnover' section shows 'Turnover Current Year: 0.00 EUR' and 'Turnover Last Year: 0.00 EUR'. The 'Further Information' section shows 'Language: German' and 'Status: Active'. At the bottom, there is a 'Turnover change' of '0%' and '59 Days inactive'. A 'Further actions' menu is open, listing various tasks. The menu items are: 'Observe dataset', 'New offer', 'New opportunity', 'New task', 'Write email', 'New letter', 'New appointment', 'New Operation Recommendation', 'New operation', 'Add to bulk mail', 'Add to serial letter', 'Create operation task' (checked), 'Add to Campaign', 'Open Location', 'Radius Search', 'Customer Base Sheet', 'Start workflow', 'Edit defaults', and 'Show Classification'. The 'New Operation Recommendation' and 'Create operation task' items are highlighted with red boxes.

Category	Value
Turnover Current Year	0.00 EUR
Turnover Last Year	0.00 EUR
Turnover change	0%
Days inactive	59

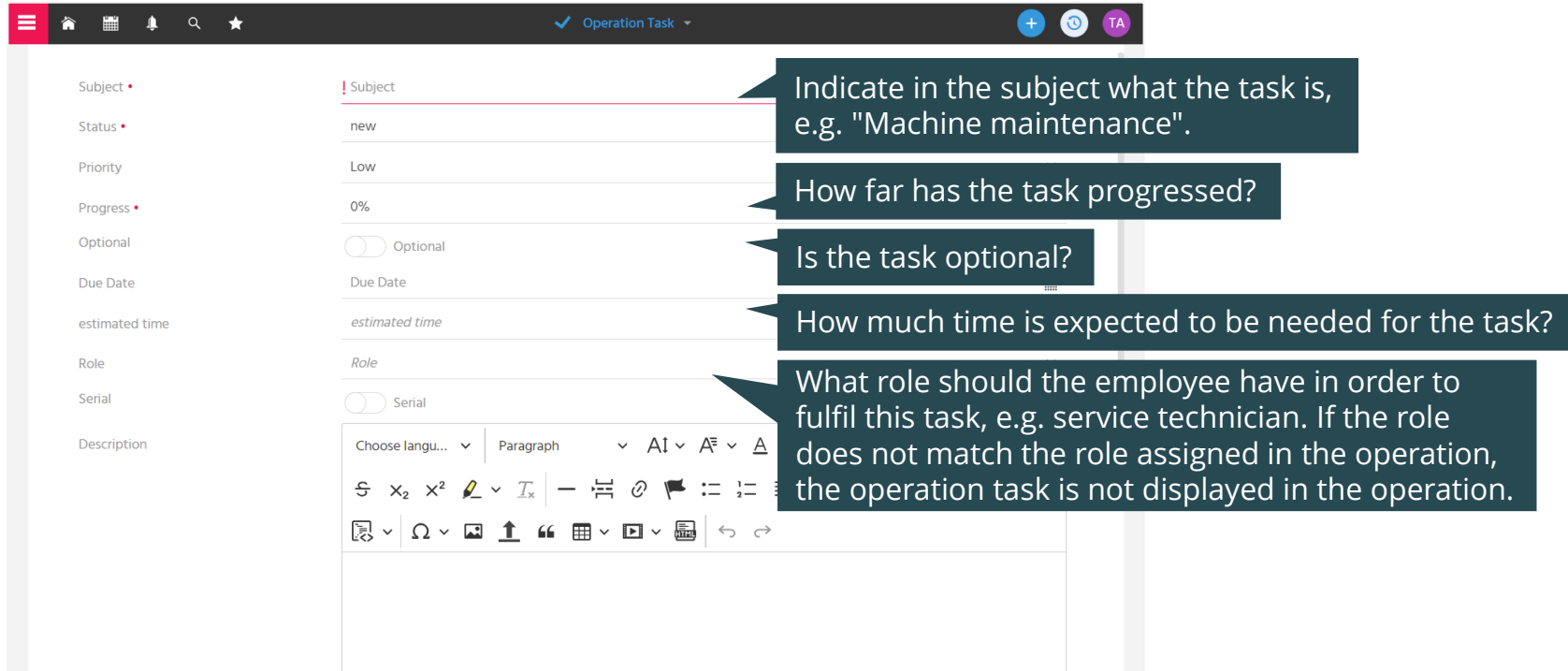
You can create a new Operation Recommendation, create a new operation as well as create an operation task via the "Further actions" button in the company preview.

Operation Task



Operation Task

Create operation task



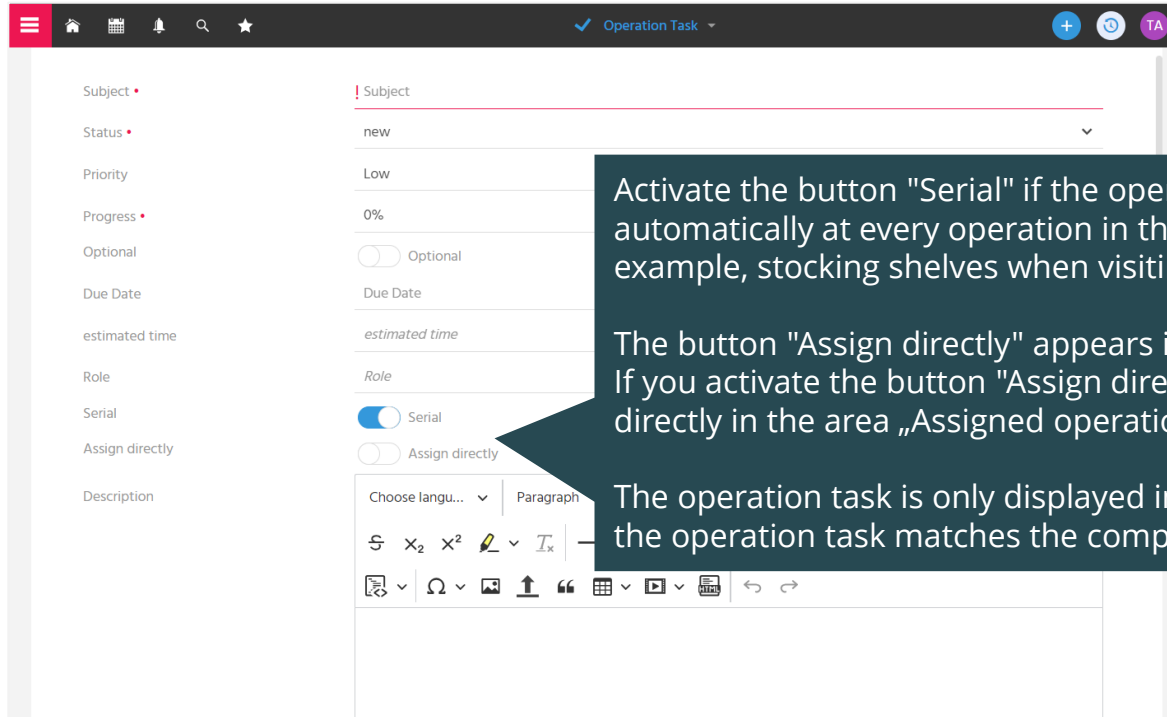
The screenshot shows the 'Create operation task' form in the ADITO system. The form includes a sidebar with labels for various fields: Subject, Status, Priority, Progress, Optional, Due Date, estimated time, Role, Serial, and Description. The main form area contains input fields for each of these. Callout boxes provide instructions for several fields:

- Subject:** Indicate in the subject what the task is, e.g. "Machine maintenance".
- Progress:** How far has the task progressed?
- Optional:** Is the task optional?
- estimated time:** How much time is expected to be needed for the task?
- Role:** What role should the employee have in order to fulfil this task, e.g. service technician. If the role does not match the role assigned in the operation, the operation task is not displayed in the operation.

The form also features a top navigation bar with icons for home, calendar, notifications, search, and favorites, and a dropdown menu for 'Operation Task'. The bottom of the form includes a rich text editor with various formatting options.

Operation Task

Create operation task



The screenshot shows a web application interface for creating an operation task. The top navigation bar includes a hamburger menu, home, calendar, notifications, search, and star icons, along with a 'Operation Task' dropdown and three circular buttons (plus, refresh, and 'TA'). The left sidebar lists form fields: Subject, Status, Priority, Progress, Optional, Due Date, estimated time, Role, Serial, Assign directly, and Description. The main form area displays the following fields and controls:

- Subject:** A text input field with a red exclamation mark icon and the label '! Subject'.
- Status:** A dropdown menu currently showing 'new'.
- Priority:** A dropdown menu currently showing 'Low'.
- Progress:** A progress bar showing '0%'.
- Optional:** A toggle switch currently in the 'off' position.
- Due Date:** A date selection field.
- estimated time:** A text input field.
- Role:** A dropdown menu.
- Serial:** A toggle switch currently in the 'on' position.
- Assign directly:** A toggle switch currently in the 'off' position.
- Description:** A rich text editor with a toolbar containing icons for undo, redo, bold, italic, link, unlink, list, and image.

Activate the button "Serial" if the operation task is to be displayed automatically at every operation in the area „Not assigned tasks". For example, stocking shelves when visiting sales outlets.

The button "Assign directly" appears if you have activated the button "Serial". If you activate the button "Assign directly", the operation task is created directly in the area „Assigned operation tasks" for newly created operations.

The operation task is only displayed in the operation if the company from the operation task matches the company in the operation.

Operation Task

Create operation task

1

2

Links	
Create new operation	☐
Operation	Operation
Parent Task	Parent Task
Company	Company

Links	
Create new operation	☒
Operation title •	service operation
Parent Task	Parent Task
Company •	! Company

When creating an operation task, you can **create a new operation (1)**, to which the operation task is then immediately assigned. You can also **assign the operation task to an existing operation (2)**. If the „serial“ button is activated, you cannot assign the operation task to an operation.

If you activate the button „Create new operation“, **the field "Operation" is replaced by the field "Operation title"**. Here you can give the new operation a title. The field is automatically preset with the title „service operation“. However, this can be overwritten. In addition, **the field "Parent task" is no longer editable and the field „Company“ becomes a mandatory field**.

Operation Task

Create operation task

Links

Create new operation

☐

Operation

Operation

Parent Task

Parent Task

Company

Company

Contact

Contact

Type

Type

Object

Object

▼

Other Links

+ Type

▼

Add Attribute

+ ! Attribute

▼

A task that you link to an operation is transferred directly to the „Assigned operation tasks" area in the operation.

If operation tasks are already assigned to the selected operation, they are available for selection here. If you do not select an operation, only operation tasks that have not yet been assigned to an operation are available here.

If a company and a contact are already assigned to the selected operation, they will be entered automatically.

Link the operation task with other data records from the system, e.g. an offer.

Determine which attributes are necessary to be able to work on the operation task.

Operation Task

Create operation task

Links

Create new operation

☐

Operation

Operation

▼

Parent Task

Parent Task

▼

Company

Company

▼

Contact

Contact

▼

Type

Type

▼

Object

Object

▼

Other Links

+ Type

Add Attribute

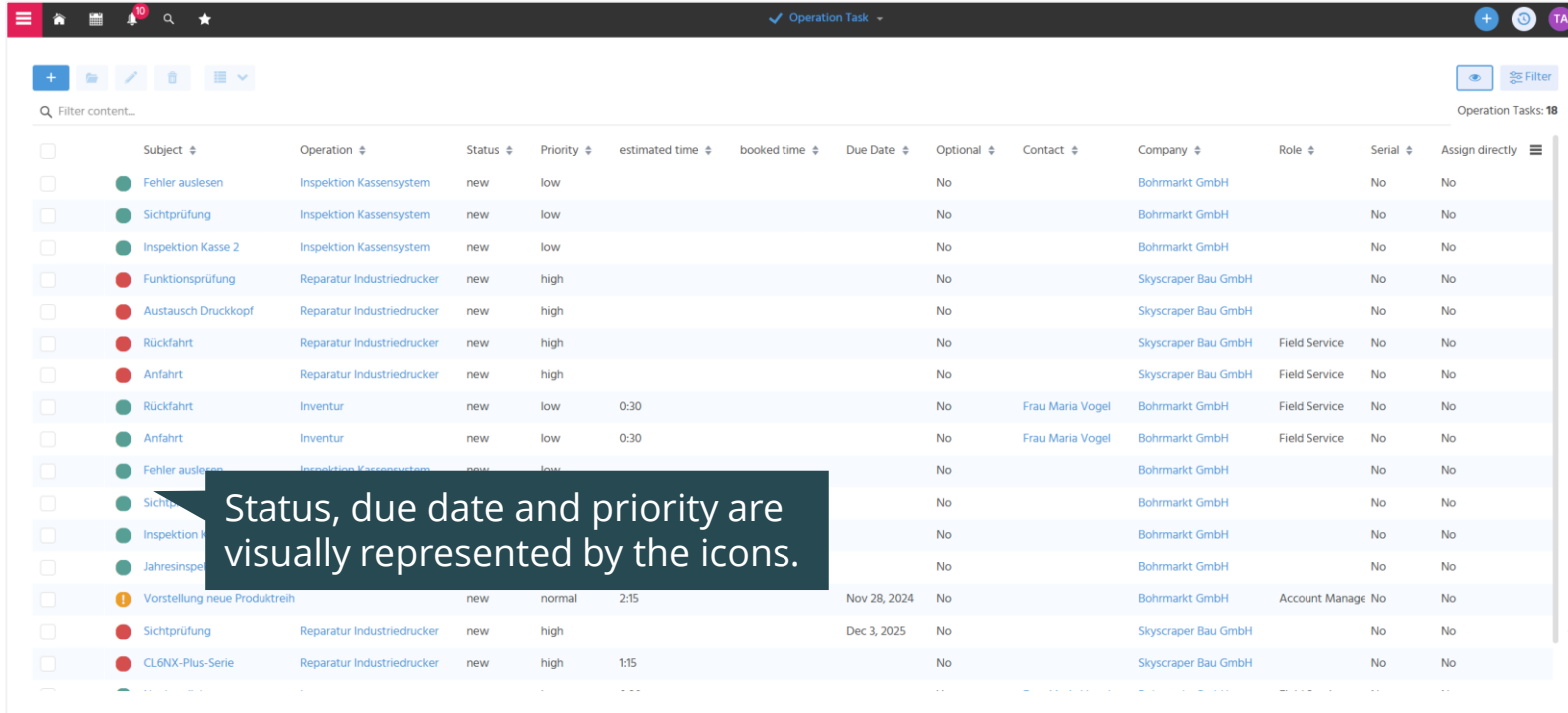
+ ! Attribute

If you do not assign an operation and manually select contact and company, the fields behave as follows:

- If you select a company, only contacts from that company will be displayed for selection.
- If you select a contact, the associated company will be entered automatically.
- If you delete the company, the contact will also be deleted.
- If you delete the contact, the company still remains.

Operation Task

Filter view



The screenshot shows the ADITO 'Operation Task' interface. At the top, there's a navigation bar with icons for home, calendar, notifications, search, and favorites. Below this is a toolbar with icons for adding, editing, deleting, and filtering tasks. A search bar labeled 'Filter content...' is present. The main area displays a table of tasks. A callout box highlights that 'Status, due date and priority are visually represented by the icons.' The table columns include checkboxes, Subject, Operation, Status, Priority, estimated time, booked time, Due Date, Optional, Contact, Company, Role, Serial, and Assign directly. The tasks are listed with various subjects like 'Fehler auslesen', 'Sichtprüfung', 'Inspektion Kasse 2', 'Funktionsprüfung', 'Austausch Druckkopf', 'Rückfahrt', 'Anfahrt', 'Inventur', 'Vorstellung neue Produktreihe', and 'CL6NX-Plus-Serie'. The status and priority are indicated by colored circles (green for new/low, red for high, yellow for normal).

	Subject	Operation	Status	Priority	estimated time	booked time	Due Date	Optional	Contact	Company	Role	Serial	Assign directly
☐	Fehler auslesen	Inspektion Kassensystem	new	low				No		Bohrmarkt GmbH		No	No
☐	Sichtprüfung	Inspektion Kassensystem	new	low				No		Bohrmarkt GmbH		No	No
☐	Inspektion Kasse 2	Inspektion Kassensystem	new	low				No		Bohrmarkt GmbH		No	No
☐	Funktionsprüfung	Reparatur Industriedrucker	new	high				No		Skyscraper Bau GmbH		No	No
☐	Austausch Druckkopf	Reparatur Industriedrucker	new	high				No		Skyscraper Bau GmbH		No	No
☐	Rückfahrt	Reparatur Industriedrucker	new	high				No		Skyscraper Bau GmbH	Field Service	No	No
☐	Anfahrt	Reparatur Industriedrucker	new	high				No		Skyscraper Bau GmbH	Field Service	No	No
☐	Rückfahrt	Inventur	new	low	0:30			No	Frau Maria Vogel	Bohrmarkt GmbH	Field Service	No	No
☐	Anfahrt	Inventur	new	low	0:30			No	Frau Maria Vogel	Bohrmarkt GmbH	Field Service	No	No
☐	Fehler auslesen	Inspektion Kassensystem	new	low				No		Bohrmarkt GmbH		No	No
☐	Sichtprüfung	Inspektion Kassensystem	new	low				No		Bohrmarkt GmbH		No	No
☐	Inspektion Kasse 2	Inspektion Kassensystem	new	low				No		Bohrmarkt GmbH		No	No
☐	Jahresinspektion	Inspektion Kassensystem	new	low				No		Bohrmarkt GmbH		No	No
☐	Vorstellung neue Produktreihe		new	normal	2:15		Nov 28, 2024	No		Bohrmarkt GmbH	Account Manage	No	No
☐	Sichtprüfung	Reparatur Industriedrucker	new	high			Dec 3, 2025	No		Skyscraper Bau GmbH		No	No
☐	CL6NX-Plus-Serie	Reparatur Industriedrucker	new	high	1:15			No		Skyscraper Bau GmbH		No	No

Operation Task

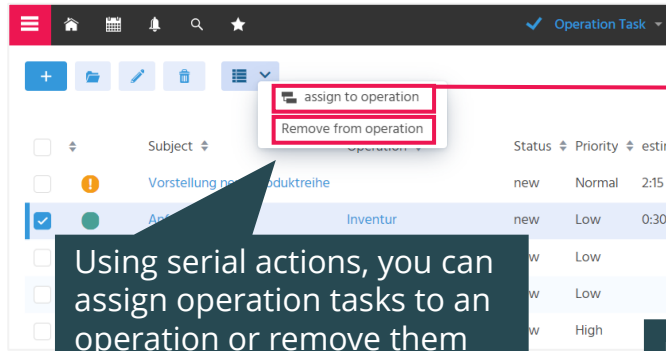


		Priority			
		None	Low	Normal	High
Due date	Not due Today is before due date				
	Due / Overdue Due date is Today or Today is after due date				
Status	Not done				
	Done				

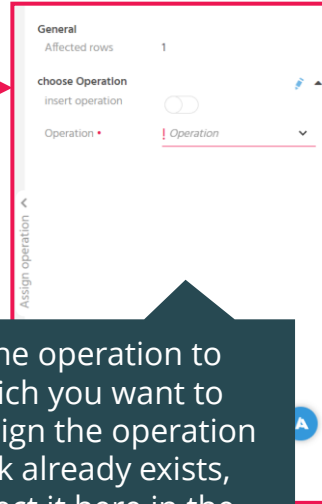


Operation Task

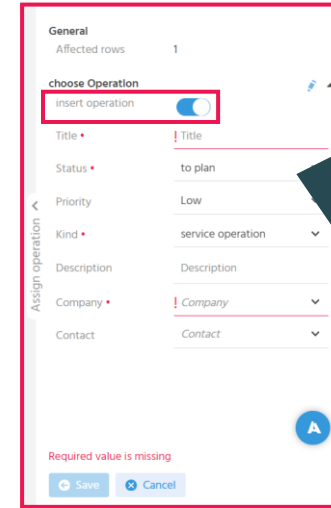
Serial actions



Using serial actions, you can assign operation tasks to an operation or remove them from an operation.



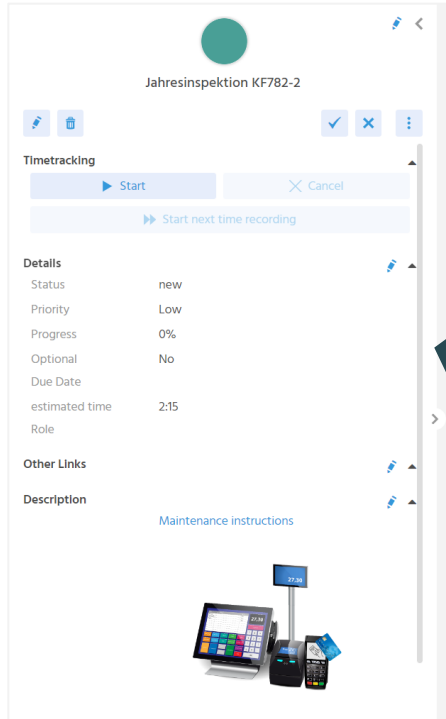
If the operation to which you want to assign the operation task already exists, select it here in the „Operation" field.



If the operation to which you want to assign the operation task does not yet exist, activate the button „Insert operation" and fill in the fields to create the operation.

Operation Task

Preview



Jahresinspektion KF782-2

Timetracking

Start Cancel

Start next time recording

Details

Status	new
Priority	Low
Progress	0%
Optional	No
Due Date	
estimated time	2:15
Role	

Other Links

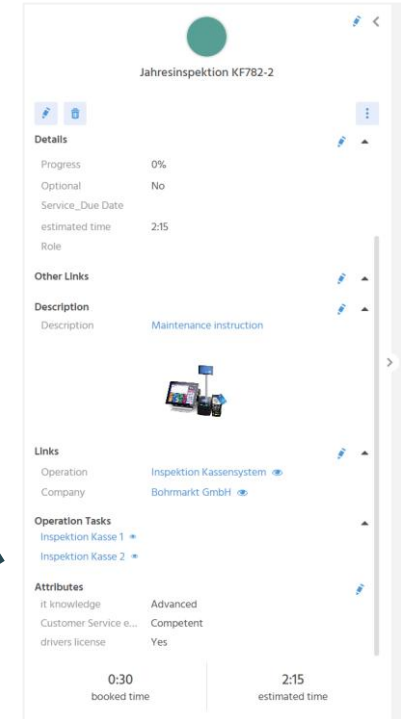
Description

Maintenance instructions



In addition to the Details area and the Description area, you will also find links to other data sets, to subordinate operation tasks and the attributes required for the task in the preview.

In the footer you will find the time that was booked for processing the operation task as well as the time that was estimated as processing time.



Jahresinspektion KF782-2

Details

Progress	0%
Optional	No
Service_Due Date	
estimated time	2:15
Role	

Other Links

Description

Description

Maintenance instruction



Links

Operation	Inspektion Kassensystem
Company	Bohrmarkt GmbH

Operation Tasks

- Inspektion Kasse 1
- Inspektion Kasse 2

Attributes

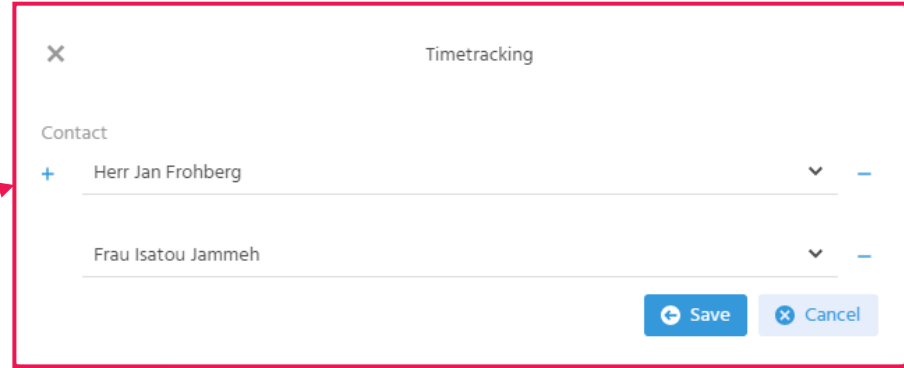
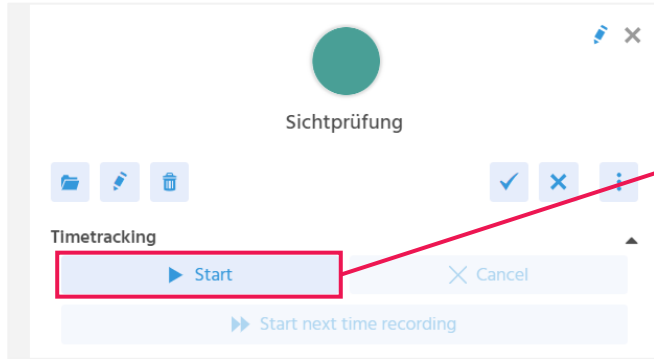
it knowledge	Advanced
Customer Service e...	Competent
drivers license	Yes

0:30 booked time

2:15 estimated time

Operation Task

Time tracking and closing

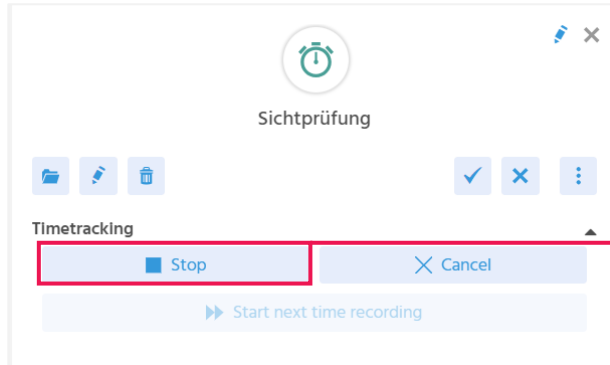


You can only start time recording if the operation task is assigned to an operation and if at least one resource is stored for the operation.

When you start the time tracking, a window opens showing you the resources deposited with the operation. You can delete resources and, if a resource was deleted by mistake, add it again. As soon as you click on "Save", time tracking is started for the selected resources.

Operation Task

Time tracking and closing

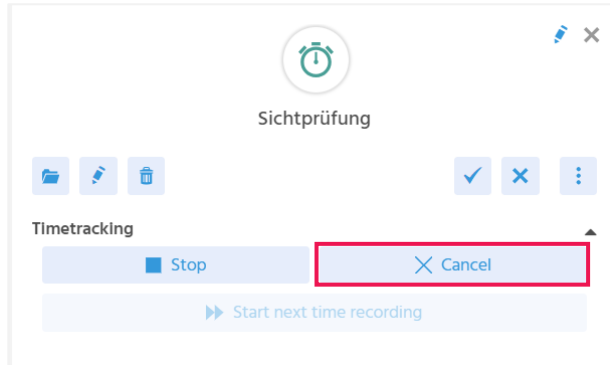


Description				Attributes	Logs
Timetracking entries					
+					
Date		Creator		Time	
JF	Dec 4, 2024	Herr Jan Froberg		0:30	
IJ	Dec 4, 2024	Frau Isatou Jammeh		0:30	

Operation tasks for which time tracking has been started have a clock as icon and the "Start" button becomes the "Stop" button with which you can stop the time tracking as soon as the operation task is completed. The stopped time is stored in the tab "Timetracking entries".

Operation Task

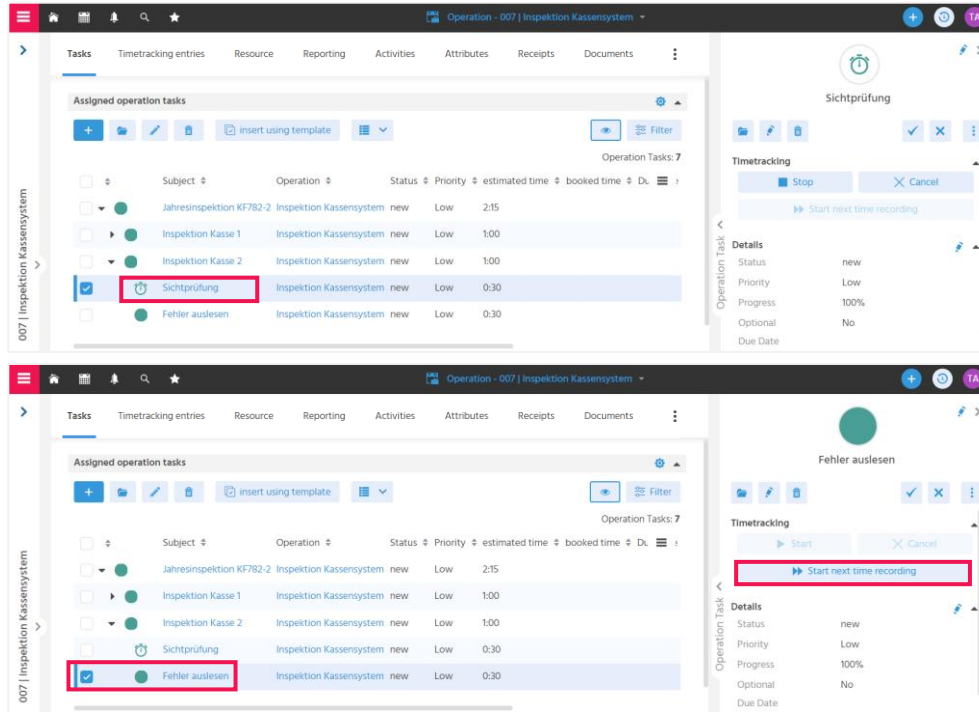
Time tracking and closing



You can also cancel time recording. No time entry will then be recorded, but you can start time tracking for this task again.

Operation Task

Time tracking and closing



The top screenshot shows the 'Assigned operation tasks' list with the following tasks:

Subject	Operation	Status	Priority	estimated time	booked time
Jahresinspektion KF782-2	Inspektion Kassensystem	new	Low	2:15	
Inspektion Kasse 1	Inspektion Kassensystem	new	Low	1:00	
Inspektion Kasse 2	Inspektion Kassensystem	new	Low	1:00	
Sichtprüfung	Inspektion Kassensystem	new	Low	0:30	
Fehler auslesen	Inspektion Kassensystem	new	Low	0:30	

The bottom screenshot shows the 'Assigned operation tasks' list with the following tasks:

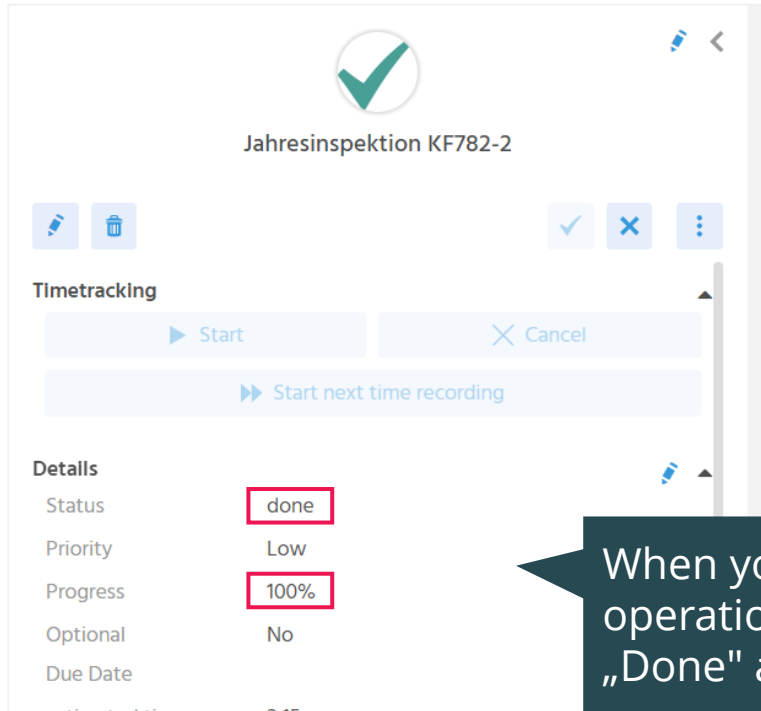
Subject	Operation	Status	Priority	estimated time	booked time
Jahresinspektion KF782-2	Inspektion Kassensystem	new	Low	2:15	
Inspektion Kasse 1	Inspektion Kassensystem	new	Low	1:00	
Inspektion Kasse 2	Inspektion Kassensystem	new	Low	1:00	
Sichtprüfung	Inspektion Kassensystem	new	Low	0:30	
Fehler auslesen	Inspektion Kassensystem	new	Low	0:30	

If time tracking is started for an operation task that is displayed in a tree, you can click on any other operation task in the tree and with help of the "Start next time recording" button

- start time recording for the selected operation task and at the same time
- stop time recording for the task for which time recording is currently running.

Operation Task

Time tracking and closing



Jahresinspektion KF782-2

Timetracking

Start Cancel

Start next time recording

Details

Status	done
Priority	Low
Progress	100%
Optional	No
Due Date	2025-01-01

When you stop time tracking, the operation task is automatically set to „Done“ and the progress is set to 100%.

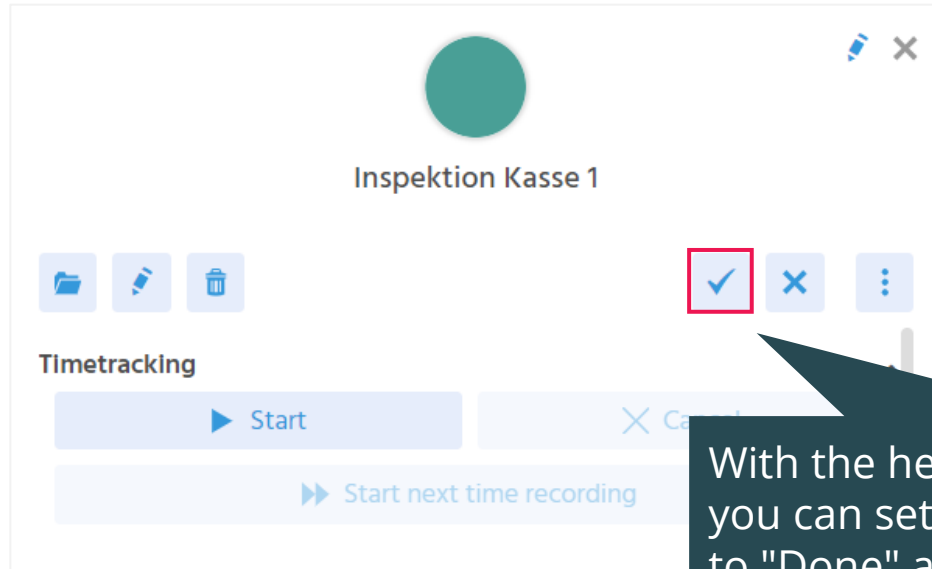
Operation Task

Time tracking and closing

- Time tracking can only be started for operation tasks,
 - which have not yet been completed.
 - that are assigned to an operation.
- Time tracking can only run for one operation task per operation.
- Time recording can only be carried out for resources that are stored at the operation.

Operation Task

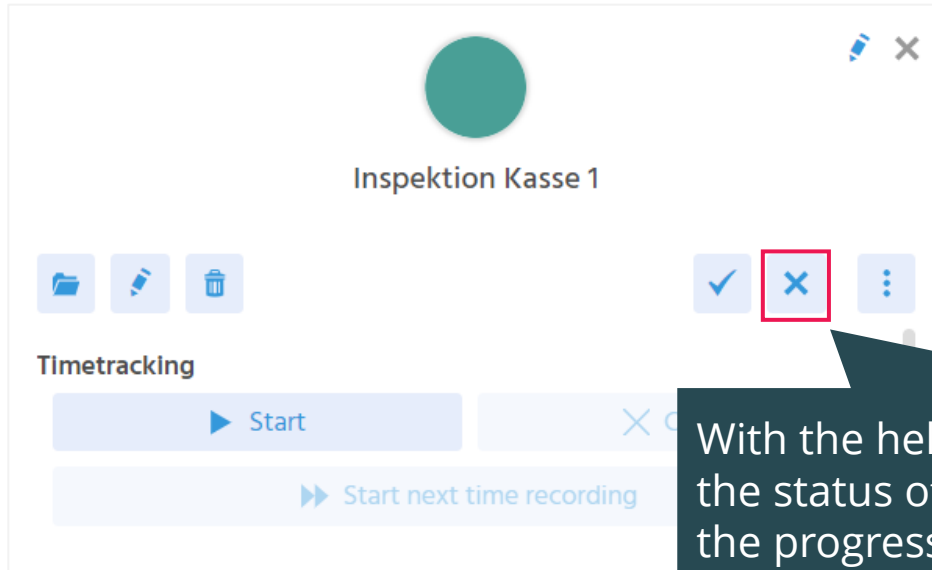
Time tracking and closing



With the help of the button "Set completed", you can set the status of the operation task to "Done" and the progress to "100%".

Operation Task

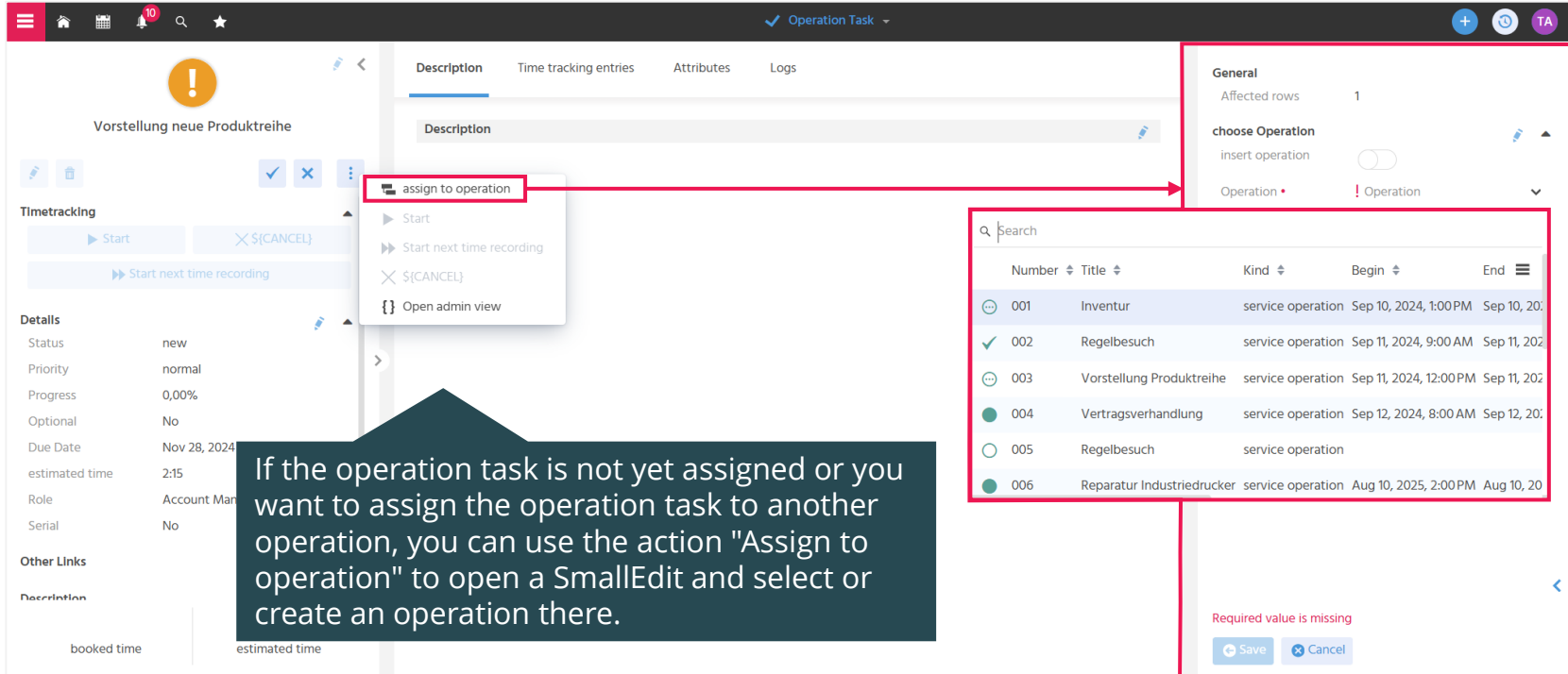
Time tracking and closing



With the help of the button "Set not done", you set the status of the operation task to "Not done" and the progress to "0%".

Operation Task

Further actions – „Assign to operation“



The screenshot shows the ADITO interface for an 'Operation Task'. A context menu is open over the 'Description' field, with the 'assign to operation' option highlighted. A red arrow points from this option to the 'choose Operation' section on the right. This section shows a table of available operations. A red box highlights the table, and another red box highlights the 'Required value is missing' error message at the bottom right.

assign to operation

- Start
- Start next time recording
- Cancel
- Open admin view

General

Affected rows 1

choose Operation

insert operation

Operation • ! Operation

Number	Title	Kind	Begin	End
001	Inventur	service operation	Sep 10, 2024, 1:00 PM	Sep 10, 2024, 1:00 PM
002	Regelbesuch	service operation	Sep 11, 2024, 9:00 AM	Sep 11, 2024, 9:00 AM
003	Vorstellung Produktreihe	service operation	Sep 11, 2024, 12:00 PM	Sep 11, 2024, 12:00 PM
004	Vertragsverhandlung	service operation	Sep 12, 2024, 8:00 AM	Sep 12, 2024, 8:00 AM
005	Regelbesuch	service operation		
006	Reparatur Industriedrucker	service operation	Aug 10, 2025, 2:00 PM	Aug 10, 2025, 2:00 PM

Required value is missing

Save Cancel

If the operation task is not yet assigned or you want to assign the operation task to another operation, you can use the action "Assign to operation" to open a SmallEdit and select or create an operation there.

Operation Task

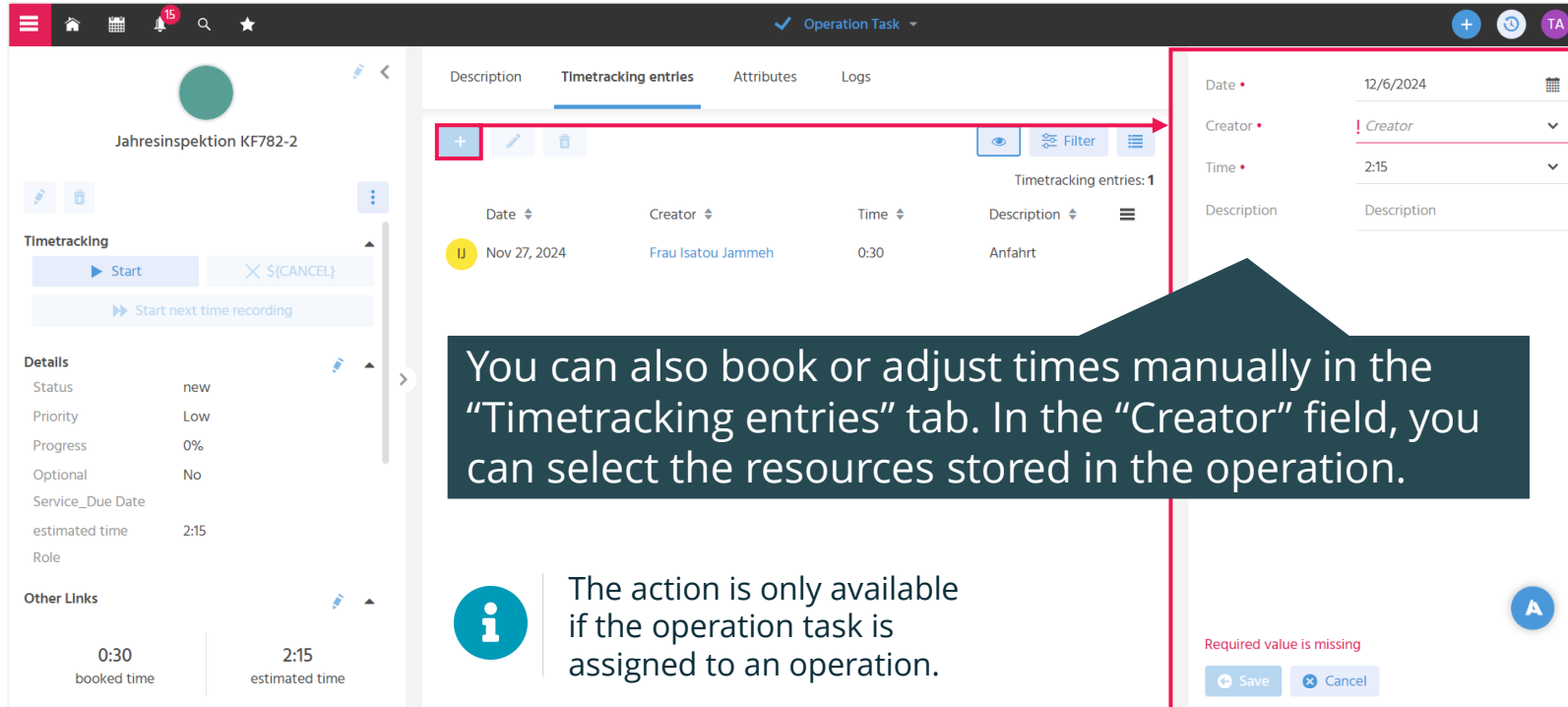
Further actions – „Assign to operation“

The following logic applies when operation tasks are assigned to operations or removed from operations:

- As soon as an operation task is assigned to an operation,
 - the contents of the "Company" and "Contact" fields are transferred from the operation to the operation task.
 - the fields "Company", "Contact", and "Operation" can no longer be edited in the operation task.
- If the contents of the "Company" or "Contact" fields are changed in the operation, the "Company" and "Contact" fields in the operation task are adjusted accordingly.
- If you remove operation tasks that are assigned to an operation using the "Unassigne from this operation" action,
 - the "Operation" field in the operation task is emptied.
 - the "Company", "Contact" and "Operation" fields in the operation task become editable again.

Operation Task

Tab „Timetracking entries“



You can also book or adjust times manually in the “Timetracking entries” tab. In the “Creator” field, you can select the resources stored in the operation.

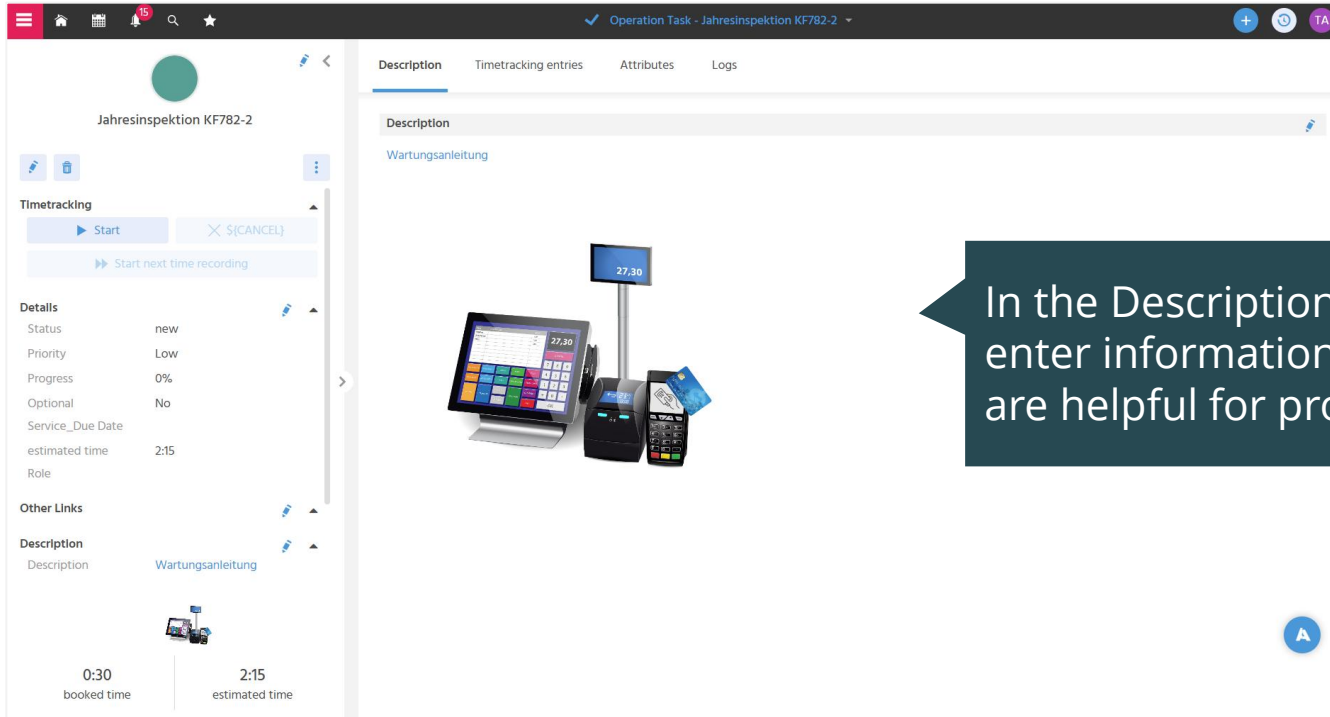
The action is only available if the operation task is assigned to an operation.

Required value is missing

Save Cancel

Operation Task

Tab „Description“



The screenshot displays the ADITO Operation Task interface for 'Jahresinspektion KF782-2'. The interface is divided into a left sidebar and a main content area. The sidebar contains a 'Timetracking' section with 'Start' and 'Start next time recording' buttons, a 'Details' section with fields for Status (new), Priority (Low), Progress (0%), Optional (No), Service_Due Date (estimated time 2:15), and Role, and an 'Other Links' section. The main content area has tabs for 'Description', 'Timetracking entries', 'Attributes', and 'Logs'. The 'Description' tab is active, showing a 'Description' field with the text 'Wartungsanleitung' and a large image of a computer monitor and a payment terminal. A blue circular button with a white 'A' is located in the bottom right corner of the main content area.

Operation Task - Jahresinspektion KF782-2

Description Timetracking entries Attributes Logs

Description

Wartungsanleitung

Timetracking

Start X {CANCEL}

Start next time recording

Details

Status new

Priority Low

Progress 0%

Optional No

Service_Due Date estimated time 2:15

Role

Other Links

Description

Description Wartungsanleitung

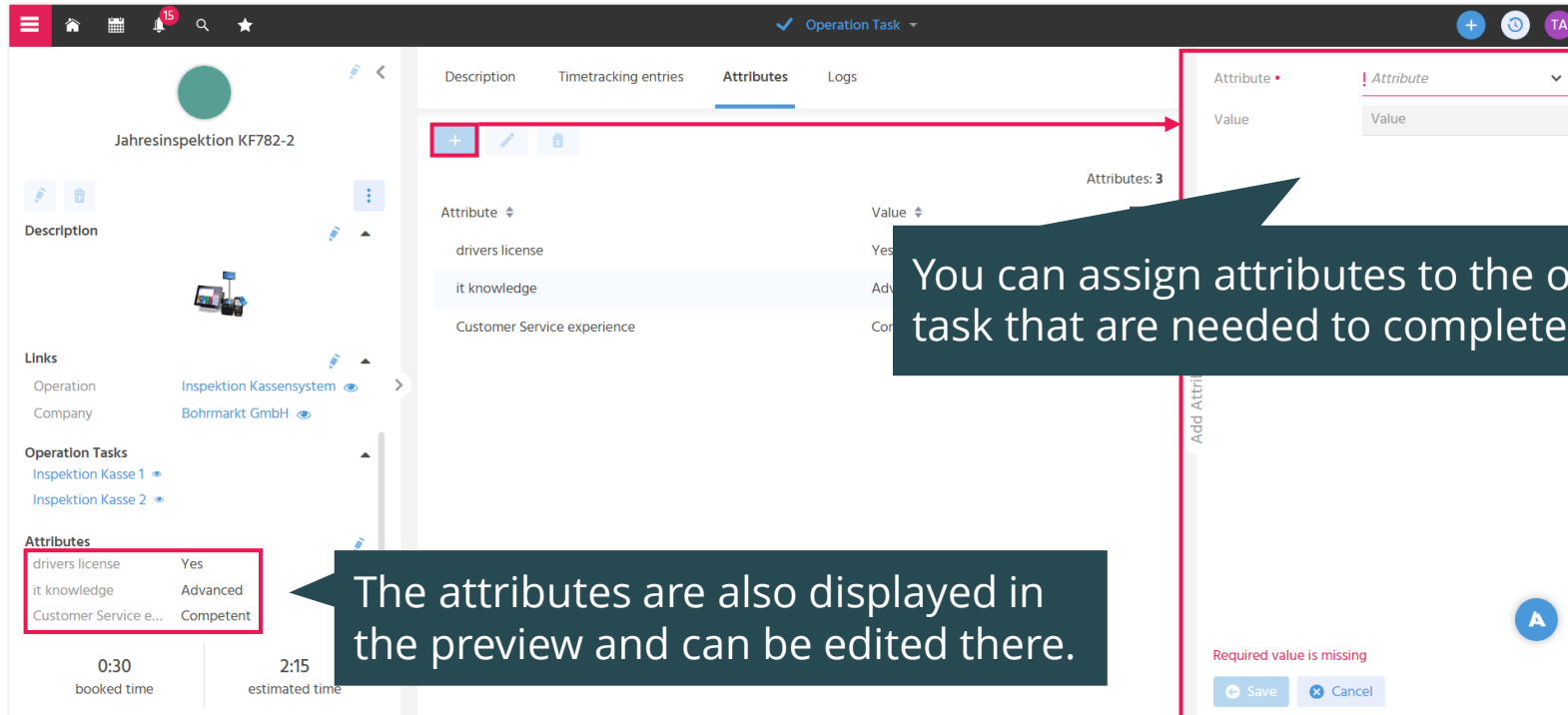
0:30 booked time

2:15 estimated time

In the Description tab, you can enter information and pictures that are helpful for processing the task.

Operation Task

Tab „Attributes“



Operation Task

Attributes

drivers license

it knowledge

Customer Service experience

Value

Value

Attributes: 3

Add Attribute

Required value is missing

Save Cancel

You can assign attributes to the operation task that are needed to complete the task.

The attributes are also displayed in the preview and can be edited there.

Operation Task Template



Operation Task Template



General

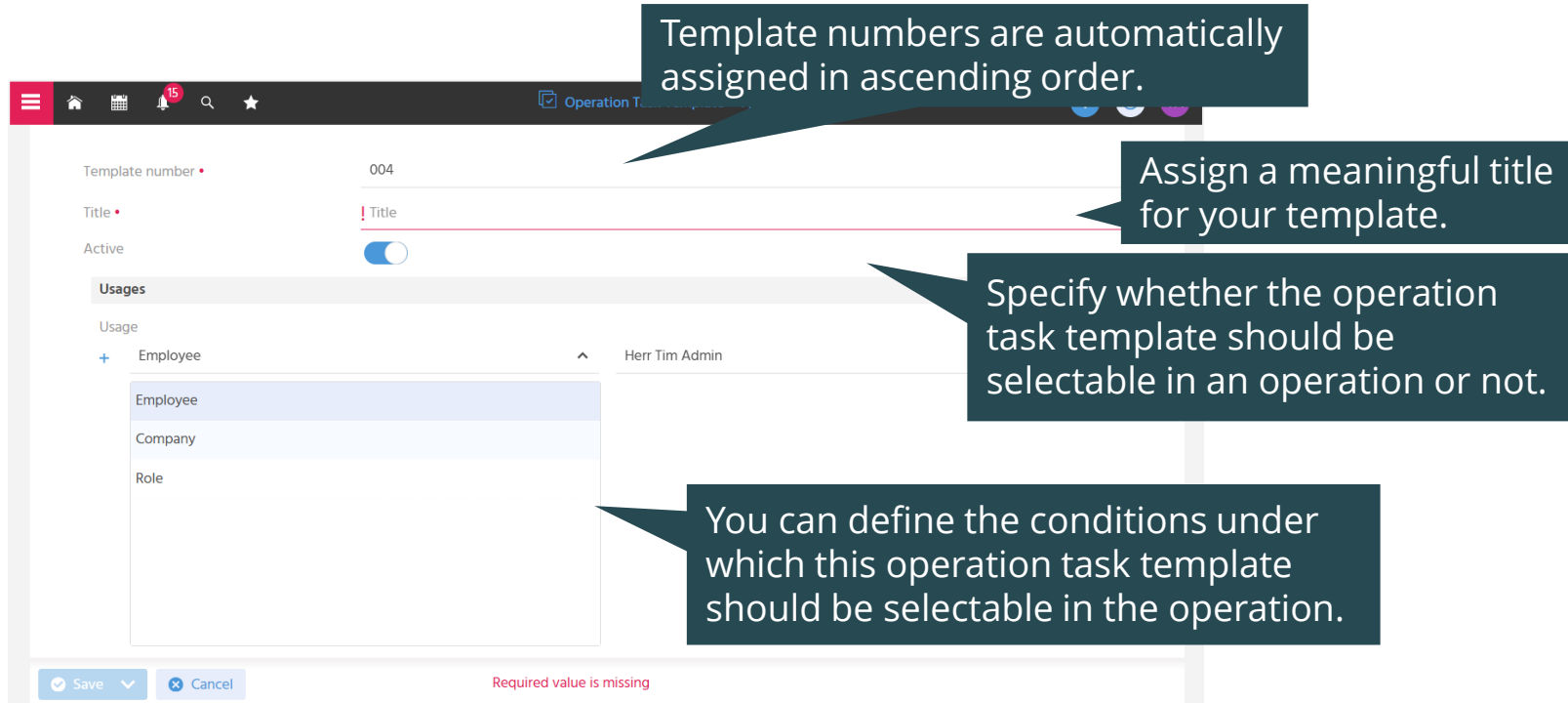
You can create operation task templates for recurring operation tasks. Instead of always creating a new operation task manually, you can use the template.

Use the task template, for example, for machine maintenance that you have to carry out regularly at customers' premises or for product range entries in sales outlets on site.



Operation Task Template

Create operation task template



The screenshot shows the 'Create operation task template' form in the ADITO application. The form includes the following fields and sections:

- Template number:** 004. A callout states: "Template numbers are automatically assigned in ascending order."
- Title:** ! Title. A callout states: "Assign a meaningful title for your template."
- Active:** A toggle switch is currently turned off. A callout states: "Specify whether the operation task template should be selectable in an operation or not."
- Usages:** A section with a sub-section 'Usage' containing a list of roles: Employee, Company, and Role. The 'Employee' role is selected. A callout states: "You can define the conditions under which this operation task template should be selectable in the operation."

At the bottom of the form, there are 'Save' and 'Cancel' buttons. A red error message at the bottom center reads: "Required value is missing".

Operation Task Template



Filterview

Operation Task Template

+

↺

TA

+

Filter

Operation Task Templates: 2

☐	Template number	Title	Active	
☐	SE 001	Sortimentserfassung Ertl GmbH	Yes	
☐	MA 002	Maschinenwartung	Yes	

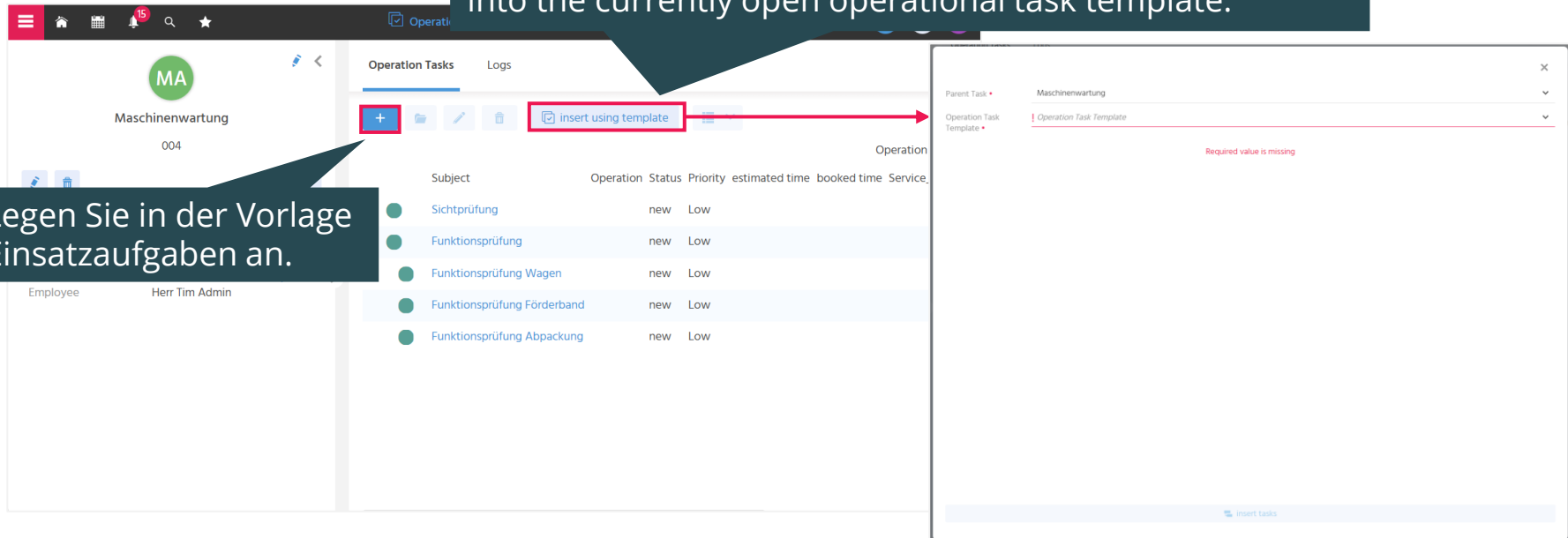
A



Operation Task Template

Tab „Einsatzaufgaben“

You can use the "Insert using template" action to copy all operational tasks from another operational task template into the currently open operational task template.



Legen Sie in der Vorlage Einsatzaufgaben an.

Operation Tasks

Maschinenwartung 004

Employee Herr Tim Admin

Subject	Operation	Status	Priority	estimated time	booked time	Service
Sichtprüfung		new	Low			
Funktionsprüfung		new	Low			
Funktionsprüfung Wagen		new	Low			
Funktionsprüfung Förderband		new	Low			
Funktionsprüfung Abpackung		new	Low			

Parent Task • Maschinenwartung

Operation Task Template • Operation Task Template

Required value is missing

Insert tasks

Expense report



Expense administration

+ ✎ 🗑️ 🔍 Filter 📄

Entries: 30

	Country ↕	Valid from ↕	Valid to ↕	Kind ↕	Amount ↕	Weight ↕	Conditions
☐	Austria	7 May 1970, 02:00		Meal allowance deduction (in %)	40.00		Lunch incl.
☐	Austria	7 May 1970, 02:00		Meal allowance deduction (in %)	20.00		Breakfast incl.
☐	Austria	7 May 1970, 02:00		Meal allowance deduction (in %)	20.00		Dinner incl.
☐	Austria	7 May 1970, 02:00		Kilometer fee	2.40		
☐	Austria	7 May 1970, 02:00		Meal allowance	27.00	0	
☐	Austria	7 May 1970, 02:00		Meal allowance	27.00	21	Arrival
☐	Austria	7 May 1970, 02:00		Meal allowance	40.00	20	Greater or equal x hours
☐	Austria	7 May 1970, 02:00		Meal allowance	27.00	21	Departure
☐	Austria	7 May 1970, 02:00		Overnight stay allowance	0.00	20	Private overnight stay
☐	Austria	7 May 1970, 02:00		Overnight stay allowance	80.00	0	
☐	Switzerland	7 May 1970, 02:00		Meal allowance deduction (in %)	40.00		Lunch incl.
☐	Switzerland	7 May 1970, 02:00		Meal allowance deduction (in %)	20.00		Dinner incl.
☐	Switzerland	7 May 1970, 02:00		Meal allowance deduction (in %)	20.00		Breakfast incl.
☐	Switzerland	7 May 1970, 02:00		Kilometer fee	2.40		
☐	Switzerland	7 May 1970, 02:00		Meal allowance	43.00	21	Arrival

Validity
 Country • Germany
 Valid from • 05/10/2023
 07:51:04
 Valid to Valid to
 Valid to

Details
 Kind • Meal allowance
 Amount (EUR) • 0.00
 Weight • 0

+ Save Cancel

Excursion into administration

Expense administration - store allowances

Expense administration

Validity

Country • Germany

Valid from • 05/10/2023 07:51:04

Valid to

Details

Kind • Meal allowance

Amount (EUR) • 0.00

Weight • 0

+ Save Cancel

Specify for which country the allowance should apply.

The "Valid from" date and time are automatically preset with the current date and time.

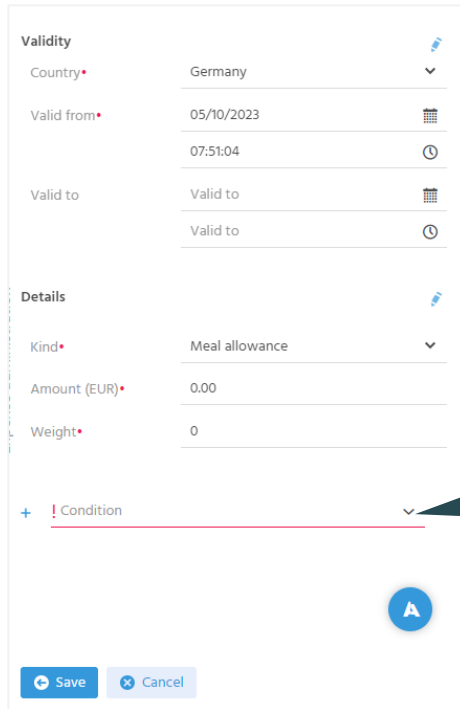
Select the kind of allowance, e.g. meal allowance, over night stay allowance or kilometer fee.

Depending on the selected "Type", this field is called "Amount (EUR)" or "Amount (%)". With "Amount (EUR)" you enter an allowance. With "Amount (%)" you specify how much should be deducted from the allowance for a service that has already been taken over.

Example: Create meal allowances for arrival days, departure days, and days with more than 8 hours. Then define what percentage should be deducted from the respective meal allowances if, for example, breakfast and lunch are included.

Excursion into administration

Expense administration - store allowances



Validity

Country • Germany

Valid from • 05/10/2023 07:51:04

Valid to Valid to

Details

Kind • Meal allowance

Amount (EUR) • 0.00

Weight • 0

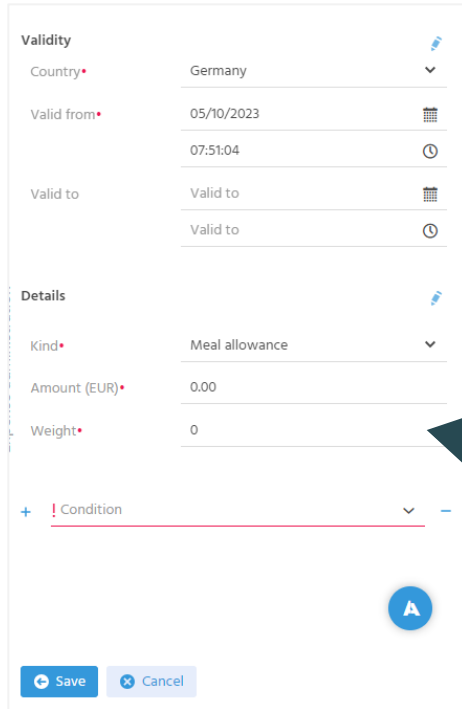
+ ! Condition

Save Cancel

The selectable conditions depend on the kind. For example, for the type "Meal allowance" the conditions "Arrival", "Departure" and "Greater or equal x hours" are selectable.

Excursion into administration

Expense administration - store allowances



The screenshot shows a web form for managing expense allowances. It is divided into two main sections: 'Validity' and 'Details'. The 'Validity' section includes fields for 'Country' (set to Germany), 'Valid from' (05/10/2023, 07:51:04), and 'Valid to' (both set to 'Valid to'). The 'Details' section includes fields for 'Kind' (Meal allowance), 'Amount (EUR)' (0.00), and 'Weight' (0). At the bottom, there is a '+ Condition' button and a 'Save' button. A blue circular icon with a white 'A' is also visible.

Validity	
Country	Germany
Valid from	05/10/2023 07:51:04
Valid to	Valid to

Details	
Kind	Meal allowance
Amount (EUR)	0.00
Weight	0

+ Condition

Save Cancel

Several conditions can apply to a record created in the expense report. For example, it is the day of arrival and you are out of the house for more than 8 hours. Which allowance should be used is controlled by the weight. This means that if, for example, the conditions of several meal allowances would apply to a record in the expense report, then the meal allowance with the highest weight is taken. If there are several meal allowances with exactly the same weight, the one with the highest amount is taken.

An exception to this weighting logic are the deductions. These are always linked with AND, which is why no weight is required. This means that if breakfast and lunch are included on one day, i.e. you do not pay for them yourself, both deductions are calculated.

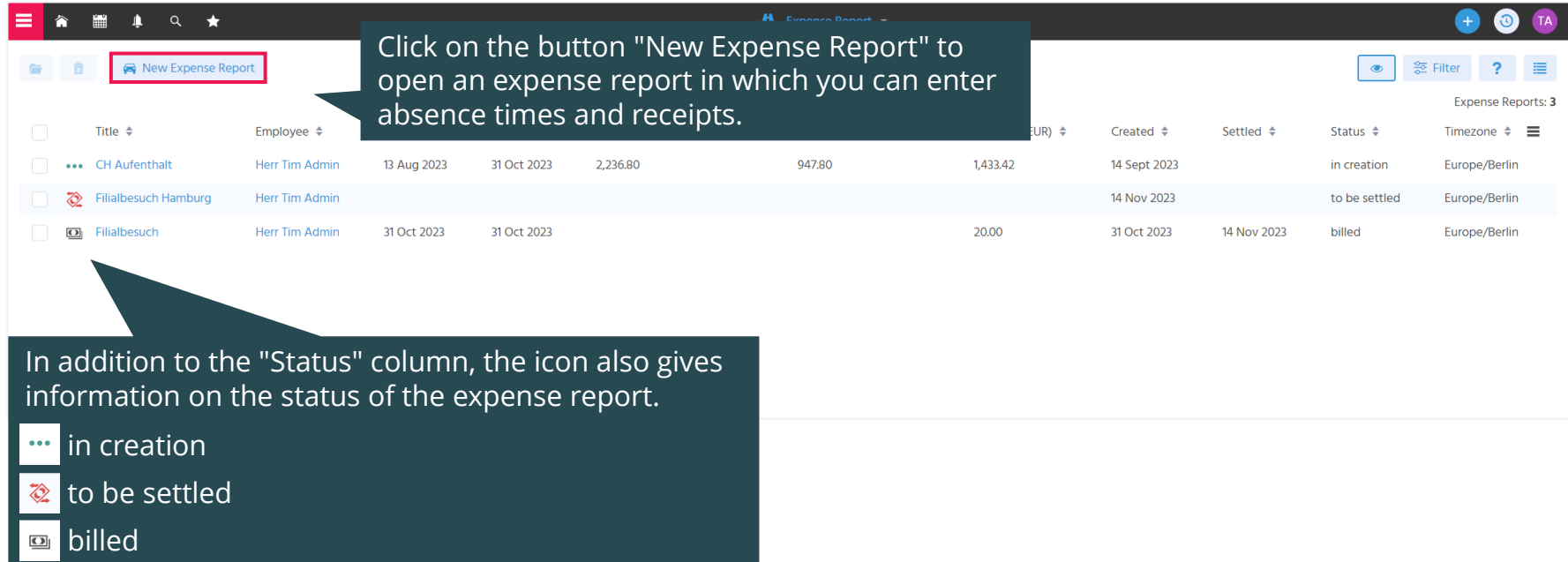
Expense report

Create new expense report

Click on the button "New Expense Report" to open an expense report in which you can enter absence times and receipts.

In addition to the "Status" column, the icon also gives information on the status of the expense report.

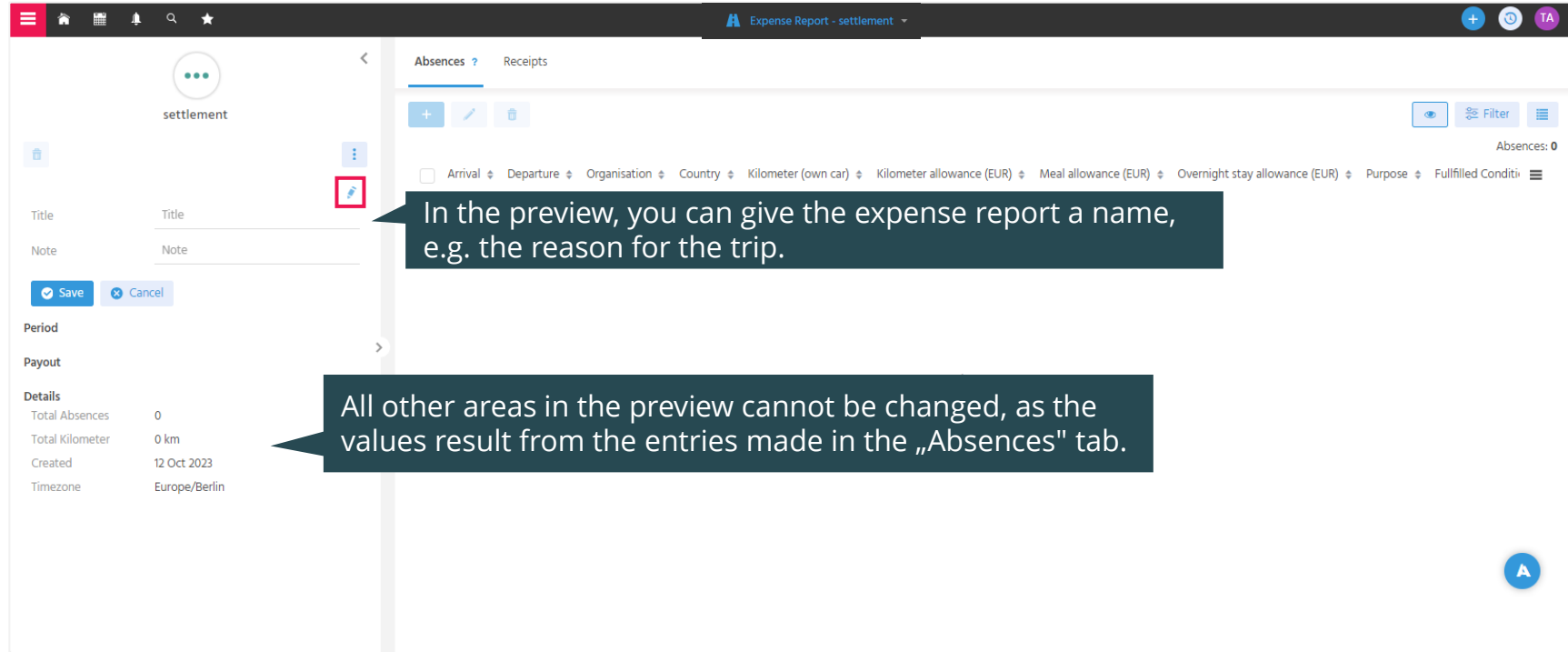
- in creation
- to be settled
- billed



Title	Employee	Start Date	End Date	Amount	Settled Amount	Created	Settled	Status	Timezone
CH Aufenthalt	Herr Tim Admin	13 Aug 2023	31 Oct 2023	2,236.80	947.80	14 Sept 2023		in creation	Europe/Berlin
Filialbesuch Hamburg	Herr Tim Admin					14 Nov 2023		to be settled	Europe/Berlin
Filialbesuch	Herr Tim Admin	31 Oct 2023	31 Oct 2023	20.00		31 Oct 2023	14 Nov 2023	billed	Europe/Berlin

Expense report

Preview



Expense Report - settlement

settlement

Absences ? Receipts

Arrival Departure Organisation Country Kilometer (own car) Kilometer allowance (EUR) Meal allowance (EUR) Overnight stay allowance (EUR) Purpose Fulfilled Conditions

Absences: 0

Title

Note

Save Cancel

Period

Payout

Details

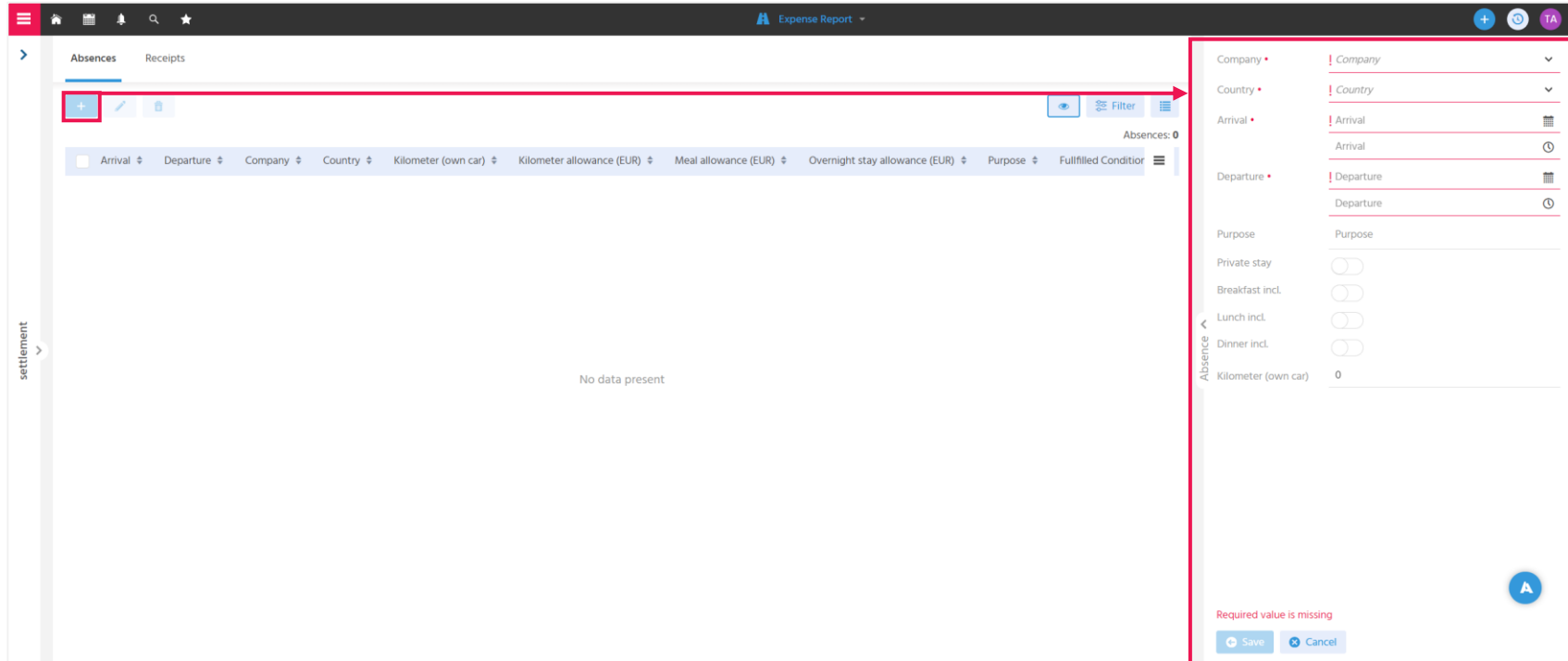
Total Absences	0
Total Kilometer	0 km
Created	12 Oct 2023
Timezone	Europe/Berlin

In the preview, you can give the expense report a name, e.g. the reason for the trip.

All other areas in the preview cannot be changed, as the values result from the entries made in the „Absences" tab.

Expense report

Tab „Absences" - Record travel time



The screenshot displays the ADITO Expense Report interface. The top navigation bar includes a menu icon, home, calendar, notifications, search, and star icons, along with the 'Expense Report' title and user profile. The main content area is divided into 'Absences' and 'Receipts' tabs. The 'Absences' tab is active, showing a form for recording travel time. A red box highlights the '+' button in the top left of the form, with a red arrow pointing to the right. The form includes fields for 'Arrival', 'Departure', 'Company', 'Country', 'Kilometer (own car)', 'Kilometer allowance (EUR)', 'Meal allowance (EUR)', 'Overnight stay allowance (EUR)', 'Purpose', and 'Fulfilled Condition'. A red box highlights the right side of the form, which contains a dropdown menu for 'Company', 'Country', 'Arrival', 'Departure', 'Purpose', 'Private stay', 'Breakfast incl.', 'Lunch incl.', 'Dinner incl.', and 'Kilometer (own car)'. The 'Arrival' and 'Departure' fields have a red exclamation mark icon next to them. The 'Kilometer (own car)' field has a value of '0'. The 'Private stay', 'Breakfast incl.', 'Lunch incl.', and 'Dinner incl.' fields have toggle switches. The 'Purpose' field has a dropdown menu. The 'Fulfilled Condition' field has a dropdown menu. The 'Absences: 0' label is visible. The 'No data present' message is displayed in the center of the form. The 'Absence' label is visible on the left side of the form. The 'Required value is missing' message is displayed at the bottom of the form. The 'Save' and 'Cancel' buttons are at the bottom right of the form.

Expense Report

Absences Receipts

+

Filter

Absences: 0

Arrival Departure Company Country Kilometer (own car) Kilometer allowance (EUR) Meal allowance (EUR) Overnight stay allowance (EUR) Purpose Fulfilled Condition

No data present

Company Country Arrival Departure Purpose Private stay Breakfast incl. Lunch incl. Dinner incl. Kilometer (own car)

Required value is missing

Save Cancel

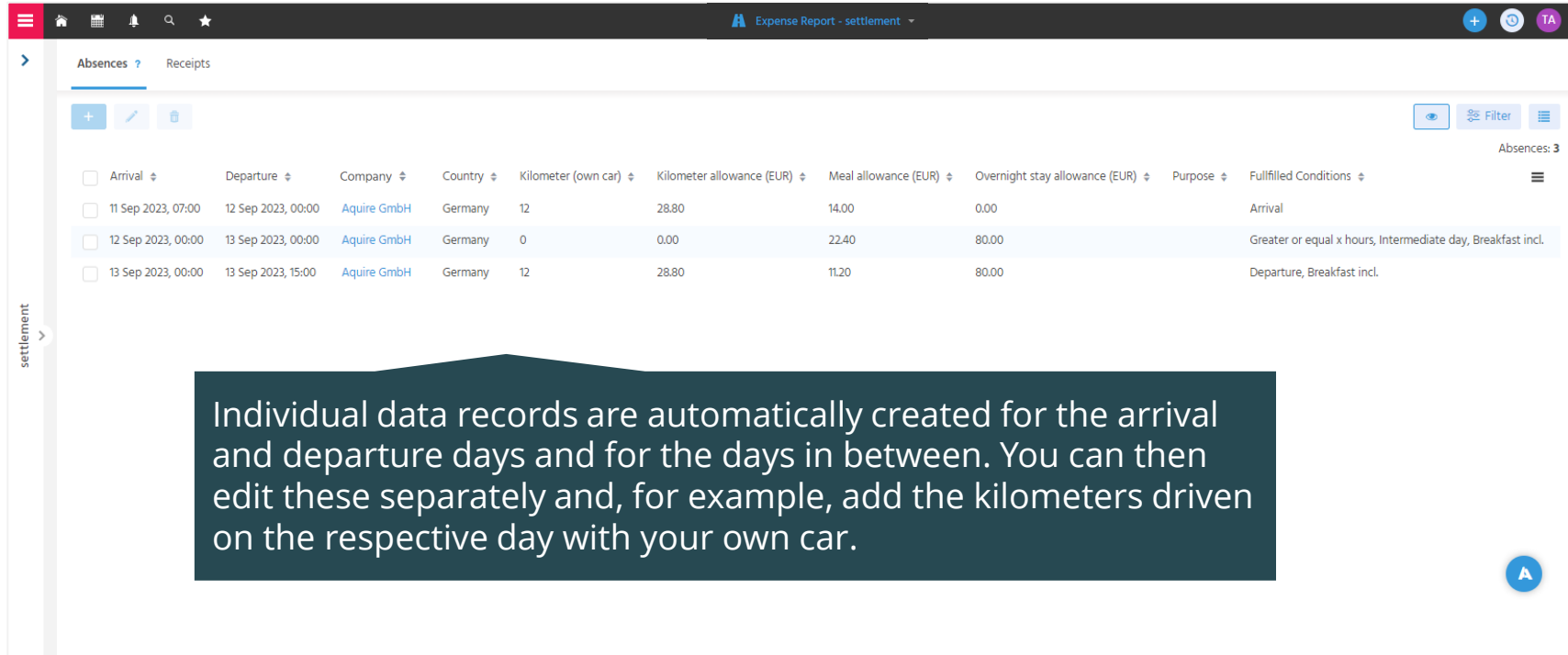
Expense report

Tab „Absences“ - Record travel time

Company •	! Company	▼	Select the company you visited.
Country •	! Country	▼	Select the country in which the visited company is located.
Arrival •	! Arrival	📅	Specify arrival date and time and departure date and time.
	Arrival	🕒	
Departure •	! Departure	📅	
	Departure	🕒	
Purpose	Purpose		Purpose of the trip.
Private stay	☐		Information about accommodation and meals on site.
Breakfast incl.	☐		
Lunch incl.	☐		
Dinner incl.	☐		
Kilometer (own car)	0		Kilometres travelled with own vehicle.

Expense report

Tab „Absences“



Expense Report - settlement

Absences ? Receipts

Filter

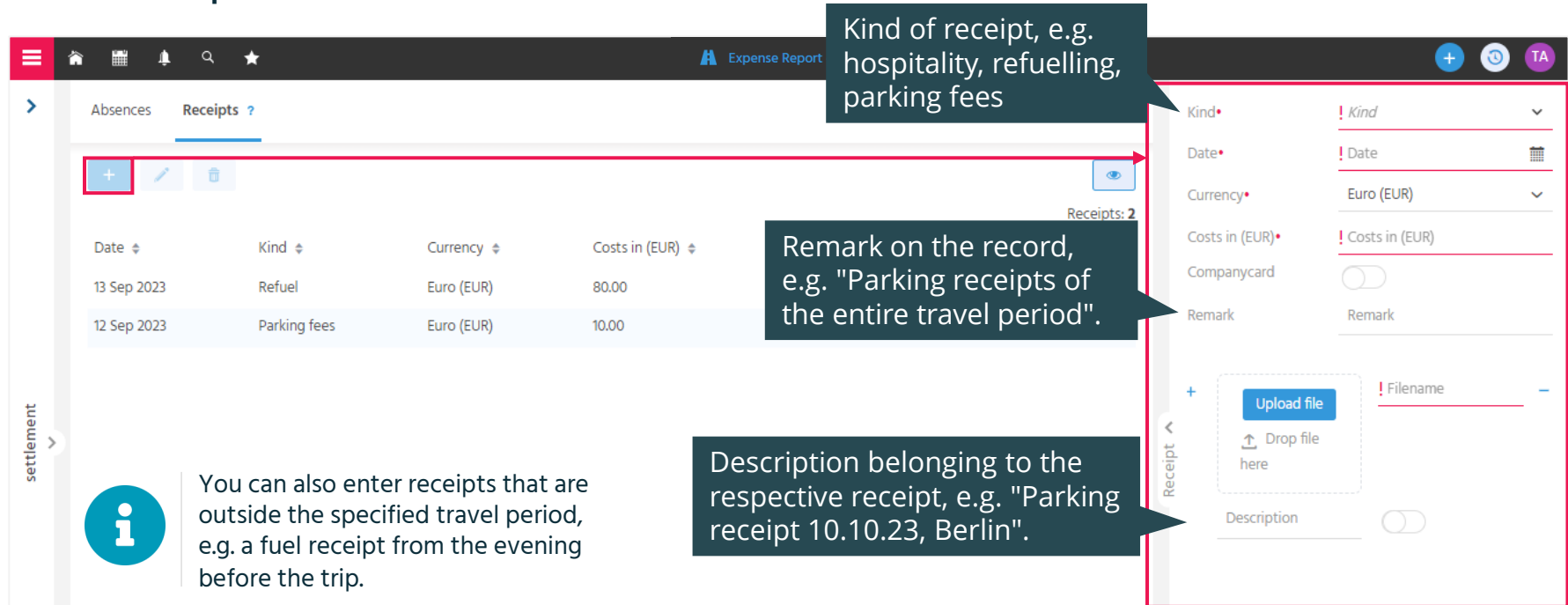
Absences: 3

Arrival	Departure	Company	Country	Kilometer (own car)	Kilometer allowance (EUR)	Meal allowance (EUR)	Overnight stay allowance (EUR)	Purpose	Fulfilled Conditions
11 Sep 2023, 07:00	12 Sep 2023, 00:00	Aquire GmbH	Germany	12	28.80	14.00	0.00		Arrival
12 Sep 2023, 00:00	13 Sep 2023, 00:00	Aquire GmbH	Germany	0	0.00	22.40	80.00		Greater or equal x hours, Intermediate day, Breakfast incl.
13 Sep 2023, 00:00	13 Sep 2023, 15:00	Aquire GmbH	Germany	12	28.80	11.20	80.00		Departure, Breakfast incl.

Individual data records are automatically created for the arrival and departure days and for the days in between. You can then edit these separately and, for example, add the kilometers driven on the respective day with your own car.

Expense report

Enter receipts



The screenshot shows the ADITO Expense Report interface. The top navigation bar includes a menu icon, home, calendar, notifications, search, and star icons. The main header displays 'Expense Report'. The left sidebar has a 'settlement' label and a plus icon. The main content area is divided into 'Absences' and 'Receipts' tabs. The 'Receipts' tab is active, showing a table with columns: Date, Kind, Currency, and Costs in (EUR). The table contains two entries: '13 Sep 2023' for 'Refuel' (Euro (EUR), 80.00) and '12 Sep 2023' for 'Parking fees' (Euro (EUR), 10.00). A red box highlights the plus icon in the top left of the receipts section. A red line connects this box to the 'Kind' field in the right-hand form. The right-hand form is titled 'Receipt' and includes fields for Kind, Date, Currency, Costs in (EUR), Companycard, Remark, and a file upload section with 'Upload file' and 'Drop file here' buttons. A red box highlights the 'Remark' field. A red line connects this box to the 'Remark' field in the right-hand form. A red box highlights the 'Description' field in the right-hand form. A red line connects this box to the 'Description' field in the right-hand form. A red box highlights the 'Filename' field in the right-hand form. A red line connects this box to the 'Filename' field in the right-hand form. A red box highlights the 'Remark' field in the right-hand form. A red line connects this box to the 'Remark' field in the right-hand form. A red box highlights the 'Description' field in the right-hand form. A red line connects this box to the 'Description' field in the right-hand form. A red box highlights the 'Filename' field in the right-hand form. A red line connects this box to the 'Filename' field in the right-hand form.

Kind of receipt, e.g. hospitality, refuelling, parking fees

Remark on the record, e.g. "Parking receipts of the entire travel period".

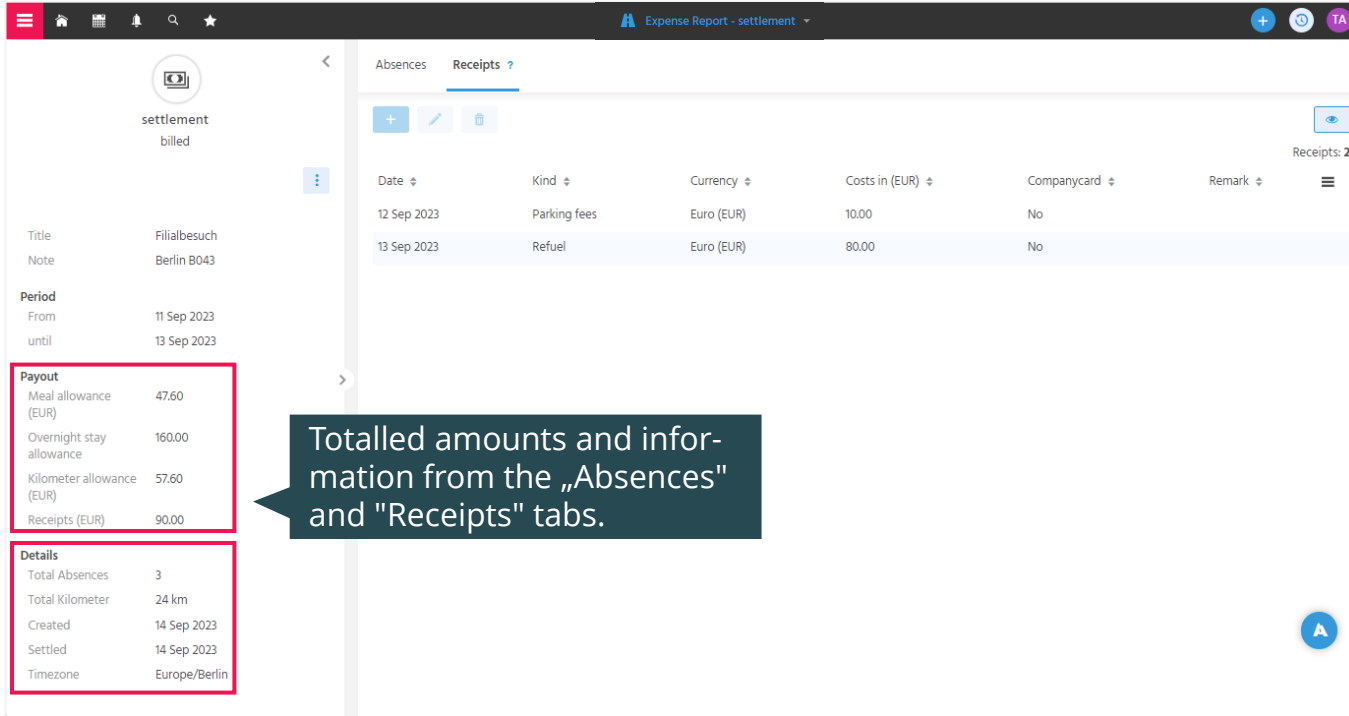
Description belonging to the respective receipt, e.g. "Parking receipt 10.10.23, Berlin".

You can also enter receipts that are outside the specified travel period, e.g. a fuel receipt from the evening before the trip.

Date	Kind	Currency	Costs in (EUR)
13 Sep 2023	Refuel	Euro (EUR)	80.00
12 Sep 2023	Parking fees	Euro (EUR)	10.00

Expense report

Enter receipts



The screenshot displays the ADITO Expense Report interface. The main area shows the 'Receipts' tab with a table of expenses. The sidebar on the left contains summary information, including 'Payout' and 'Details' sections, which are highlighted with red boxes. A callout box points to the 'Payout' section, indicating that the totals are derived from the 'Absences' and 'Receipts' tabs.

settlement billed

Title: Filialbesuch
Note: Berlin B043

Period
From: 11 Sep 2023
until: 13 Sep 2023

Payout

Meal allowance (EUR)	47.60
Overnight stay allowance	160.00
Kilometer allowance (EUR)	57.60
Receipts (EUR)	90.00

Details

Total Absences	3
Total Kilometer	24 km
Created	14 Sep 2023
Settled	14 Sep 2023
Timezone	Europe/Berlin

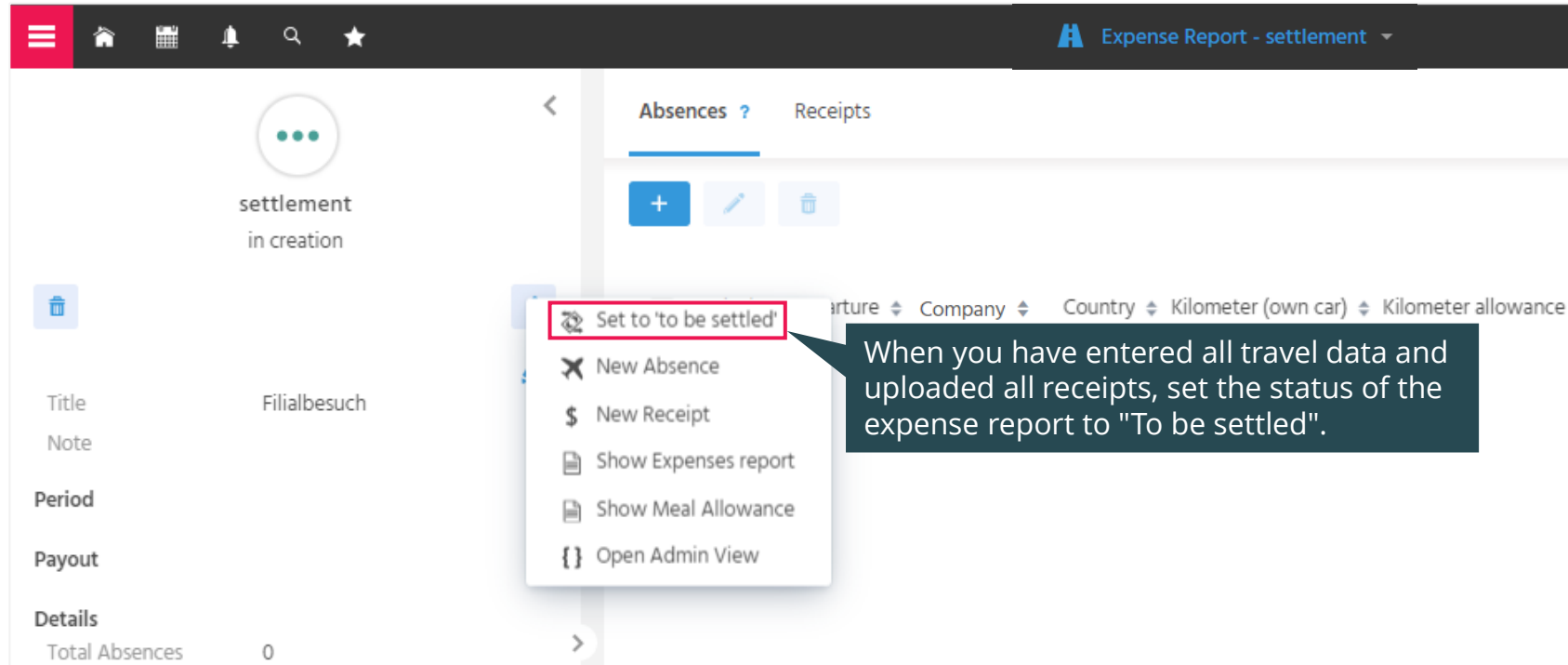
Receipts

Date	Kind	Currency	Costs in (EUR)	Companycard	Remark
12 Sep 2023	Parking fees	Euro (EUR)	10.00	No	
13 Sep 2023	Refuel	Euro (EUR)	80.00	No	

Totalled amounts and information from the „Absences“ and “Receipts” tabs.

Expense report

Change status „in creation“



The screenshot shows the ADITO Expense Report interface. The top navigation bar includes a hamburger menu, home, calendar, notifications, search, and star icons, along with the text "Expense Report - settlement". The main content area displays a "settlement in creation" status with a three-dot menu icon. A dropdown menu is open, showing options: "Set to 'to be settled'", "New Absence", "New Receipt", "Show Expenses report", "Show Meal Allowance", and "Open Admin View". The "Set to 'to be settled'" option is highlighted with a red box. A callout box points to this option with the text: "When you have entered all travel data and uploaded all receipts, set the status of the expense report to 'To be settled'".

settlement
in creation

Absences ? Receipts

+ ✎ 🗑

Set to 'to be settled'

✈ New Absence

\$ New Receipt

📄 Show Expenses report

📄 Show Meal Allowance

{ } Open Admin View

When you have entered all travel data and uploaded all receipts, set the status of the expense report to "To be settled".

Title Filialbesuch

Note

Period

Payout

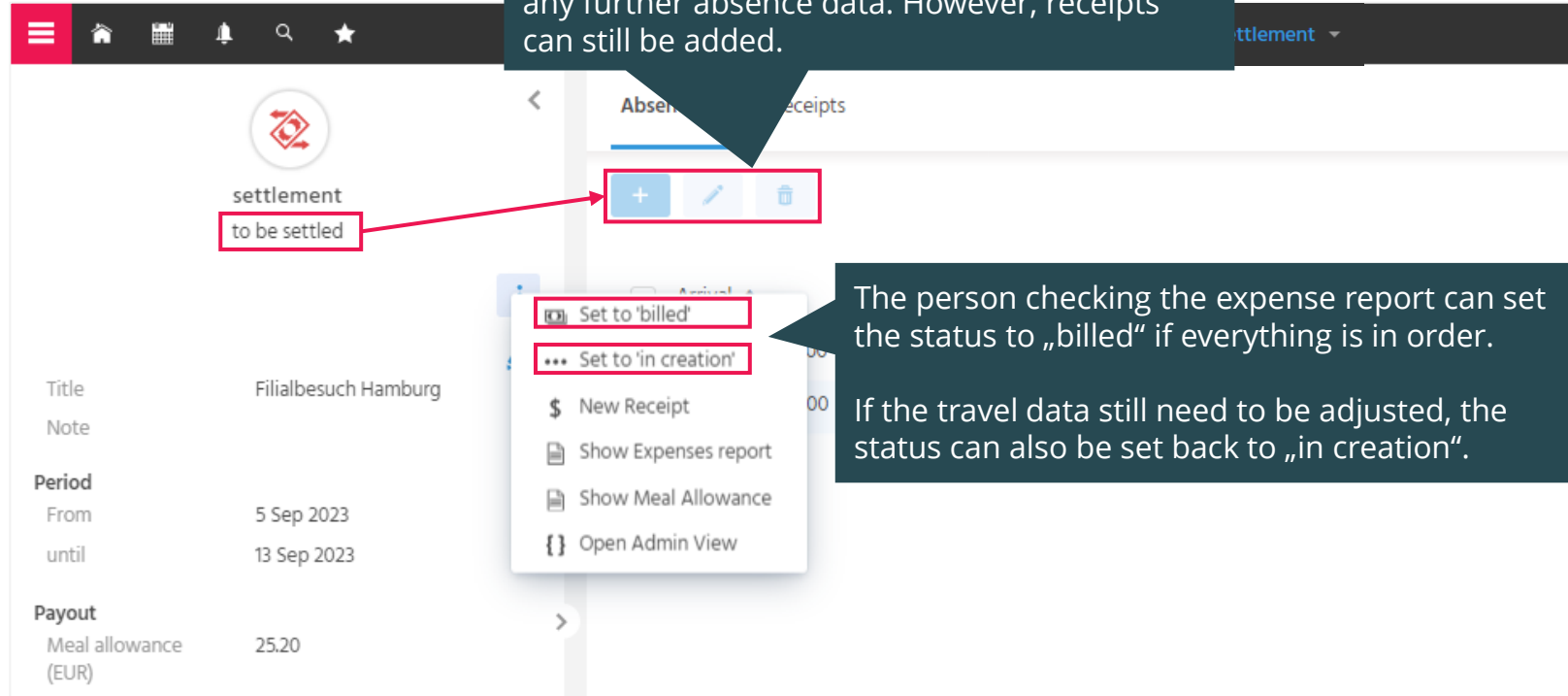
Details

Total Absences 0

Expense report

Status „to be settled“

If the status is „to be settled“, you cannot enter any further absence data. However, receipts can still be added.



The screenshot shows the ADITO expense report interface. At the top, there is a navigation bar with icons for home, calendar, notifications, search, and a star. Below the navigation bar, the main content area displays the expense report details. The status is 'settlement to be settled', which is highlighted with a red box. A red arrow points from this box to a dropdown menu that is open. The dropdown menu contains the following options: 'Set to 'billed'', 'Set to 'in creation'', 'New Receipt', 'Show Expenses report', 'Show Meal Allowance', and 'Open Admin View'. The first two options are highlighted with red boxes. A dark blue callout box explains that if the status is 'to be settled', no further absence data can be entered, but receipts can still be added. Another dark blue callout box explains that the person checking the expense report can set the status to 'billed' if everything is in order, or back to 'in creation' if the travel data still needs to be adjusted. The expense report details include the title 'Filialbesuch Hamburg', the period from '5 Sep 2023' to '13 Sep 2023', and the payout 'Meal allowance (EUR) 25.20'.

settlement
to be settled

+

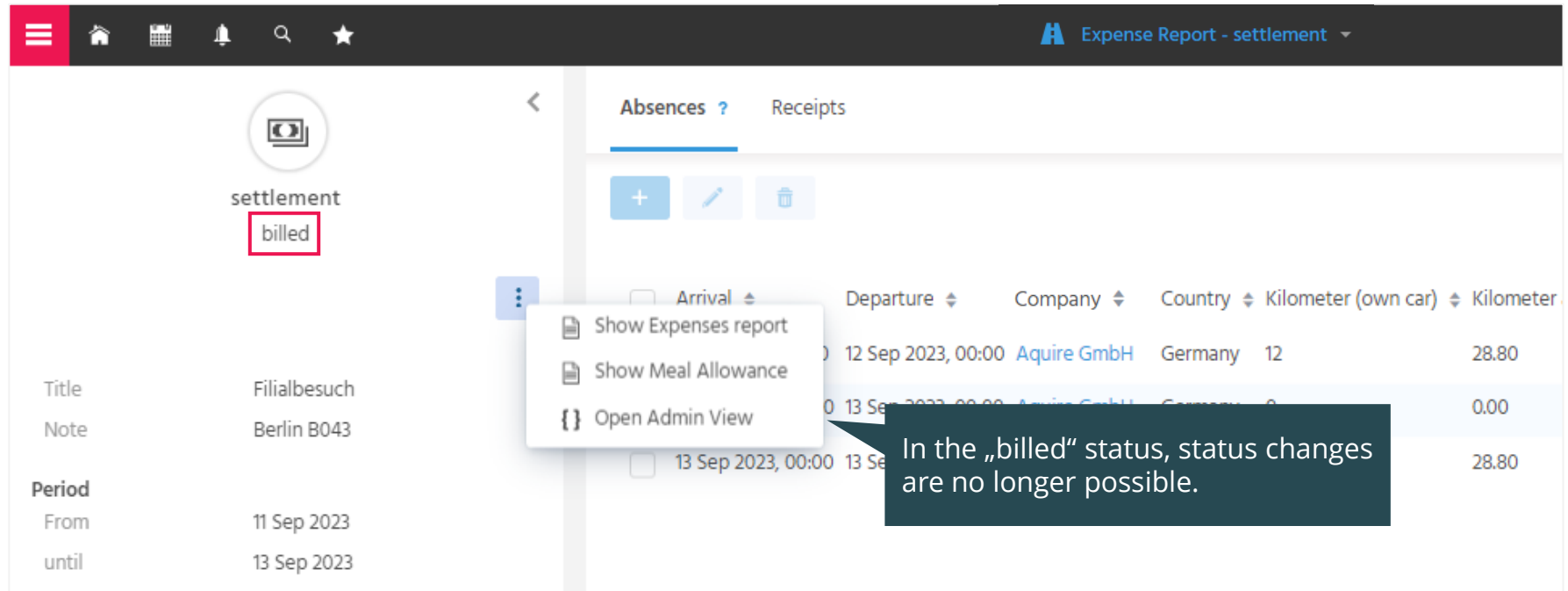
Set to 'billed'
Set to 'in creation'

New Receipt
Show Expenses report
Show Meal Allowance
Open Admin View

Title: Filialbesuch Hamburg
Note:
Period:
From: 5 Sep 2023
until: 13 Sep 2023
Payout:
Meal allowance (EUR): 25.20

Expense report

Status „billed“

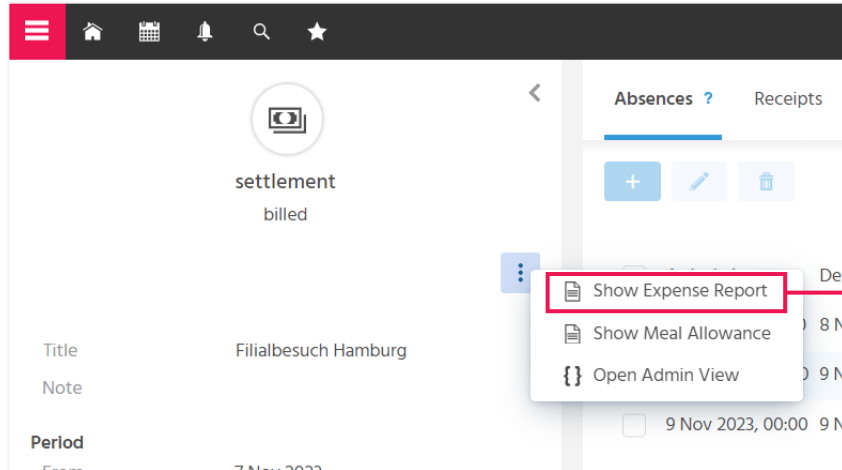


The screenshot shows the ADITO Expense Report interface. On the left, a sidebar displays a 'settlement' icon with a 'billed' status label. Below this, details for a settlement are shown: Title 'Filialbesuch', Note 'Berlin B043', and Period '11 Sep 2023' to '13 Sep 2023'. The main area shows a table of expenses with columns for Arrival, Departure, Company, Country, Kilometer (own car), and Kilometer. A context menu is open over the table, offering options: 'Show Expenses report', 'Show Meal Allowance', and 'Open Admin View'. A dark blue callout box points to the 'billed' status, stating: 'In the „billed“ status, status changes are no longer possible.'

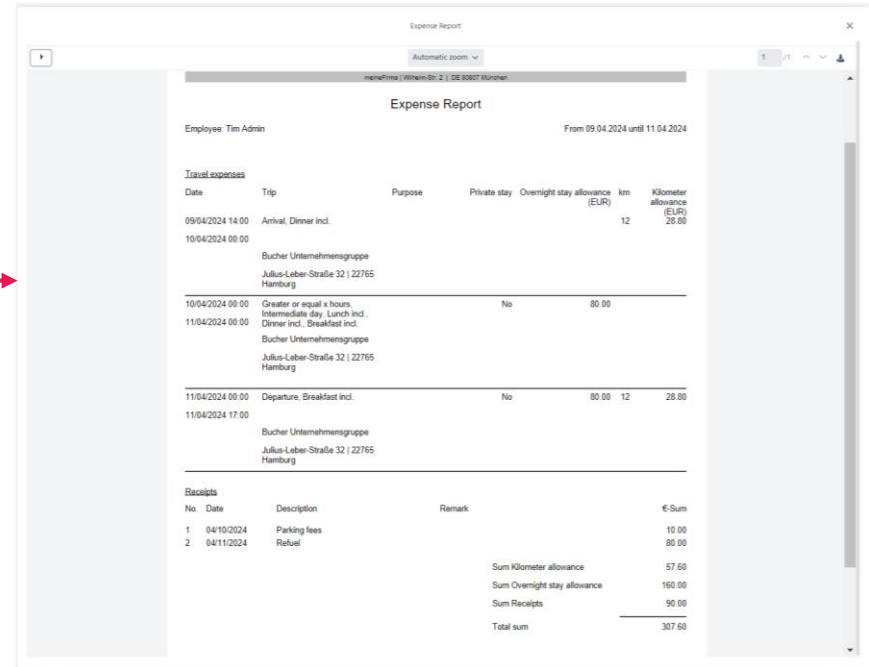
Arrival	Departure	Company	Country	Kilometer (own car)	Kilometer
12 Sep 2023, 00:00	12 Sep 2023, 00:00	Aquire GmbH	Germany	12	28.80
13 Sep 2023, 00:00	13 Sep 2023, 00:00	Aquire GmbH	Germany	0	0.00
13 Sep 2023, 00:00	13 Sep 2023, 00:00	Aquire GmbH	Germany	0	28.80

Expense report

Action „Show Expense Report“



The screenshot shows the ADITO mobile app interface. At the top, there is a navigation bar with icons for home, calendar, notifications, search, and favorites. Below this, the main screen displays a 'settlement billed' card. To the right of this card, there are tabs for 'Absences' and 'Receipts'. A red box highlights the 'Show Expense Report' option in the menu.



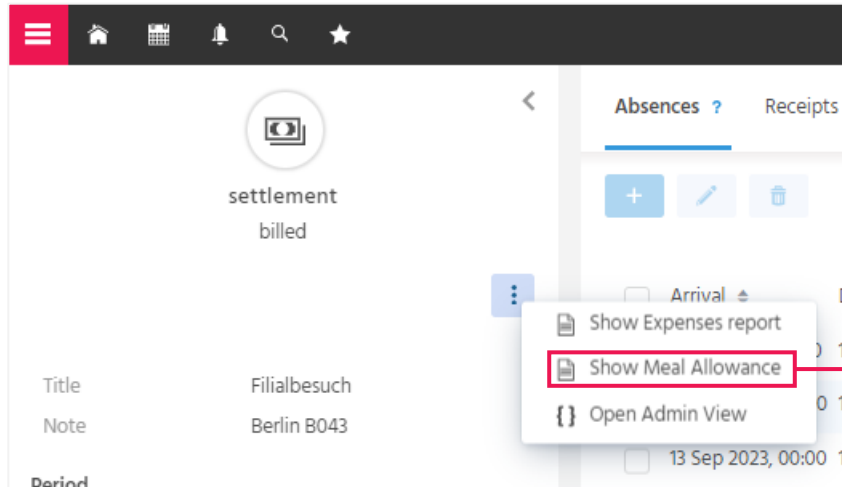
The screenshot shows the ADITO web interface for the 'Expense Report' of Employee: Tim Admin, covering the period from 09.04.2024 to 11.04.2024. The report is divided into two main sections: 'Travel expenses' and 'Receipts'.

Date	Trip	Purpose	Private stay	Overnight stay allowance (EUR)	km	Kilometer allowance (EUR)
09/04/2024 14:00	Arrival, Dinner incl.				12	28.00
10/04/2024 00:00	Bucher Unternehmensgruppe Julius-Leber-Straße 32 22765 Hamburg					
10/04/2024 00:00	Greater or equal x hours Intermediate day, Lunch incl.		No	80.00		
11/04/2024 00:00	Dinner incl., Breakfast incl.					
11/04/2024 00:00	Bucher Unternehmensgruppe Julius-Leber-Straße 32 22765 Hamburg					
11/04/2024 00:00	Departure, Breakfast incl.		No	80.00	12	28.00
11/04/2024 17:00	Bucher Unternehmensgruppe Julius-Leber-Straße 32 22765 Hamburg					

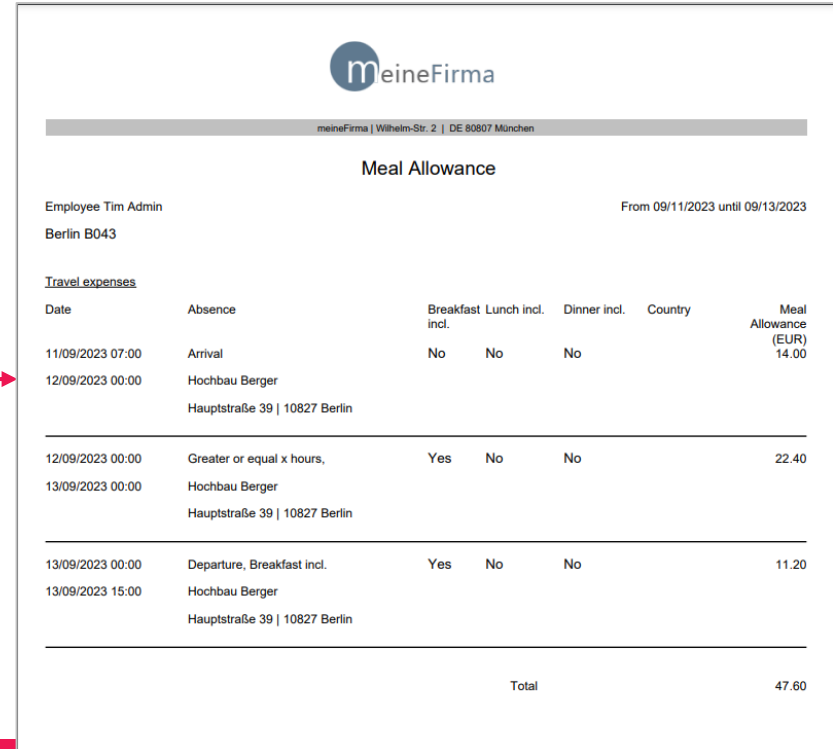
No.	Date	Description	Remark	€-Sum
1	04/10/2024	Parking fees		10.00
2	04/11/2024	Refuel		80.00
Sum Kilometer allowance				57.60
Sum Overnight stay allowance				160.00
Sum Receipts				90.00
Total sum				307.60

Expense report

Action „Show Meal Allowance“



The screenshot shows the ADITO mobile app interface. At the top, there is a navigation bar with icons for home, calendar, notifications, search, and favorites. Below this, the main content area displays a 'settlement billed' status. A menu overlay is visible, showing options: 'Show Expenses report', 'Show Meal Allowance' (highlighted with a red box and a red arrow pointing to the right), and 'Open Admin View'. The background shows a list of entries with dates and times.



The screenshot shows the 'meineFirma' web interface. The header includes the company logo and name 'meineFirma', and the address 'meineFirma | Wilhelm-Str. 2 | DE 80807 München'. The main content area displays the 'Meal Allowance' report for Employee Tim Admin, Berlin B043, covering the period from 09/11/2023 until 09/13/2023. The report includes a table of travel expenses with columns for Date, Absence, Breakfast incl., Lunch incl., Dinner incl., Country, and Meal Allowance (EUR).

Date	Absence	Breakfast incl.	Lunch incl.	Dinner incl.	Country	Meal Allowance (EUR)
11/09/2023 07:00	Arrival	No	No	No		14.00
12/09/2023 00:00	Hochbau Berger Hauptstraße 39 10827 Berlin					
12/09/2023 00:00	Greater or equal x hours,	Yes	No	No		22.40
13/09/2023 00:00	Hochbau Berger Hauptstraße 39 10827 Berlin					
13/09/2023 00:00	Departure, Breakfast incl.	Yes	No	No		11.20
13/09/2023 15:00	Hochbau Berger Hauptstraße 39 10827 Berlin					
Total						47.60

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