



Service Administration

ADITO Software GmbH

As of Version 2026.4.0 | April 2026





Screenshots

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



Agenda

Service Administration

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- [Priority](#)

- Employee groups

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- Employee group rule group

- Escalation

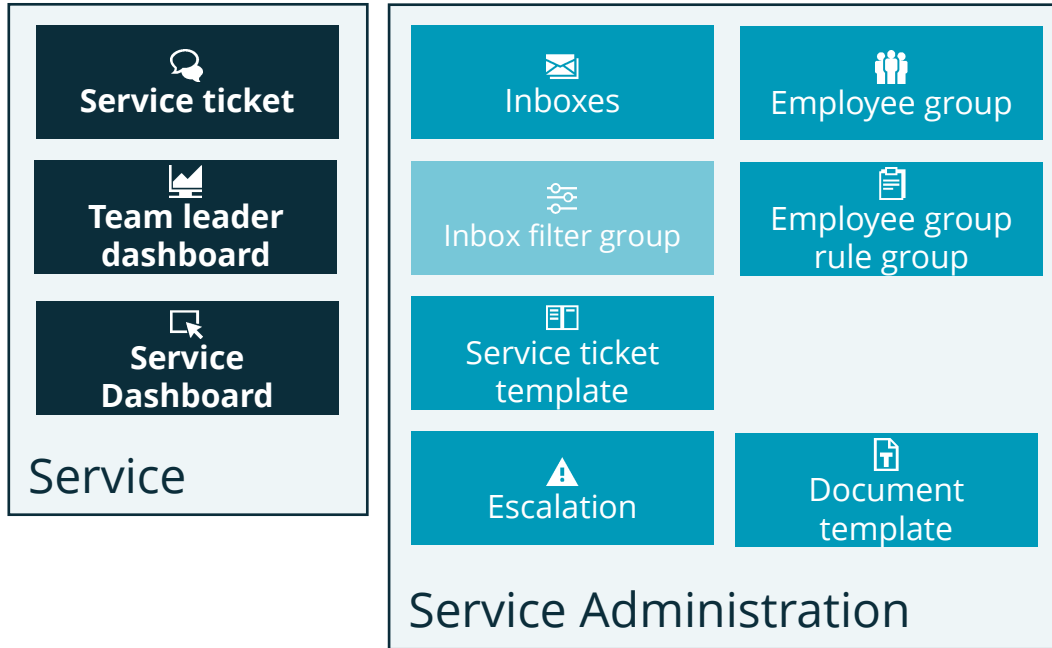
- Bounce Management

- Document template

End of
Life

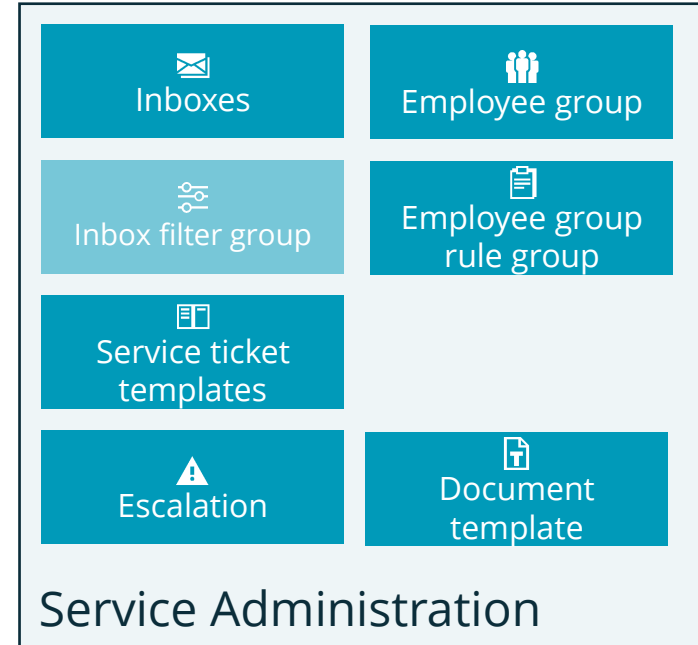
End of
Life

Menu groups „Service“ und „Service Administration“



Menu group „Service Administration“

- **Inboxes:** logical data pools for tickets
- **Inbox filter group:** Configuration for automatic assignment of tickets from e-mail inboxes
 - **Service ticket templates:** Templates for automatic and manual entry of new service tickets
- **Employee group:** Division of service employees into expert groups
 - **Employee group rule group:** Configurations for the assignment of service tickets to service employees
- **Escalation:** Define criteria for automated escalation and create notification template



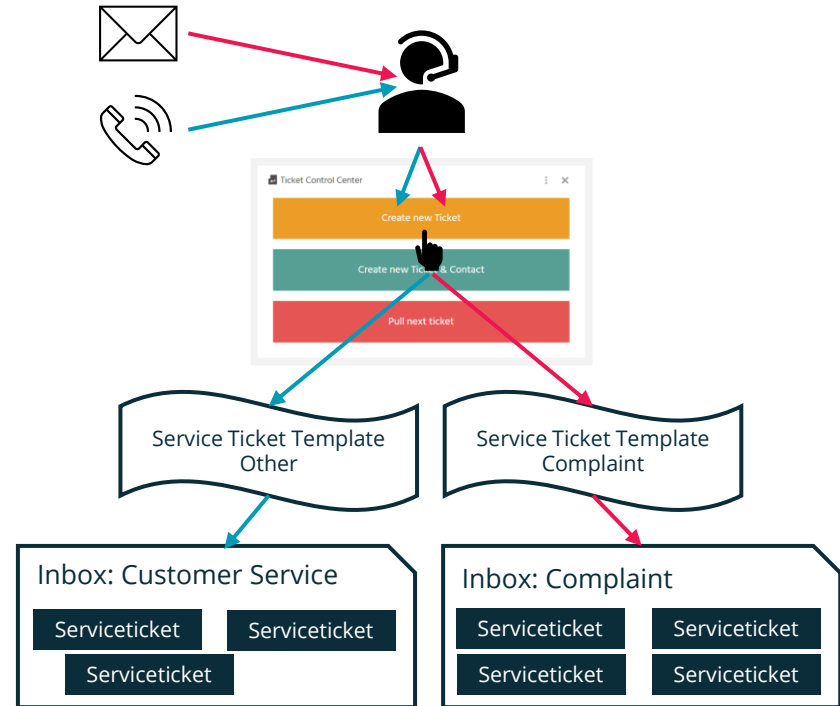
Inbox without mail connection

Create service ticket manually

The service staff receives inquiries, complaints, etc. by telephone, letter, etc. and creates a service ticket.

If a suitable service ticket template exists, the service staff can use this.

The service ticket is assigned to an inbox by the selected service ticket template or by manual selection by the user.



Inbox with mail connection

Service ticket is created automatically

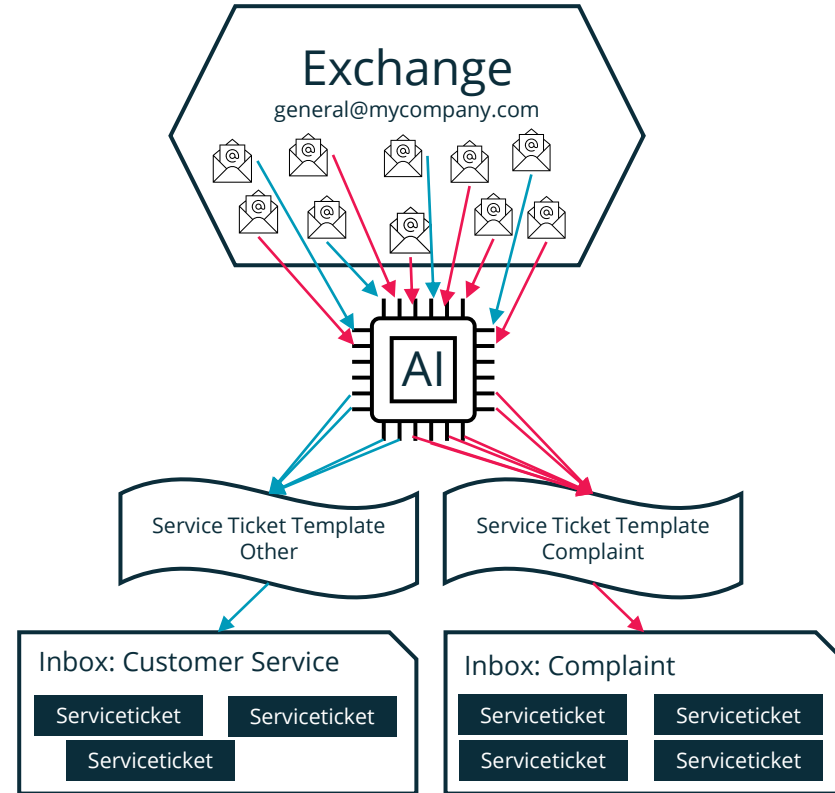
Enquiries, complaints, etc. are received by E-Mail on the Exchange server.

The AI searches for a suitable service ticket template and creates a service ticket using the service ticket template it finds. If the AI process fails, the default ticket template stored in the mailbox where the email was received is used.

The service ticket is assigned to the inbox specified in the service ticket template.



If a ticket number is found in the email subject line, no new ticket is created; instead, an activity containing the incoming email is added to the existing service ticket.



Inbox with mail connection

Create service ticket automatically

End of Life

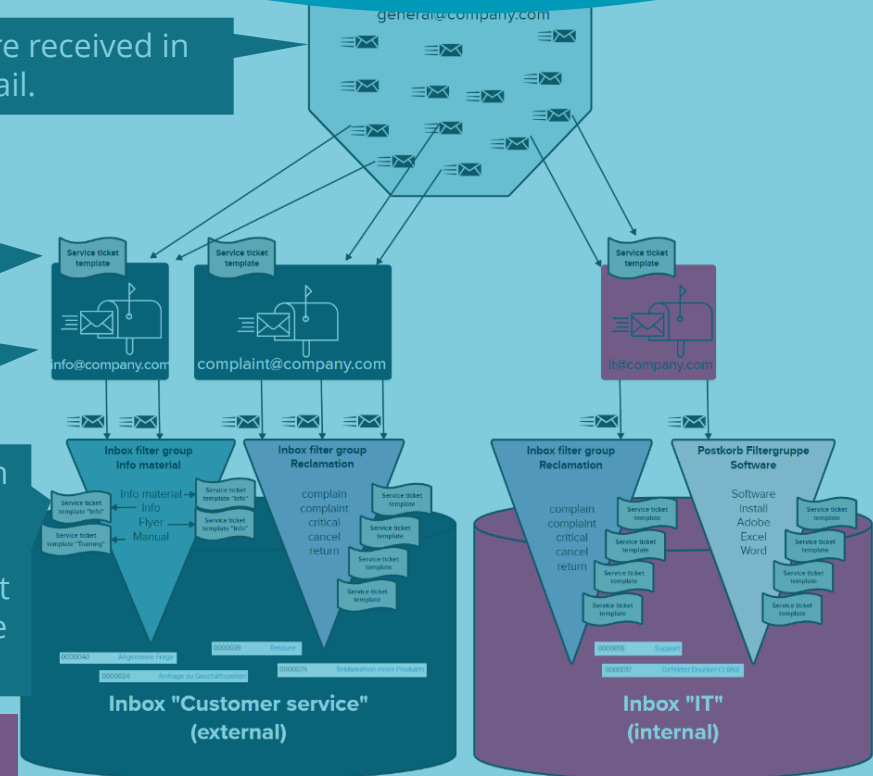
With version 2026.4.0, service ticket templates are no longer determined using mailbox filter groups, but by default using AI. Mailbox filter groups will be removed in the next xRM major version.

Inquiries, complaints, etc. are received in the Exchange server by e-mail.

Service ticket templates are used to define field contents that are to be adopted when service tickets are created automatically.

E-mail addresses (mailboxes) are stored in the inbox.

You can use the inbox filter groups to define terms for which the incoming emails are to be searched. A service ticket template is assigned to each term. Instead of the service ticket template stored at the email address, the service ticket template assigned to the term is then used when the service ticket is created.



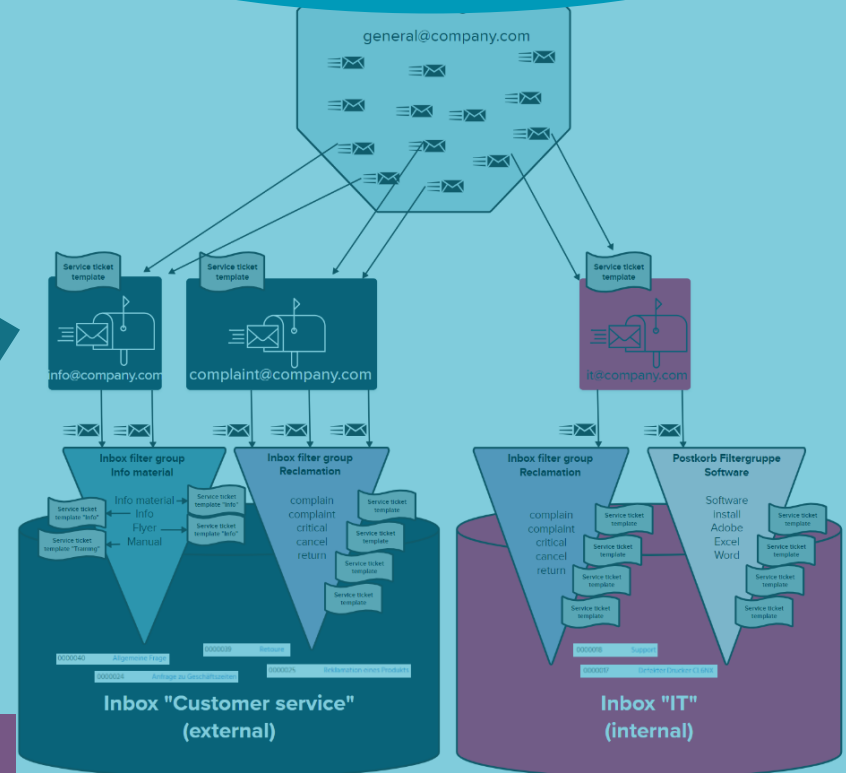
Inbox with mail connection

Create service ticket automatically

The system checks which email address received the email and assigns it to the corresponding inbox. If no inbox filter groups are stored in the inbox or if the email does not contain a search term from an inbox filter group, a service ticket is created using the service ticket template stored in the inbox. It is possible that the service ticket is assigned to a different inbox at this point based on the information in the service ticket template.

End of Life

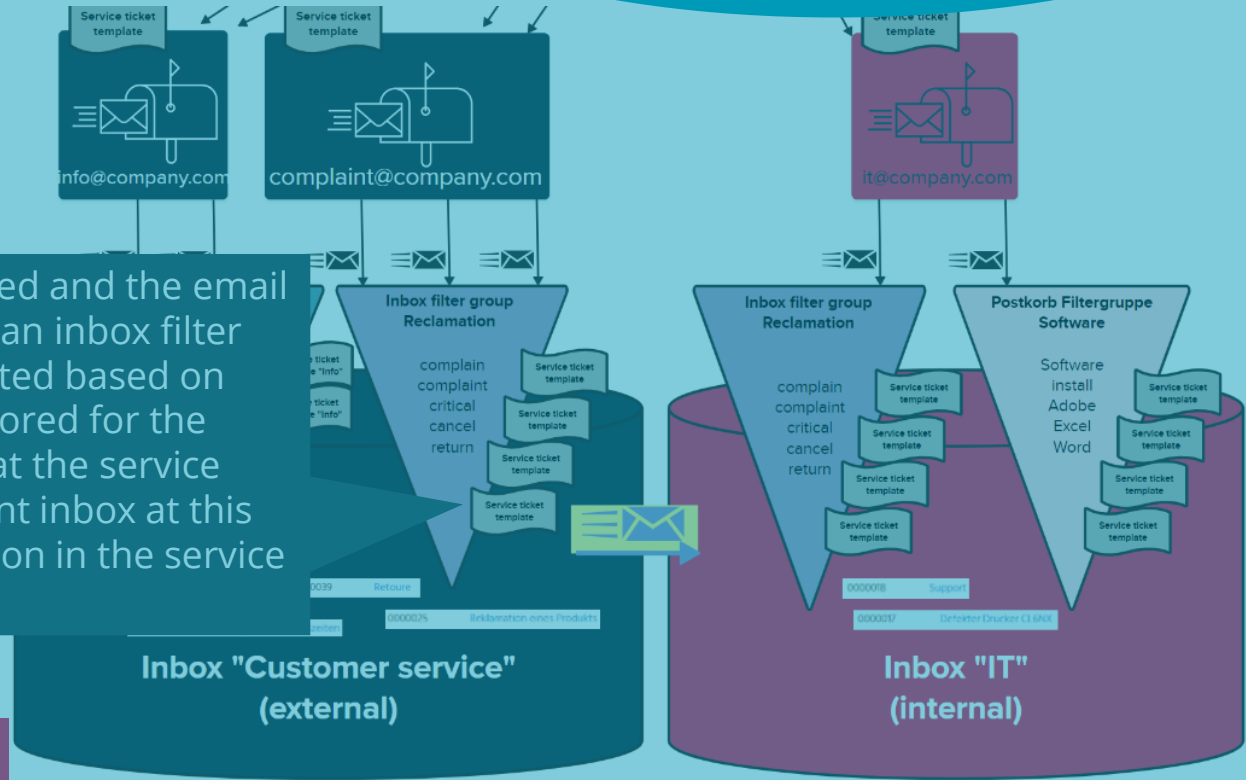
With version 2026.4.0, service ticket templates are no longer determined using mailbox filter groups, but by default using AI. Mailbox filter groups will be removed in the next xRM major version.



Inbox with mail connection

Create service ticket automatically

If inbox filter groups are stored and the email contains a search term from an inbox filter group, a service ticket is created based on the service ticket template stored for the search term. It is possible that the service ticket is assigned to a different inbox at this point based on the information in the service ticket template.



End of Life

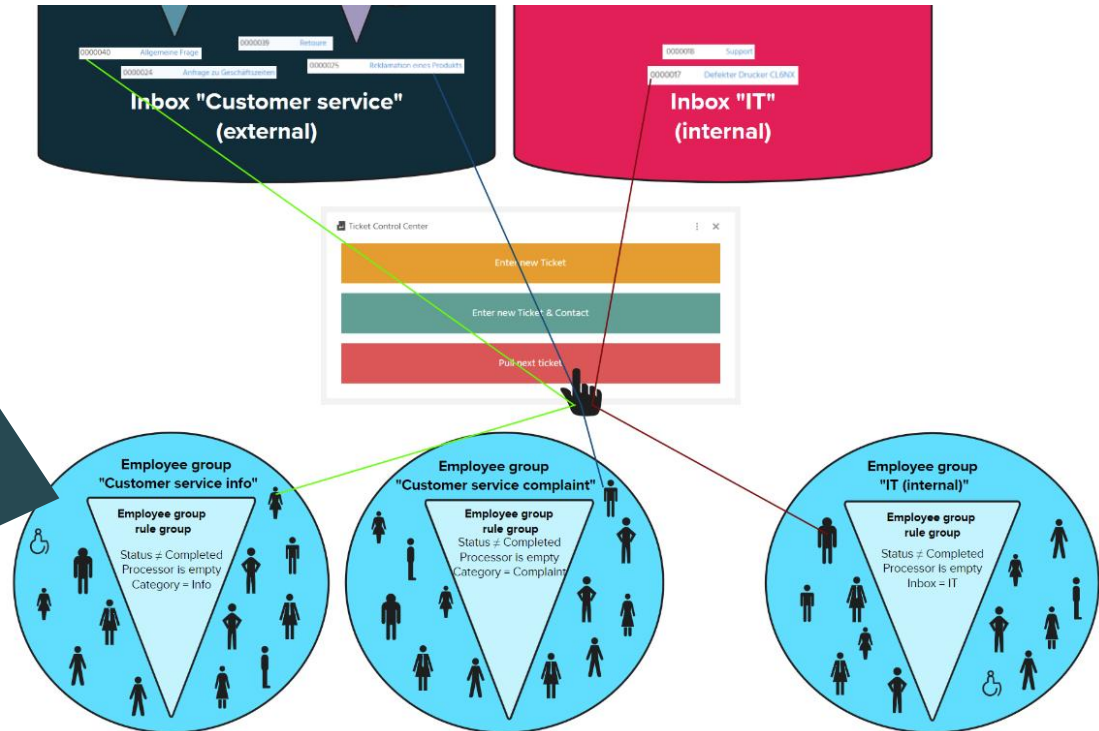
With version 2026.4.0, service ticket templates are no longer determined using mailbox filter groups, but by default using AI. Mailbox filter groups will be removed in the next xRM major version.

Ticket processing

Pull next ticket

You use employee groups and employee group rule groups to **configure which service tickets a user can pull** using the “Pull next ticket” button.

To do this, assign employees to the employee groups who are responsible for processing service tickets. **Use the employee group rule groups to define which tickets the employees are allowed to pull.** To do this, assign the employee group rule groups to the employee groups.





Service ticket template

Service ticket template



What are service ticket templates needed for?

For example, the fields “Inbox”, “Category”, “Priority” and “Status” are predefined in the service ticket template.

Manually created service tickets

If the template is selected when creating a service ticket, the values defined in the template are transferred to the fields of the service ticket.

Automatically created service tickets

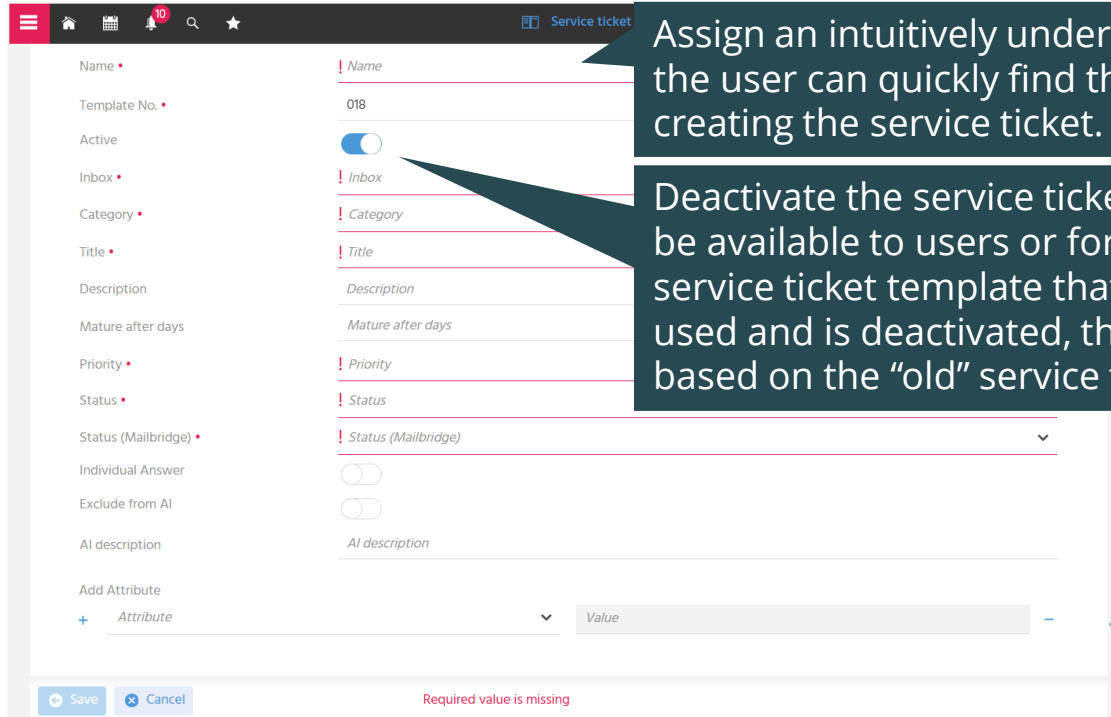
For automatically generated service tickets, the service ticket templates and the incoming E-Mail including attachments are transferred to the LLM in a prompt. The AI checks the subject, content and attachments* of the E-Mail and sees which description/title of a template best matches it. The LLM then delivers this template to the Mailbridge, which uses it to create a service ticket.

* Only attachments containing text content (common file types such as pdf, txt, docx) are taken into account. Attachments that do not contain text, as well as images in attachments, are not taken into account by the AI.



Service ticket template

Create service ticket template (1/5)



Service ticket

Name • ! Name

Template No. • 018

Active ☒

Inbox • ! Inbox

Category • ! Category

Title • ! Title

Description Description

Mature after days Mature after days

Priority • ! Priority

Status • ! Status

Status (Mailbridge) • ! Status (Mailbridge) ▼

Individual Answer ☐

Exclude from AI ☐

AI description AI description

Add Attribute

+ Attribute ▼ Value -

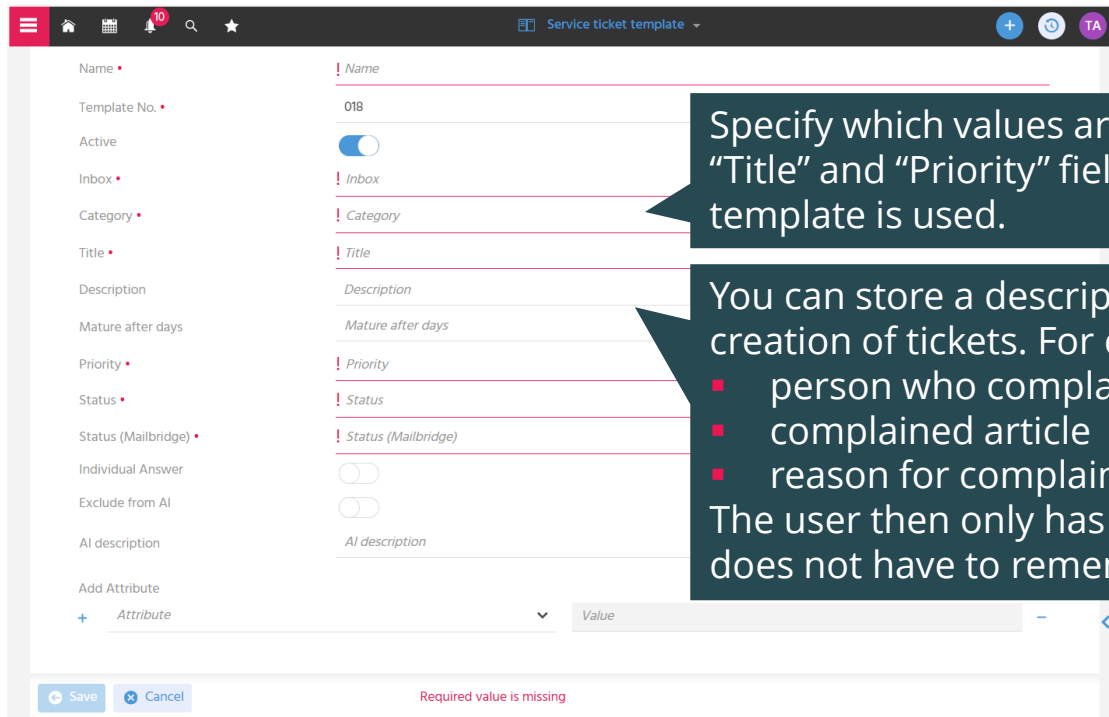
Save Cancel Required value is missing

Assign an intuitively understandable, meaningful name so that the user can quickly find the right service ticket template when creating the service ticket.

Deactivate the service ticket template if you do not want it to be available to users or for automatic ticket creation. If a service ticket template that is already in use is no longer to be used and is deactivated, this has no effect on service tickets based on the "old" service ticket templates.

Service ticket template

Create service ticket template (2/5)



Service ticket template

Name

Template No. 018

Active ☒

Inbox

Category

Title

Description

Mature after days

Priority

Status

Status (Mailbridge)

Individual Answer ☐

Exclude from AI ☐

AI description

Add Attribute

Attribute Value

Save Cancel

Required value is missing

Specify which values are to be set in the "Inbox", "Category", "Title" and "Priority" fields in the service ticket when this template is used.

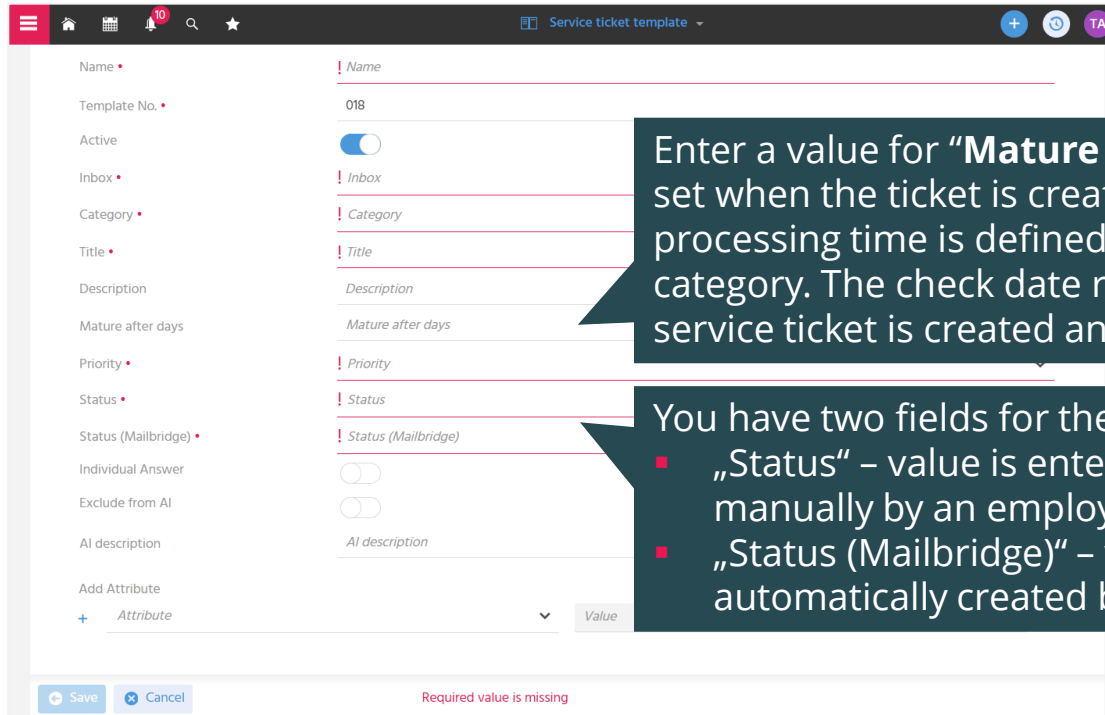
You can store a description that further standardizes the creation of tickets. For complaints, for example

- person who complains
- complained article
- reason for complaint

The user then only has to add the required information, but does not have to remember to ask for it himself.

Service ticket template

Create service ticket template (3/5)



Service ticket template

Name • ! Name

Template No. • 018

Active ☒

Inbox • ! Inbox

Category • ! Category

Title • ! Title

Description Description

Mature after days Mature after days

Priority • ! Priority

Status • ! Status

Status (Mailbridge) • ! Status (Mailbridge)

Individual Answer ☐

Exclude from AI ☐

AI description AI description

Add Attribute

+ Attribute Value

Save Cancel

Required value is missing

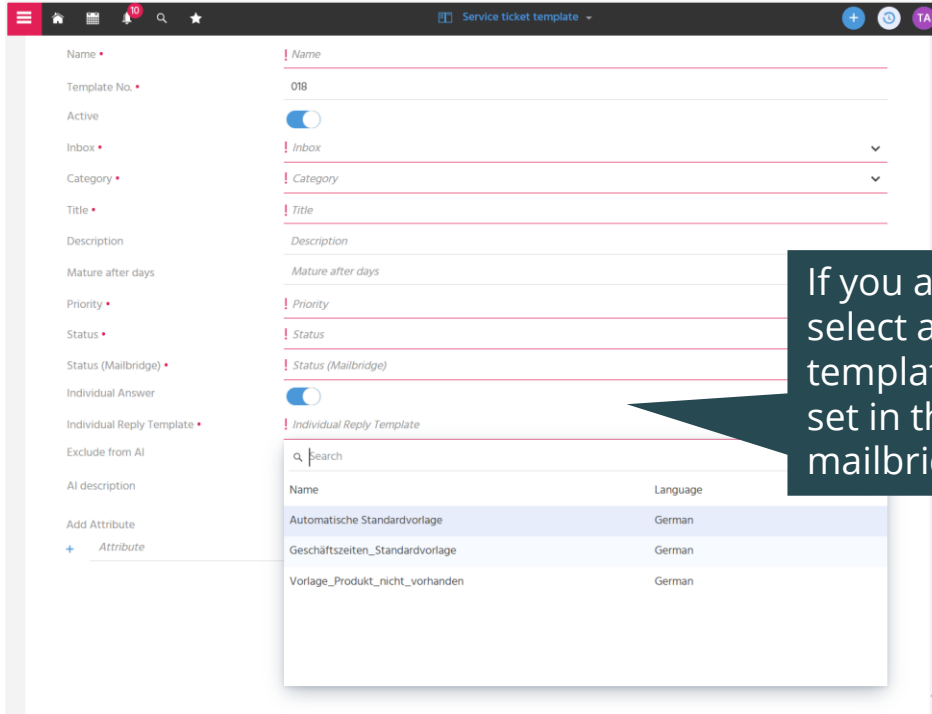
Enter a value for **“Mature after days”** if a check date is to be set when the ticket is created. For example, if a maximum processing time is defined for a service ticket of a certain category. The check date results from the date on which the service ticket is created and the value you enter here.

You have two fields for the **status**:

- „Status” – value is entered if the service ticket is created manually by an employee
- „Status (Mailbridge)” – value is entered if the service ticket is automatically created by the Mailbridge

Service ticket template

Create service ticket template (4/5)

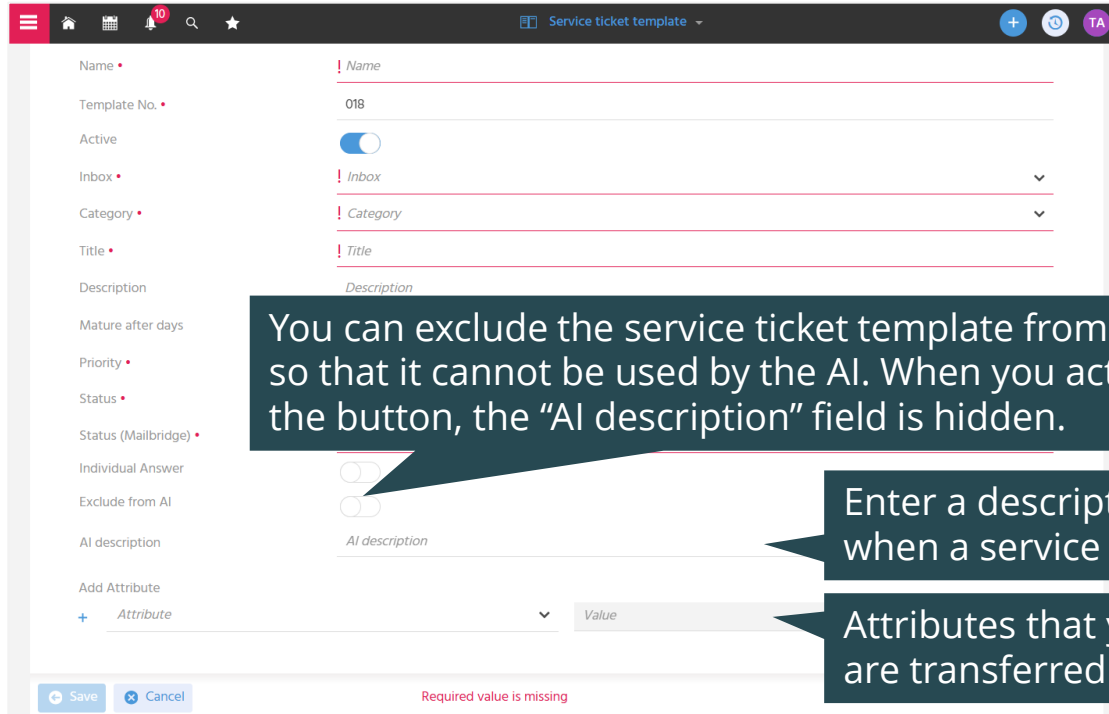


Name	Language
Automatische Standardvorlage	German
Geschäftszeiten_Standardvorlage	German
Vorlage_Produkt_nicht_vorhanden	German

If you activate the “Individual answer” button, you can select a document template. The selected document template is sent instead of the automatic reply email set in the inbox when a service ticket is created via the mailbridge with this service ticket template.

Service ticket template

Create service ticket template (5/5)



The screenshot shows the 'Create service ticket template' form in the ADITO application. The form is divided into two main sections: a left sidebar with a list of fields and a main content area with input fields. The fields are: Name, Template No., Active, Inbox, Category, Title, Description, Mature after days, Priority, Status, Status (Mailbridge), Individual Answer, Exclude from AI, AI description, and Add Attribute. The 'Name' field is required and has a red exclamation mark icon. The 'Template No.' field contains the value '018'. The 'Active' field is a toggle switch that is currently turned on. The 'Inbox', 'Category', and 'Title' fields are required and have red exclamation mark icons. The 'Description' field is a text area. The 'Mature after days' field is a text input. The 'Priority' field is a dropdown menu. The 'Status' field is a dropdown menu. The 'Status (Mailbridge)' field is a dropdown menu. The 'Individual Answer' field is a toggle switch. The 'Exclude from AI' field is a toggle switch. The 'AI description' field is a text area. The 'Add Attribute' field is a table with columns for 'Attribute' and 'Value'. At the bottom of the form, there are 'Save' and 'Cancel' buttons. A red error message 'Required value is missing' is displayed below the buttons.

You can exclude the service ticket template from the AI so that it cannot be used by the AI. When you activate the button, the "AI description" field is hidden.

Enter a description that will be checked by the AI when a service ticket is automatically created.

Attributes that you add in the service ticket template are transferred to the service ticket.



Inboxes

Inboxes with and without mail connections

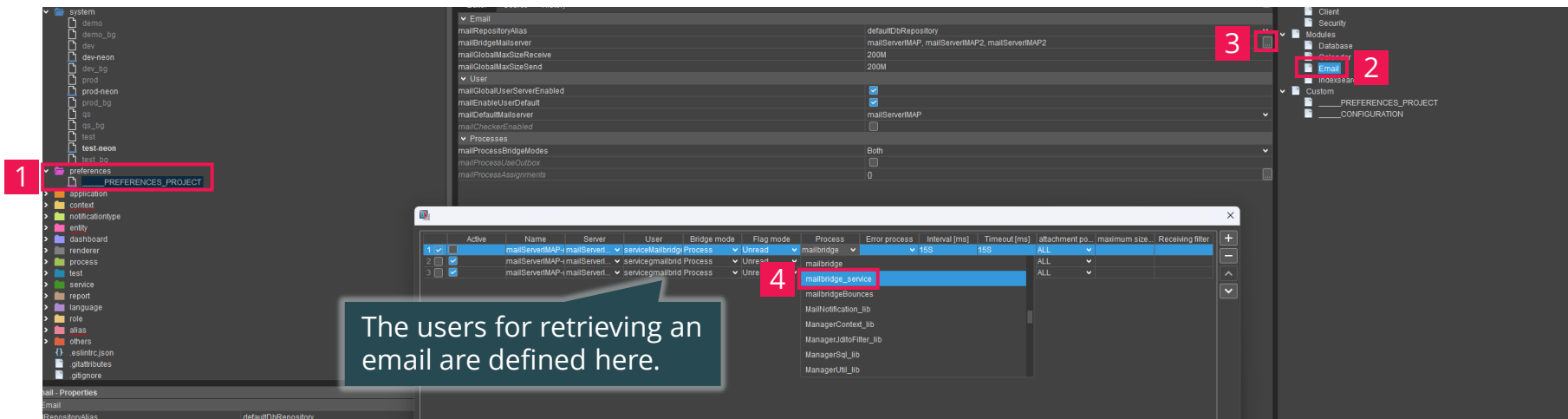
- **Inbox without mail connection** – Logical data pool to which service tickets can be assigned. Inboxes without a mail connection are used when **service tickets** are **created purely manually**, i.e. by the user. In this case, the inbox is only used to structure the tickets.
- **Inbox with mail connection** – Logical data pool in which emails collected via the mailbridge are stored as a service ticket.

The following configuration options are available for inboxes:

- Setting to automatically **reopen** a service ticket.
- **Assignment of e-mail addresses**, with reply template, signature and a service ticket template which is used when the AI process fails.
- Assignment of **extended connections**, e.g. for processing fax messages or answering machine messages from a telephone system.
- **Rule editor** for setting rules that may be required (inbox filter groups) to scan incoming messages for a search value. However, an inbox can also be used without rules.

End of
Life

Exkursus Mailbridge-Configuration



The screenshot shows the ADITO configuration interface. On the left, a tree view shows the project structure with 'preferences' and 'PREFERENCES_PROJECT' highlighted. In the center, a table lists various services and processes. A callout box points to the 'mailbridge_service' entry in the 'Process' column. On the right, a sidebar shows the 'Email' module selected under 'Modules'.

1 Mark „PREFERENCES_PROJEKT“

2 Mark „Email“

3 Open the corresponding overlay via the 3-dot button at „mailBridgeMailserver“

4 Select „mailbridge_service“ in the „Process“ column

The users for retrieving an email are defined here.

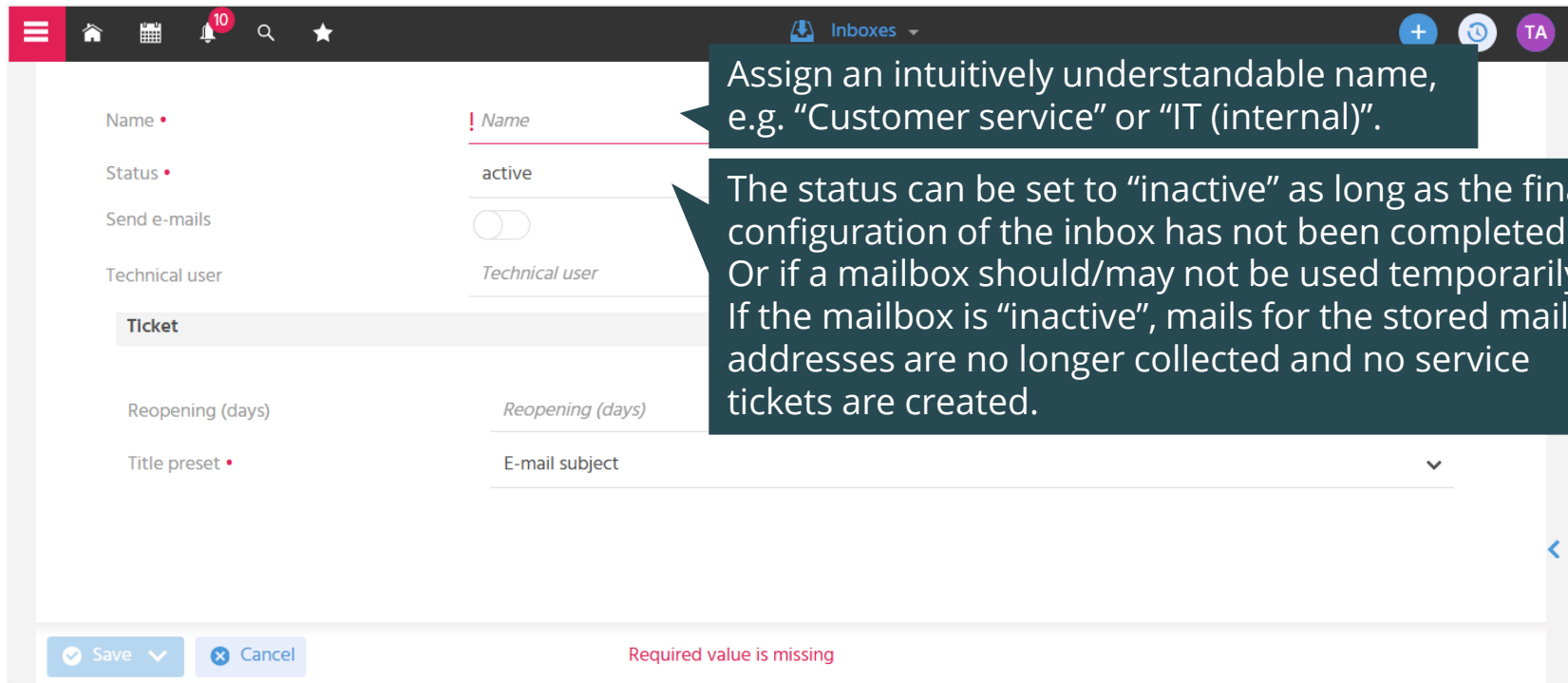
- 1 Mark „PREFERENCES_PROJEKT“
- 2 Mark „Email“
- 3 Open the corresponding overlay via the 3-dot button at „mailBridgeMailserver“
- 4 Select „mailbridge_service“ in the „Process“ column



Basic information on the mail bridge can be found in AID 019 “Mailbridge”

Inboxes

Create inbox

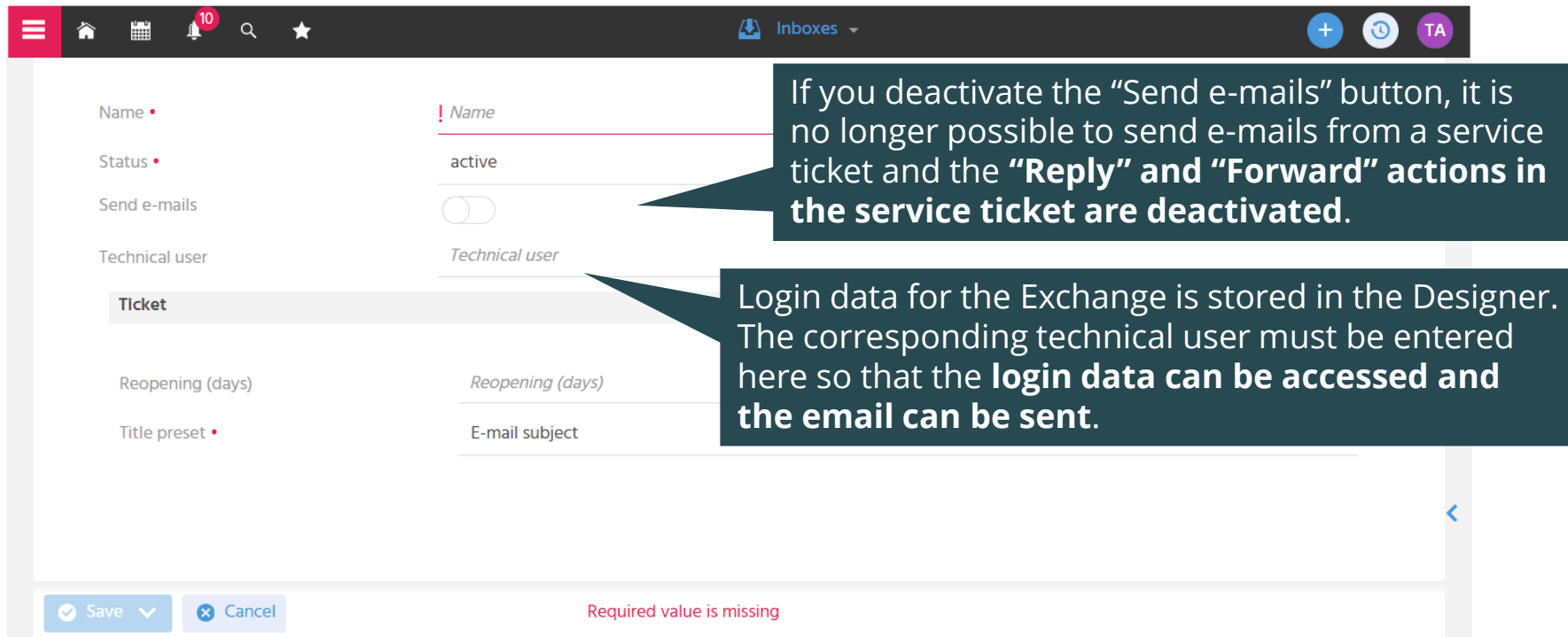


Assign an intuitively understandable name, e.g. "Customer service" or "IT (internal)".

The status can be set to "inactive" as long as the final configuration of the inbox has not been completed. Or if a mailbox should/may not be used temporarily. If the mailbox is "inactive", mails for the stored mail addresses are no longer collected and no service tickets are created.

Required value is missing

Create inbox



Name •

Status •

Send e-mails ☐

Technical user

Ticket

Reopening (days)

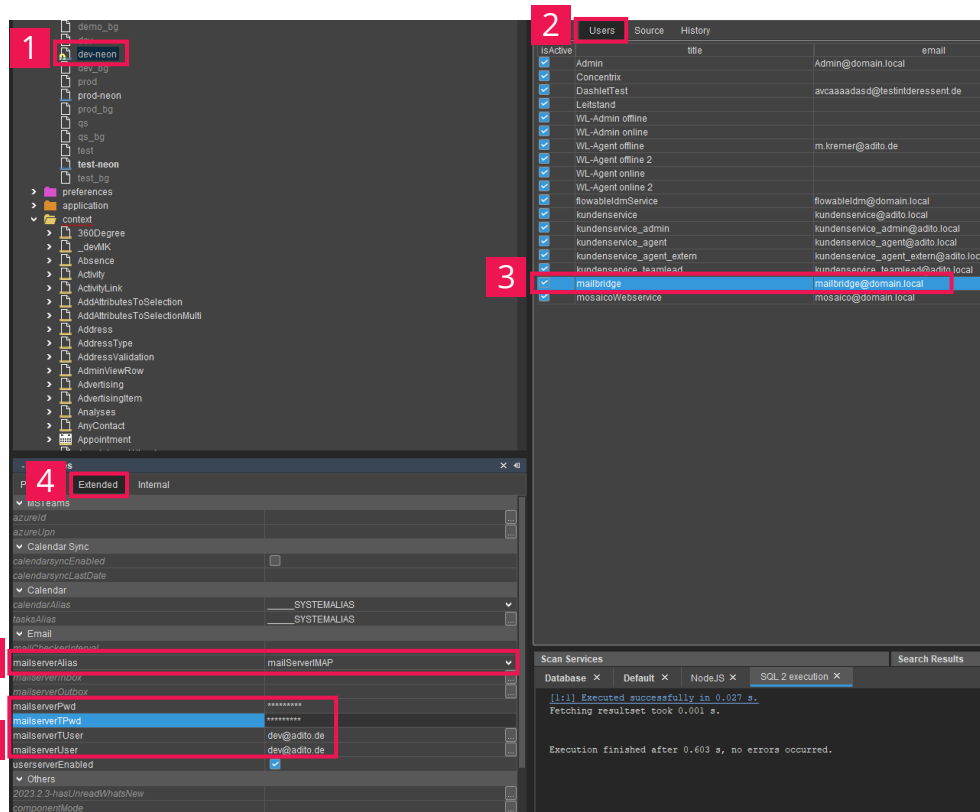
Title preset •

Required value is missing

If you deactivate the "Send e-mails" button, it is no longer possible to send e-mails from a service ticket and the "Reply" and "Forward" actions in the service ticket are deactivated.

Login data for the Exchange is stored in the Designer. The corresponding technical user must be entered here so that the login data can be accessed and the email can be sent.

Exkursus Configuration „Technical user“



The screenshot displays the ADITO configuration interface. On the left, a tree view shows the 'dev-neon' user selected. On the right, the 'Users' tab is active, showing a list of users. The 'mailbridge' user is highlighted. Below the list, the 'Extended' tab is selected, showing the 'mailServerAlias' and 'mailServerUser' fields. The 'mailServerAlias' is set to 'mailServer@P' and the 'mailServerUser' is set to 'dev@adito.de'.

1. dev-neon

2. Users

3. mailbridge

4. Extended

5. mailServerAlias

6. mailServerUser

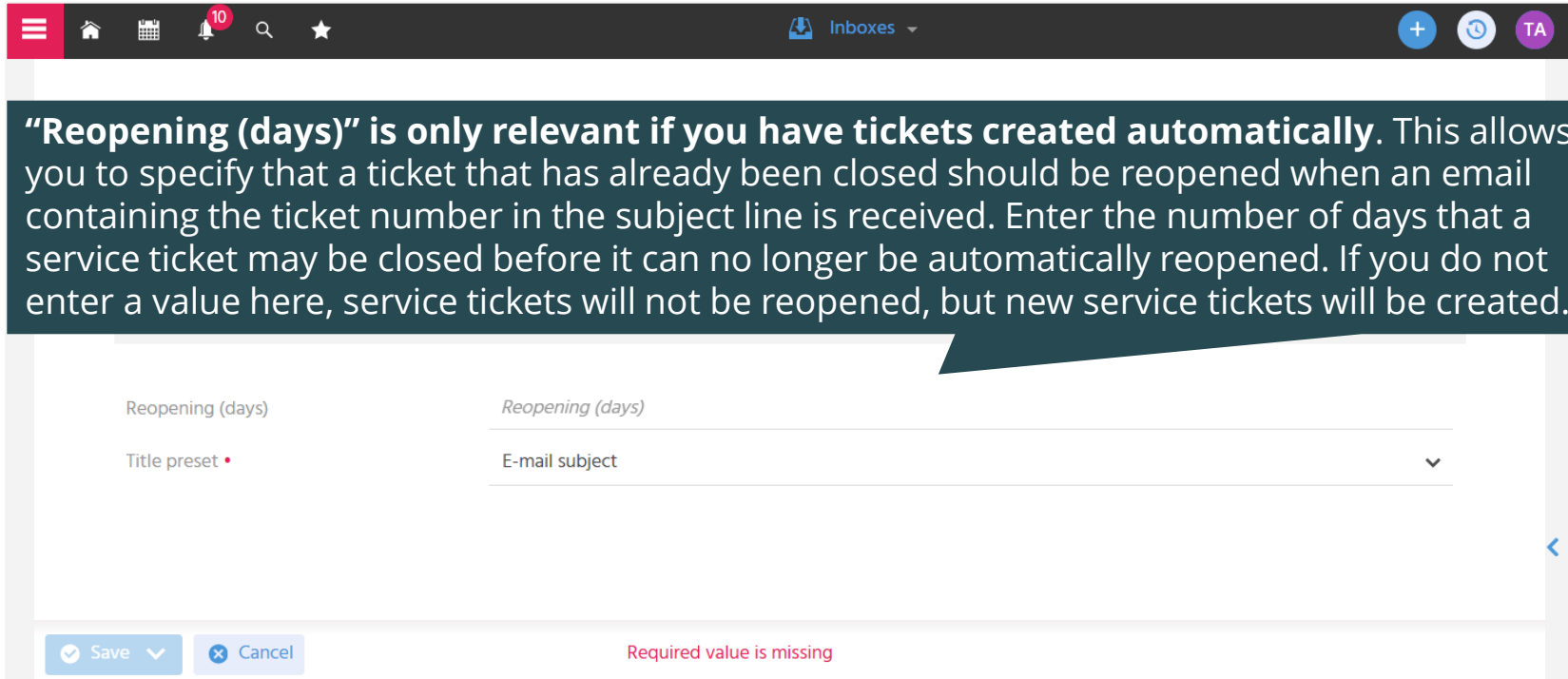
Proceed as follows to store the e-mail server at the user to be used for sending e-mails :

- 1 Choose system
- 2 Switch to the tab „Users“
- 3 Mark user „mailbridge“ (or other User)
- 4 Select the „Extended“ tab in the „Properties“ area
- 5 Select the server from which the email is collected
- 6 Login data: Password, Email



Basic information on the mail bridge can be found in AID 019 “Mailbridge”

Create inbox



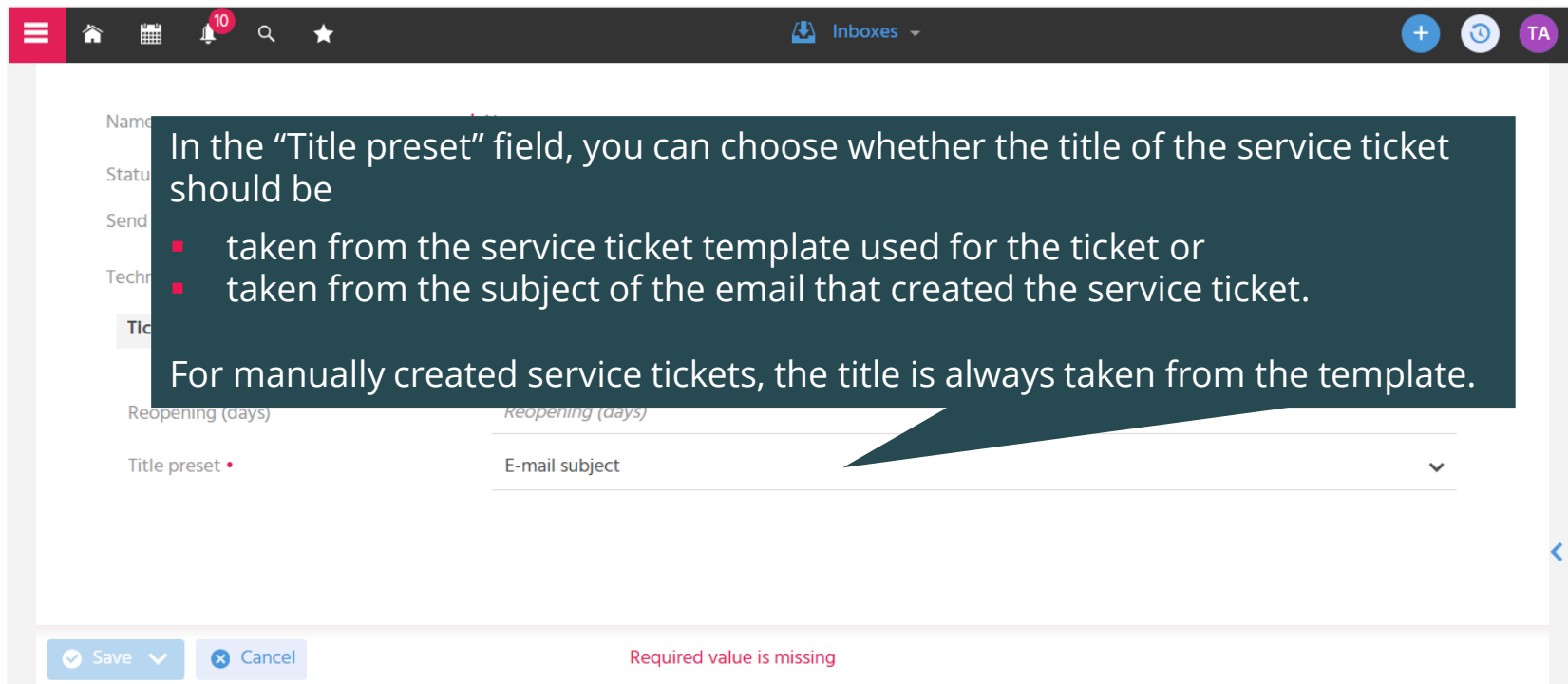
“Reopening (days)” is only relevant if you have tickets created automatically. This allows you to specify that a ticket that has already been closed should be reopened when an email containing the ticket number in the subject line is received. Enter the number of days that a service ticket may be closed before it can no longer be automatically reopened. If you do not enter a value here, service tickets will not be reopened, but new service tickets will be created.

Reopening (days)	<i>Reopening (days)</i>
Title preset •	E-mail subject ▼

Save Cancel

Required value is missing

Create inbox



In the "Title preset" field, you can choose whether the title of the service ticket should be

- taken from the service ticket template used for the ticket or
- taken from the subject of the email that created the service ticket.

For manually created service tickets, the title is always taken from the template.

Reopening (days) *Reopening (days)*

Title preset • E-mail subject

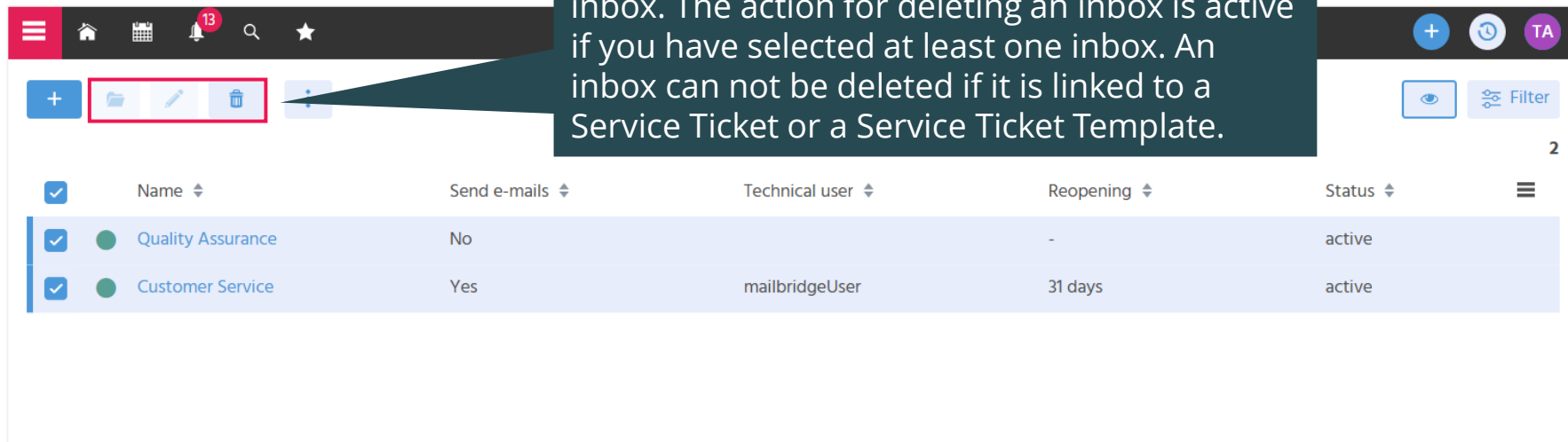
Save Cancel

Required value is missing

Inboxes

Opening, editing or deleting an inbox

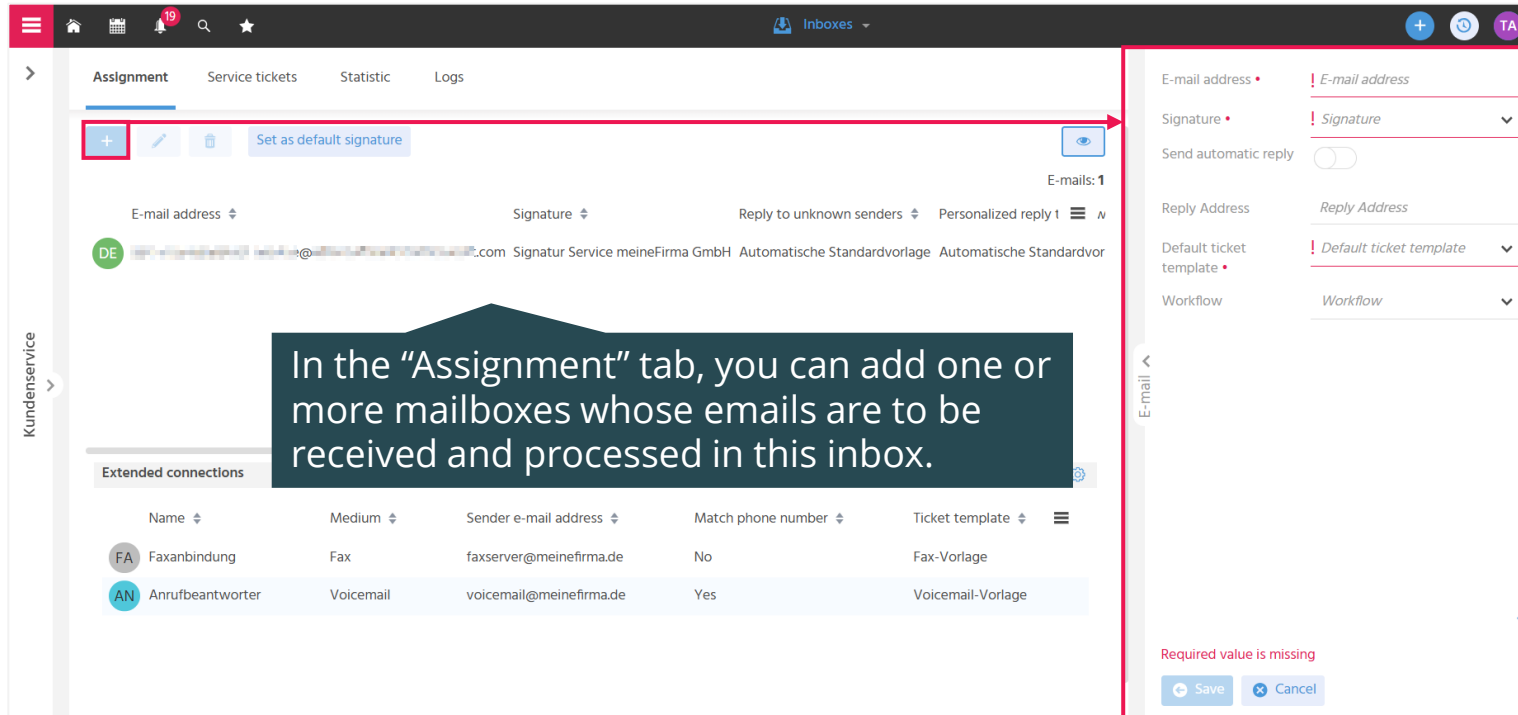
The actions for opening or editing an inbox are only active if you have selected exactly one inbox. The action for deleting an inbox is active if you have selected at least one inbox. An inbox can not be deleted if it is linked to a Service Ticket or a Service Ticket Template.



☒	Name	Send e-mails	Technical user	Reopening	Status
☒	Quality Assurance	No		-	active
☒	Customer Service	Yes	mailbridgeUser	31 days	active

Inbox with mail connection

Tab "Assignment" – Assignment of mailboxes



In the "Assignment" tab, you can add one or more mailboxes whose emails are to be received and processed in this inbox.

Extended connections

Name	Medium	Sender e-mail address	Match phone number	Ticket template
FA Faxanbindung	Fax	faxserver@meinefirma.de	No	Fax-Vorlage
AN Anrufbeantworter	Voicemail	voicemail@meinefirma.de	Yes	Voicemail-Vorlage

Configuration Panel (Right):

- E-mail address: ! E-mail address
- Signature: ! Signature
- Send automatic reply: ☐
- Reply Address: Reply Address
- Default ticket template: ! Default ticket template
- Workflow: Workflow

Required value is missing

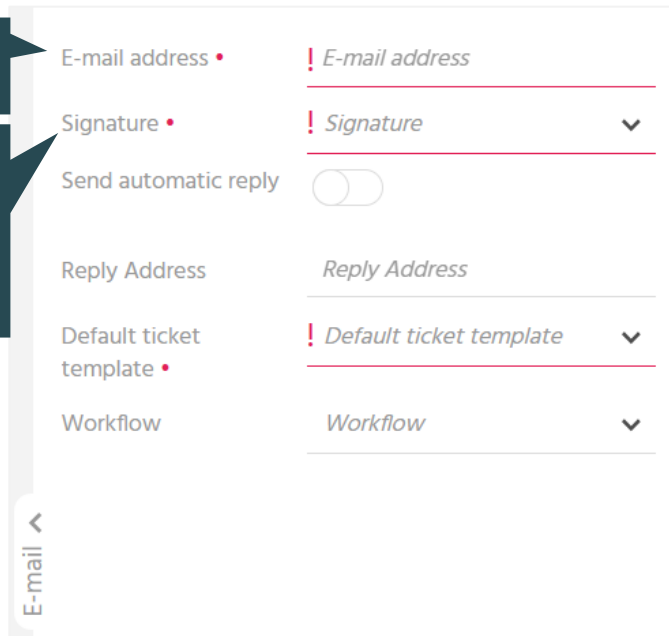
Save Cancel

Inbox with mail connection

Tab "Assignment" – Assignment of mailboxes

Service tickets are **automatically created** for emails sent to this email address.

Select the signature to be used when emails are sent from this mailbox (automatically or manually triggered). As a rule, the same signature is used for all mailboxes, but different signatures can also be used. Example: You manage the service on behalf of your customers. You therefore need a separate signature for each customer.

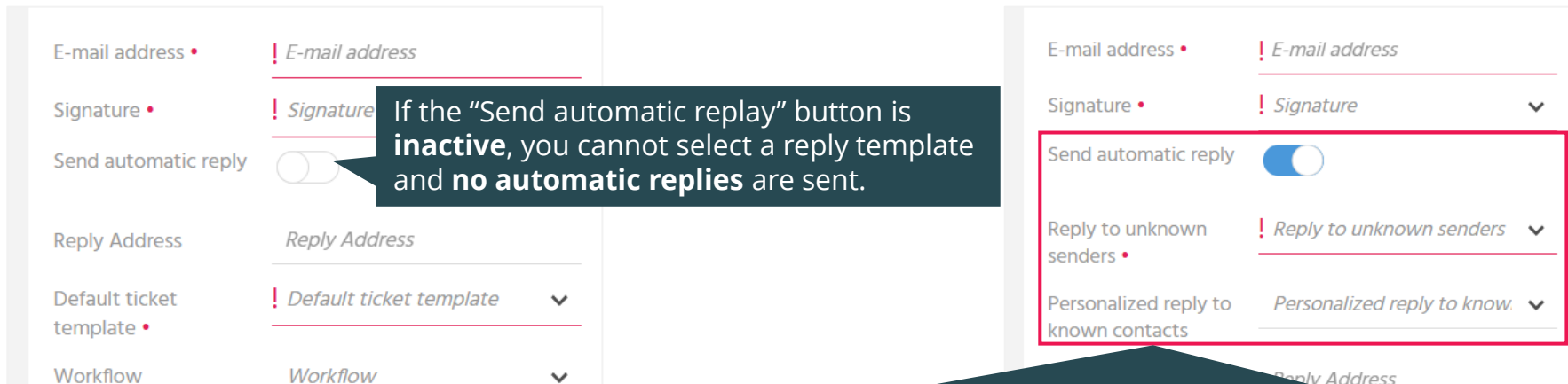


E-mail address •	! E-mail address
Signature •	! Signature ▼
Send automatic reply	☐
Reply Address	Reply Address
Default ticket template •	! Default ticket template ▼
Workflow	Workflow ▼

E-mail <

Inbox with mail connection

Tab “Assignment” – Assignment of mailboxes



E-mail address • ! E-mail address

Signature • ! Signature

Send automatic reply ☐

Reply Address Reply Address

Default ticket template • ! Default ticket template ▼

Workflow Workflow ▼

E-mail address • ! E-mail address

Signature • ! Signature ▼

Send automatic reply ☒

Reply to unknown senders • ! Reply to unknown senders ▼

Personalized reply to known contacts Personalized reply to known contacts ▼

Reply Address

If the “Send answer” button is **active**, a reply E-mail is automatically sent when an E-mail is received.

The template selected for “**Reply to unknown senders**” is used

- when the E-mail cannot be assigned to a contact
- when the E-mail can be assigned to a contact, but no “Personalized reply to known contacts” template was chosen.

The template selected for “**Personalized reply to known contacts**” is used when the E-mail can be assigned to a contact. Use a reply template with a contact placeholder here, so that the requester is addressed individually right from the first contact.

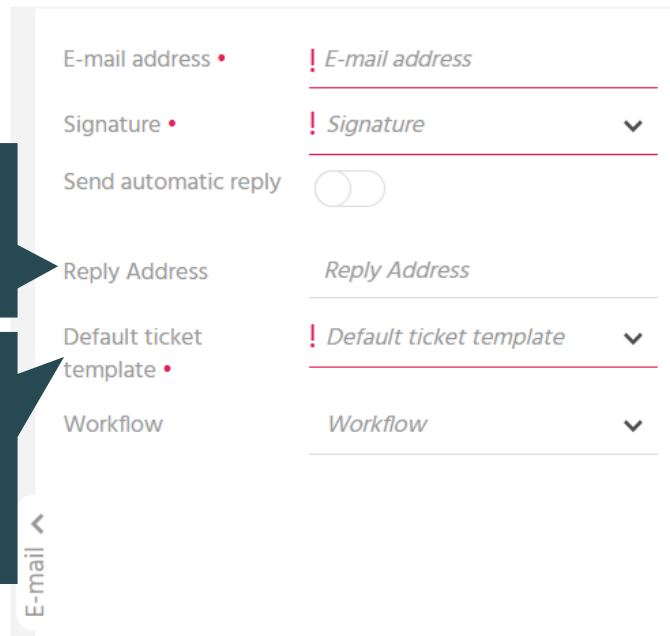
Inbox with mail connection

Tab "Assignment" – Assignment of mailboxes

You can **define a replay address** (e-mail address) that will be displayed as the sender address for e-mails you send. If you do not enter an answer address, the e-mail address in which the e-mail to which you are replying was received is automatically used.

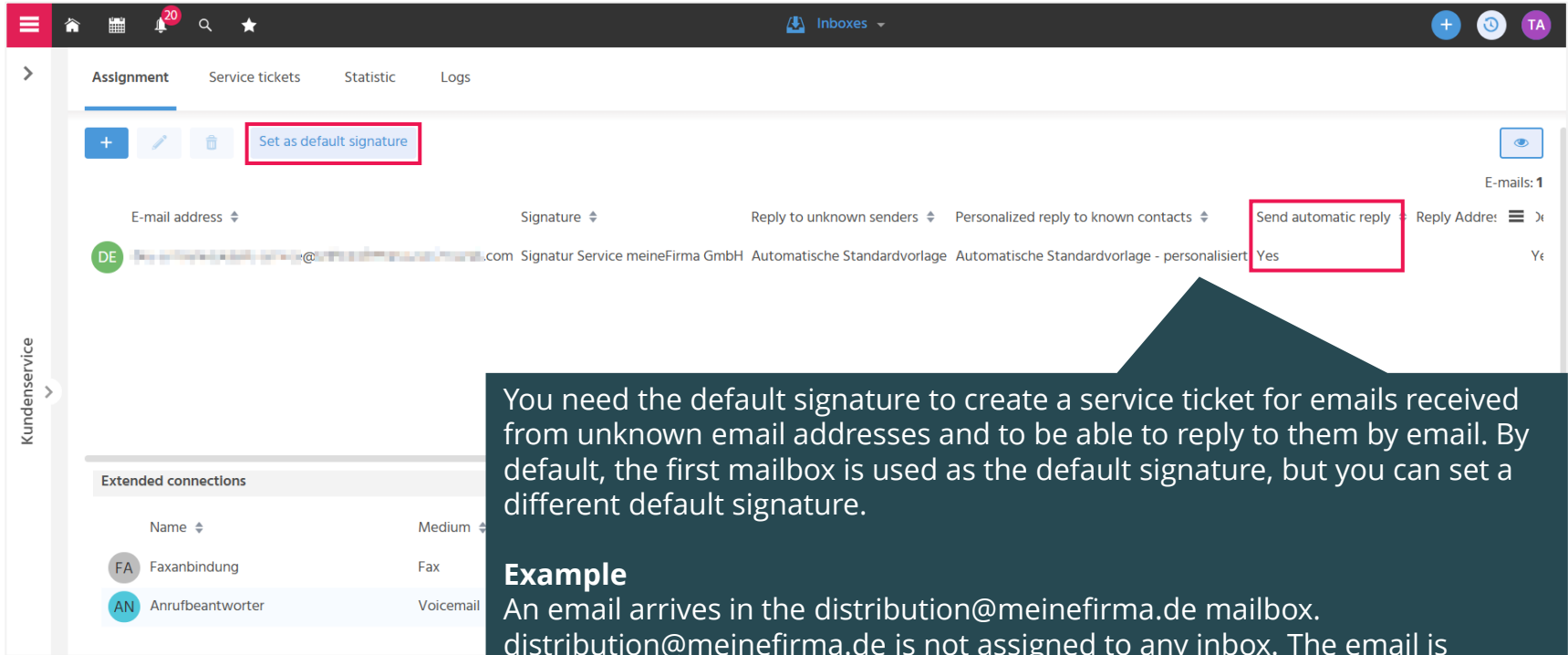
Select a **default ticket template** that is always used to create service tickets

- if no rules are defined in the rule editor or no rule applies that would use a different service ticket template.
- if no service ticket template can be determined by the AI. In these cases, it is therefore the default ticket template.



Inbox with mail connection

Tab "Assignment" – Set default signature



The screenshot shows the 'Assignment' tab in the ADITO interface. The 'Set as default signature' button is highlighted with a red box. Below it, the 'Send automatic reply' dropdown is also highlighted with a red box and set to 'Yes'. The 'E-mail address' field shows 'distribution@meinefirma.de'. The 'Signature' field shows 'Signatur Service meineFirma GmbH'. The 'Reply to unknown senders' field shows 'Automatische Standardvorlage'. The 'Personalized reply to known contacts' field shows 'Automatische Standardvorlage - personalisiert'. The 'Reply Address' field shows 'Ye'. The 'Extended connections' table is visible at the bottom left.

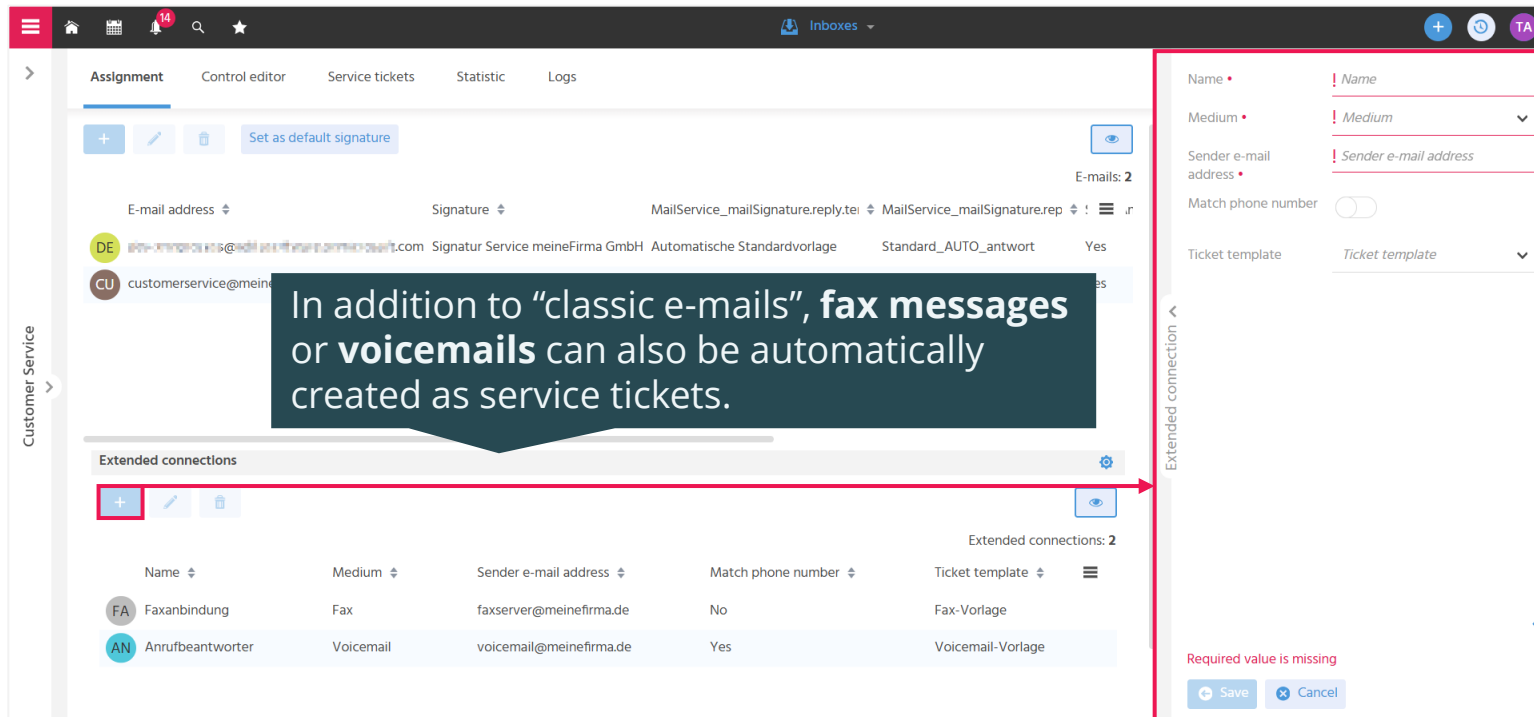
Name	Medium
FA Faxanbindung	Fax
AN Anrufbeantworter	Voicemail

You need the default signature to create a service ticket for emails received from unknown email addresses and to be able to reply to them by email. By default, the first mailbox is used as the default signature, but you can set a different default signature.

Example

An email arrives in the `distribution@meinefirma.de` mailbox. `distribution@meinefirma.de` is not assigned to any inbox. The email is therefore automatically assigned to the `support@meinefirma.de` mailbox.

Tab "Assignment" – Extended connections



The screenshot shows the 'Assignment' tab in the ADITO interface. A dark blue callout box states: "In addition to 'classic e-mails', **fax messages** or **voicemails** can also be automatically created as service tickets." Below this, the 'Extended connections' section is visible, showing a table with two entries: 'Faxanbindung' (Fax) and 'Anrufbeantworter' (Voicemail). A red arrow points from the '+' button in the 'Extended connections' table to a modal window on the right. The modal window contains a form for adding a new extended connection, with fields for Name, Medium, Sender e-mail address, Match phone number, and Ticket template. A red error message at the bottom of the modal states: "Required value is missing".

Extended connections table:

Name	Medium	Sender e-mail address	Match phone number	Ticket template
FA Faxanbindung	Fax	faxserver@meinefirma.de	No	Fax-Vorlage
AN Anrufbeantworter	Voicemail	voicemail@meinefirma.de	Yes	Voicemail-Vorlage

Modal Form Fields:

- Name: (Required)
- Medium: (Required)
- Sender e-mail address: (Required)
- Match phone number: ☐
- Ticket template:

Buttons: Save, Cancel

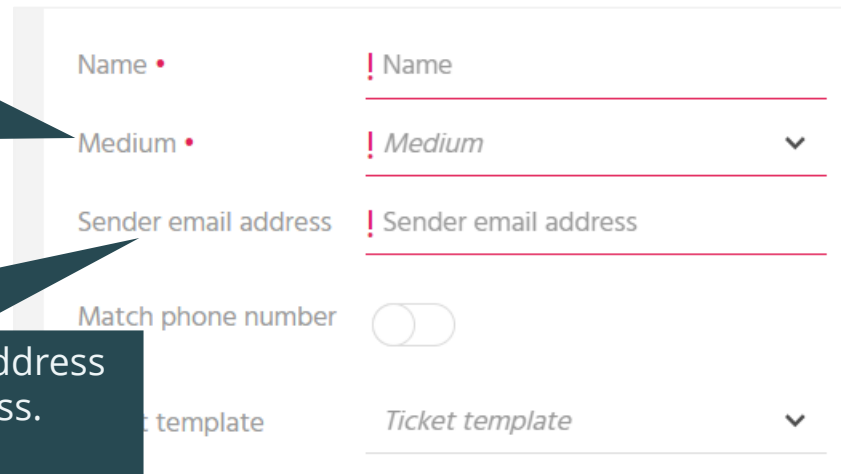
Tab “Assignment” – Extended connections

In the **“Medium” field**, select the value that should be used when a service ticket is created. If, for example, the service ticket should not state that it was created from a fax, you can enter “E-Mail” here.

In the Sender email address field, enter the email address that the selected medium uses as the sender address.

Example

The fax machine sends emails to Mailbridge with the sender address ‘faxserver@meinefirma.de’, which assigns the ticket to the inbox that this sender address was assigned to in the extended connections.



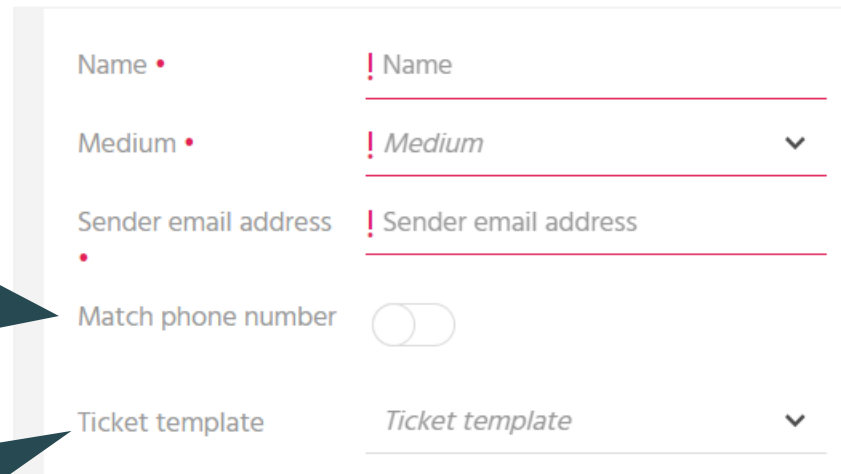
The screenshot shows a form with the following fields:

- Name**: A text input field with a red exclamation mark icon.
- Medium**: A dropdown menu with a red exclamation mark icon and a downward arrow.
- Sender email address**: A text input field with a red exclamation mark icon.
- Match phone number**: A toggle switch.
- Ticket template**: A dropdown menu with a downward arrow.

Tab "Assignment" – Extended connections

To automatically link the service tickets from these messages to contacts, you can activate the **"Match phone number"** button. A process recognizes the phone numbers and matches them with the contacts in the system. Contacts found are linked to the resulting tickets.

Specify which service ticket template is to be used when a service ticket is created via the specified sender address and if no service ticket template can be determined by the AI.



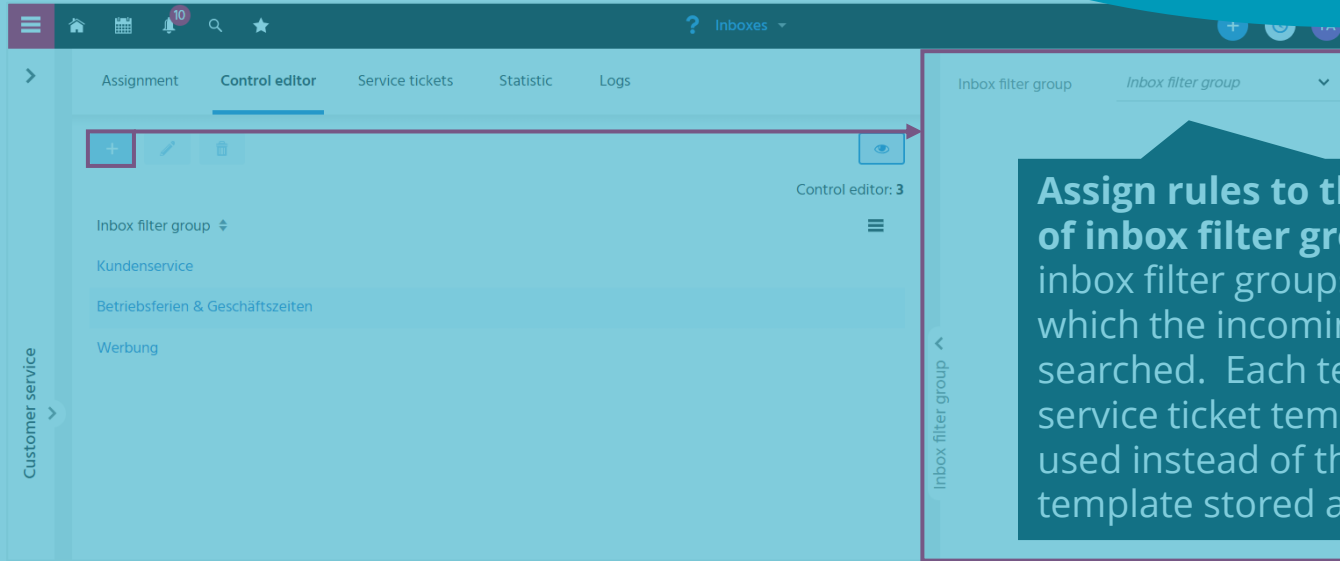
Name •	! Name
Medium •	! Medium ▼
Sender email address •	! Sender email address
Match phone number	☐
Ticket template	Ticket template ▼



In order to use number matching, activation and, if necessary, adjustments in the Designer are required. Please contact your ADITO project manager in this regard.

Inbox

Tab „Control editor“



End of Life

With version 2026.4.0, service ticket templates are no longer determined using mailbox filter groups, but by default using AI. Mailbox filter groups will be removed in the next xRM major version.

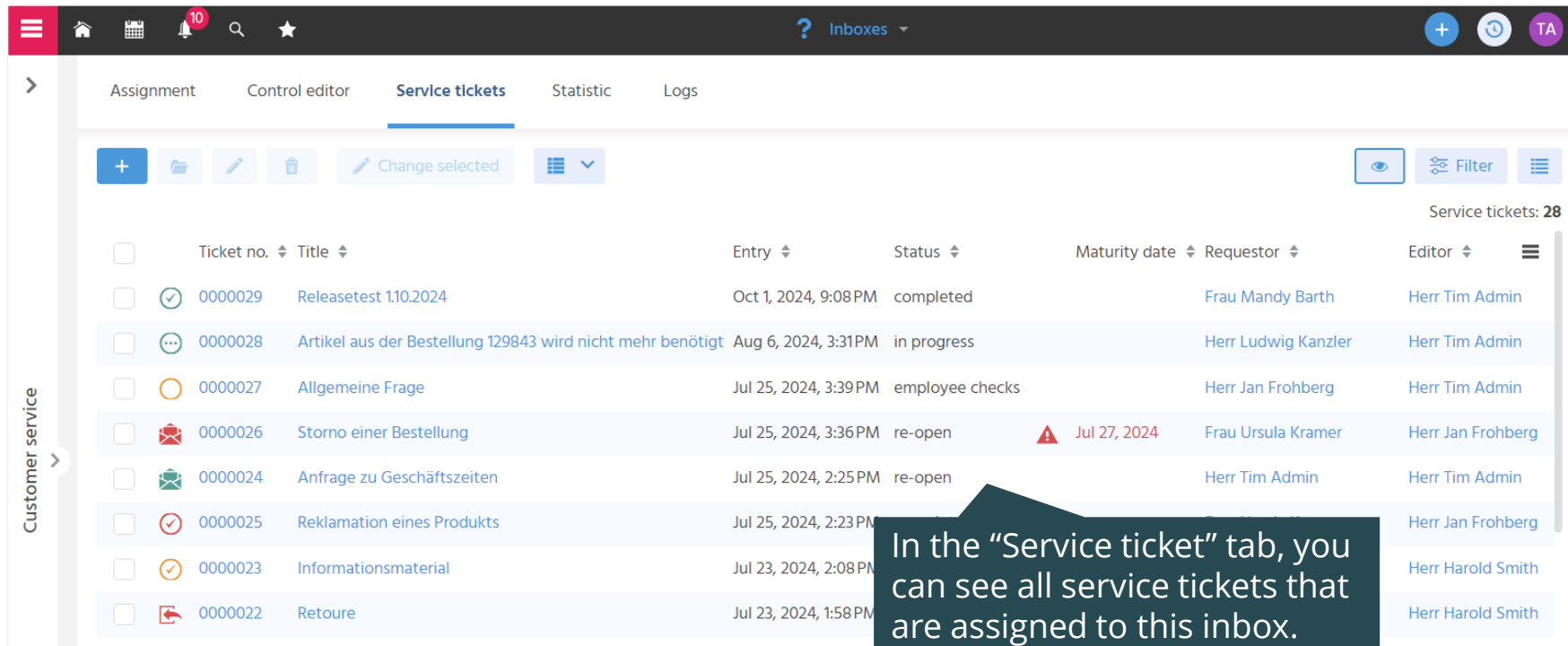
Assign rules to the inbox in the form of inbox filter groups. You can use the inbox filter groups to define terms for which the incoming emails are to be searched. Each term is assigned a service ticket template that is to be used instead of the service ticket template stored at the email address.



If you do not define any rules here, all incoming emails are automatically created as service ticket using the standard template.

[Create inbox filter groups](#)

Tab „Service tickets“ – Overview of all service tickets entered in the inbox

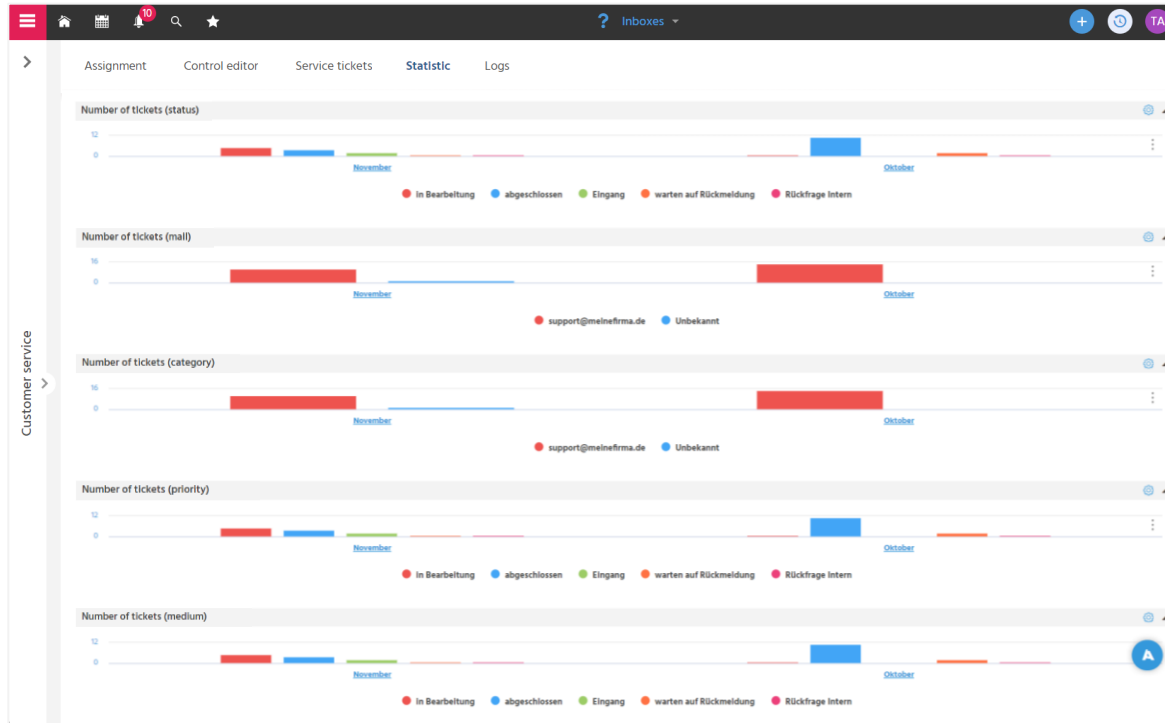


The screenshot shows the 'Service tickets' tab in the ADITO interface. The top navigation bar includes icons for home, calendar, notifications (10), search, and a star. The 'Inboxes' dropdown is set to '?'. The left sidebar shows 'Customer service' with a right-pointing arrow. The main content area has tabs for 'Assignment', 'Control editor', 'Service tickets' (selected), 'Statistic', and 'Logs'. Below the tabs are action buttons: '+', a folder icon, a pencil icon, a trash icon, 'Change selected', and a list view icon. On the right, there are icons for eye, filter, and list. The text 'Service tickets: 28' is displayed. The table below lists the tickets:

	Ticket no.	Title	Entry	Status	Maturity date	Requestor	Editor
☐	0000029	Releasetest 1.10.2024	Oct 1, 2024, 9:08 PM	completed		Frau Mandy Barth	Herr Tim Admin
☐	0000028	Artikel aus der Bestellung 129843 wird nicht mehr benötigt	Aug 6, 2024, 3:31 PM	in progress		Herr Ludwig Kanzler	Herr Tim Admin
☐	0000027	Allgemeine Frage	Jul 25, 2024, 3:39 PM	employee checks		Herr Jan Froberg	Herr Tim Admin
☐	0000026	Storno einer Bestellung	Jul 25, 2024, 3:36 PM	re-open	Jul 27, 2024	Frau Ursula Kramer	Herr Jan Froberg
☐	0000024	Anfrage zu Geschäftszeiten	Jul 25, 2024, 2:25 PM	re-open		Herr Tim Admin	Herr Tim Admin
☐	0000025	Reklamation eines Produkts	Jul 25, 2024, 2:23 PM				Herr Jan Froberg
☐	0000023	Informationsmaterial	Jul 23, 2024, 2:08 PM				Herr Harold Smith
☐	0000022	Retoure	Jul 23, 2024, 1:58 PM				Herr Harold Smith

In the "Service ticket" tab, you can see all service tickets that are assigned to this inbox.

Tab „Statistic“



Here you will find graphical evaluations of the service tickets. Alternatively, you can also find the graphical evaluations as dashlets in the dashlet stores of the service dashboards.



End of Life

With version 2026.4.0, service ticket templates are no longer determined using mailbox filter groups, but by default using AI. Mailbox filter groups will be removed in the next xRM major version.

Inbox filter group

Inbox filter group

End of Life

With version 2026.4.0, service ticket templates are no longer determined using mailbox filter groups, but by default using AI. Mailbox filter groups will be removed in the next xRM major version.

What are inbox filter groups and how do they work?

- Inbox filter groups are used in an inbox **to search mails for specific terms** (search values). They form a logical bracket around several search values.
- In an inbox filter group, you define search values for which a message is to be searched. You must link each search value to a service ticket template. This creates a service ticket for a message in which the search value is found, based on the service ticket template stored for the search value. The service ticket is stored in the inbox specified in the service ticket template. This allows service tickets to be moved to a different inbox if the incoming email was initially addressed to the “wrong” mailbox.
- You can only use inbox filter groups in inboxes with a mail connection. However, you do not have to use them there.
- You can assign several inbox filter groups to each inbox. The priority of the inbox filter group then determines which service ticket template is used to create the service tickets.
- You can assign a inbox filter group to different inboxes. This means that you do not have to create identical inbox filter groups for each new inbox.
- You can define which attributes should be recorded in the service ticket if a certain search value occurs in an e-mail.

Inbox filter group

Create Inbox filter groups

End of Life

With version 2026.4.0, service ticket templates are no longer determined using mailbox filter groups, but by default using AI. Mailbox filter groups will be removed in the next xRM major version.

Assign a name that indicates the "topic" to which the associated search values belong.

☐	Name ↕		
☐	Werbung	3	active
☐	Betriebsferien & Geschäftszeiten	2	active
☐	Kundenservice	1	active

The priority (integer >1) indicates which filter group is used first in an inbox.
([Further information on the topic „Priority“](#))

Inbox filter group

Priority

- The priority (integer >1) indicates which filter group is used first if several inbox filter groups are linked in one inbox and the hit would apply to several at the same time.
- The lower the number, the higher the priority.
- Therefore, assign the “important” search values to the inbox filter group with the higher priority.

End of Life

With version 2026.4.0, service ticket templates are no longer determined using mailbox filter groups, but by default using AI. Mailbox filter groups will be removed in the next xRM major version.

Example:

- Inbox filter group “Customer service” with priority 1 contains the search value “Action” and uses the service ticket template “x”.
- Inbox filter group “Advertising” with priority 3 also contains the search value “Action” and uses service ticket template “y”.
- If a mail is now received in which the term “action” is found, the service ticket is created with service ticket template “x”.

Inbox filter group

Tab „Inbox filters“ – Define search values

The screenshot shows the 'Inbox filter group' interface. At the top, there are tabs for 'Inbox filters', 'Attribute filters', and 'Logs'. The 'Inbox filters' tab is active. Below the tabs, there is a table with 12 filters. The table has three columns: 'Search component', 'Search term', and 'Ticket template'. A red box highlights the '+' button in the top left corner of the table. A red arrow points from this button to a modal window titled 'Ticket filter'. The modal window has three fields: 'Search component', 'Search term', and 'Ticket template'. Each field has a dropdown menu. The 'Search component' dropdown is open, showing a list of options: 'Body', 'Subject', 'Sender', and 'Subject and Body'. The 'Search term' field is empty. The 'Ticket template' dropdown is also open, showing a list of options: 'Werbung', 'Messe', 'Gestalter', 'Marketing', 'Event', 'Neuheit', 'einmalig', 'Reklame', 'Veranstaltung', and 'Werbung'. The modal window also has a 'Save' button and a 'Cancel' button. A red box highlights the 'Save' button.

Search component	Search term	Ticket template
Subject and Body	Webinar	Werbung
Subject and Body	Messe	Werbung
Subject and Body	Gestalter	Werbung
Subject and Body	Marketing	Werbung
Subject and Body	Event	Werbung
Subject and Body	Neuheit	Werbung
Subject and Body	einmalig	Werbung
Subject and Body	Reklame	Werbung
Subject and Body	Veranstaltung	Werbung
Subject and Body	Werbung	Werbung

End of Life

With version 2026.4.0, service ticket templates are no longer determined using mailbox filter groups, but by default using AI. Mailbox filter groups will be removed in the next xRM major version.

Specify where to search for the search term in the mail :

- Body
- Subject
- Sender
- Subject and Body

Inbox filter group

Tab „Inbox filters“ – Define search values

The screenshot shows the 'Inbox filter group' configuration page. The main table lists 12 filters. The modal dialog on the right is for adding or editing a filter. The 'Search term' field is highlighted with a red border and a red exclamation mark, indicating a required value is missing.

Search component	Search term	Ticket template
Subject and Body	Webinar	Werbung
Subject and Body	Messe	Werbung
Subject and Body	Gestalter	Werbung
Subject and Body	Marketing	Werbung
Subject and Body	Event	Werbung
Subject and Body	Neuheit	Werbung
Subject and Body	einmalig	Werbung
Subject and Body	Reklame	Werbung
Subject and Body	Veranstaltung	Werbung
Subject and Body	Werbung	Werbung

Search component • ! Search component

Search term • ! Search term

Ticket template • ! Ticket template

Required value is missing

Save Cancel

End of Life

With version 2026.4.0, service ticket templates are no longer determined using mailbox filter groups, but by default using AI. Mailbox filter groups will be removed in the next xRM major version.

Specify the "Search term", i.e. the term to be searched for.

Inbox filter group

Tab „Inbox filters“ – Define search values

Search component	Search term	Ticket template
Subject and Body	Webinar	Werbung
Subject and Body	Messe	Werbung
Subject and Body	Gestalter	Werbung
Subject and Body	Marketing	Werbung
Subject and Body	Event	Werbung
Subject and Body	Neuheit	Werbung
Subject and Body	einmalig	Werbung
Subject and Body	Reklame	Werbung
Subject and Body	Veranstaltung	Werbung
Subject and Body	Werbung	Werbung

Search component • ! Search component

Search term • ! Search term

Ticket template • ! Ticket template

Required value is missing

Save Cancel

End of Life

With version 2026.4.0, service ticket templates are no longer determined using mailbox filter groups, but by default using AI. Mailbox filter groups will be removed in the next xRM major version.

Specify which service ticket template should be used to create a service ticket if the search value is found.

Inbox filter group

Tab „Attribute filters“ – Define search values

End of Life

With version 2026.4.0, service ticket templates are no longer determined using mailbox filter groups, but by default using AI. Mailbox filter groups will be removed in the next xRM major version.

The screenshot shows the 'Attribute filters' configuration page. The top navigation bar includes a menu icon, home, calendar, notifications (10), search, and star icons. The main header is 'Inbox filter group'. Below it, there are tabs for 'Inbox filters', 'Attribute filters' (selected), and 'Logs'. The 'Attribute filters' tab contains a table with columns: 'Search component', 'Search term', and 'Attributes'. The table has one row: 'Body', 'complain', and '1'. To the right of the table is a 'Filter' button. Below the table, there is a 'Search component' dropdown set to 'Body', a 'Search term' input field with a red error message '! Search term', and an 'Attribute' dropdown set to 'Value'. At the bottom, there is a 'Required value is missing' message and 'Save' and 'Cancel' buttons.

Search component	Search term	Attributes
Body	complain	1

You can define which attributes should be recorded in the service ticket if a certain search term occurs in an e-mail.

Inbox filter group

Tab „Attribute filters“ – Define search values

End of Life

With version 2026.4.0, service ticket templates are no longer determined using mailbox filter groups, but by default using AI. Mailbox filter groups will be removed in the next xRM major version.

The screenshot shows the 'Attribute filters' tab within the 'Inbox filter group' configuration. The interface includes a top navigation bar with icons for menu, home, calendar, notifications (10), search, and star. The main content area has three tabs: 'Inbox filters', 'Attribute filters' (selected), and 'Logs'. Below the tabs, there are buttons for adding (+), editing (pencil), and deleting (trash) filters. A table lists the attribute filters with columns for 'Search component', 'Search term', and 'Attributes'. One filter is listed: 'Body' with search term 'complain' and attribute '1'. To the right of the table is a 'Filter' button. Below the table, there is a section for 'Attribute filters: 1' with a dropdown for 'Search component' (set to 'Body'), a text input for 'Search term' (containing '! Search term'), and a table for 'Attribute' and 'Value'. The 'Attribute' column has a dropdown set to 'Attribute', and the 'Value' column is empty. At the bottom right, there is a 'Required value is missing' message and 'Save' and 'Cancel' buttons.

Search component	Search term	Attributes
Body	complain	1

Attribute	Value
Attribute	

Specify where to search for the search term in the mail :

- Body
- Subject
- Sender
- Subject and Body

Inbox filter group

Tab „Attribute filters“ – Define search values

End of Life

With version 2026.4.0, service ticket templates are no longer determined using mailbox filter groups, but by default using AI. Mailbox filter groups will be removed in the next xRM major version.

The screenshot shows the 'Attribute filters' tab within the 'Inbox filter group' configuration. The interface includes a top navigation bar with icons for home, calendar, notifications (10), search, and star. Below the navigation bar, there are tabs for 'Inbox filters', 'Attribute filters' (selected), and 'Logs'. The main area is divided into three columns: 'Search component', 'Search term', and 'Attributes'. The 'Search component' column has a dropdown menu with 'Body' selected. The 'Search term' column has a text input field with the placeholder '! Search term'. The 'Attributes' column has a dropdown menu with '1' selected. To the right of the main area, there is a 'Filter' button and a list of 'Attribute filters: 1'. Below this, there is a table with two columns: 'Attribute' and 'Value'. The 'Attribute' column has a dropdown menu with 'Body' selected. The 'Value' column has a text input field with the placeholder 'Value'. At the bottom right, there is a blue circular button with a white 'A' icon. At the bottom left, there is a message 'Required value is missing' and two buttons: 'Save' and 'Cancel'.

Specify the “Search term”, i.e. the term to be searched for.

Specify which attribute value should be stored when creating a service ticket.

Employee group



Employee group

Overview

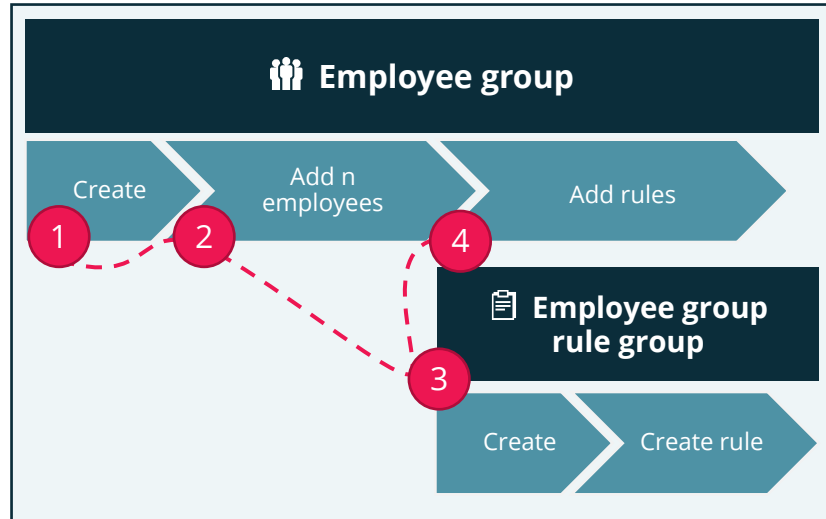
Employee groups are used,

- to assign specific employees and
- to define which service tickets are assigned to them for processing.

Structure your service team into employee groups, according to responsibilities, specialist areas/expert knowledge or other key topics.

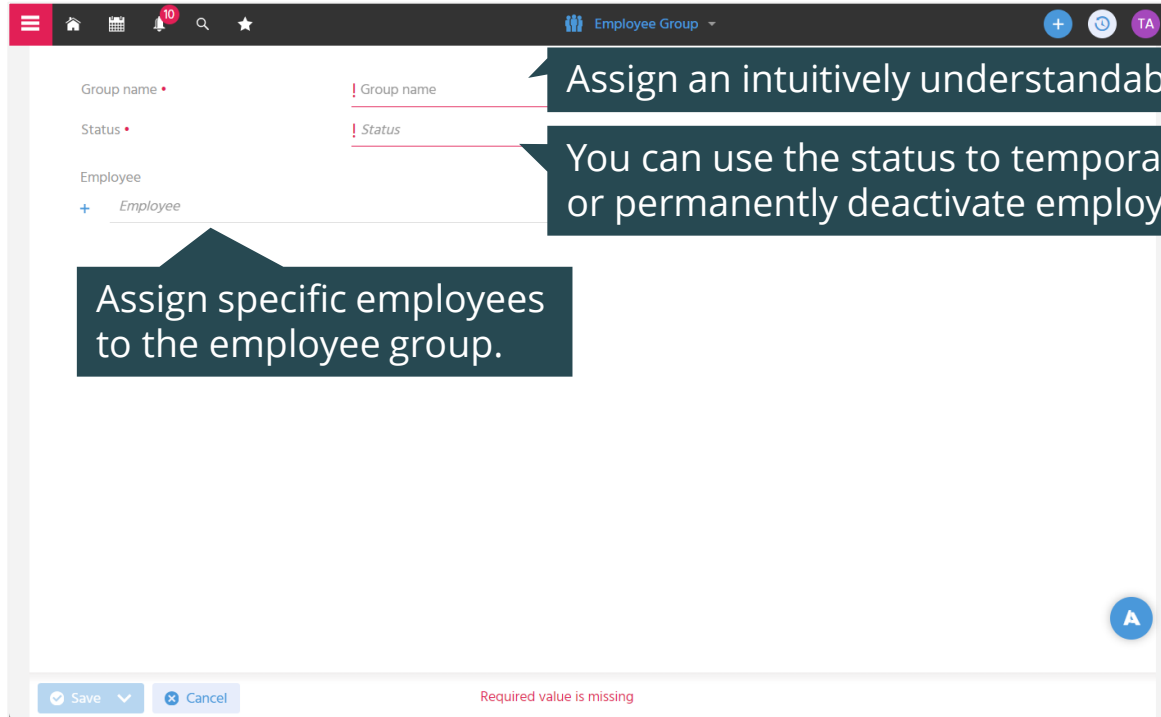
These groups are later used with the employee group rule groups for the automatic assignment of tickets (Action “Pull next ticket”).

Configuration of employee groups



Employee group

Create employee group



Group name • ! Group name

Status • ! Status

Employee
+ Employee

Save Cancel

Required value is missing

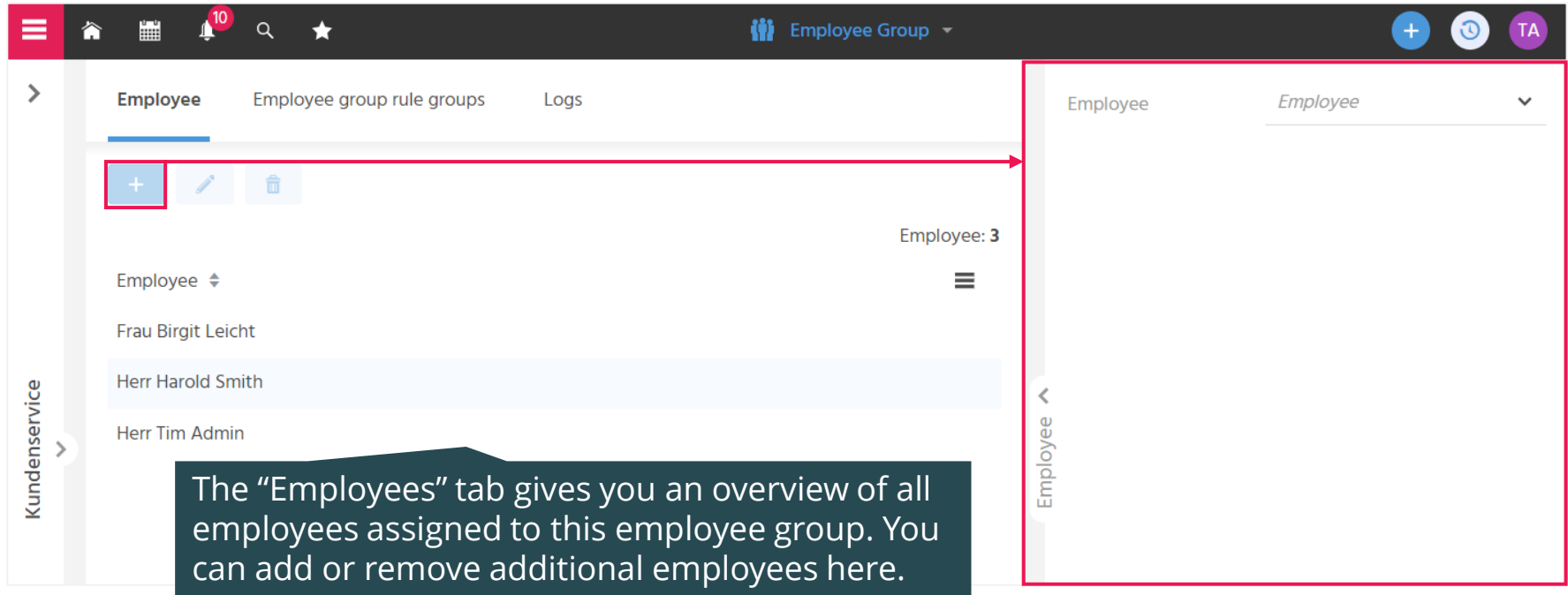
Assign an intuitively understandable, meaningful name.

You can use the status to temporarily (e.g. during configuration) or permanently deactivate employee groups.

Assign specific employees to the employee group.

Employee group

Tab „Mitarbeiter“



The screenshot displays the ADITO interface for managing an 'Employee Group'. The top navigation bar includes a hamburger menu, home, calendar, notifications (10), search, and star icons. The 'Employee Group' dropdown is active, showing options for adding (+), refreshing, and deleting (TA). The main content area has three tabs: 'Employee', 'Employee group rule groups', and 'Logs'. The 'Employee' tab is selected, showing a list of employees assigned to the group. A red box highlights the '+', edit, and delete icons, with a red arrow pointing to the right-hand pane. The right-hand pane shows a detailed view of an employee, with a red box around the 'Employee' header and a red arrow pointing to the left-hand pane. A text box at the bottom explains the functionality of the 'Employees' tab.

Employee: 3

Employee

Frau Birgit Leicht

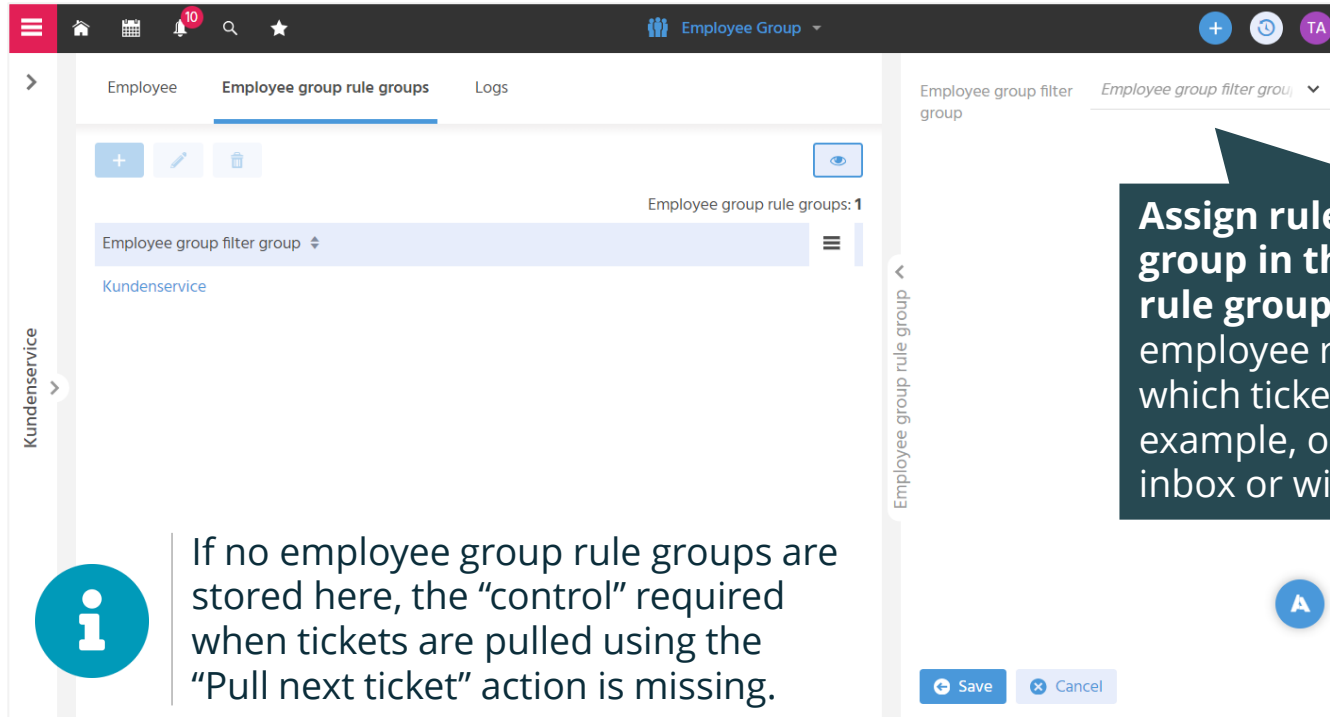
Herr Harold Smith

Herr Tim Admin

The “Employees” tab gives you an overview of all employees assigned to this employee group. You can add or remove additional employees here.

Employee group

Tab „Employee group rule groups“



Employee group rule groups

Employee group filter group

Kundenservice

Employee group rule groups: 1

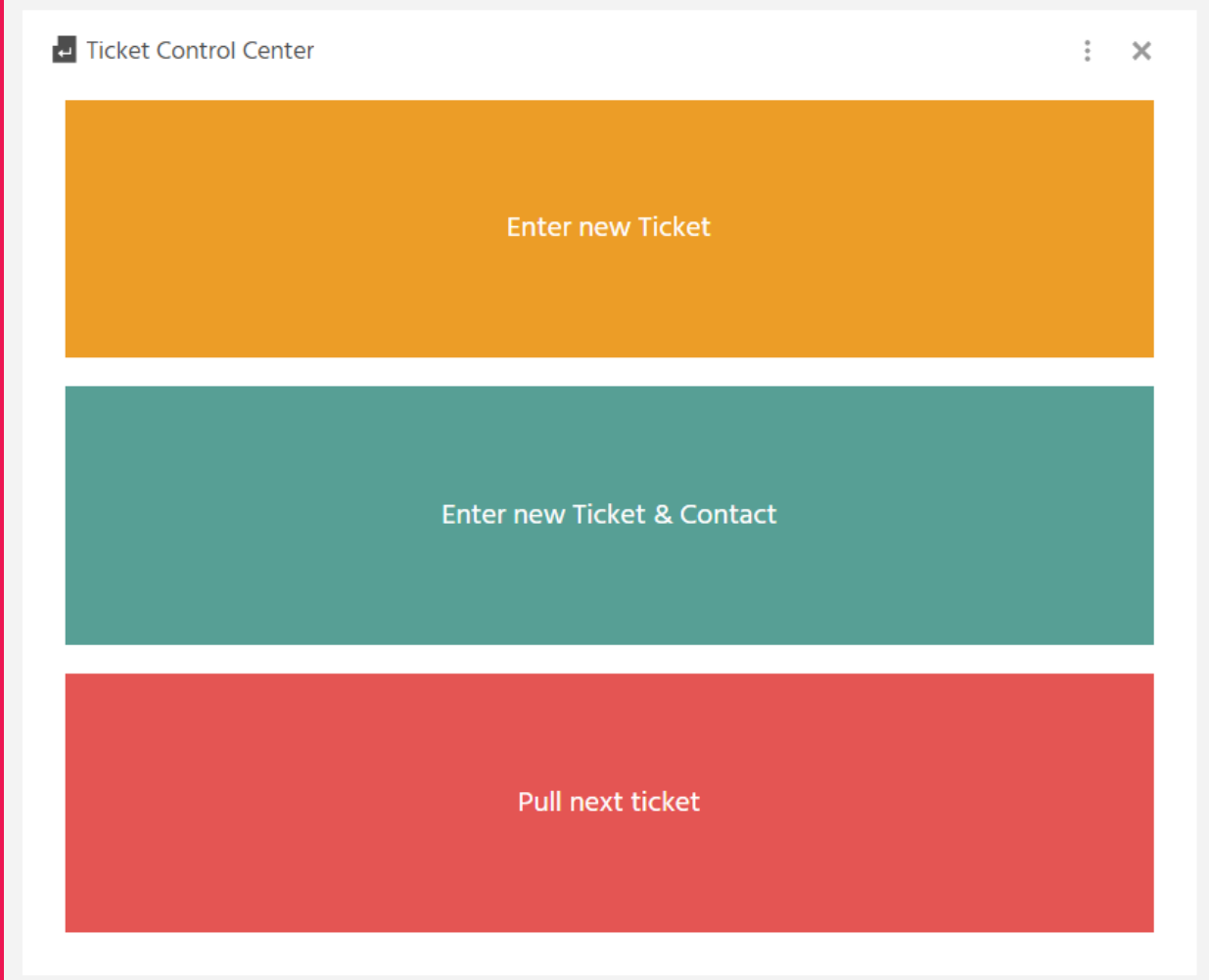
Employee group filter group

Assign rules to the employee group in the form of employee rule groups. You can use the employee rule groups to define which tickets may be pulled. For example, only tickets from a certain inbox or with a certain category.

Save Cancel

If no employee group rule groups are stored here, the “control” required when tickets are pulled using the “Pull next ticket” action is missing.

Employee group rule groups



Employee group rule group



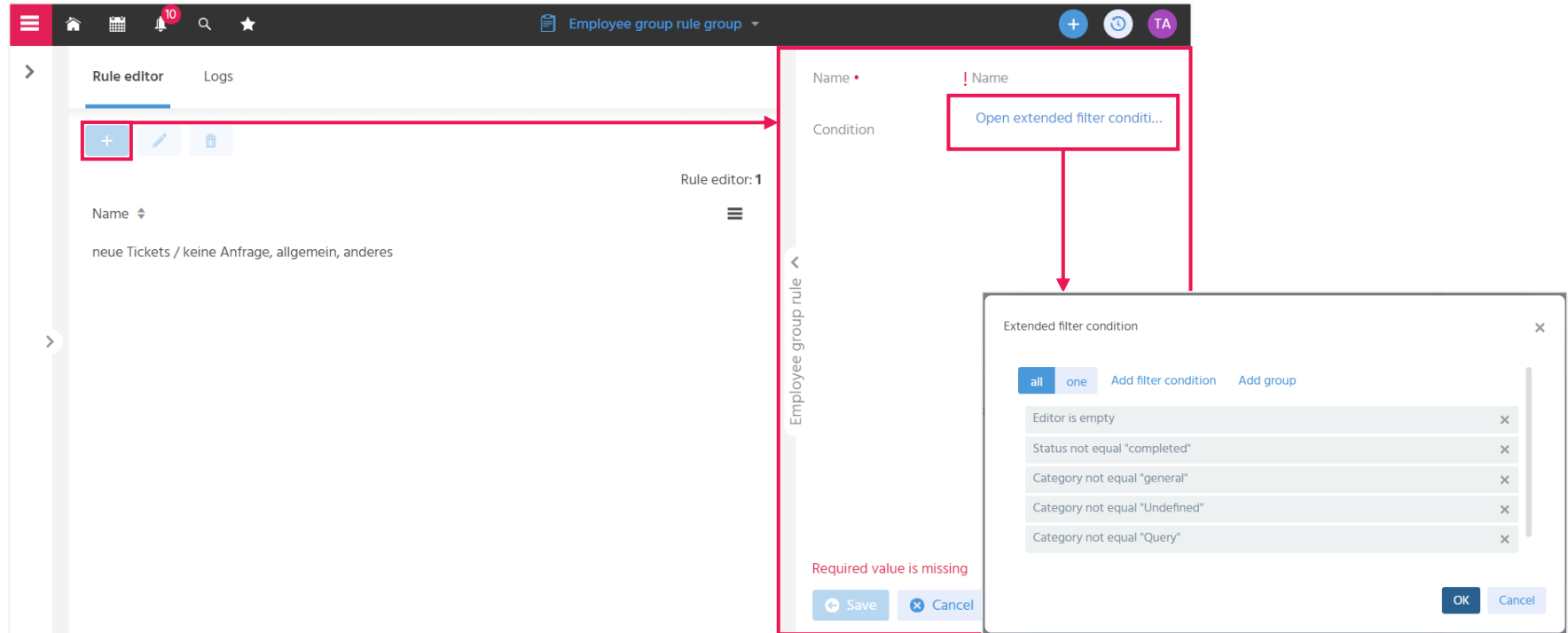
Functionality

In employee group rule groups, **filter conditions** are used to map rules that define which service tickets can be pulled using the “Pull next ticket” button. If no employee group rule group is assigned to an employee group, no ticket can be pulled via the “Pull next ticket” button.



Employee group rule group

Create rules



The screenshot displays the ADITO interface for creating rules within an 'Employee group rule group'. The main window is divided into a 'Rule editor' and a 'Logs' tab. The 'Rule editor' shows a rule named 'neue Tickets / keine Anfrage, allgemein, anderes'. A red box highlights the '+' button in the top left of the rule editor, with an arrow pointing to the 'Condition' field in the right-hand pane. The right-hand pane shows the 'Name' field with a red exclamation mark and the text '! Name', and the 'Condition' field with a red box around the text 'Open extended filter condi...'. A red arrow points from this box to a dialog titled 'Extended filter condition'. The dialog has a close button (X) in the top right corner. It contains a list of filter conditions: 'Editor is empty', 'Status not equal "completed"', 'Category not equal "general"', 'Category not equal "Undefined"', and 'Category not equal "Query"'. Each condition has a red 'X' button next to it. At the bottom of the dialog are 'OK' and 'Cancel' buttons. In the bottom right corner of the main window, there is a red error message: 'Required value is missing', with 'Save' and 'Cancel' buttons below it.

Employee group rule group

Rule editor

Logs

+

Name

Condition

! Name

Open extended filter condi...

Rule editor: 1

Name

neue Tickets / keine Anfrage, allgemein, anderes

Employee group rule

Extended filter condition

all one Add filter condition Add group

Editor is empty

Status not equal "completed"

Category not equal "general"

Category not equal "Undefined"

Category not equal "Query"

Required value is missing

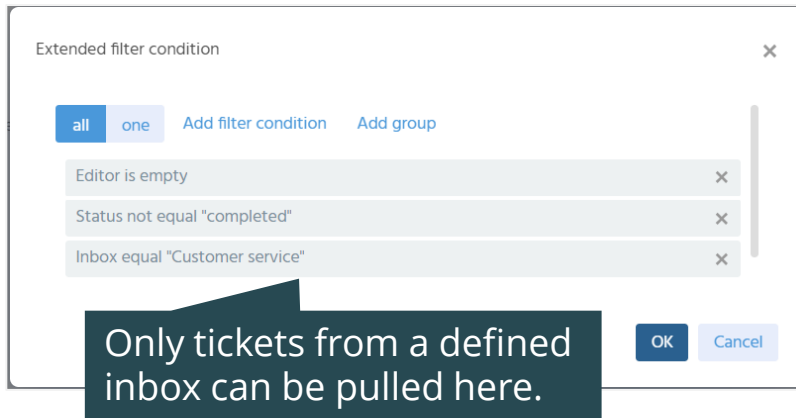
Save Cancel

OK Cancel

Employee group rule group

Examples of filter conditions

- Use the filter properties of the service ticket to determine in which cases a service ticket can be pulled by a service employee.
- Example:



Extended filter condition

all one Add filter condition Add group

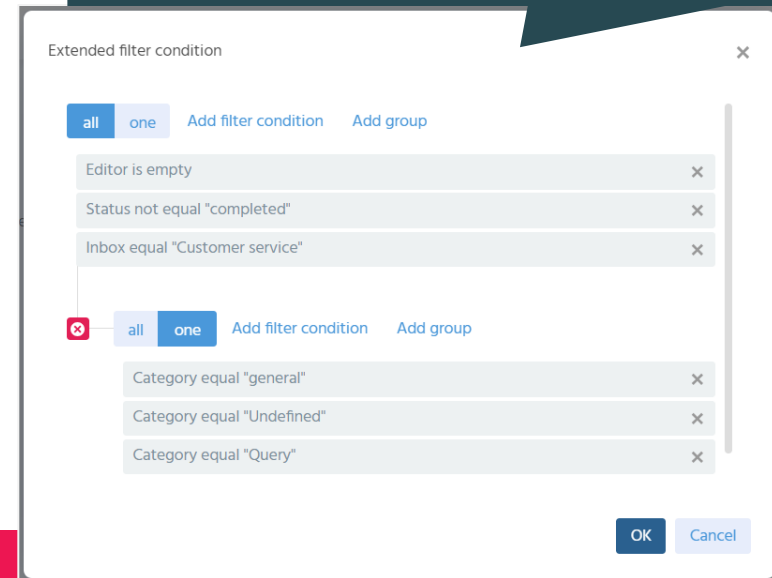
Editor is empty

Status not equal "completed"

Inbox equal "Customer service"

Only tickets from a defined inbox can be pulled here.

OK Cancel



Extended filter condition

all one Add filter condition Add group

Editor is empty

Status not equal "completed"

Inbox equal "Customer service"

Only tickets from a defined inbox and from defined categories can be pulled here.

all one Add filter condition Add group

Category equal "general"

Category equal "Undefined"

Category equal "Query"

OK Cancel



Escalation

Escalation



Overview

In ADITO, a process can activate the “Escalation” indicator in the service ticket and send a notification to a defined contact or employee group as soon as certain criteria are met.

To map this, an administrator can

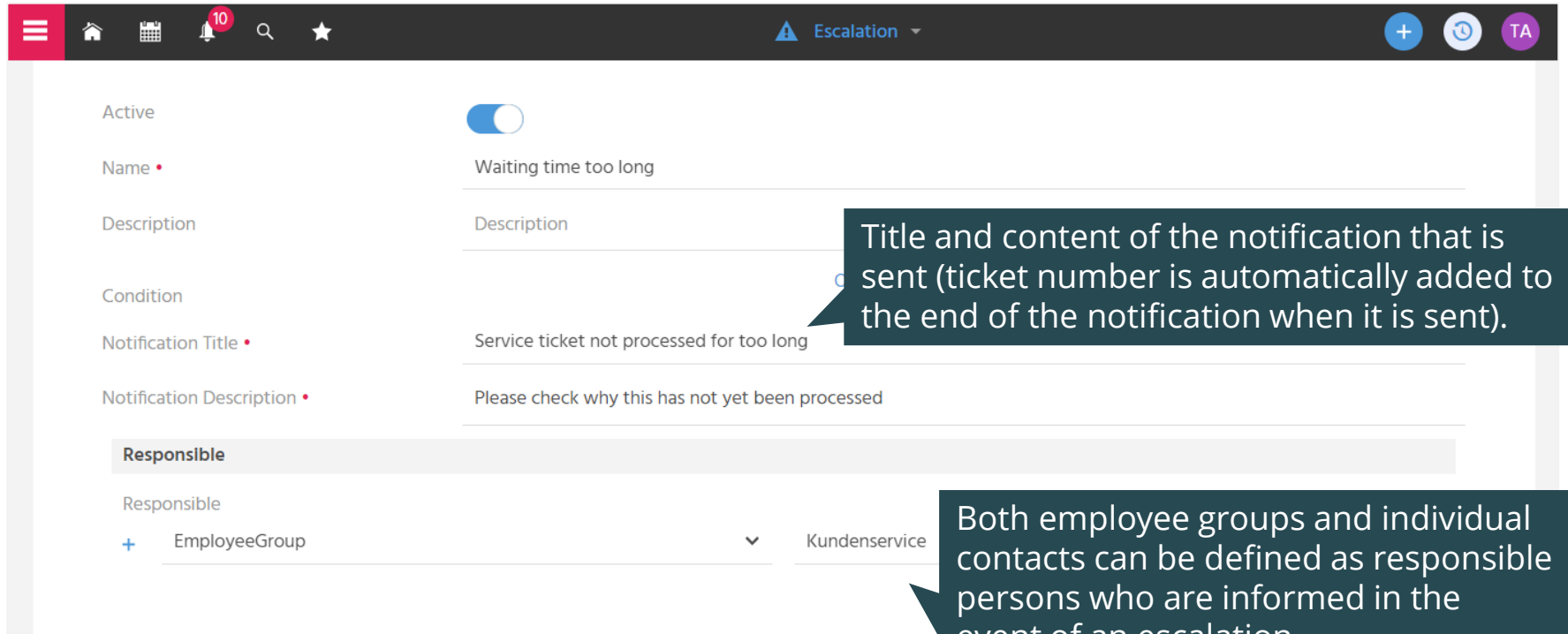
- use filters to define the criteria that the process uses to activate the “Escalation” indicator.
- define the title and content of a notification that is sent to a responsible person as soon as the corresponding case occurs.
- define the persons responsible, which can be either individual contacts or groups of employees.



The screenshot displays the Microsoft Dynamics 365 Escalation interface. At the top, there's a navigation bar with icons for home, calendar, notifications (showing 10), search, and favorites. The main area shows a list of escalations with columns for Name and Description. The first item, 'Waiting time too long', is selected and highlighted in blue. A callout box points to this item, stating: 'An inactive escalation is indicated by a red icon, while an active escalation is indicated by a green icon.' The right-hand pane provides details for the selected escalation, including its name, description, condition, notification title, and responsible person (Kundenservice).

Escalation

Define condition and notification template for escalation case



The screenshot shows the ADITO Escalation configuration interface. The top navigation bar includes a menu icon, home, calendar, notifications (10), search, and star icons. The main header is labeled 'Escalation' with a dropdown arrow. On the right, there are buttons for '+', a clock icon, and 'TA'.

The configuration form includes the following fields:

- Active:** A toggle switch that is currently turned on.
- Name:** A text field containing 'Waiting time too long'.
- Description:** A text field containing 'Description'.
- Condition:** A text field containing 'Service ticket not processed for too long'.
- Notification Title:** A text field containing 'Service ticket not processed for too long'.
- Notification Description:** A text field containing 'Please check why this has not yet been processed'.

Below these fields is a section titled 'Responsible' with a light gray background. It contains a 'Responsible' label and a dropdown menu. The dropdown menu is open, showing a list of options: '+ EmployeeGroup' and 'Kundenservice'.

Two callout boxes provide additional information:

- A callout box pointing to the 'Condition' field states: 'Title and content of the notification that is sent (ticket number is automatically added to the end of the notification when it is sent).'.
- A callout box pointing to the 'Responsible' dropdown menu states: 'Both employee groups and individual contacts can be defined as responsible persons who are informed in the event of an escalation.'

Escalation



Define condition and notification template for escalation case

10

Escalation

+

TA

Active

Name

Waiting time too long

Description

Description

Condition

Notification Title

Service ticket not processed for too long

Notification Description

Please check why this

Responsible

Responsible

+

EmployeeGroup

Extended filter condition

alloneAdd filter conditionAdd group

Entry past "5 Weeks"

New filter condition

Property

Operator

Value

OK

Cancel

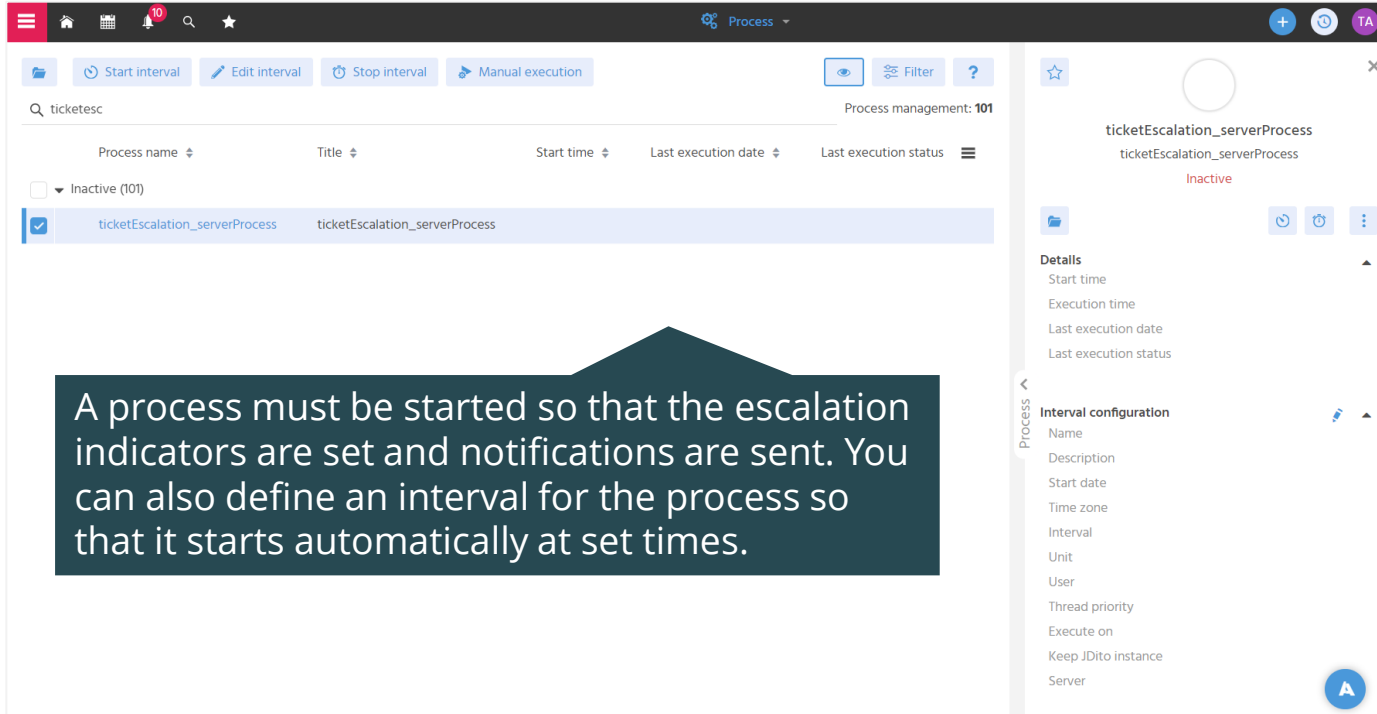
Condition that is checked in order to have the "Escalation" indicator set in the service ticket by the process. Use the filter criteria of the service ticket.

Open extended filter conditions



Escalations-Process in the Manager

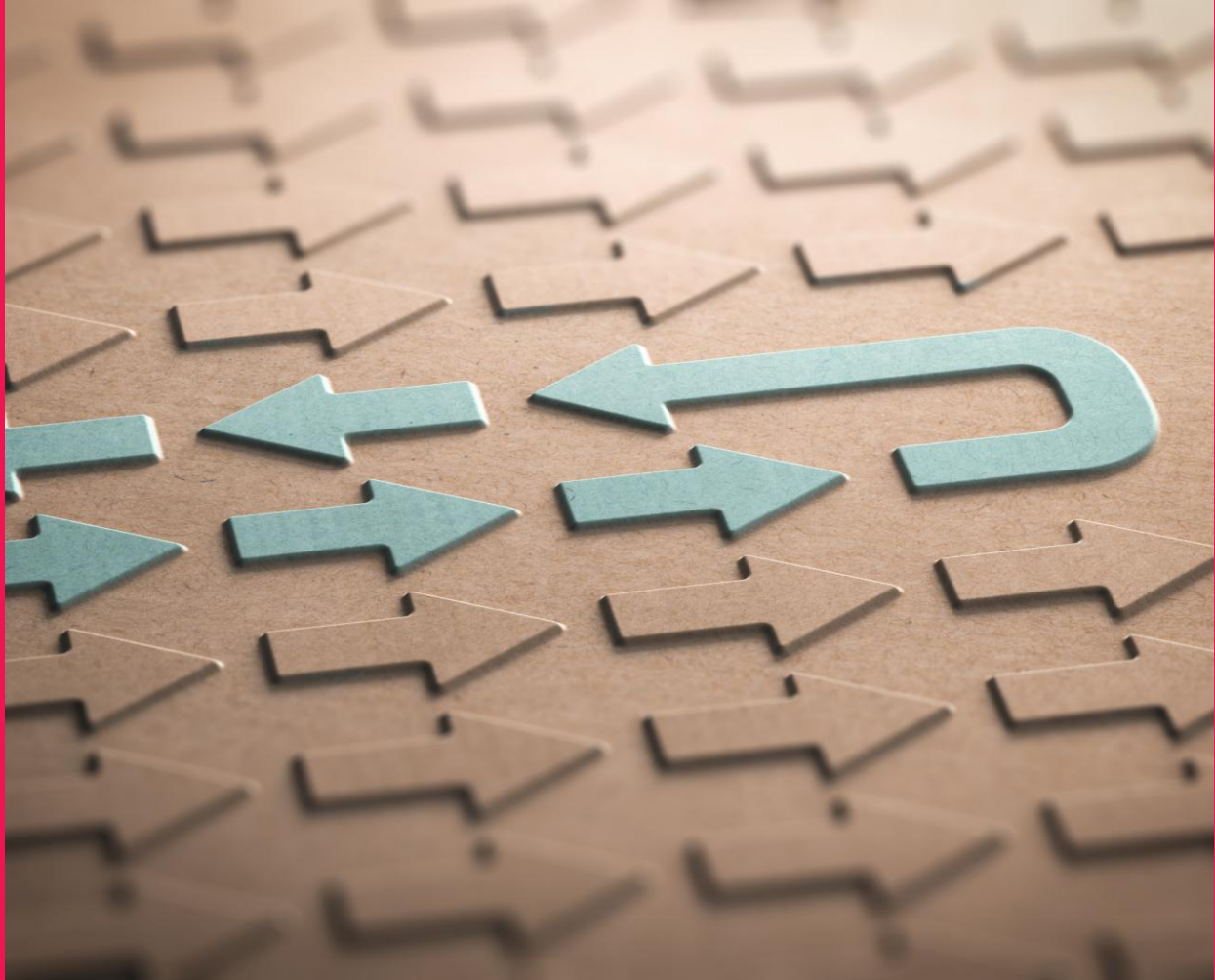
Start manually if necessary



The screenshot displays the ADITO Manager interface. On the left, a table lists processes under the heading 'Process management: 101'. The table has columns for 'Process name', 'Title', 'Start time', 'Last execution date', and 'Last execution status'. A search bar at the top left contains the text 'ticketesc'. Below the table, a filter dropdown shows 'Inactive (101)'. The first row in the table is highlighted and shows 'ticketEscalation_serverProcess' for both the process name and title. On the right side of the interface, a detailed view for 'ticketEscalation_serverProcess' is shown. It includes a status indicator 'Inactive' and a 'Details' section with fields for 'Start time', 'Execution time', 'Last execution date', and 'Last execution status'. Below this is an 'Interval configuration' section with fields for 'Name', 'Description', 'Start date', 'Time zone', 'Interval', 'Unit', 'User', 'Thread priority', 'Execute on', 'Keep JDito instance', and 'Server'. At the top of the interface, there are navigation buttons: 'Start interval', 'Edit interval', 'Stop interval', and 'Manual execution'. A dark blue callout box is overlaid on the bottom left of the screenshot.

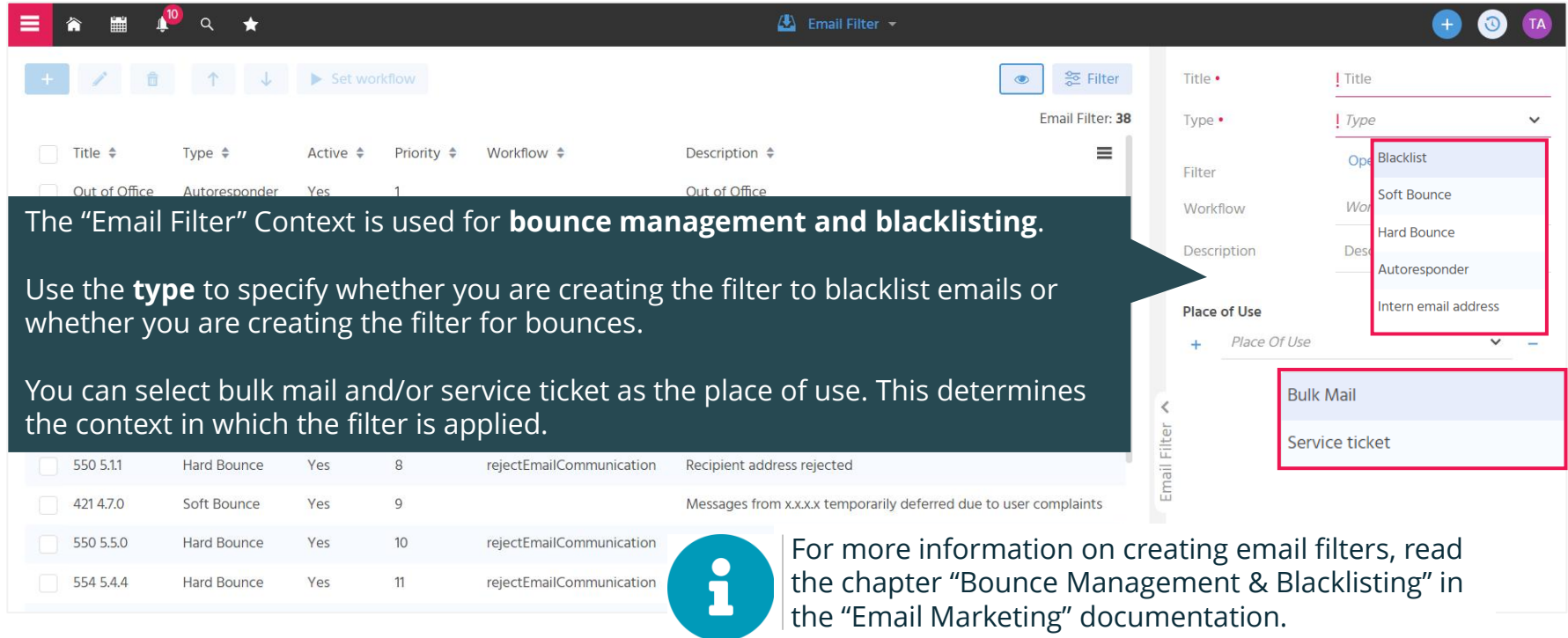
A process must be started so that the escalation indicators are set and notifications are sent. You can also define an interval for the process so that it starts automatically at set times.

Bounce- Management



Bounce-Management and Blacklist

Exkursus Context „Email Filter“



The “Email Filter” Context is used for **bounce management and blacklisting**.

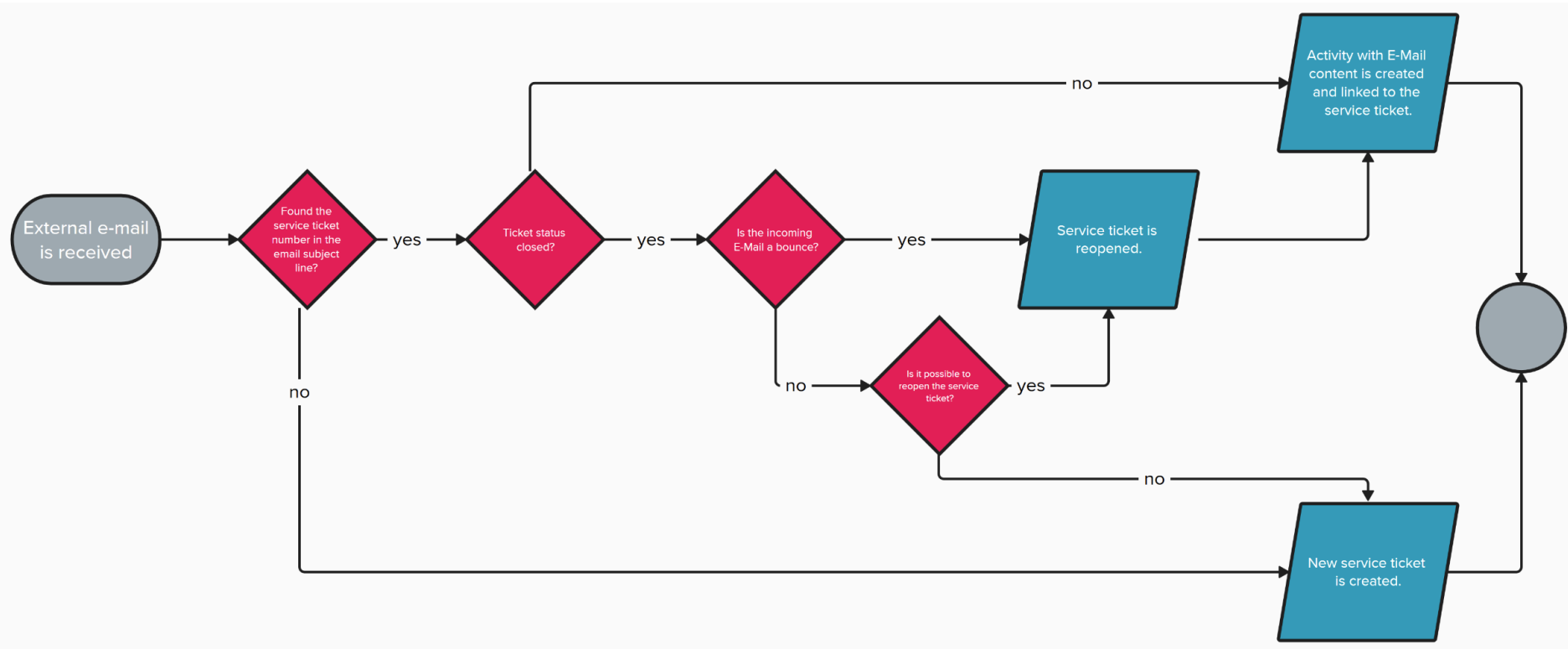
Use the **type** to specify whether you are creating the filter to blacklist emails or whether you are creating the filter for bounces.

You can select bulk mail and/or service ticket as the place of use. This determines the context in which the filter is applied.

	Title	Type	Active	Priority	Workflow	Description
☐	Out of Office	Autoresponder	Yes	1		Out of Office
☐	550 5.1.1	Hard Bounce	Yes	8	rejectEmailCommunication	Recipient address rejected
☐	421 4.7.0	Soft Bounce	Yes	9		Messages from x.x.x.x temporarily deferred due to user complaints
☐	550 5.5.0	Hard Bounce	Yes	10	rejectEmailCommunication	
☐	554 5.4.4	Hard Bounce	Yes	11	rejectEmailCommunication	

For more information on creating email filters, read the chapter “Bounce Management & Blacklisting” in the “Email Marketing” documentation.

Bounce-Management



An abstract background on the left side of the slide, featuring a dark blue field with a network of glowing blue lines and nodes, resembling a molecular or digital structure.

Document template

Document template



Note

Information on the use of document templates can be found in the **“Emails, letters and document templates” documentation.**



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