



Sales – Advertising material and sample management

ADITO Software GmbH

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Screenshots

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





Agenda

- [Overview of advertising material and sample management](#)
- [Advertising material and sample dispatch process](#)
- [Create product as advertising material](#)
- [Create activity as advertising material dispatch](#)
- [Edit advertising material dispatch activity](#)
- [Edit advertising material dispatch](#)

 Workflow AdvertisingShipment
Product
Activity
**Advertising
material** Workflow must be activated Used "daily" by users

Advertising material and sample management



Overview

The following functions are available in ADITO for sending advertising material or samples:

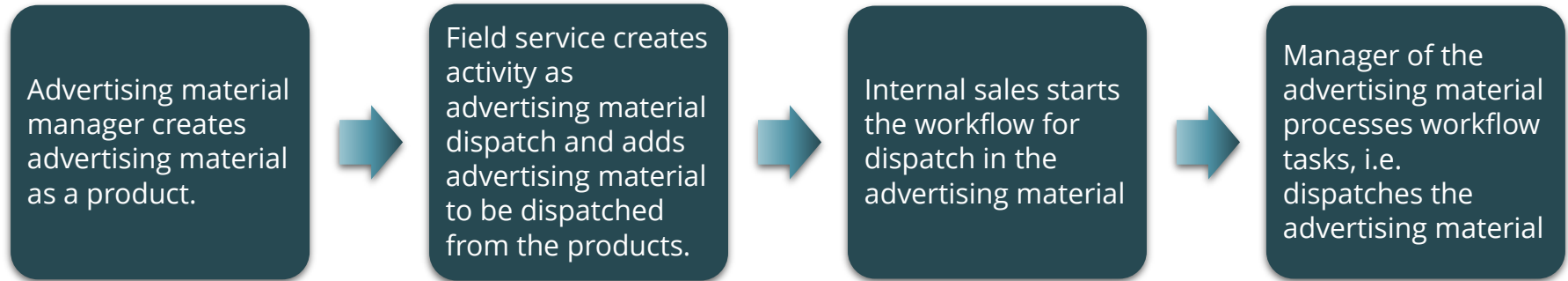
- Management of advertising materials and samples in the Context “Product” (digital advertising materials and physical advertising materials/samples)
- Creating an activity and, at the same time, advertising material and sample shipments for a person-related advertising material or sample shipment
- Overview of current advertising materials and sample shipments (delivered in person, digitally, or by mail) in a separate filter view and in the 360-degree view of the contact (recipient)
- Creating workflow tasks



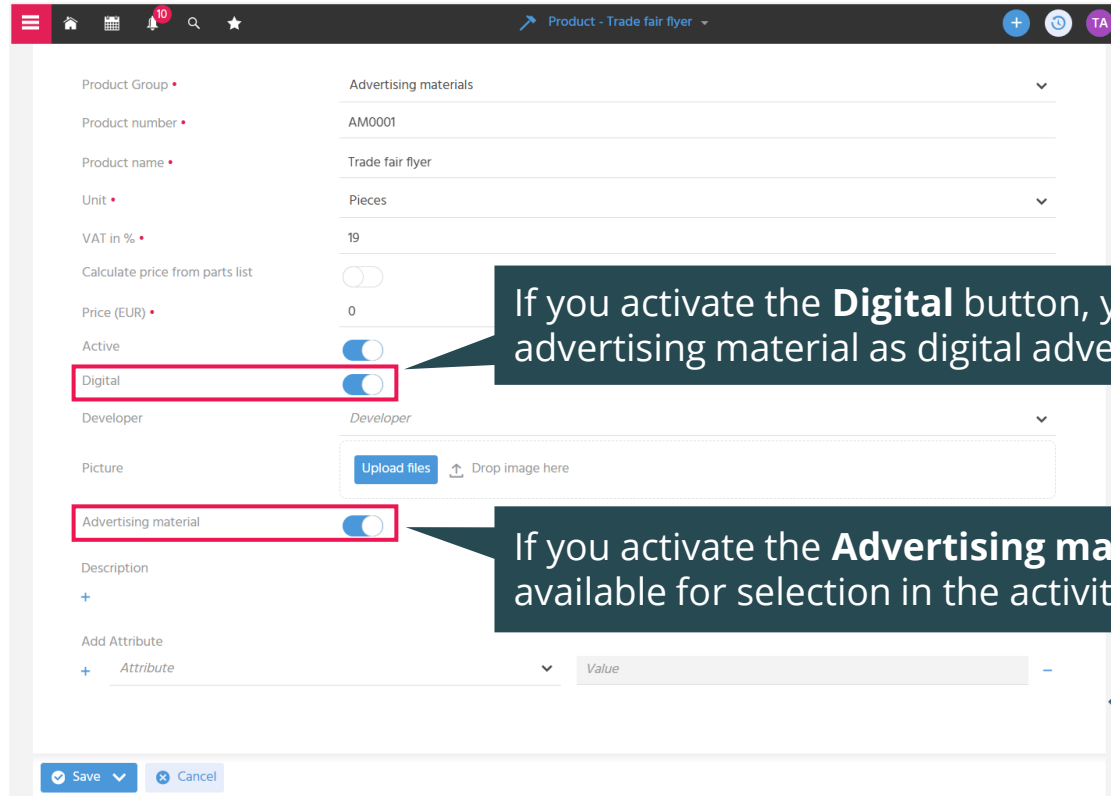
In the further course of the documentation, only advertising material is mentioned. Samples are always included.



Advertising material dispatch process



Create product as advertising material



The screenshot shows the 'Product - Trade fair flyer' form in the ADITO system. The form includes fields for Product Group, Product number (AM0001), Product name (Trade fair flyer), Unit (Pieces), VAT in % (19), Calculate price from parts list (disabled), Price (EUR) (0), Active (checked), Digital (checked), Developer (Developer), Picture (with an 'Upload files' button), Advertising material (checked), Description, and Add Attribute. The 'Digital' and 'Advertising material' fields are highlighted with red boxes. The 'Save' button is at the bottom left.

Product Group	Advertising materials
Product number	AM0001
Product name	Trade fair flyer
Unit	Pieces
VAT in %	19
Calculate price from parts list	☐
Price (EUR)	0
Active	☒
Digital	☒
Developer	Developer
Picture	Upload files Drop image here
Advertising material	☒
Description	
Add Attribute	

If you activate the **Digital** button, you mark the advertising material as digital advertising material.

If you activate the **Advertising material** button, this product is available for selection in the activity in the "Advertising material" tab.

Product as a digital advertising material



The screenshot shows the ADITO software interface. On the left, a sidebar displays product details for 'AM0001 Trade fair flyer'. The main area shows the 'Documents' tab with a list of documents. A callout box points to a document entry.

Product Details:

- Product Group: Advertising materials
- Active: Yes
- Unit: Pieces
- Digital: Yes
- Insert parts list: Yes
- Advertising material: Yes

Prices:

- Calculate price from parts list: No
- Curr. sales price (EUR): 0.00
- VAT in %: 19 %

Relevant Documents:

- Trade fair flyer.pdf

Documents Tab:

- Buttons: +, Edit, Download
- Filter: Filter
- Documents: 1
- Document entry: Trade fair flyer.pdf (application/pdf, 29.3 kB, Tim Admin (01.09.2025))

Callout Box:

Store the advertising material file in the Documents tab of your digital advertising material. The documents stored here are sent as an e-mail attachment when the advertising material is sent.

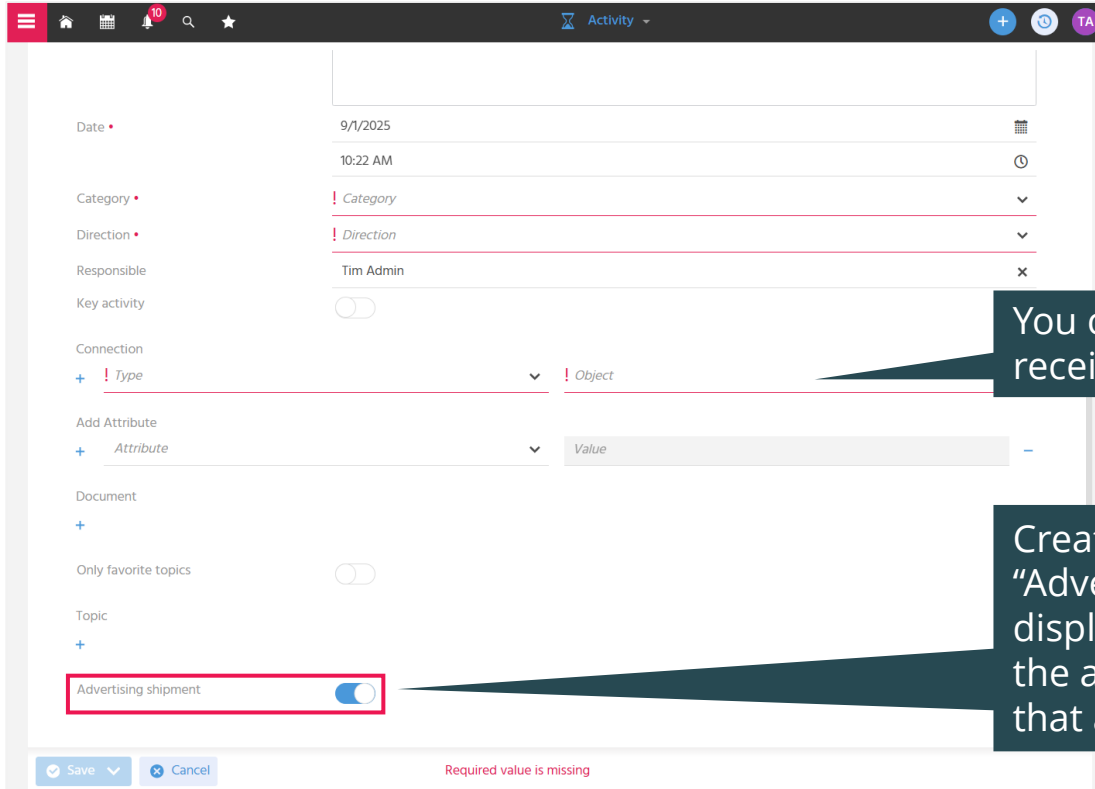
For the user, a visual distinction between

- the "Documents" tab of digital advertising material
- to the "Documents" tab of a physical product is not possible.

The "Documents" tab contains the logic for using the documents as email attachments for digital advertising materials.



Create activity as advertising material dispatch



Activity

Date • 9/1/2025

10:22 AM

Category • ! Category

Direction • ! Direction

Responsible Tim Admin

Key activity

Connection

+ ! Type ! Object

Add Attribute

+ Attribute Value

Document

+ Only favorite topics

Topic

+ Advertising shipment

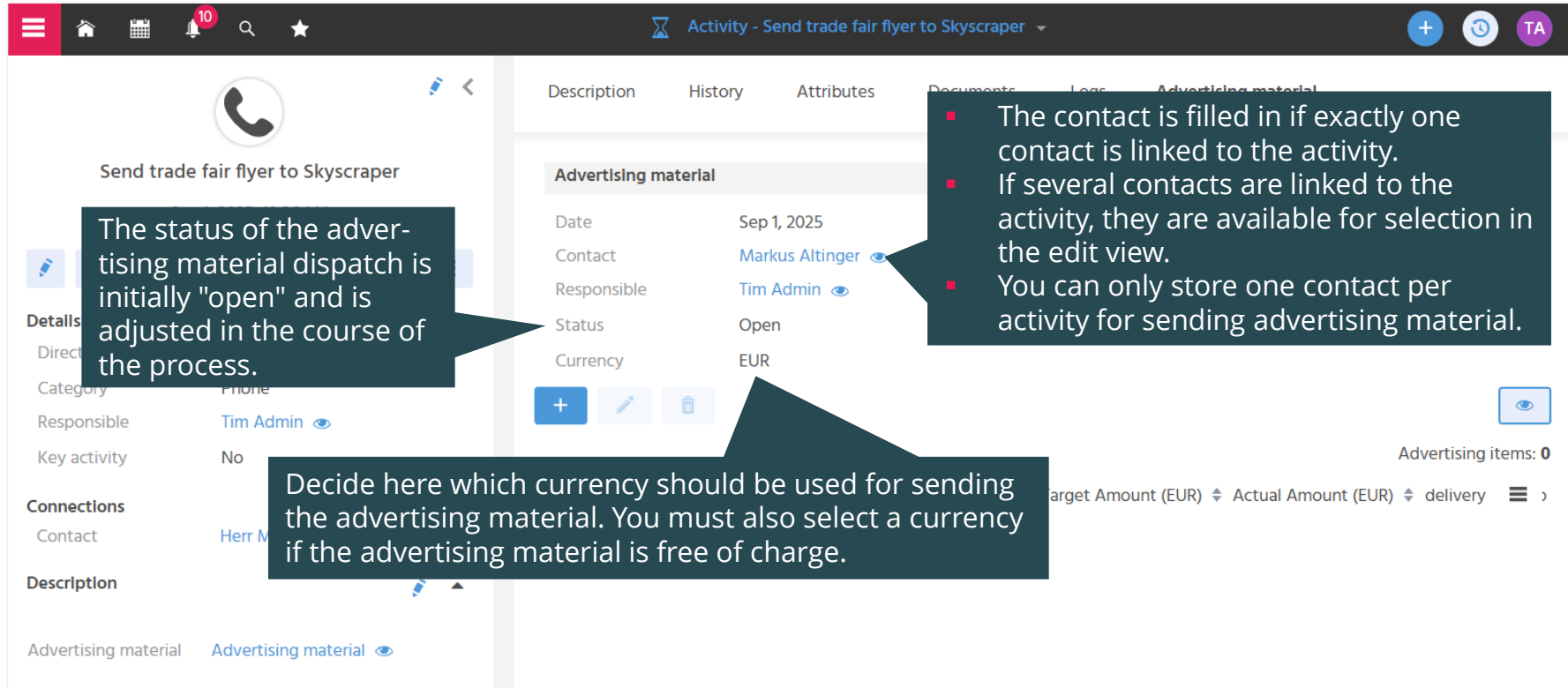
Save Cancel

Required value is missing

You can already link the contact who is to receive the advertising material here.

Create an activity in which you activate the "Advertising shipment" indicator. This will display the "Advertising material" tab in the activity. There you can add products that are marked as advertising material.

Edit advertising material dispatch activity



The status of the advertising material dispatch is initially "open" and is adjusted in the course of the process.

The contact is filled in if exactly one contact is linked to the activity.
If several contacts are linked to the activity, they are available for selection in the edit view.
You can only store one contact per activity for sending advertising material.

Decide here which currency should be used for sending the advertising material. You must also select a currency if the advertising material is free of charge.

Activity - Send trade fair flyer to Skyscraper

Advertising material

Date	Sep 1, 2025
Contact	Markus Altinger
Responsible	Tim Admin
Status	Open
Currency	EUR

Advertising items: 0

target Amount (EUR) Actual Amount (EUR) delivery

Edit advertising material dispatch activity



Send trade fair flyer to Skyscraper

Activity

Description History Attributes Documents Logs Advertising material

Advertising material

Date Sep 1, 2025
Contact Markus Altinger
Responsible Tim Admin
Status Open
Currency EUR

+ ✎ 🗑️

Advertising items: 0

Position	Product	Quantity	Unit	Price (EUR)	Target Amount (EUR)	Actual Amount (EUR)	delivery
No data present							

You can use the "Create new" button to add the advertising material to the activity that is to be sent.

Position 1
delivery ! delivery
Product ! Product
Quantity 1
Unit Unit
Price (EUR) 0.00
Free
Actual Amount (EUR) Actual Amount (EUR)
Target Amount (EUR) 0.00
Info Info

Required value is missing

Save Cancel



Edit advertising material dispatch activity



Advertising item

Position • 1

delivery • ! delivery ▼

Product • ! Product ▼

Quantity • 1

Unit Unit ▼

Price (EUR) • 0.00

Free ☐

Actual Amount (EUR) Actual Amount (EUR)

Target Amount (EUR) Target Amount (EUR)

Info Info

Required value is missing

In the "Delivery" field, enter the information as to whether the advertising material should be delivered to the recipient in person, by post or by email.

All products marked as advertising material are available for selection in the "Product" field.

If you select a digital product, the quantity is automatically set to "1" and can no longer be edited.

Edit advertising material dispatch activity



Advertising item

Position • 1

delivery • ! delivery ▼

Product • ! Product ▼

Quantity • 1

Unit Unit ▼

Price (EUR) • 0.00

Free ☒

Actual Amount (EUR) Actual Amount (EUR)

Target Amount (EUR) Target Amount (EUR)

Info Info

Required value is missing

Save Cancel

If you activate the "Free" button, this means that the customer will not be charged for the advertising material. As soon as you activate this button, the "Price (EUR)" field is set to "0".

The "Actual amount" is calculated by multiplying the quantity * price.

The "Target amount" is calculated by multiplying the quantity * product price (i.e. the price stored on the product).



Edit advertising material dispatch activity



Send trade fair flyer to Skyscraper

Activity

Description History Attributes Documents Logs Advertising material

Advertising material

Date Sep 1, 2025
Contact Markus Altinger
Responsible Tim Admin
Status Open
Currency EUR

+ Edit Delete

Advertising items: 1

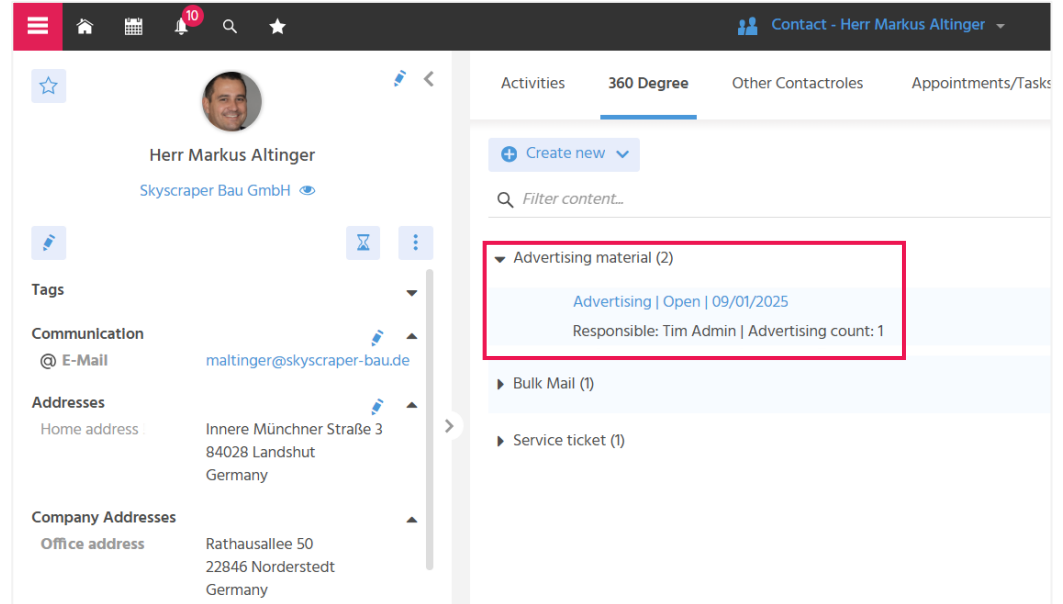
	Position	Product	Quantity	Unit	Price (EUR)	Target Amount (EUR)	Actual Amount (EUR)	delivery	Info
ME Advertising Open	1	Messeflyer	1	Pieces	0.00	0.00	0.00	via mail	

All advertising material items added to the activity are displayed in the activity at the lower area of the "Advertising material" tab .



Advertising material in the contact

The advertising material mailings that were initiated for a contact are stored in the 360 degree view.



The screenshot displays the ADITO interface for a contact named Herr Markus Altinger. The left sidebar shows contact details including a profile picture, name, company (Skyscraper Bau GmbH), email (maltinger@skyscraper-bau.de), and addresses. The main area is titled '360 Degree' and contains a list of activities. A red box highlights the 'Advertising material (2)' section, which lists 'Advertising | Open | 09/01/2025' with a responsible person 'Tim Admin' and an 'Advertising count: 1'. Other activities like 'Bulk Mail (1)' and 'Service ticket (1)' are also visible.

Activities

360 Degree

Other Contactroles

Appointments/Tasks

Create new

Filter content...

Advertising material (2)

Advertising | Open | 09/01/2025

Responsible: Tim Admin | Advertising count: 1

Bulk Mail (1)

Service ticket (1)

Overview of all advertising material mailings

In the filter view in the "Advertising material" context, you can see all mailings that have been created in the system, the status of the mailings and to whom they are addressed.

☐	Status	Date	Contact	Object	Currency
☐	OP Open	15 Jul 2024	Frau Anke Herrmann	Send trade fair flyer to Skyscraper	Euro (EUR)
☐	OP Open	12 Jul 2024		Send sample	US-Dollar (USD)
☐	OP Open	14 May 2024			Euro (EUR)
☐	SE Sent	4 May 2024	Herr Markus Altinger	Zusenden eines Werbemittels	Euro (EUR)
☐	OP Open	4 May 2024		Digitales Werbemittel versenden	Euro (EUR)
☐	OP Open	1 May 2024	Frau Sarah Eichelberger	Zusendung Werbemittel per Brief	US-Dollar (USD)
☐	OP Open	28 Apr 2024	Frau Barabara Hönig	Weitere Informationen zusenden per Mail	Euro (EUR)
☐	OP Open	24 Apr 2024	Mr. Cameron Doyle	Informationen zum Produkt per Mail zusenden	British Pound Sterling (GBP)
☐	OP Open	23 Apr 2024	Frau Annette Zimmermann	Informationen zusenden	Euro (EUR)
☐	OP Open	22 Apr 2024		Zusendung Werbemittel	Euro (EUR)
☐	SE Sent	5 Dec 2023	Mr. Carl E. Bush	Werbemittel zusenden	Euro (EUR)
☐	SE Sent	2 Jul 2023	Herr Peter Sommer	Werbemittel versenden	Euro (EUR)
☐	OP Open	2 Jul 2023	Frau Clara Hüven	Werbemittel versenden	Euro (EUR)
☐	OP Open	2 Jul 2023	Frau Bernadette Frey	Werbemittel digital versenden	Euro (EUR)
☐	FU Followed up	2 Jul 2023	Frau Clara Maier	Werbemittel digital versenden	Euro (EUR)

Advertising material dispatch – start workflow



Advertising material

Advertising materials: 15

Status	Date	Contact	Object	Currency
OP Open	15 Jul 2024	Frau Anke Herrmann	Send trade fair flyer to Skyscraper	Euro (EUR)
OP Open	12 Jul 2024		Send sample	US-Dollar (USD)
OP Open		Mr Markus Altinger	Zusenden eines Werbemittels	Euro (EUR)
OP Open			Digitales Werbemittel versenden	Euro (EUR)
OP Open	1 May 2024	Frau Sarah Eichelberger	Zusendung Werbemittel per Brief	US-Dollar (USD)
OP Open	28 Apr 2024	Frau Barabara Hönig	Weitere Informationen zusenden per Mail	Euro (EUR)
OP Open	24 Apr 2024	Mr. Cameron Doyle	Informationen zum Produkt per Mail zusenden	British Pound
OP Open	23 Apr 2024	Frau Annette Zimmermann	Informationen zusenden	Euro (EUR)
OP Open	22 Apr 2024		Zusendung Werbemittel	Euro (EUR)
SE Sent	5 Dec 2023	Mr. Carl E. Bush	Werbemittel zusenden	Euro (EUR)
SE Sent	2 Jul 2023	Herr Peter Sommer	Werbemittel versenden	Euro (EUR)
OP Open	2 Jul 2023	Frau Clara Hüven	Werbemittel versenden	Euro (EUR)
OP Open	2 Jul 2023	Frau Bernadette Frey	Werbemittel digital versenden	Euro (EUR)

Open

Frau Anke Herrmann

Herr Tim Admin

15 Jul 2024

Activity

Advertising material count 1

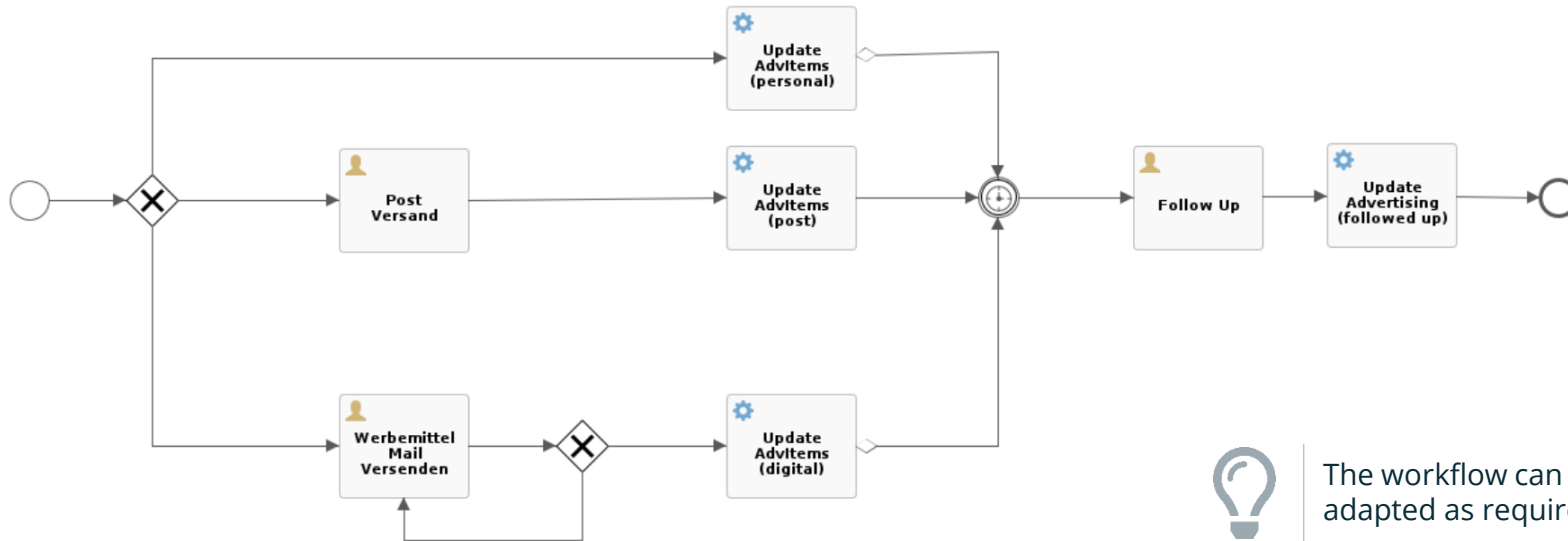
Currency

Send trade fair flyer to Skys...

Start the process for sending advertising material by clicking on the "Start advertising material workflow" button.

Workflow AdvertisingShipment

The workflow for sending advertising material is stored in the system and can be activated by the administrator in the "Workflow definitions" context. Depending on the delivery type, this creates tasks for the respective person responsible and sets the status in the dispatch. After a defined period of time, a workflow task is created to follow up with the customer.



The workflow can be adapted as required.

Process advertising material dispatch "via post"

You will receive the tasks from the workflow in the "My workflow tasks" dashlet. These serve as a reminder for further processing of the advertising material dispatch.

The screenshot shows a software interface with a top navigation bar containing icons for menu, home, calendar, notifications, search, and favorites. The main area is divided into two panels. The left panel, titled "My Workflow Tasks", displays a list of tasks. The first task is "Werbemittel Mail Versenden" dated "15 Jul 2024, 14:17". The second task, "Post Versand", is highlighted in blue. A dark blue callout box with a pointer directed at the "Post Versand" task contains the text: "The tasks inform you, whether the advertising material should be sent by post or by email." The right panel shows details for the "Post Versand" task, including a circular icon with a chain link, a checkmark button, and a "Further Information" section with the following data: Workflow instance: AdvertisingShipment, Creation date: 15 Jul 2024, 14:17, Link: Advertising | Sent | 07/12..., and Priority: 50.

My Workflow Tasks

15 Jul 2024, 14:17 Werbemittel Mail Versenden

Post Versand

The tasks inform you, whether the advertising material should be sent by post or by email.

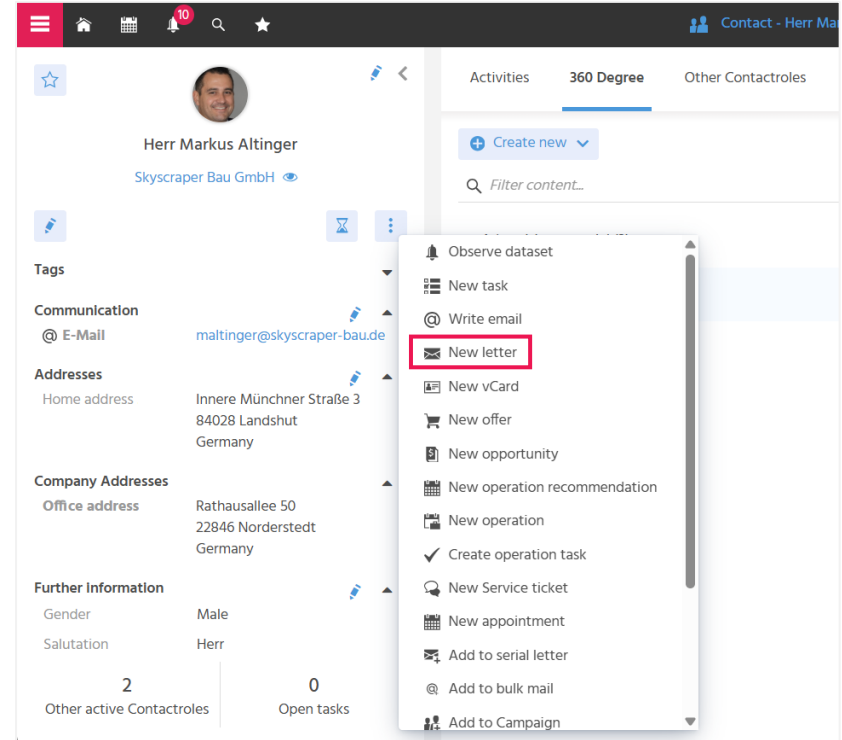
Post Versand

Further Information

Workflow instance	AdvertisingShipment
Creation date	15 Jul 2024, 14:17
Link	Advertising Sent 07/12...
Priority	50

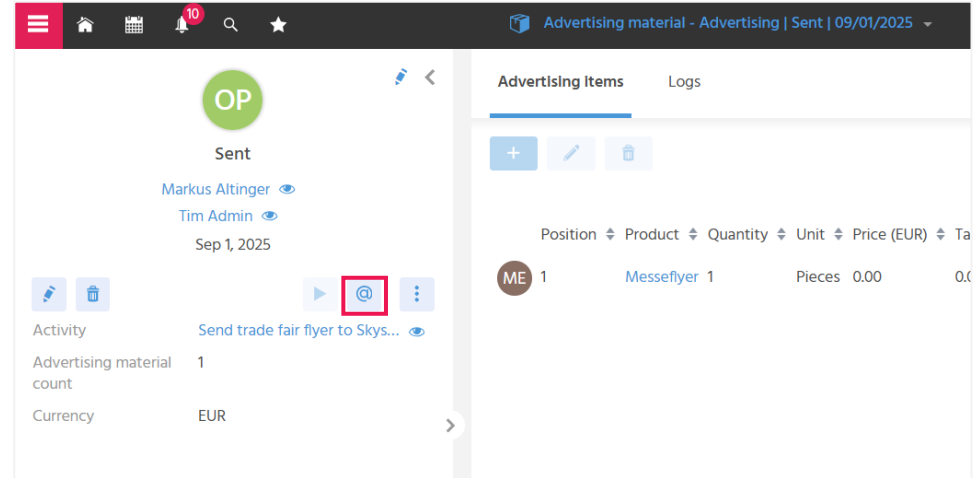
Process advertising material dispatch "via post"

1. To send advertising material by post, create a letter for the contact to accompany the advertising material. To do this, use the "New letter" action. You have the option of selecting a document template and the system automatically creates an activity that documents the sending of the cover letter.
2. Finally, check off the associated workflow task.

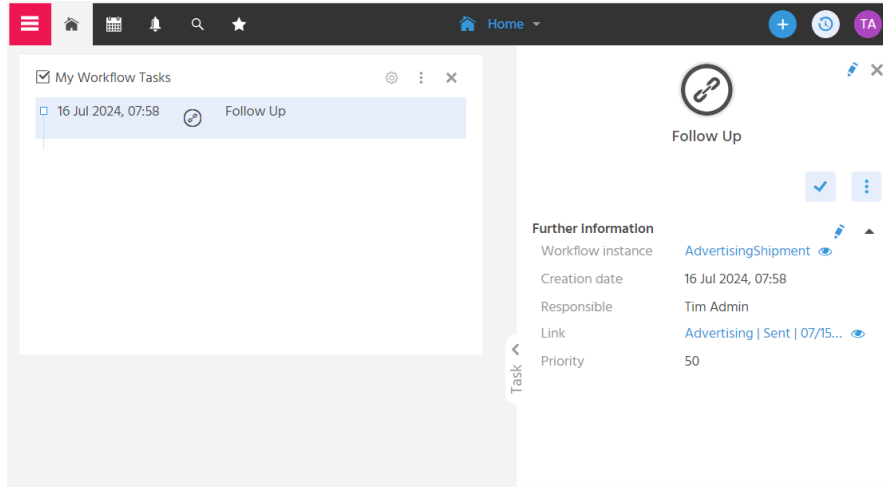


Process advertising material dispatch "via email"

1. To send the advertising material by email, open the preview of the advertising material dispatch via the link in the workflow task (alternatively via the 360 degree view in the contact or the filter view of the "Advertising material" context).
2. Click on the @ button to create the email with the digital advertising material. Clicking on the @ button also automatically completes the workflow task.



Follow-up tasks



If you have set the original Workflow task to "completed", a follow-up task is automatically created after a specified time to remind you to contact the customer again. The period of time that should elapse before the follow-up task is created must be defined in the system by the administrator.

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