



Marketing: Campaign

ADITO Software GmbH

As of version 2025.9.1 | November 2025





Screenshots

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

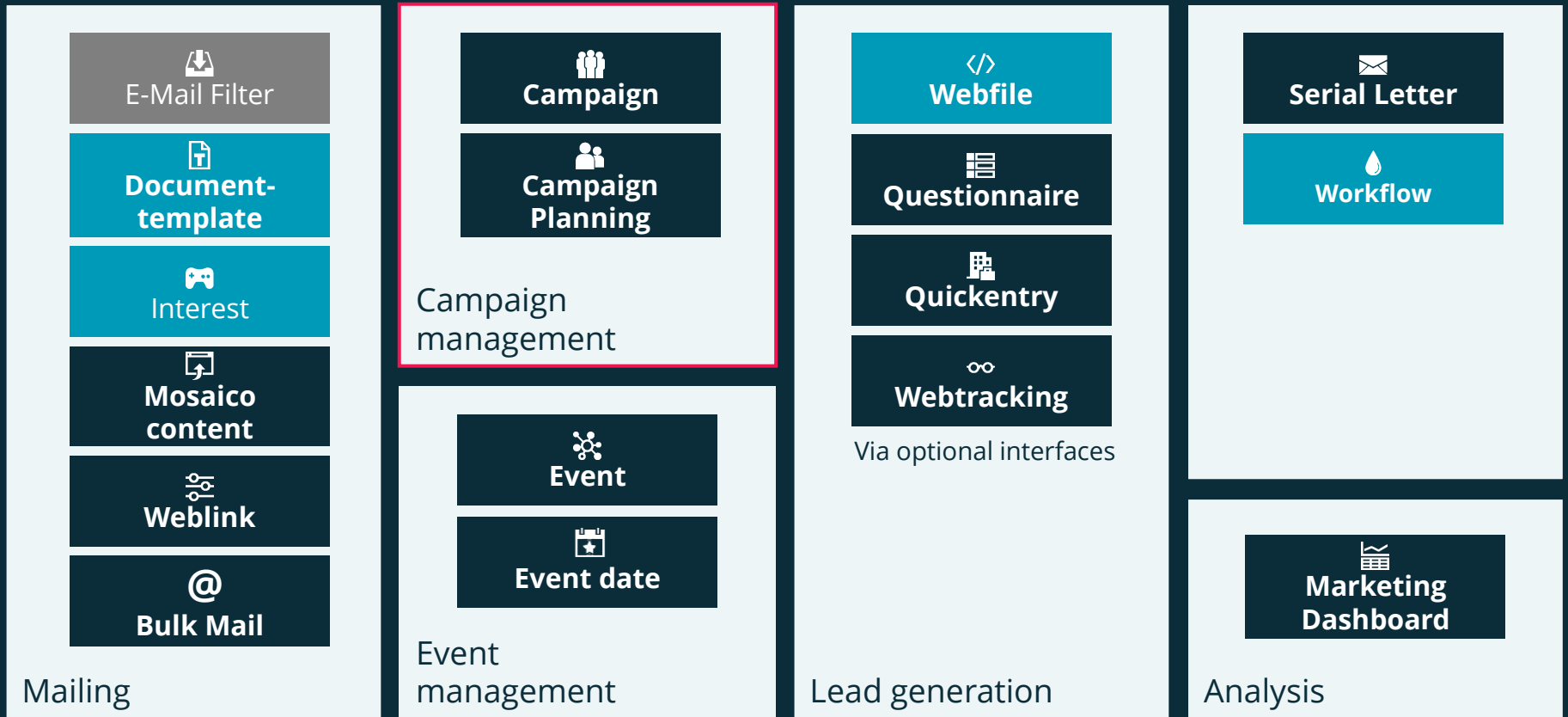


Agenda



- [Overview – procedure](#)
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■ To be defined in advance (infrequent adjustment)

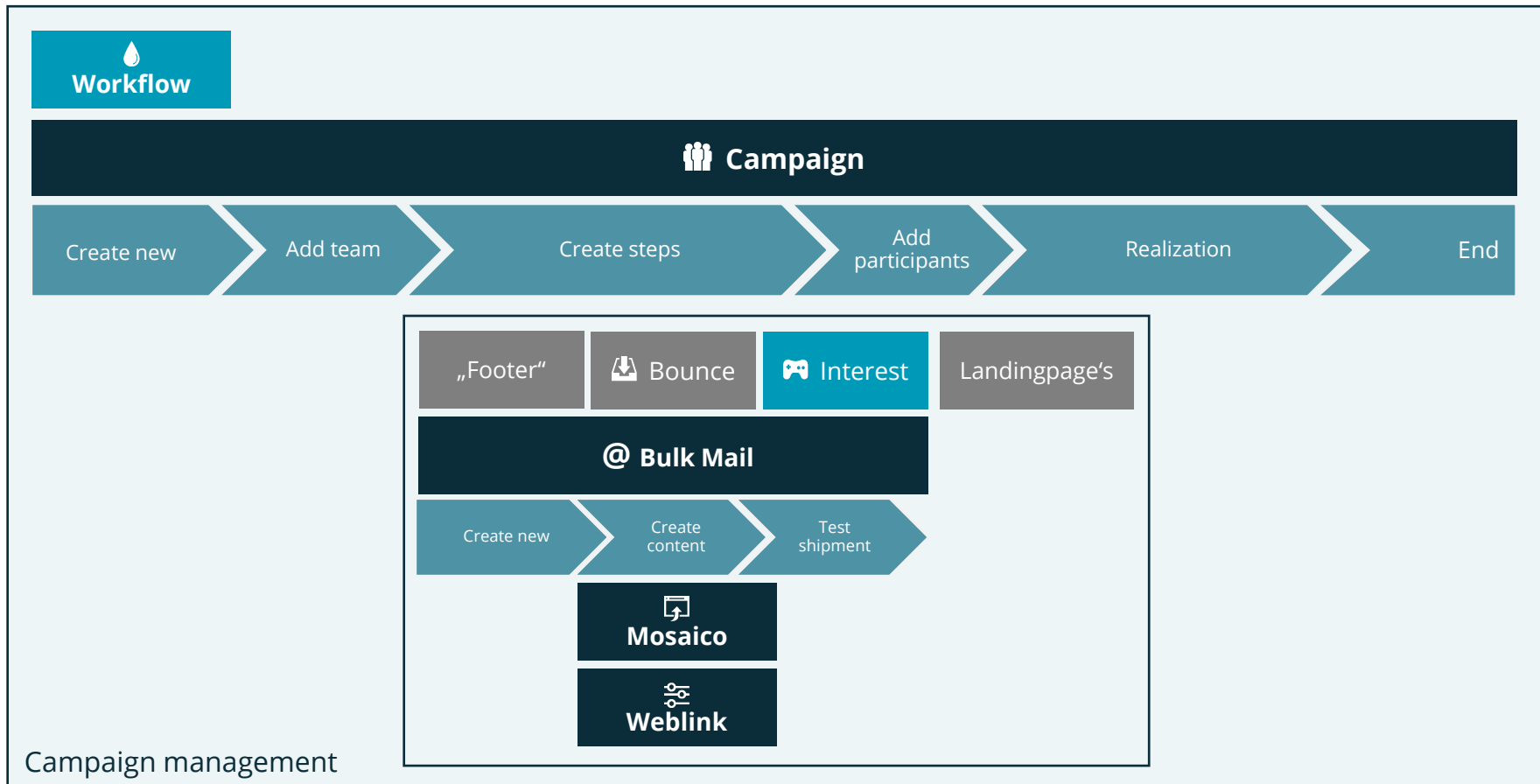
■ Occasional addition/adjustment

■ By user "daily" in use

Overview

Campaign management supports you in **planning, implementing** and **analysing** campaigns.

- Record **campaigns** and the associated campaign stages.
- Participant management shows which participants have been added and which step they are in.
- The cost overview lists fixed and variable costs.
- The project team members are recorded with the project-specific role.



■ To be defined in advance (infrequent adjustment) ■ Occasional addition/adjustment ■ By user "daily" in use

Campaign

„Manual“ procedure

Attachment

- Create campaign
- Create steps
- Enter team
- Enter costs

Realisation

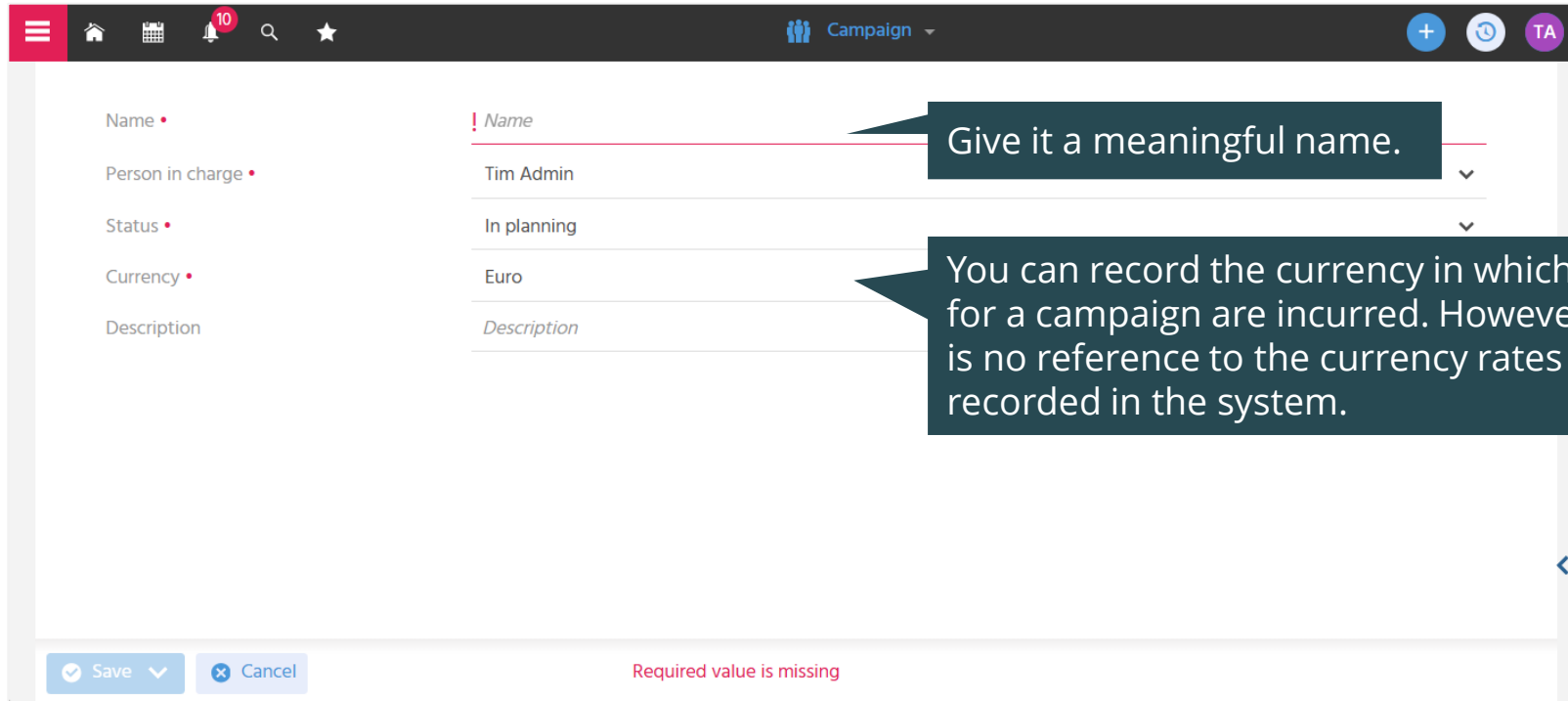
- Add participants
- Maintain status (of the campaign and the steps)
- Move participants to the next step after completing a step

Conclusion

- Maintain the status of the campaign

Campaign

Create new



! Name

Give it a meaningful name.

Person in charge • Tim Admin

Status • In planning

Currency • Euro

You can record the currency in which costs for a campaign are incurred. However, there is no reference to the currency rates recorded in the system.

Description

Save Cancel

Required value is missing

Campaign

Information and Actions in the Preview

The header contains the name, code and responsible employee.

The following actions can be carried out from here:

- Edit
- New activity
- Further Actions
 - New task
 - New step
 - Copy campaign (incl. participants)

The screenshot shows a campaign management interface. At the top, there's a header with a star icon, a 'KU' logo, and a close icon. Below this, the campaign title 'Kundenzufriedenheitsanalyse' is displayed, followed by the code '1001' and the responsible employee 'Isatou Jammeh' with an eye icon. A sidebar on the left contains icons for folders and documents. The main content area is divided into sections: 'Tags' (with a search bar), 'Campaign Period' (showing start and end dates), 'Steps' (a list of tasks with progress bars), and 'Further Information' (showing currency and description). At the bottom, there's a summary bar with '249.00 Cost', '100 Remaining Runtime', and '4 Steps'.

KU

Kundenzufriedenheitsanalyse

1001

Isatou Jammeh

Tags

Enter text

Campaign Period

Start: Oct 7, 2025

End: Jan 31, 2026

Steps

Hinzugefügt	14/100
Onlineumfrage vers...	10
Erinnerung senden	0
Dankesmail versend...	0

Further Information

Currency: EUR

Description: Wir möchten mehr über die Zufriedenheit unserer Kunden erfahren und führen eine entsprechende Kampagne durch.

249.00 Cost

100 Remaining Runtime

4 Steps

Campaign

Information and Actions in the Preview

Campaign <

Details

Status

Approved

Campaign Period

Start

Oct 7, 2025

End

Jan 31, 2026

Steps

Hinzugefügt

14/100

Onlineumfrage vers...

10

Erinnerung senden

0

Dankesmail versend...

0

Further Information

Currency

EUR

Description

Wir möchten mehr über die Zufriedenheit unserer Kunden erfahren und führen eine entsprechende Kampagne durch.

249.00

Cost

100

Remaining Runtime

4

Steps

The start and end result from the start of the first step and the end of the last step.

All steps created for the campaign are displayed here, including the added participants and the maximum number of participants.

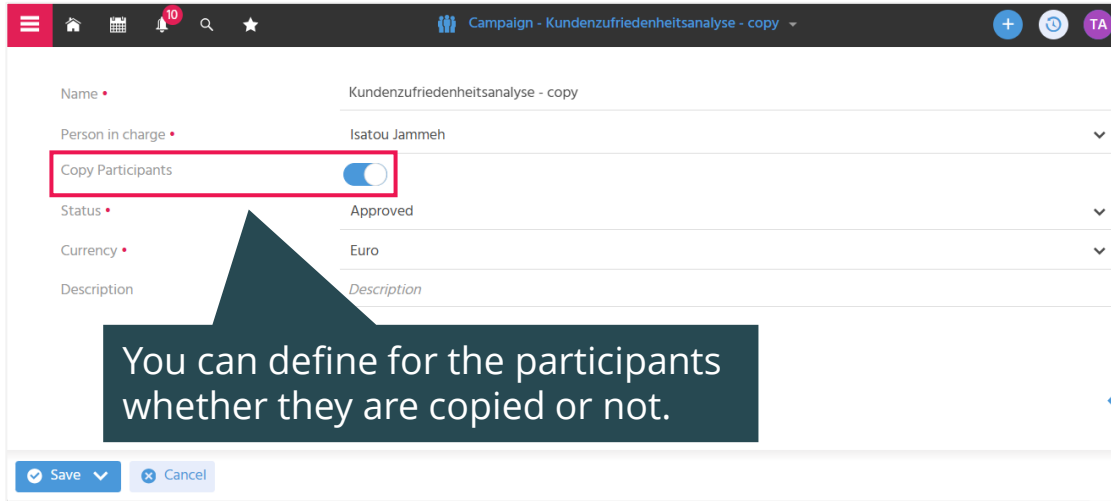
The currency and the description text can be viewed and edited here.

The total of all costs, the remaining term and the number of steps are displayed here.

Campaign

Action “Copy campaign”

The “Copy campaign” action can be found in the “Further Actions” selection in the preview. The steps are copied.



The screenshot shows the ADITO interface for the 'Copy campaign' action. The form is titled 'Campaign - Kundenzufriedenheitsanalyse - copy'. It contains several fields: 'Name' (Kundenzufriedenheitsanalyse - copy), 'Person in charge' (Isatou Jammeh), 'Copy Participants' (a toggle switch that is currently turned on), 'Status' (Approved), 'Currency' (Euro), and 'Description' (Description). A red rectangle highlights the 'Copy Participants' toggle switch. A dark blue callout box with white text points to the toggle, stating: 'You can define for the participants whether they are copied or not.' At the bottom of the form, there are 'Save' and 'Cancel' buttons.

Campaign

Example: Steps in the customer satisfaction analysis

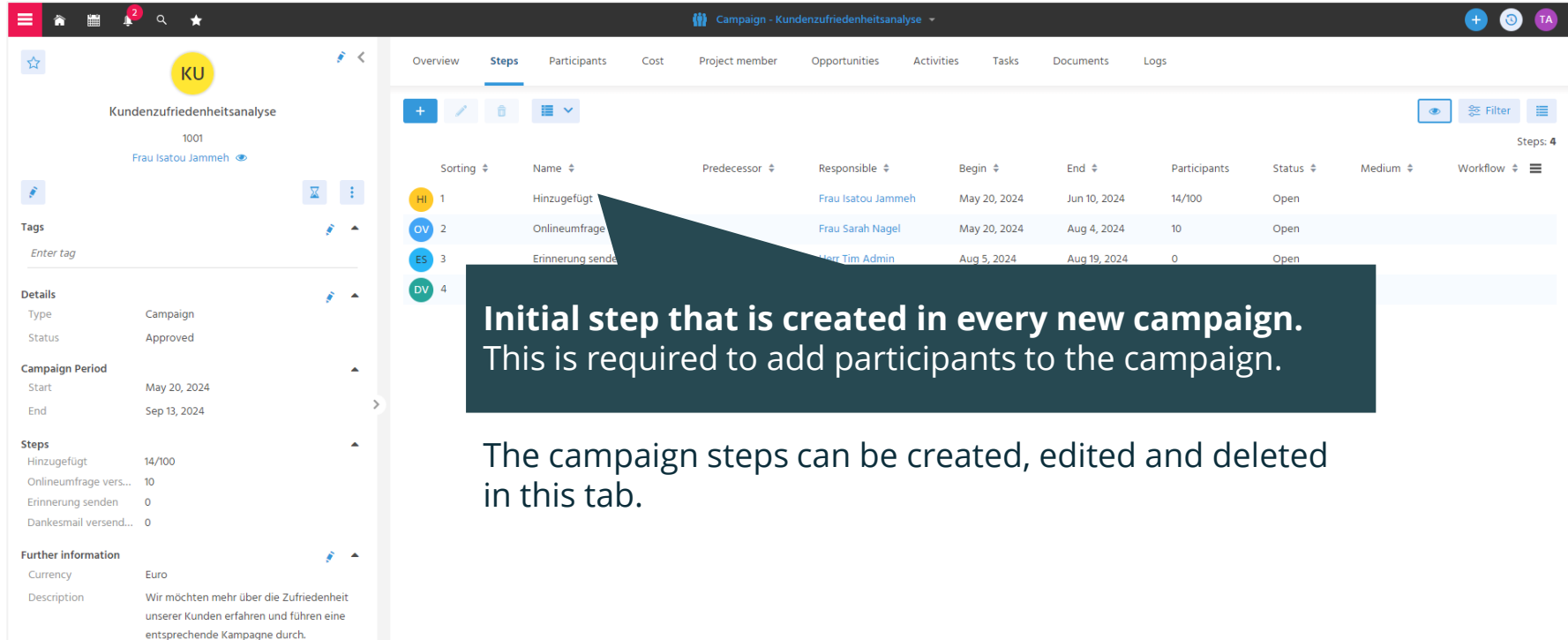
1. Added
2. Define Participants
3. Send online survey
4. Send reminder
5. Send thank-you e-mail

With the steps you define the steps that are necessary to carry out the campaign.

Steps can be recorded flexibly and individually.

Campaign

Overview of the steps – Creating steps



The screenshot displays the ADITO Campaign management interface. The left sidebar shows campaign details for 'Kundenzufriedenheitsanalyse' (ID 1001) managed by 'Frau Isatou Jammeh'. The main area is the 'Steps' tab, which lists the following steps:

Sorting	Name	Predecessor	Responsible	Begin	End	Participants	Status	Medium	Workflow
1	Hinzugefügt		Frau Isatou Jammeh	May 20, 2024	Jun 10, 2024	14/100	Open		
2	Onlineumfrage		Frau Sarah Nagel	May 20, 2024	Aug 4, 2024	10	Open		
3	Erinnerung senden		Herr Tim Admin	Aug 5, 2024	Aug 19, 2024	0	Open		
4									

A callout box highlights the first step, 'Hinzugefügt', with the text: **Initial step that is created in every new campaign. This is required to add participants to the campaign.**

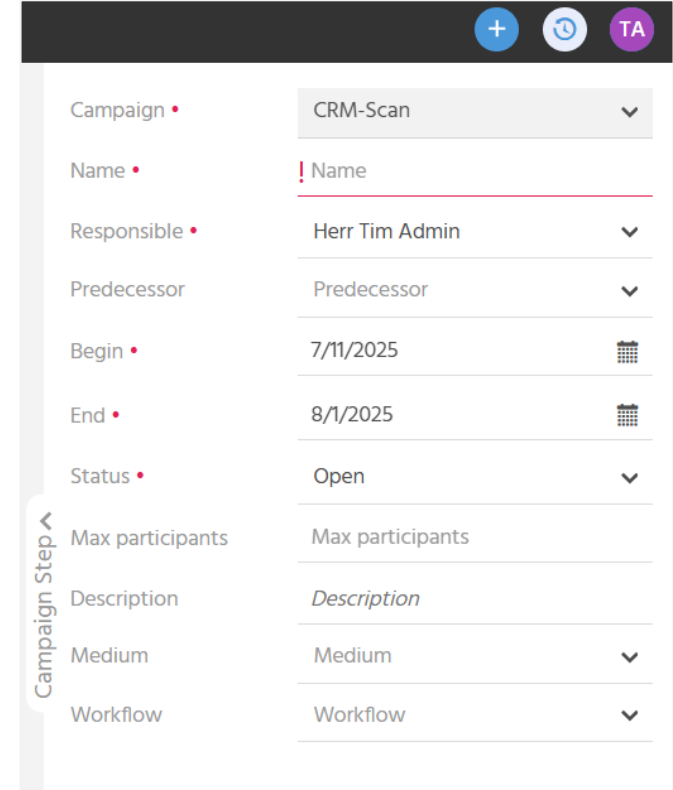
The bottom section of the sidebar, 'Further information', shows the currency as 'Euro' and a description: 'Wir möchten mehr über die Zufriedenheit unserer Kunden erfahren und führen eine entsprechende Kampagne durch.'

Campaign

Create steps

You define the following for a step:

- the name,
- the colleague responsible,
- the predecessor step, if applicable,
- the time period of a step,
- the initial status,
- if applicable, the maximum number of participants
- which medium (letter, e-mail, etc.) is required for this
- Workflow that is executed when this step is reached



The screenshot shows the 'Campaign Step' configuration interface in ADITO. At the top right, there are three circular icons: a blue plus sign, a blue clock, and a purple circle with 'TA'. The main form has a dark header bar. Below it, the 'Campaign' dropdown is set to 'CRM-Scan'. The 'Name' field is labeled with a red exclamation mark and the text 'Name'. The 'Responsible' field is set to 'Herr Tim Admin'. The 'Predecessor' field is set to 'Predecessor'. The 'Begin' field is set to '7/11/2025' with a calendar icon. The 'End' field is set to '8/1/2025' with a calendar icon. The 'Status' field is set to 'Open'. The 'Max participants' field is set to 'Max participants'. The 'Description' field is labeled 'Description'. The 'Medium' field is set to 'Medium'. The 'Workflow' field is set to 'Workflow'. A vertical label 'Campaign Step' is on the left side of the form.

Campaign •	CRM-Scan	▼
Name •	! Name	
Responsible •	Herr Tim Admin	▼
Predecessor	Predecessor	▼
Begin •	7/11/2025	📅
End •	8/1/2025	📅
Status •	Open	▼
Max participants	Max participants	
Description	Description	
Medium	Medium	▼
Workflow	Workflow	▼

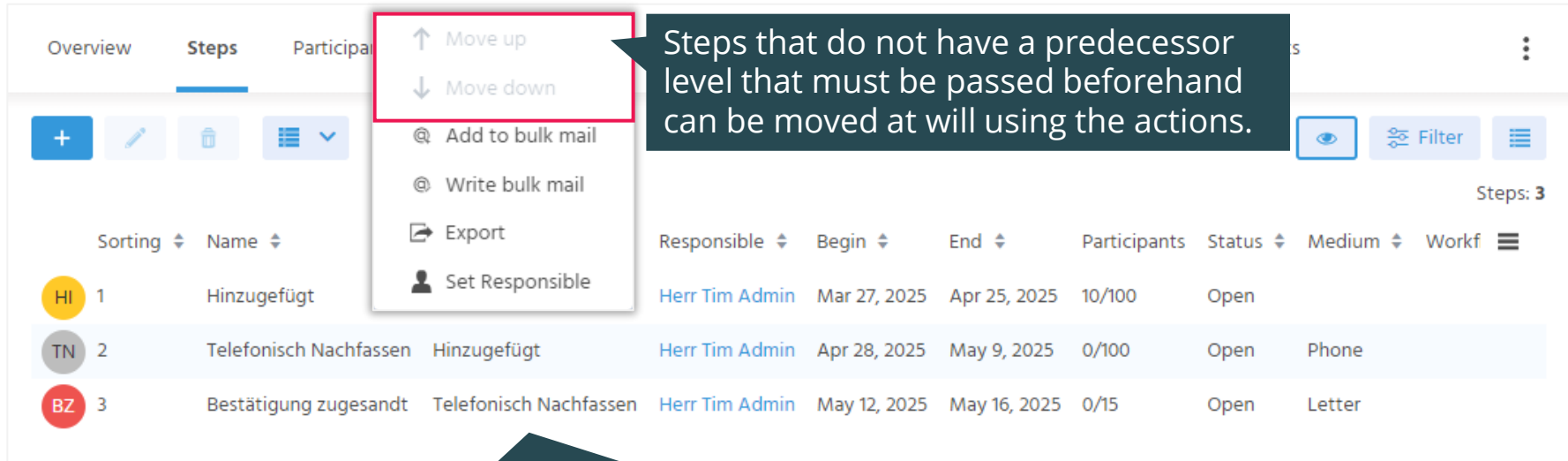
Campaign

Create steps – options in the system

- Tab “Steps” via new creation button
- “Overview” tab in the Gantt chart using the new creation button
- Preview of the campaign in the “Further Actions”: “New step”
- Preview of a step in the “Further Actions”: “New step”
- Campaign planning: “New creation”

Campaign

Sorting of the steps



Steps that do not have a predecessor level that must be passed beforehand can be moved at will using the actions.

Sorting	Name	Responsible	Begin	End	Participants	Status	Medium	Workf
HI 1	Hinzugefügt	Herr Tim Admin	Mar 27, 2025	Apr 25, 2025	10/100	Open		
TN 2	Telefonisch Nachfassen	Herr Tim Admin	Apr 28, 2025	May 9, 2025	0/100	Open	Phone	
BZ 3	Bestätigung zugesandt	Herr Tim Admin	May 12, 2025	May 16, 2025	0/15	Open	Letter	

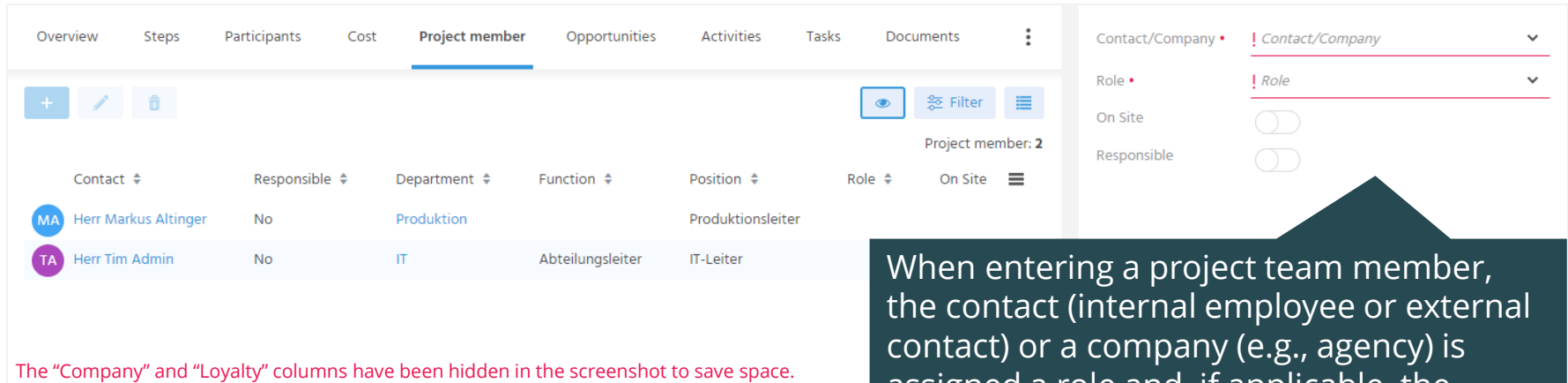
The sorting of the steps can be defined by the previous steps. This means that this must be completed before you can switch to the next step.

Campaign

Participants can no longer be added to a step if...

- the period of the campaign stage has expired.
- a maximum number of participants has been reached.

“Project team” tab – Overview of main and co-responsible persons



Overview Steps Participants Cost **Project member** Opportunities Activities Tasks Documents

+ [edit] [trash]

Project member: 2

Contact	Responsible	Department	Function	Position	Role	On Site
MA Herr Markus Altinger	No	Produktion		Produktionsleiter		
TA Herr Tim Admin	No	IT	Abteilungsleiter	IT-Leiter		

When entering a project team member, the contact (internal employee or external contact) or a company (e.g., agency) is assigned a role and, if applicable, the indicator “on site” and/or “responsible.”

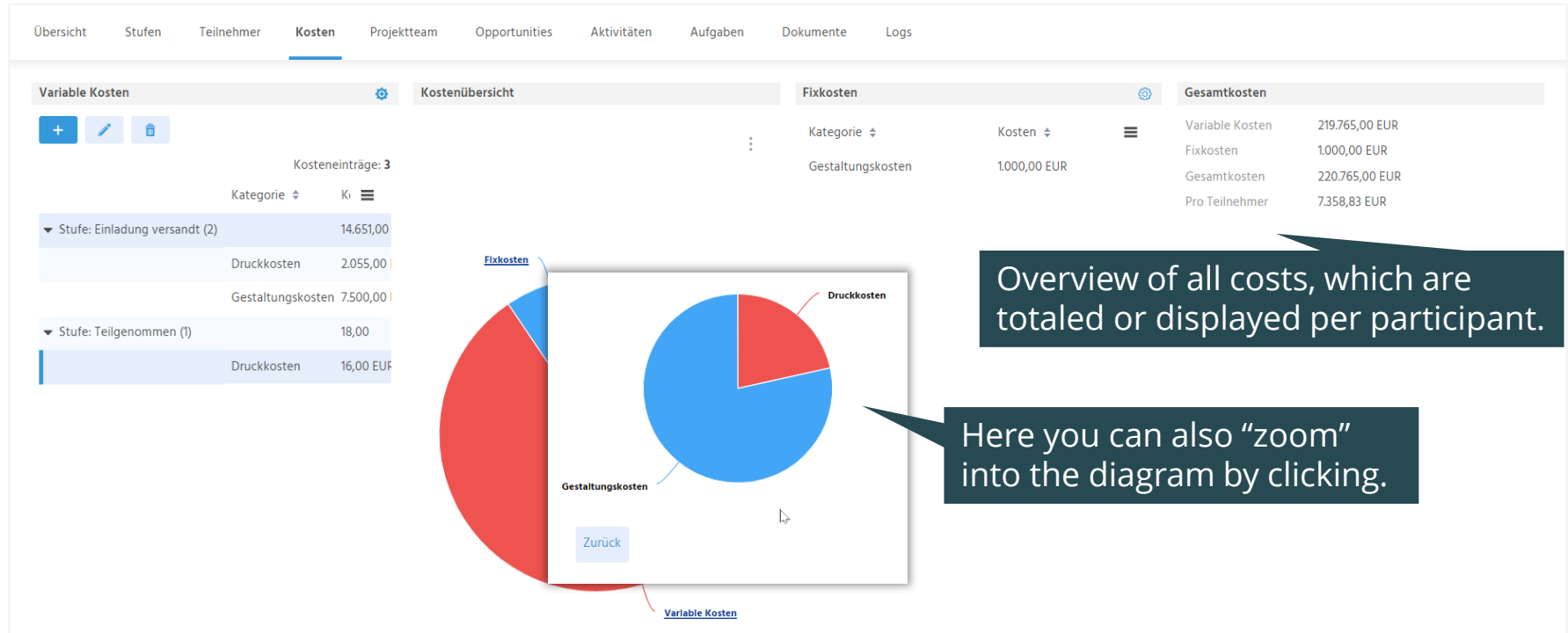
The “Company” and “Loyalty” columns have been hidden in the screenshot to save space.



The list of roles can be customized by the administrator.

Campaign

"Cost" tab



Campaign

“Cost” tab – Variable costs

Variable costs can be specified per step in the campaign. The costs are totaled per participant.

×

Kampagnen Stufe • ! *Kampagnen Stufe* ▼

Kategorie • ! *Kategorie* ▼

Kosten pro Teilnehmer *Kosten pro Teilnehmer*

Währung EUR

The following fields are available when creating new variable costs:

- Campaign step
- Category
- Costs per participant
- Currency: Automatically filled with the currency from the campaign and cannot be changed

Campaign

"Cost" tab – Fixed costs

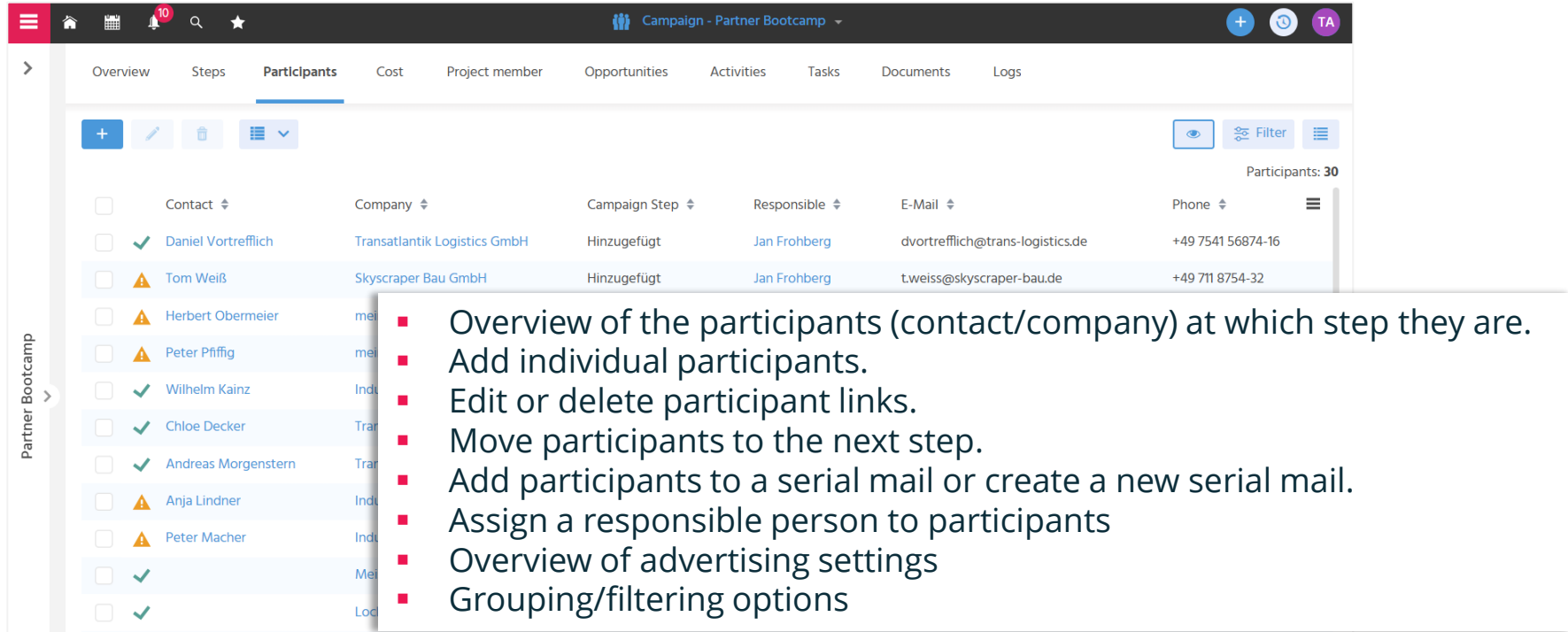
Fixed costs that are incurred once per campaign can be recorded.

Category •	! Category
Cost	Cost
Currency	EUR

The following fields are available when creating new fixed costs:

- Category
- Cost category
- Currency: Automatically filled with the currency from the campaign and cannot be changed

Participant administration in the “Participants” tab



Contact	Company	Campaign Step	Responsible	E-Mail	Phone
☐ Daniel Vortrefflich	Transatlantik Logistics GmbH	Hinzugefügt	Jan Froberg	dvortrefflich@trans-logistics.de	+49 7541 56874-16
☐ Tom Weiß	Skyscraper Bau GmbH	Hinzugefügt	Jan Froberg	t.weiss@skyscraper-bau.de	+49 711 8754-32
☐ Herbert Obermeier	mei				
☐ Peter Pfiffig	mei				
☐ Wilhelm Kainz	Indu				
☐ Chloe Decker	Tran				
☐ Andreas Morgenstern	Tran				
☐ Anja Lindner	Indu				
☐ Peter Macher	Indu				
☐	Mei				
☐	Loc				

- Overview of the participants (contact/company) at which step they are.
- Add individual participants.
- Edit or delete participant links.
- Move participants to the next step.
- Add participants to a serial mail or create a new serial mail.
- Assign a responsible person to participants
- Overview of advertising settings
- Grouping/filtering options

Excursus to the Context „Contact”/”Company”



Add participants: Serial Action contact/company

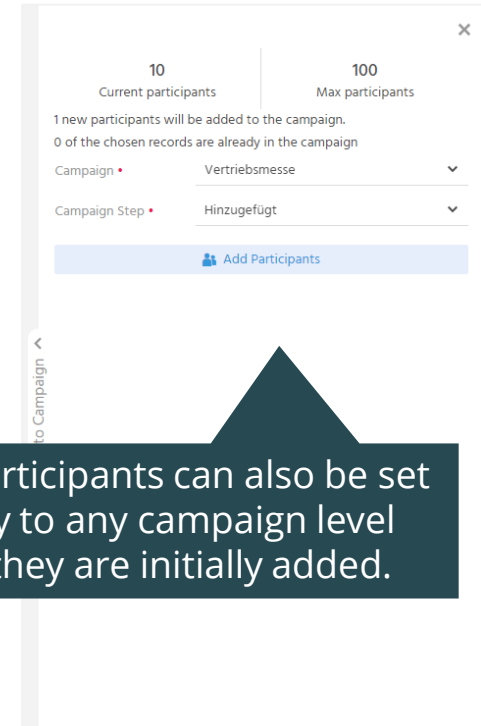
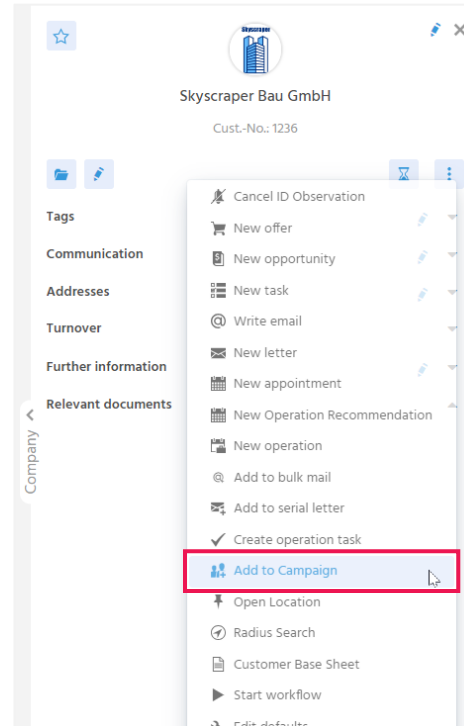
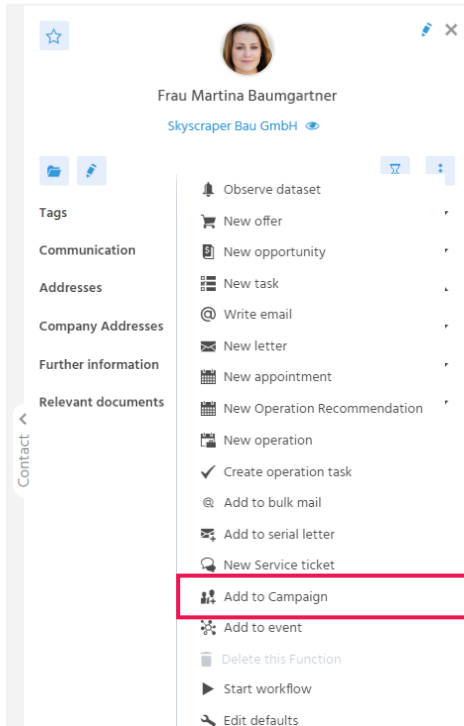
The screenshot displays the ADITO interface. On the left, a table lists contacts with columns for selection, picture, salutation, title, first name, last name, company, email, phone, and address. A context menu is open over the 'Serial Actions' button, showing options like 'Create operation task', 'Add to Campaign', 'Add to event', 'Add to bulk mail', 'Add to serial letter', 'Export', 'Start workflow', and 'Set attribute'. The 'Add to Campaign' option is highlighted. On the right, a campaign configuration window is shown with fields for 'Current participants' (0) and 'Max participants' (0). Below these are dropdowns for 'Campaign' and 'Campaign Step', both showing error messages: '! Campaign' and '! Campaign Step'. A blue button 'Add Participants' is at the bottom of the window. A dark blue callout box with white text states: 'Only campaigns with a valid term or whose status is not completed are displayed.' Another dark blue callout box with white text states: 'If the maximum number of participants in a step is exceeded, this selection cannot be added and must be restricted manually.'

	Picture	Salutation	Title	Firstname	Lastname	Comp	E-Mail	Phone	Address
☒	SA	Herr		Steffen	Abend	privat	steffenabend1903@gmx.de	+49 8137 123456	Kirchstraße 17 - DE 85238 Petershausen
☒		Herr		Tim	Admin	meine	tadmin@meinefirma.adito.de		
☒	TA	Herr		Tasuku	Akiyama	Rixne	akiyama@rixnerrupp.de		
☒		Herr		Markus	Altinger	Firme			
☒		Herr		Markus	Altinger	Industrial Steel AG	maltinger@industrial-steel.de		
☒		Herr		Markus	Altinger	Skyscraper Bau GmbH	maltinger@skyscraper-bau.de		
☒	LA	Frau		Lea	Amsel	privat			Mühlweg 3a - DE 86899 Landsberg am Lech
☒	BA	Frau		Belle	Angéilil	privat			Schweizersbildstraße 10 - CH 8207 Schaffhausen
☒	FA	Frau		Feorie	Awate	Ertl GmbH	awate@ertl.de	+49 34772 5711	Parkstraße 6 - DE 04916 Schönewalde
☒	MB	Herr		Marcel	Bader	Lichtenstein Document Solutions GmbH	m.bader@marselektronikgmbh.de		Gottthardstraße 1 -
☒	MB	Herr		Marcel	Bader	Mars Elektronik GmbH	marcel.bader@marselektronikgmbh.de	+49 8142 8910	Puchheimer Straße
☒	FB	Herr	MdB	Frank	Baer	Fischer AG	baer@fischer.tr	+49 491 7684643	Brenneckestraße 1
☒	MB	Frau		Mandy	Barth	Rixner und Rupp SE	barth@rixnerrupp.de	+49 6731 368828	Schloßfreiheit 1A -
☒	AB	Herr		Anton	Bauer	privat	anton.bauer@gmx.de		Obere Mühlbrücke
☒	DB	Herr		David	Bauer	Anderson-Dibbert			2 Park Lane - GB L
☒		Frau		Martina	Baumgartner	Skyscraper Bau GmbH	m.baumgartner@skyscraper-bau.de	+49 711 8754-22	Rathausallee 50 - DE 22846 Norderstedt



Excursus to the Context „Contact“/“Company“

Add participants: Individual contacts/companies



Campaign



Add participants: Individual contacts/companies directly in the campaign

The screenshot shows the ADITO Campaign interface. The 'Participants' tab is selected. A red box highlights the '+' button in the top left of the participants list. A red arrow points from this button to a red box in the right sidebar, which contains a dropdown menu for adding a participant. The dropdown menu is open, showing options like 'Participant' and 'Responsible'.

Contact	Company	Campaign Step	Responsible	E-Mail	
☐ ✓ Daniel Vortrefflich	Transatlantik Logistics GmbH	Hinzugefügt	Jan Froberg	dvortrefflich@trans-logistics.de	+45
☐ ⚠ Tom Weiß	Skyscraper Bau GmbH	Hinzugefügt	Jan Froberg	t.weiss@skyscraper-bau.de	+45
☐ ⚠ Herbert Obermeier	meineFirma GmbH	Hinzugefügt	Jan Froberg	hobermeier@meinefirma.adito.de	+45
☐ ⚠ Peter Pfiffig	meineFirma GmbH	Hinzugefügt	Franz Müller	ppfiffig@meinefirma.adito.de	+45
☐ ✓ Wilhelm Kainz	Industrial Steel AG	Hinzugefügt	Birgit Leicht	wkainz@industrial-steel.de	+45
☐ ✓ Chloe Decker	Transatlantik Logistics GmbH	Hinzugefügt	Franz Müller	cdecker@trans-logistics.de	+45
☐ ✓ Andreas Morgenstern	Transatlantik Logistics GmbH	Hinzugefügt	Birgit Leicht	amorgenstern@trans-logistics.de	+45
☐ ⚠ Anja Lindner	Industrial Steel AG	Hinzugefügt	Franz Müller	alindner@industrial-steel.de	+45
☐ ⚠ Peter Macher	Industrial Steel AG	Hinzugefügt	Birgit Leicht	pmacher@industrial-steel.de	+45

Participants: 30

0 Current participants 100 Max participants

Campaign • Partner Bootcamp

Campaign Step • Hinzugefügt

Participant • ! Participant

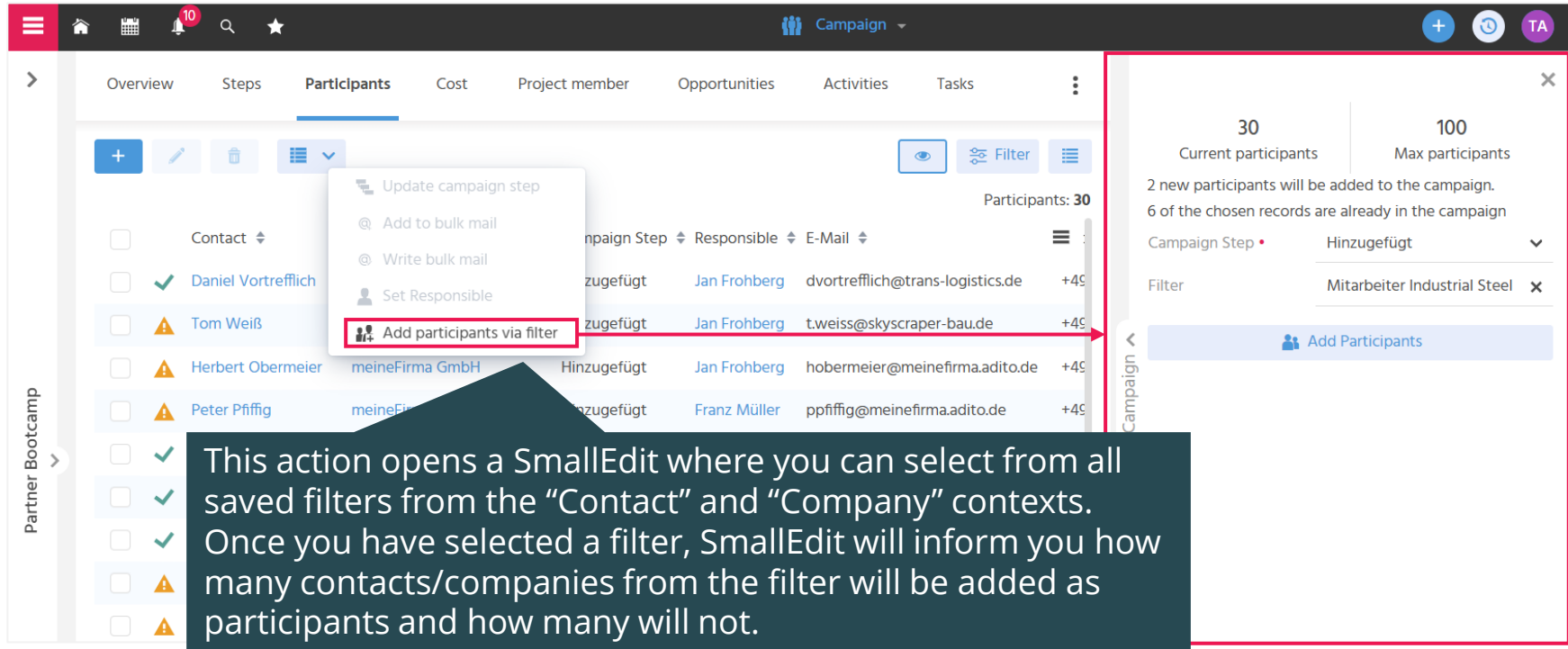
Responsible Tim Admin

The addition of a participant to a campaign is always documented in an activity.



Campaign

Add participants via filter



The screenshot shows the ADITO Campaign interface. The 'Participants' tab is selected, displaying a list of participants. A context menu is open over the list, with the option 'Add participants via filter' highlighted. A red box highlights this option, and a red arrow points from it to a sidebar panel on the right. The sidebar panel shows the current number of participants (30) and the maximum allowed (100). It also displays a message: '2 new participants will be added to the campaign. 6 of the chosen records are already in the campaign.' Below this, there is a section for 'Campaign Step' and 'Filter', with 'Hinzugefügt' and 'Mitarbeiter Industrial Steel' selected. At the bottom of the sidebar, there is a button labeled 'Add Participants'.

Partner Bootcamp

Overview Steps **Participants** Cost Project member Opportunities Activities Tasks

+ Edit Delete Filter

Update campaign step

Add to bulk mail

Write bulk mail

Set Responsible

Add participants via filter

Participants: 30

30 Current participants | 100 Max participants

2 new participants will be added to the campaign.
6 of the chosen records are already in the campaign

Campaign Step • Hinzugefügt

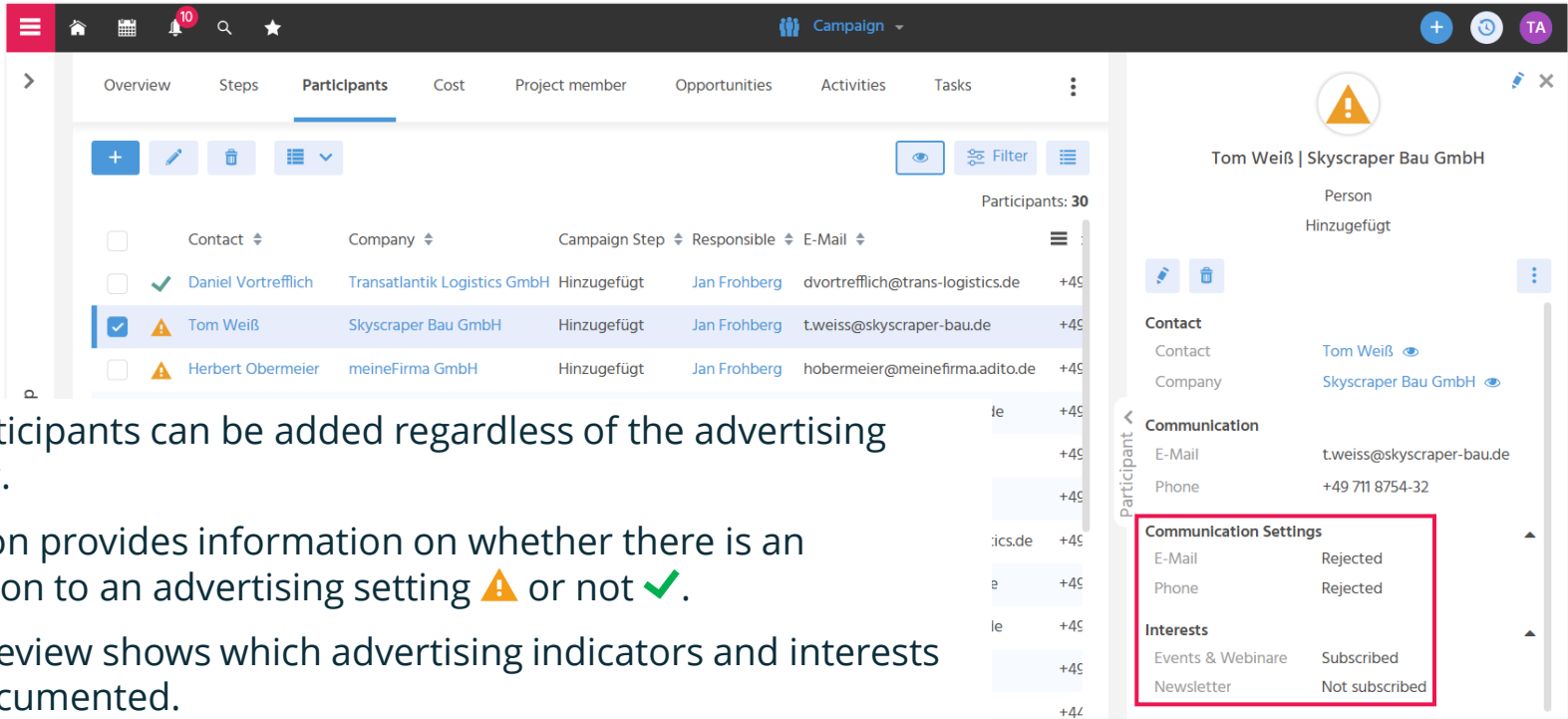
Filter Mitarbeiter Industrial Steel

Add Participants

This action opens a SmallEdit where you can select from all saved filters from the "Contact" and "Company" contexts. Once you have selected a filter, SmallEdit will inform you how many contacts/companies from the filter will be added as participants and how many will not.

Campaign

Recognizing the participants' advertising settings



The screenshot displays the ADITO Campaign interface. The top navigation bar includes icons for home, calendar, notifications (10), search, and a star. The main header shows 'Campaign' with a dropdown menu and user avatars. The 'Participants' tab is selected, showing a list of participants with columns for Contact, Company, Campaign Step, Responsible, E-Mail, and a status icon. The list includes Daniel Vortrefflich, Tom Weiß (highlighted with a yellow warning icon), and Herbert Obermeier. A detailed view of Tom Weiß is shown on the right, including his contact information and advertising settings. The 'Communication Settings' section is highlighted with a red box, showing 'E-Mail' and 'Phone' as 'Rejected', and 'Interests' as 'Subscribed' for 'Events & Webinar' and 'Not subscribed' for 'Newsletter'.

Contact	Company	Campaign Step	Responsible	E-Mail	Status
✓ Daniel Vortrefflich	Transatlantik Logistics GmbH	Hinzugefügt	Jan Froberg	dvortrefflich@trans-logistics.de	✓
⚠ Tom Weiß	Skyscraper Bau GmbH	Hinzugefügt	Jan Froberg	t.weiss@skyscraper-bau.de	⚠
⚠ Herbert Obermeier	meineFirma GmbH	Hinzugefügt	Jan Froberg	hobermeier@meinefirma.adito.de	⚠

Tom Weiß | Skyscraper Bau GmbH
Person
Hinzugefügt

Contact
Contact: Tom Weiß
Company: Skyscraper Bau GmbH

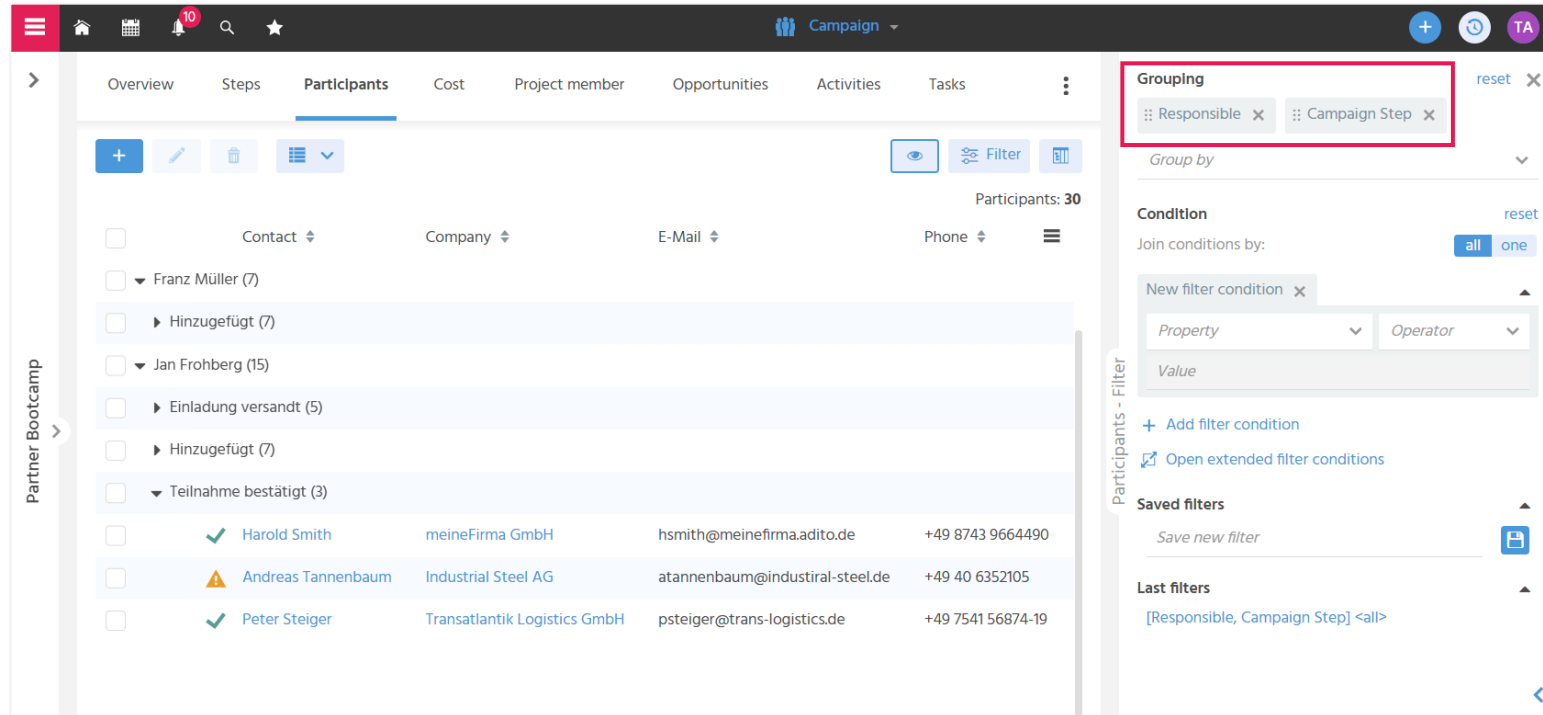
Communication
E-Mail: t.weiss@skyscraper-bau.de
Phone: +49 711 8754-32

Communication Settings
E-Mail: Rejected
Phone: Rejected

Interests
Events & Webinar: Subscribed
Newsletter: Not subscribed

- All participants can be added regardless of the advertising setting.
- The icon provides information on whether there is an objection to an advertising setting ⚠ or not ✓.
- The preview shows which advertising indicators and interests are documented.

Filtering/grouping participants



The screenshot displays the ADITO Campaign interface. The top navigation bar includes a menu icon, home, calendar, notifications (10), search, and star icons. The main header shows 'Campaign' with a dropdown arrow. Below this, a sub-header contains tabs: Overview, Steps, Participants (selected), Cost, Project member, Opportunities, Activities, and Tasks. The 'Participants' tab is active, showing a list of participants with columns for Contact, Company, E-Mail, and Phone. The list includes entries like 'Franz Müller (7)', 'Hinzugefügt (7)', 'Jan Froberg (15)', 'Einladung versandt (5)', 'Hinzugefügt (7)', and 'Teilnahme bestätigt (3)'. Below these are individual participant details for Harold Smith, Andreas Tannenbaum, and Peter Steiger. On the right side, a 'Grouping' panel is open, showing 'Group by' options (Responsible, Campaign Step) and a 'Condition' section for filtering. The 'Condition' section includes a 'Join conditions by' dropdown (all, one) and a 'New filter condition' section with 'Property' and 'Operator' dropdowns. Below this are 'Add filter condition' and 'Open extended filter conditions' buttons. The 'Saved filters' section shows 'Save new filter' and a 'Last filters' section with '[Responsible, Campaign Step] <all>'. A red box highlights the 'Grouping' panel.

Participants: 30

Contact	Company	E-Mail	Phone
▼ Franz Müller (7)			
▶ Hinzugefügt (7)			
▼ Jan Froberg (15)			
▶ Einladung versandt (5)			
▶ Hinzugefügt (7)			
▼ Teilnahme bestätigt (3)			
✓ Harold Smith	meineFirma GmbH	hsmith@meinefirma.adito.de	+49 8743 9664490
⚠ Andreas Tannenbaum	Industrial Steel AG	atannenbaum@industrial-steel.de	+49 40 6352105
✓ Peter Steiger	Transatlantik Logistics GmbH	psteiger@trans-logistics.de	+49 7541 56874-19

Grouping reset X

Responsible X Campaign Step X

Group by

Condition reset

Join conditions by: all one

New filter condition X

Property Operator

Value

+ Add filter condition

Open extended filter conditions

Saved filters

Save new filter

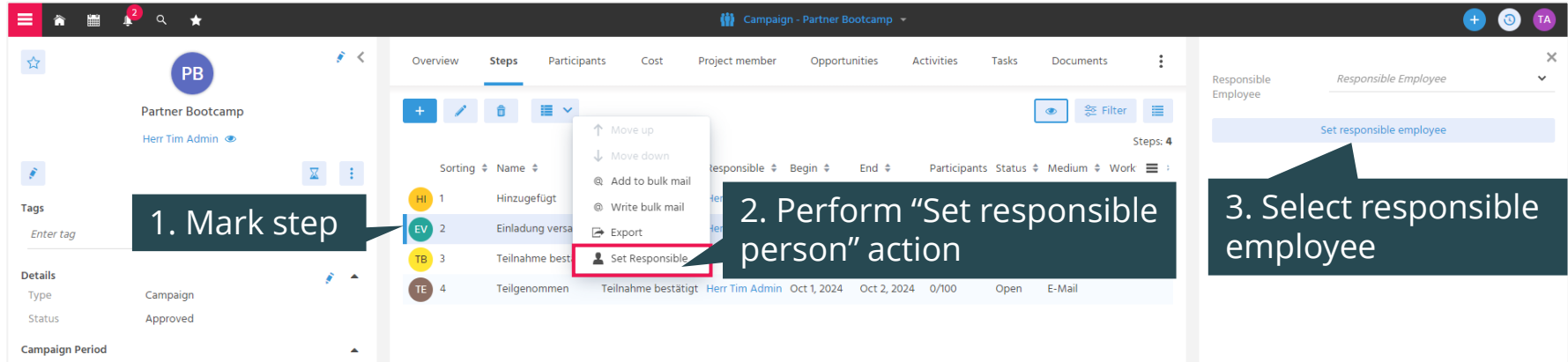
Last filters

[Responsible, Campaign Step] <all>

Campaign

Set responsible employee: in the “Steps” tab

The employee responsible should be set for the participants in a step. So that, for example, the participants of a step are processed by one employee as part of a marketing campaign.



1. Mark step

2. Perform “Set responsible person” action

3. Select responsible employee

Step	Name	Responsible	Begin	End	Participants	Status	Medium	Work
1	Hinzugefügt							
2	Einladung vers	Herr Tim Admin	Oct 1, 2024	Oct 2, 2024	0/100	Open	E-Mail	
3	Teilnahme best							
4	Teilgenommen							

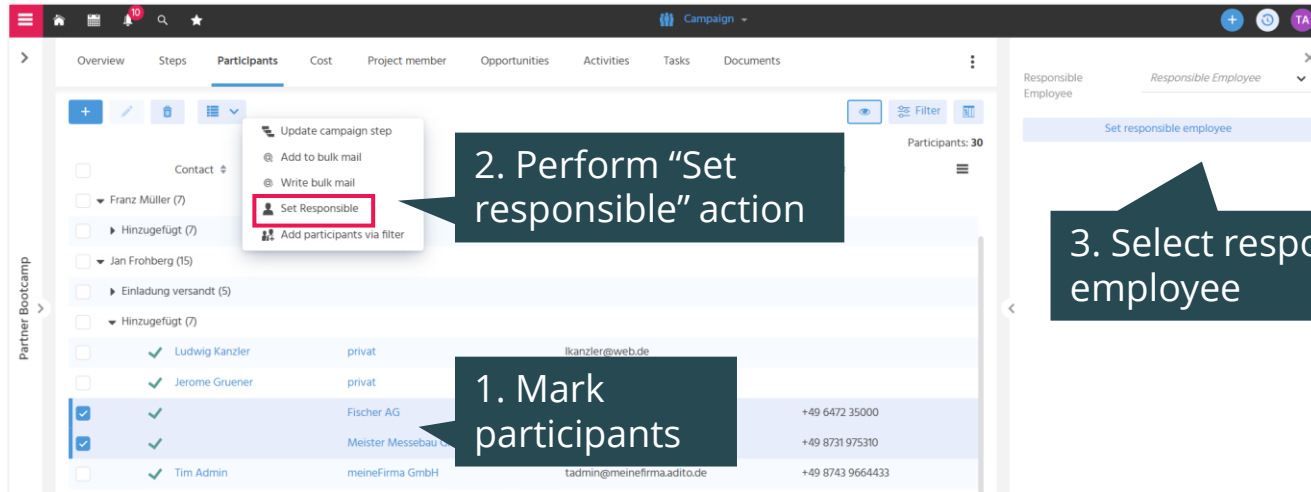
4. The “Participants” tab opens, here the employee responsible has been added to the participants of the selected step.

Campaign

Set responsible employee: in the “Participants” tab

The participants in a step should be divided among several responsible employees.

So that, for example, several call agents process the subscribers of a step during a telephone campaign. Or the subscribers of a call agent can be redistributed to other call agents.



2. Perform “Set responsible” action

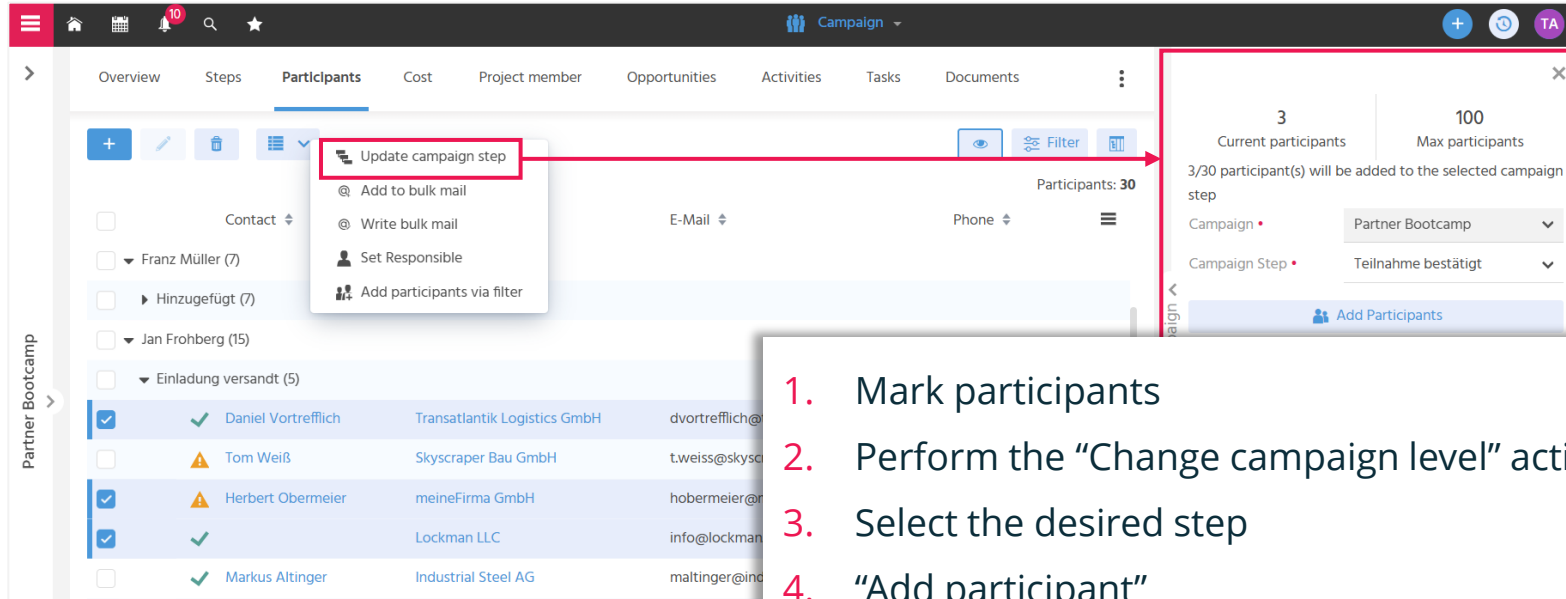
3. Select responsible employee

1. Mark participants

Partner Bootcamp	Contact	Company	Phone
☐	Franz Müller (7)		
☐	Hinzugefügt (7)		
☐	Jan Froberg (15)		
☐	Einladung versandt (5)		
☐	Hinzugefügt (7)		
☒	Ludwig Kanzler	privat	+49 6472 35000
☒	Jerome Gruener	privat	+49 8731 975310
☒	Fischer AG		+49 8743 9664433
☒	Meister Messebau		
☒	Tim Admin	meineFirma GmbH	

Campaign

Taking participants to the next step



Overview Steps **Participants** Cost Project member Opportunities Activities Tasks Documents

Participants: 30

Update campaign step

- Add to bulk mail
- Write bulk mail
- Set Responsible
- Add participants via filter

Current participants: 3 | Max participants: 100

3/30 participant(s) will be added to the selected campaign step

Campaign: Partner Bootcamp

Campaign Step: Teilnahme bestätigt

Add Participants

Contact	E-Mail	Phone
☐ Franz Müller (7)		
☐ Hinzugefügt (7)		
☐ Jan Froberg (15)		
☐ Einladung versandt (5)		
☒ Daniel Vortrefflich	Transatlantik Logistics GmbH	dvortrefflich@
☐ Tom Weiß	Skyscraper Bau GmbH	t.weiss@skysc
☒ Herbert Obermeier	meineFirma GmbH	hobermeier@
☒ Lockman LLC	info@lockman	
☐ Markus Altinger	Industrial Steel AG	maltinger@ind

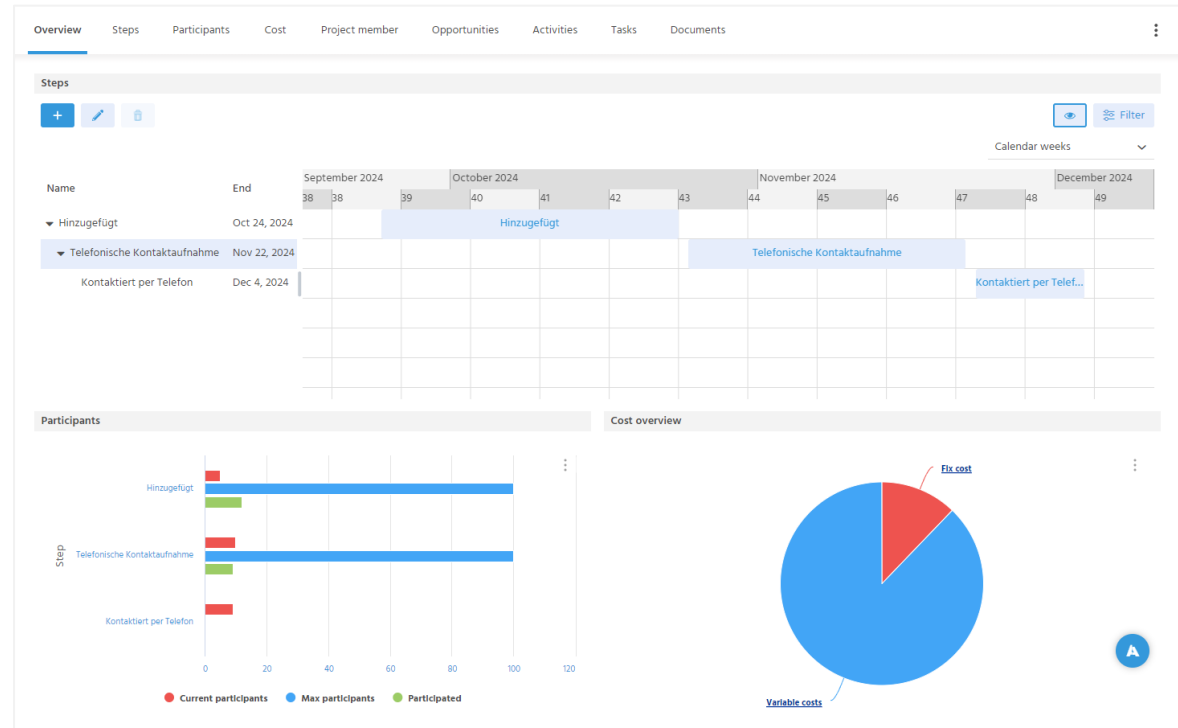
1. Mark participants
 2. Perform the “Change campaign level” action
 3. Select the desired step
 4. “Add participant”
- Each campaign level change is documented on the participant with an activity

Campaign

“Overview” tab

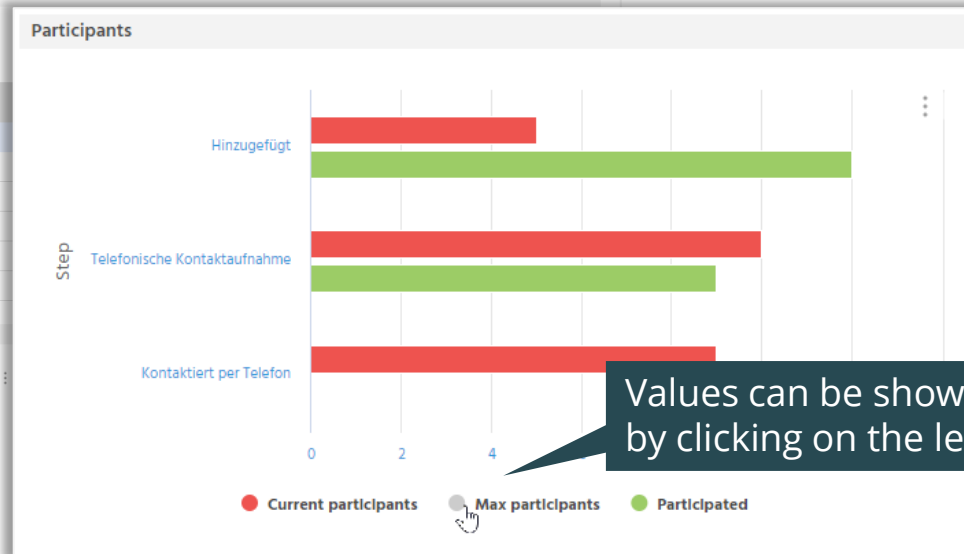
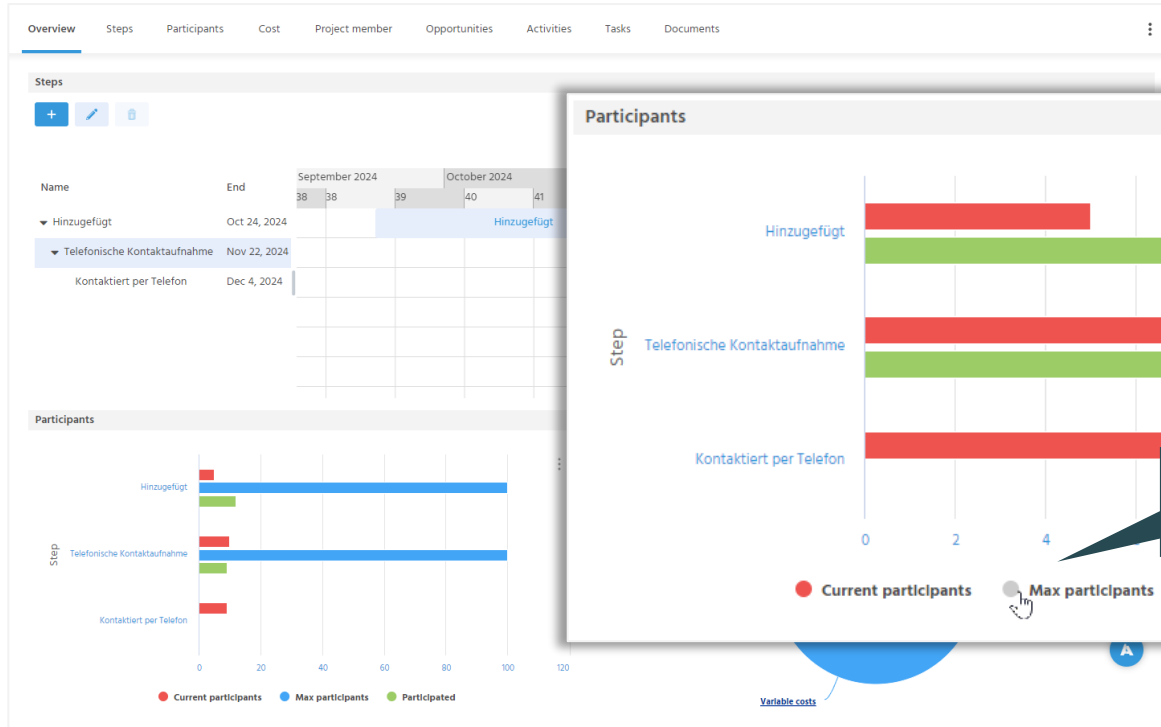
Graphic representation of the

- Steps
- Participants per step
- Costs



Campaign

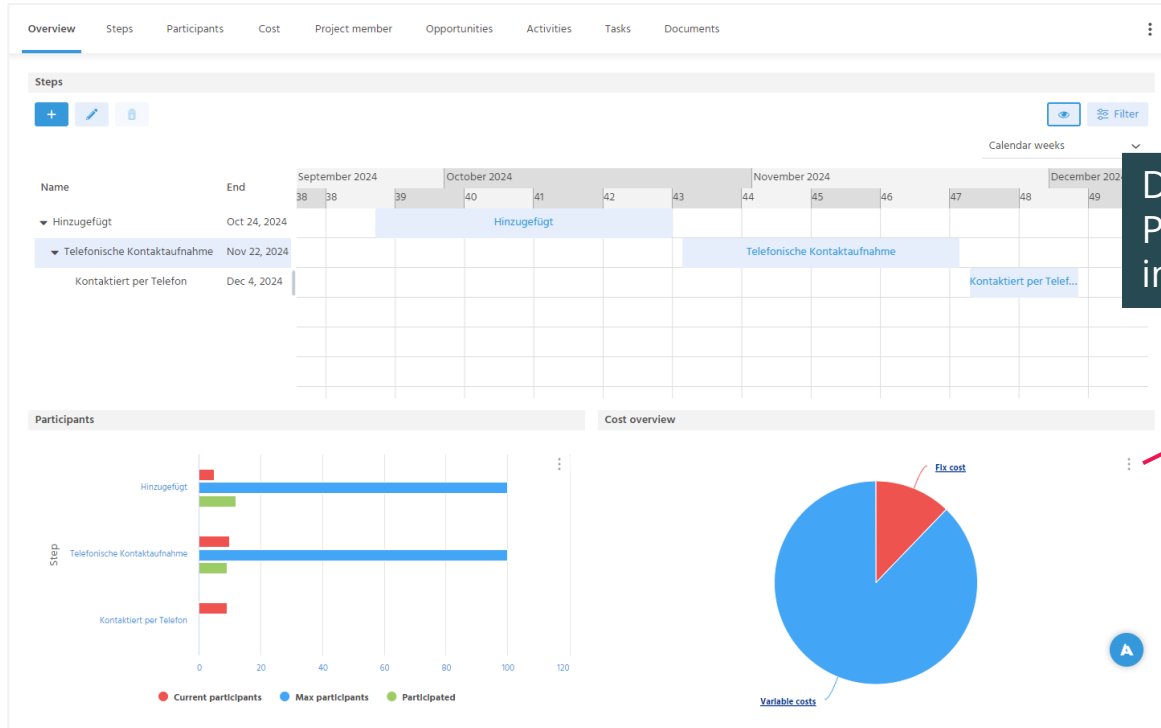
“Overview” tab – Behavior of the diagrams



Values can be shown and hidden by clicking on the legend.

Campaign

“Overview” tab – Behavior of the diagrams



Diagrams can be downloaded as PNG, JPEG, PDF or SVG and inserted into a presentation, for example.

View in full screen

Print chart

Download PNG

Download JPEG

Download PDF

Download SVG

Campaign

“Opportunities” tab – touchpoints on sales topics

Overview of current opportunities for all participants in a campaign

Overview Steps Participants Cost Project member Opportunities Activities Tasks Documents											
+ Observe dataset Cancel ID Observation Export Filter											
Opportunities: 3											
☐	Number	Title	Company	Classification	Days inactive	Created on	Start of the opportunity	Target date of the service	Phase	Status	Proç
☐	PF 1011	Projekt - Fortsetzung	Industrial Steel AG	AB	172	Oct 1, 2023, 2:00:00 AM	Mar 1, 2024	Aug 29, 2025	Offer	Open	60%
☐	SP 1003	Skyscraper / Pilotprojekt	Skyscraper Bau GmbH	BC	207	Aug 10, 2023, 1:22:17 PM	May 3, 2024	Dec 5, 2024	Qualification	Open	20%
☐	TI 1004	Transatlantik Initialprojekt	Transatlantik Logistics GmbH	BC	35	Aug 30, 2023, 1:22:17 PM	May 3, 2024	May 6, 2025	Qualification	Open	20%

Campaign



“Participants” tab – touchpoints on sales topics

Partner Bootcamp

Overview Steps **Participants** Cost Project member Opportunities Activities Tasks Documents

Participants: 30

Contact	Company	Campaign Step	Responsible	E-mail	Phone
☐ ✓ Birgit Leicht	meineFirma GmbH	Hinzugefügt	Birgit Leicht	bleicht@meinefirma.adito.de	+49 8743 9664732
☐ ✓ Anke Herrmann	Skyscraper Bau GmbH	Hinzugefügt	Birgit Leicht	a.herrmann@skyscraper-bau.de	+49 711 8754-25
☐ ✓ Martina Baumgartner	Skyscraper Bau GmbH	Hinzugefügt	Franz Müller	m.baumgartner@skyscraper-bau.de	+49 711 8754-22
☒ ✓ Markus Altinger	Industrial Steel AG	Hinzugefügt	Jan Froberg	maltinger@industrial-steel.de	+49 40 6352-109
☐ ✓ Harold Smith	meineFirma GmbH	Hinzugefügt	Jan Froberg	hsmith@meinefirma.adito.de	+49 8743 9
☐ ⚠ Andreas Tannenbaum	Industrial Steel AG	Hinzugefügt	Jan Froberg	atannenbaum@industrial-steel.de	+49 40 635
☐ ✓ Peter Steiger	Transatlantik Logistics GmbH	Hinzugefügt	Jan Froberg	psteiger@trans-logistics.de	+49 7541 5
☐ ✓ Ludwig Kanzler	privat	Hinzugefügt	Jan Froberg	lkanzler@web.de	
☐ ✓ Erik Pfeiffer	Skyscraper Bau GmbH	Hinzugefügt	Birgit Leicht	e.pfeiffer@skyscraper-bau.de	+49 711 875
☐ ✓ Lisa Sommer	meineFirma GmbH	Hinzugefügt	Franz Müller	lsommer@meinefirma.adito.de	+49 8743 9664333
☐ ✓ Jerome Gruener	privat	Hinzugefügt	Jan Froberg	jgruener@web.de	
☐ ✓	Fischer AG				
☐ ✓	Meister Messebau GmbH				
☐ ✓ Tim Admin	meineFirma GmbH				

Markus Altinger | Industrial Steel AG

Person
Hinzugefügt

New opportunity

Contact
Contact
Company
Communication

Produktinformation... Subscribed
Newsletter Subscribed
Events & Webinar Subscribed

Opportunities

ID	Name	Status
1002	Erstprojekt	Negotiation
1011	Projekt - Fortsetzung	Offer

Display of current opportunities in the preview for campaign participants.



Campaign

“Activities” tab

OverviewStepsParticipantsCostProject memberOpportunities**Activities**TasksDocuments

+

Cancel ID Observation

Observe dataset

Set attribute

Export

Filter

Filter content...Activities: 2

Apr 5, 2024, 11:14 AM

Wichtige Teilnehmer einladen (Herr Tim Admin)

Hallo Zusammen, bitte ladet alle eure A Kontakte ein für das Event. Grüße Euer Markteting;

Oct 19, 2023, 3:15 AM

Erste Planung für die Kampagne gelaufen (Herr Tim Admin)

Hallo zusammen, wir sind sehr froh euch mitteilen zu dürfen das wir die ersten Vorbereitungen für die Messe geplant haben. Weitere Infos werden euch zum passenden Zeitpunkt zugespielt. Grüße Das Marketing

Here you will find a list of all activities that are linked to the campaign.
This view can also be filtered.

37



Campaign

"Tasks" tab

OverviewStepsParticipantsCostProject memberOpportunitiesActivitiesTasksDocumentsLogs

+

✓ Set completed

🔔 Observe dataset

🚫 Cancel ID Observation

👁️

Filter

Tasks: 1

☐

Oct 23, 2024, 9:02 AM

●

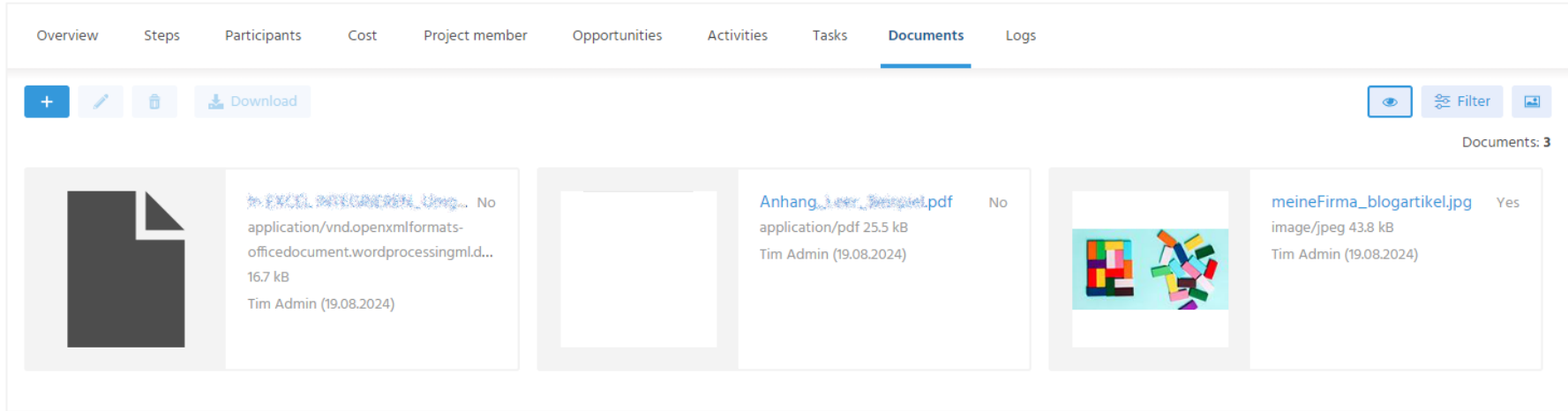
Bitte alle Teilnehmer hinzufügen

Für diese Kampagne, bitte die Teilnehmer bis zum Stichtag hinzufügen. Stichtag: ...

new

All tasks linked to the campaign are listed in this tab.

“Documents” tab



Document Name	MIME Type	Size	Uploaded By	Date	Open
EXCEL_DOCUMENT_1.docx	application/vnd.openxmlformats-officedocument.wordprocessingml.d...	16.7 kB	Tim Admin	19.08.2024	No
Anhang_1.pdf	application/pdf	25.5 kB	Tim Admin	19.08.2024	No
meineFirma_blogartikel.jpg	image/jpeg	43.8 kB	Tim Admin	19.08.2024	Yes

Here you will find an overview of all documents that have been saved for the campaign.

- Images and PDFs can be displayed directly in the tab using the “Open” action (in the preview).
- All files can be downloaded and opened using the “Download” action.

Campaign



Deleting

Campaigns can no longer be deleted once participants have been added or links to other contexts (e.g. activities) exist.



Campaign



Exports

You can export CSV information from campaigns either

- per campaign (filter view) or
- per campaign step ("Steps" tab).

To do this, you need an export template in advance, which must be created administratively in the system.

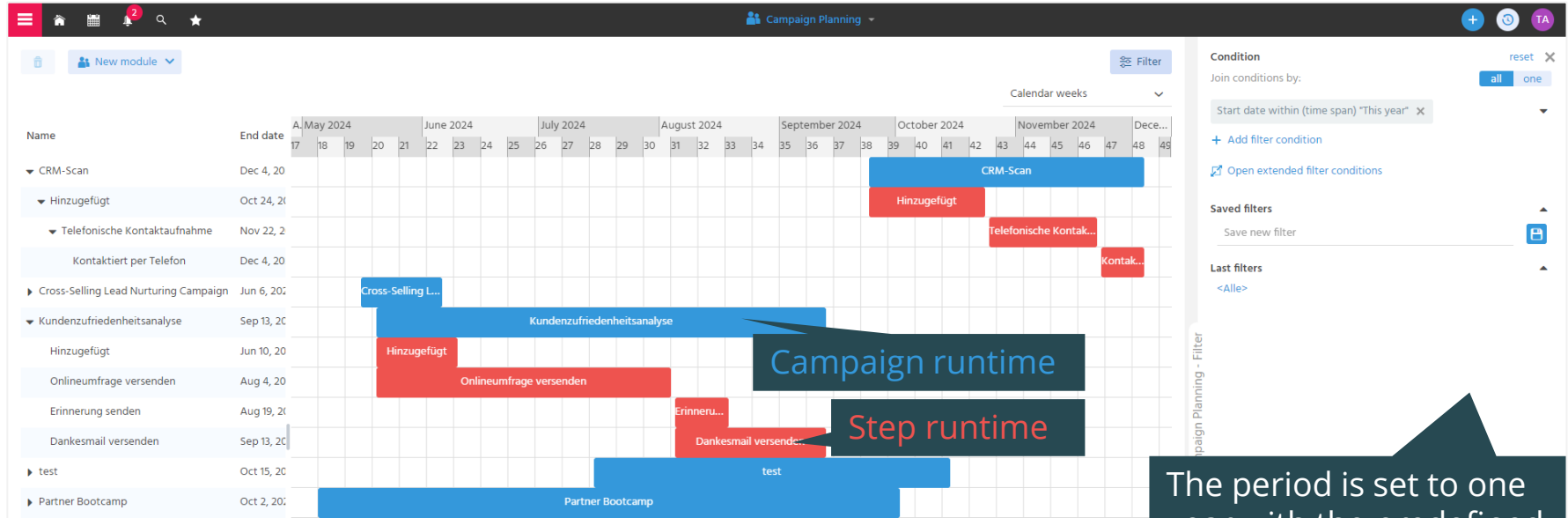


Campaign Planning



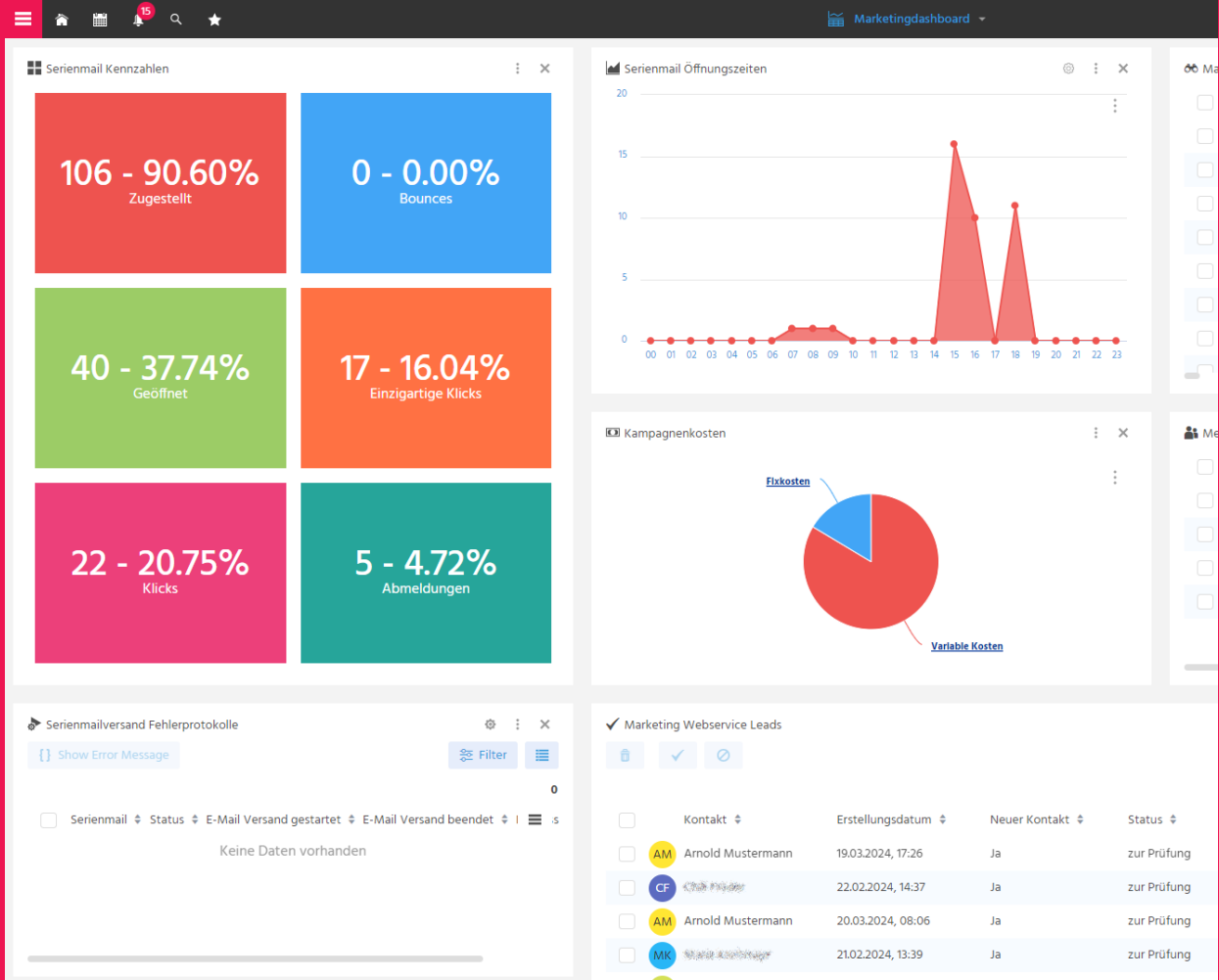
Campaign Planning

Chronological overview of all current campaigns and their steps



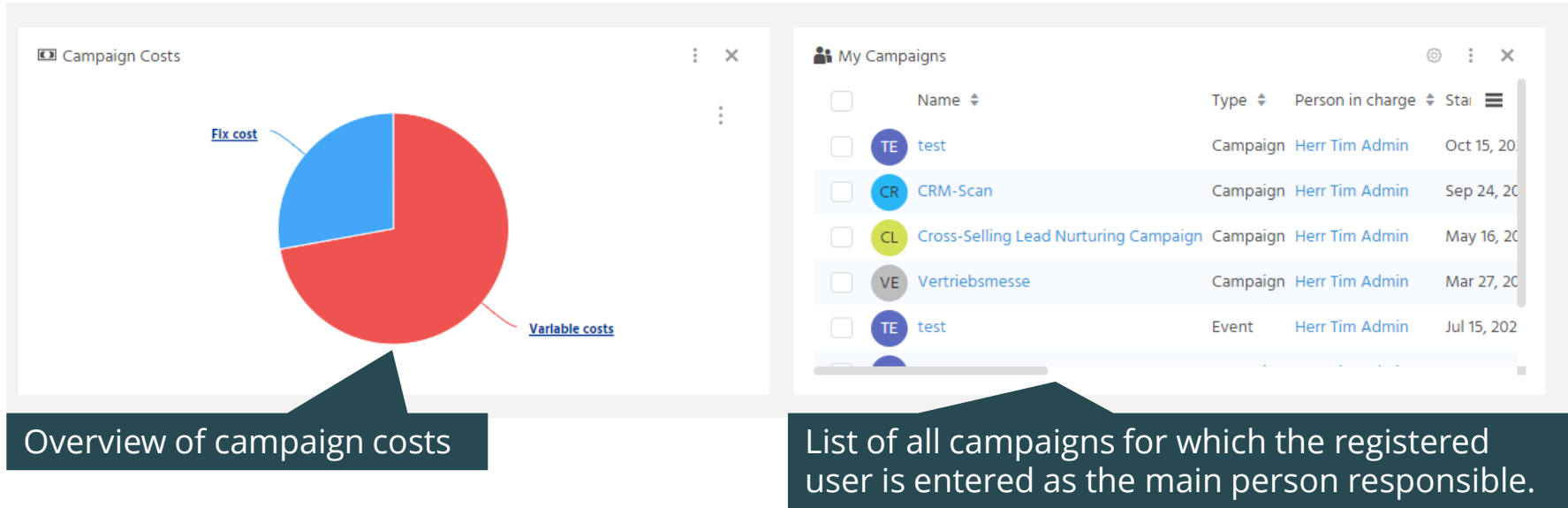
The period is set to one year with the predefined filter, which can be adjusted as required.

Marketing Dashboard



Marketing Dashboard

Key figures for analyzing campaigns



**Marketing
specifics in
contact or
company**



Marketing specifics in contact



Information in the...

Mainview

- Tab “360 degrees”: Display of serial mails, serial letters, events, **campaigns** and questionnaires to which the contact is linked.

Actions in the...

Preview:

- Add to Campaign
To add the individual contact in each case.

Filterview:

- Add to Campaign
To add the filter result or the selected contacts in each case.



Marketing specific filters in contact



Filter criteria

- **Campaign participation**

All contacts linked to a specific campaign (regardless of the step they are currently at) are listed.

In the **extended filter** of Contact, you can also filter by other fields of the campaign:

- Campaign: Description
- Campaign: End
- Campaign: Main responsible
- Campaign: Name
- Campaign: Start
- Campaign: Status



Marketing specifics in company



Information in the...

MainView

- Tab “360 degrees”: Display of serial mails, serial letters, **campaigns** and questionnaires to which the contact is linked.

Actions in the...

Preview:

- Add to Campaign
To add the individual company in each case.

Filterview:

- Add to Campaign
To add the filter result or the selected companies in each case.

Marketing specific filters in companies



Filter criterion

- **Campaign participation**
All companies that are linked to a specific campaign (regardless of which step they are currently at) are listed.

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