



Document templates, writing letters & emails

ADITO Software GmbH

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Screenshots

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



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Document template

Document template



Overview

In the Context **Document Template**, language-dependent templates for letters, emails, and documents can be created and managed centrally within the system (creating, editing, deleting).

Users have the ability to create the necessary documents directly from the ADITO Web Client.

Technical and personalized placeholders are then filled with the required system data at runtime, resulting in the generation of the finished document.

Templates can be created for the following **use cases**:

- Individual letters, serial letters
- Emails, email attachments, serial mails, signatures and reply mails
- Templates for header and footer texts in Offers and Receipts
- Downloads
- Project descriptions, project ticket descriptions and comment descriptions
- Content templates for Activities



Document template

FilterView

The FilterView can also be used in the Tiles view.

The screenshot displays the 'Document Template' FilterView. The main area shows a list of templates with columns for Name, Language, Description, and Placeholder. The list is filtered to show 87 document templates. The sidebar on the right contains a 'Grouping' section with 'Type' and 'Classification' filters, and a 'Condition' section for adding filter conditions. The 'Condition' section includes a 'Join conditions by' dropdown (set to 'all') and a 'New filter condition' section with 'Property', 'Operator', and 'Value' fields. Below the condition section are 'Saved filters' and 'Last filters' sections. A 'Filter' button is visible at the bottom right of the sidebar.

Name	Language	Description	Placeholder
Download (1)			
HTML (2)			
Letter (6)			
Serial (2)			
Serial Letter_Standard template (odt)	English	The file format of this template is ODT.	
Serienbrief_Standardbriefvorlage (odt)	German	Das Dateiformat dieser Serienbrief Vorlage ist ODT.	
Single (4)			
Mail (39)			
Digital Signature (8)			
Begleitmail_Vertrag_signiert	German		
Begleitmail_Angebot_Signiert	German		
contrato de firma digital	Spanish		
Courrier d'accompagnement Contrat Signé	French		
Digital signature contract email	English		
Digital_signature_accompanying_email	English		
Firma_digital_que_acompaña_al_correo_ele	Spanish		
Signature_numérique_accompagnant_l'e-mail	French		
Serial (4)			
Single (12)			
Single (Service/All) (1)			
Single (Service/automatic Response) (3)			
Single (Service/External) (1)			

All document templates that have been generated in the system are visible. They can be organized in a structured manner by utilizing grouping and filter settings.

Document template: Preview

Information and Actions in the Preview

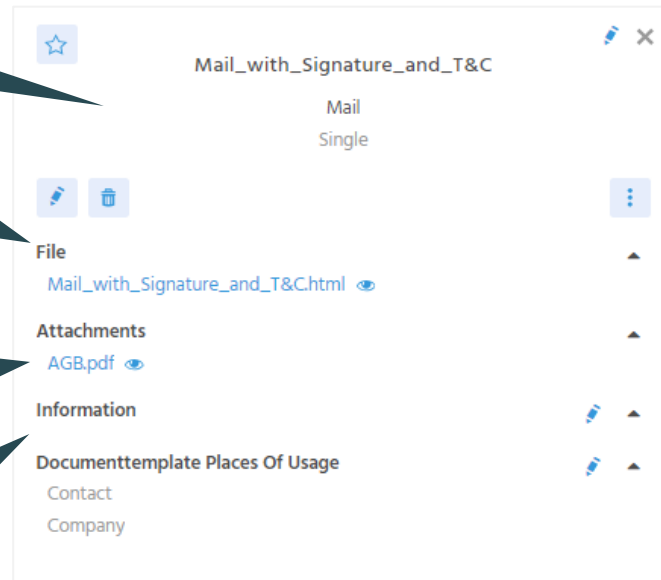
Name, type and **category** are displayed in the Header.

The attached template is displayed under „**File**“.

All attached documents (for emails) are displayed under „**Attachments**“.

Description is a free text field, which can be utilized for informational purposes.

Places of Usage controls the availability of the document template in the different Contexts.



Creating a document template



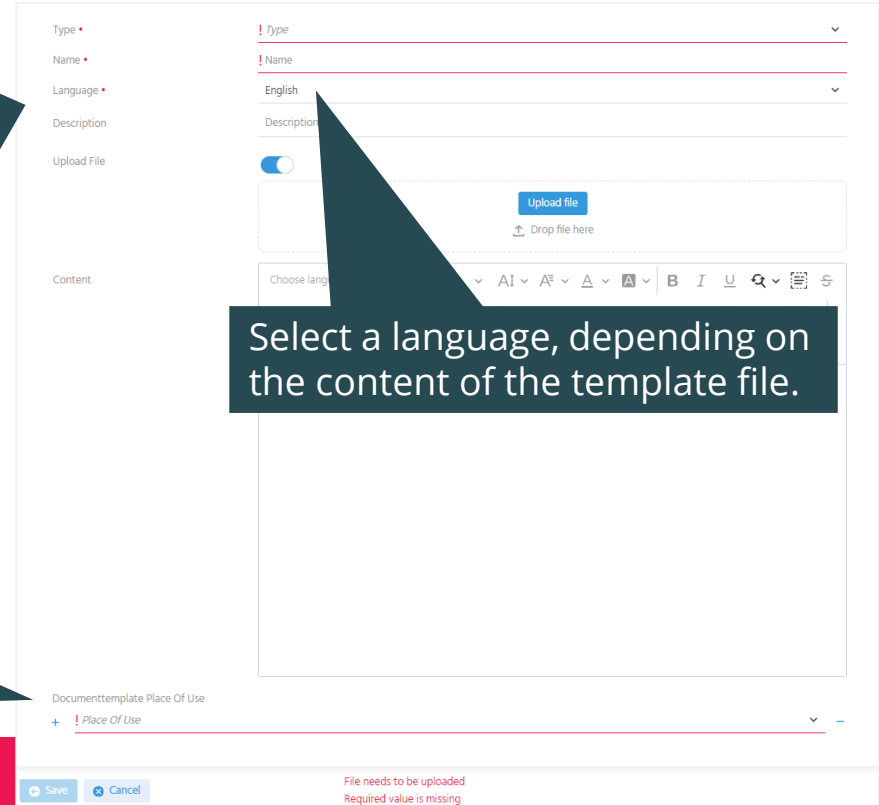
Document template

New creation

The configurations of the document templates for the potential **types** and their corresponding **classifications** are outlined in the following slides.

The field "Classification" is only shown if it is necessary for the specific type. It is not required for types "Download" and "Signature".

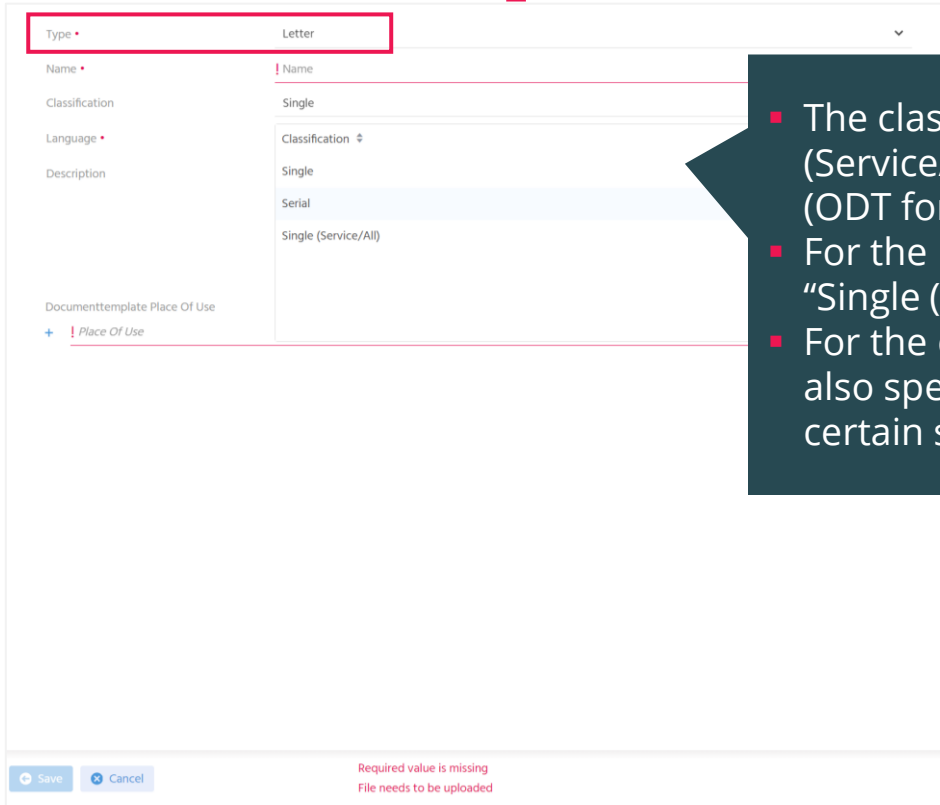
Depending on the „Type“, a Place of Usage can/must be added.



The screenshot shows the ADITO document template creation interface. It includes fields for Type, Name, Language, Description, and Upload File. The Language field is set to English. The Upload File section has an 'Upload file' button and a 'Drop file here' area. The Content section has a rich text editor with various formatting options. A dark blue callout box points to the Language dropdown menu with the text: "Select a language, depending on the content of the template file." At the bottom, there is a 'Documenttemplate Place Of Use' section with a '+ Place Of Use' button. The footer contains 'Save' and 'Cancel' buttons, and a message: 'File needs to be uploaded Required value is missing'.

Letter template

Document template: Letter



Type • Letter

Name •

Classification

Language •

Description

Documenttemplate Place Of Use

+ Place Of Use

Save Cancel

Required value is missing
File needs to be uploaded

- The classifications "Single," "Serial," or "Single (Service/All)" can be selected once the template file (ODT format) has been uploaded.
- For the DOCX file format, the classification "Single" or "Single (Service/All)" can be selected.
- For the classification "Single (Service/All)", you must also specify whether this template should be used for certain service ticket categories or for all of them.

Document template: Letter

Place of usage depending on classification

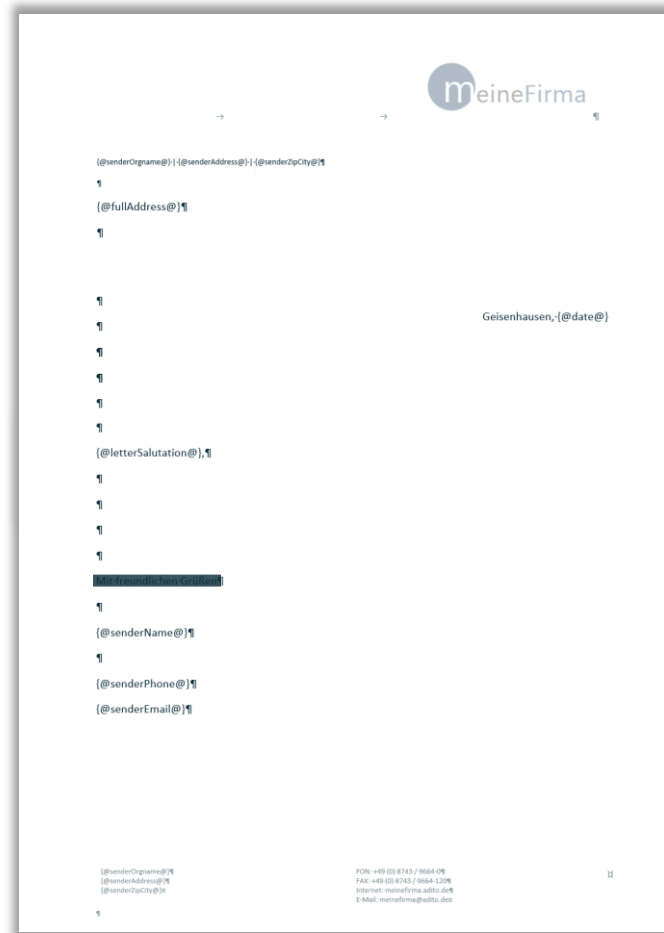
Classification	Place of usage	Hint
Single	Company, Contact, Data Privacy Report	These templates are available in the Contexts „Company“ and/or „Contact“ in the Action „New letter“, or when generating a data privacy report.
Serial	Remove field	This template is available in the Context „Serial letter“.
Single (Service/all)	Service ticket	Templates for letter communications from service tickets can be defined based on the service ticket category for which the template should be made available.

Document template: Letter

Example of a template file

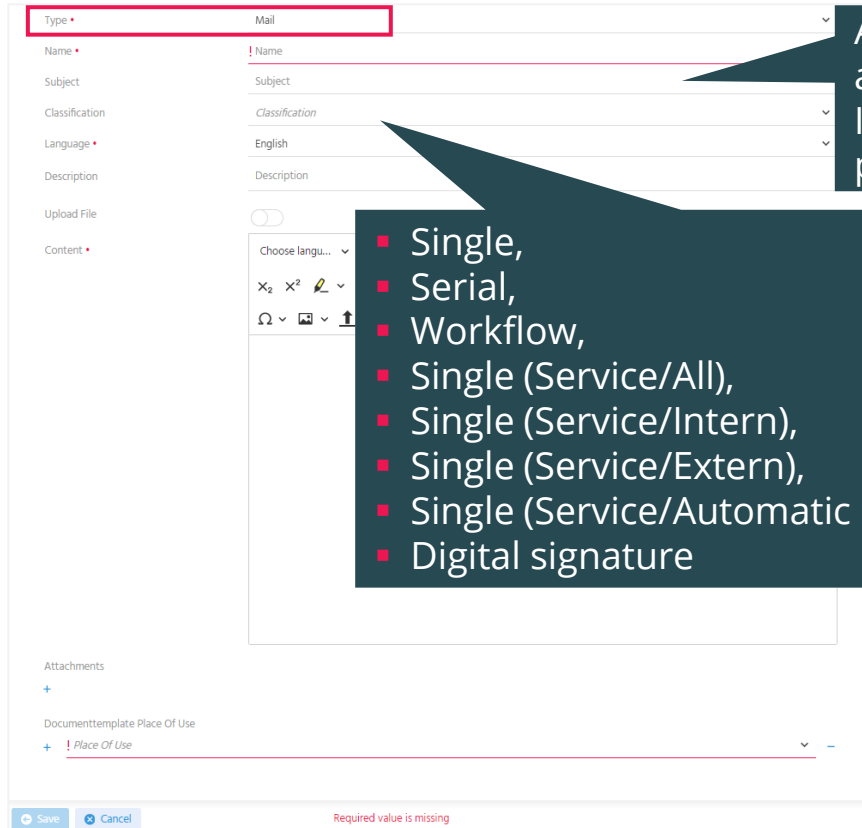
Create a template file with your Office program.

In places with varying content, set the corresponding placeholders, which are later filled with information from ADITO.



Email templates

Document template: Email



The screenshot shows the configuration interface for an email document template. On the left is a sidebar with labels: Type, Name, Subject, Classification, Language, Description, Upload File, and Content. The main area contains a form with corresponding input fields. The 'Type' field is set to 'Mail'. The 'Name' field is empty and has a red exclamation mark icon to its left. The 'Subject' field is empty. The 'Classification' field is set to 'English'. The 'Language' field is set to 'English'. The 'Description' field is empty. Below these fields is a section for 'Upload File' with a toggle switch and a 'Choose language...' dropdown. Below that is a section for 'Content' with a rich text editor toolbar. At the bottom, there is an 'Attachments' section with a plus icon, a 'Documenttemplate Place Of Use' section with a plus icon and a dropdown menu, and a 'Save' button. A red error message 'Required value is missing' is displayed at the bottom right.

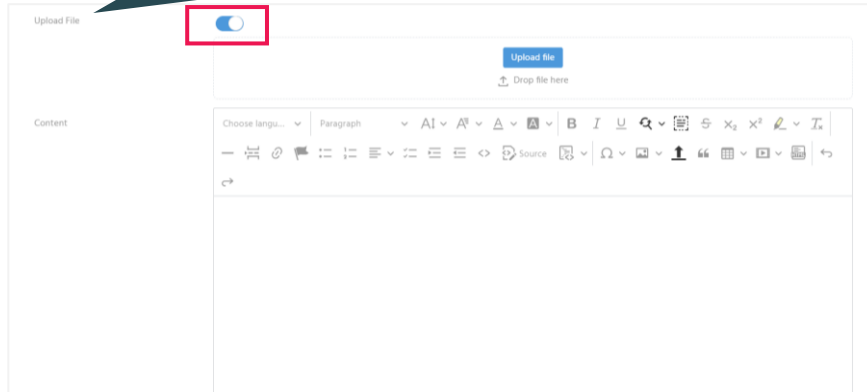
Add the subject line, which should be used automatically, when writing an email.
In the subject line, you can, for example, use the personalization placeholder {@letterSalutation@}.

- Single,
- Serial,
- Workflow,
- Single (Service/All),
- Single (Service/Intern),
- Single (Service/Extern),
- Single (Service/Automatic reply),
- Digital signature

Document template: Email

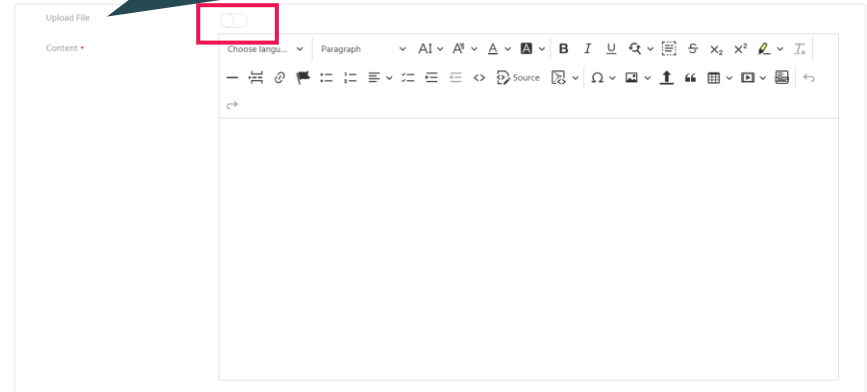
Capturing the template file

To upload an externally created template file in HTML format, the **"Upload file"** button must be activated. This indicates that the file upload feature is available and the "Content" field cannot be edited and will be used as a preview.



The screenshot shows the ADITO interface for creating a document template. At the top, there is a section labeled "Upload File" with a toggle switch that is turned on (blue). Below this, there is a blue button labeled "Upload file" and a text area labeled "Content" with a "Drop file here" prompt. The "Content" field is currently empty and has a rich text editor toolbar above it. The toolbar includes options for language, paragraph, font size, bold, italic, underline, link, unlink, source code, and various icons for text formatting and alignment.

Set the **„Upload file“** indication to inactive in order to enter the content directly into the „Content“ field. The file upload will be hidden and the field „Content“ will become editable, allowing you to enter the content.

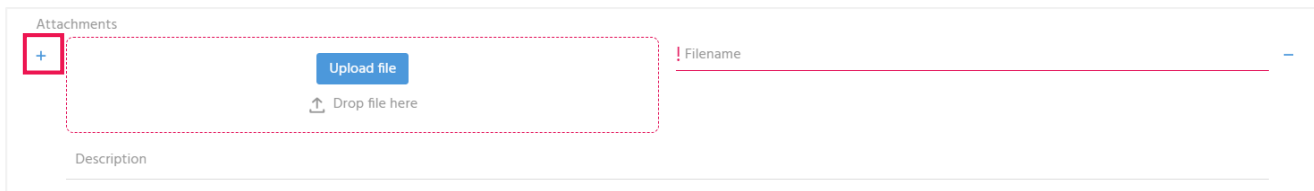


The screenshot shows the ADITO interface for creating a document template. At the top, there is a section labeled "Upload File" with a toggle switch that is turned off (grey). Below this, the "Content" field is now visible and contains the text "Content". The "Content" field is now editable, and the rich text editor toolbar is visible above it. The toolbar includes options for language, paragraph, font size, bold, italic, underline, link, unlink, source code, and various icons for text formatting and alignment.

Document template: Email attachments

Uploading attachment in email document template

Add one or more file upload fields by clicking the plus button in the “Attachments” area.



The screenshot shows a user interface for adding attachments to an email document template. It features a dashed red rectangular area for file upload. Inside this area, there is a small square button with a plus sign (+) on the left, a blue button labeled 'Upload file' in the center, and the text 'Drop file here' with an upward arrow icon below it. To the right of the dashed area is a text input field labeled 'Filename' with an exclamation mark icon on the left and a minus sign (-) on the right. Below the dashed area is a text input field labeled 'Description'.

Therefore, you can add the required files as attachment in a document template for an email.

The attachments are sent, if

- a document template with attachment is used for **single emails**.
- it is specified that the attachment is to be attached, when **creating** new **serial mails**.

Document template: Email

Place of usage according to classification

Classification	Place of usage	Hint
Single	Company, Contact, Offer, Receipt, Contract, Advertising material, Data Privacy Report, ProjectTime	These templates are available in the corresponding Context in the Action „New email“.
Serial	Remove field	This template is available in the Context „Bulk mail“.
Single (Service/all)	Service ticket	Templates for mail communication from service tickets, to reply to emails or forward them.
Single (Service/intern)	Service ticket	Templates for mail communication from service tickets to forward emails
Single (Service/extern)	Service ticket	Templates for mail communication from service tickets to reply to emails.
Single (Service/automatic Response)	Remove field	Templates for reply emails, which can be sent from the inbox.
Digital signature	Offer, Contract	Template for sending offers or contracts that require a digital signature via email (automatically inserted by the system).

Document template: Email

Example of a template file

Create a new template file with your mail program (Microsoft Outlook, Thunderbird, etc.) or a HTML editor (e.g. Mosaico).

In places with personalized content, set the corresponding placeholders, which are later filled with information from ADITO.

Images (Logo in the signature etc.) can be integrated as Base64 in HTML.

```
{@letterSalutation@},  
  
Kind regards,  
{@senderName@}  
  
{@senderOrgname@}  
{@senderAddress@}  
{@senderZipCity@}  
  
Fon: {@senderPhone@}  
E-Mail: {@senderEmail@}  
Internet: meinefirma.adito.de
```

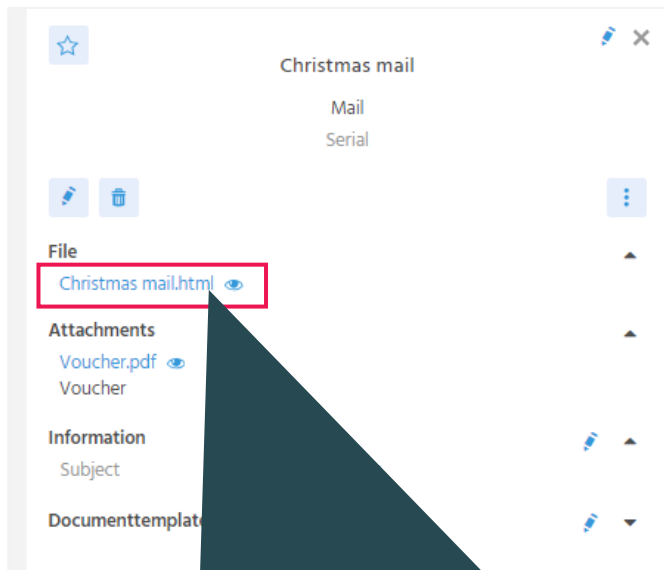


meineFirma GmbH | CEO: Susanne
Registergericht AG Landshut HRB 240

```
{@letterSalutation@},  
<br><br>  
Kind regards,<br>  
{@senderName@}<br>  
<br><br>  
<b>{@senderOrgname@}</b><br>  
{@senderAddress@}<br>  
{@senderZipCity@}  
<br><br>  
Fon: {@senderPhone@}<br>  
E-Mail: {@senderEmail@}<br>  
Internet: <a href="https://meinefirma.adito.de/">meinefir  
<br><br>  
<p><a href="https://meinefirma.adito.de/"><img alt="" src  
"data:image/png;base64,iVBORw0KGgoAAAANSUhuEUGAAAKIAAAACAA  
4OnhtcG1ldGEgeG1sbnM6eD0iYWVvYmU6bnM6bWV0YS8iIHg6G1wdGs9  
j4gPHJkZjZpEZXNjcmldG1vbiByZGY6YWVvdXQ9IiIgeG1sbnM6eG1wPS  
jZVJlZiMiIHhtcDpDcmVhdG9yVG9vbD0iQWRvYmUgUGhvdG9zaG9wIENt  
UMiPiA8eG1wTU06RGVyaXZlZEZyb20gc3RSZWY6aW5zdGFuY2VJRDR0ieG  
GPIA8L3g6eG1wbWV0YT4gPD94cGFja2V0IGVvZD0iICI/PhayC3AAAXN  
+QSiAREkUhaFAMiIpGAKBIQRSIBURRkPerlycY+NRpkqfIXiQ7TtZL1k  
Owlmycz7mAbinyQ5xXgJjCOX38s2MzxCaOsf5iQTEfWPCqSbXZ4rzFQmL  
YdNdfXnbWt5vpJmbj8Qew+SGHAL768LxxhA88/q2YXv1CPxZrV9Dtv1V  
ecvHLVbWxf0S78Yft8thiAeha2cQu4LsBQgyDX01jRB4K+IR3emw24T3  
GUo3oTlMSJubVvRY0QzjCxn5KM9J47h/swilzvK71N0jgy1X6L34xy3wC  
aE3gAMqI9Jb9mGMZ+j+toN5Muag/KgGpPFqXPQ0a8NH+hxi1j0wnT+/H7  
fwYd81+K0f5JMI6gyUA4UjWgboST5SG9PgyDCBCePh9TLX+VrDLlu4nyd  
2spFXssYEiIdipRoY1g1R9k2uj2/lj3h5J0WV3cBQmekmXsOPleUmAtkN  
AD+CfjtNm7H5QAAAABJRUS5ErkJggg==" /> </a><br />  
<br />  
<span style="font-family:Calibri">meineFirma GmbH | CEO:  
<span style="font-family:Calibri">Registergericht AG Land
```

Document template: Email

Creating document templates with the email editor Mosaico



HTML document templates can be created with Mosaico. These can be added in the document template.

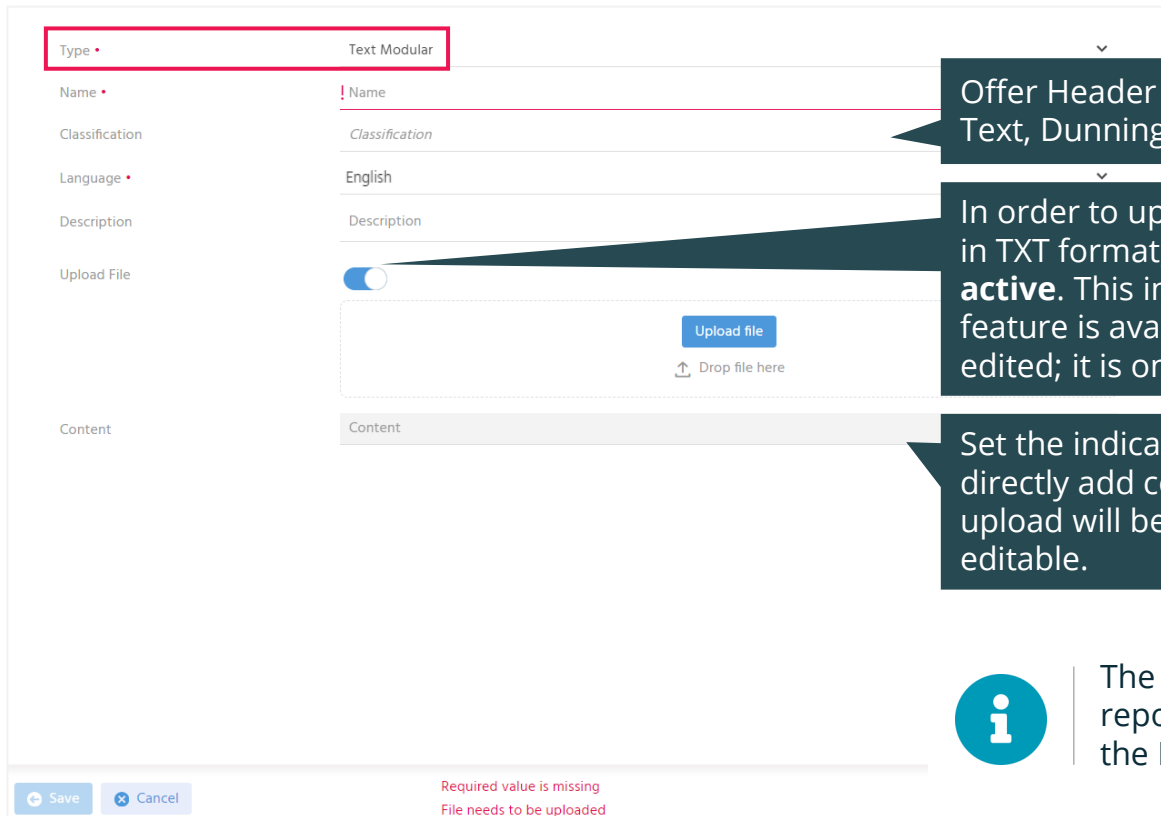
This procedure is used

- for serial mails, to which an **attachment** is added.
- for HTML mailings that are edited infrequently for serial or individual emails (frequently edited HTML mailings, like newsletters, are created using Mosaico templates).

Download the HTML file, which you have created with Mosaico. Create a document template, in which you upload this file.

Text modular

Document template: Text modular



Type • Text Modular

Name • ! Name

Classification Classification

Language • English

Description Description

Upload File ☒

Upload file

Drop file here

Content

Save Cancel

Required value is missing
File needs to be uploaded

Offer Header Text, Offer Footer Text, Receipt Header Text, Dunning text, Operationreport can be selected.

In order to upload an externally created template file in TXT format, the **"Upload file" indicator** must be **active**. This indicator signifies that the file upload feature is available and the "Content" field cannot be edited; it is only used for preview purposes.

Set the indicator **„Upload File“ to inactive** to directly add content in the field „Content“. The file upload will be hidden and the field „Content“ will be editable.



The text modulars are embedded in the report, which must be created in advance in the Designer for Offers, Receipts, etc.

Sub document template

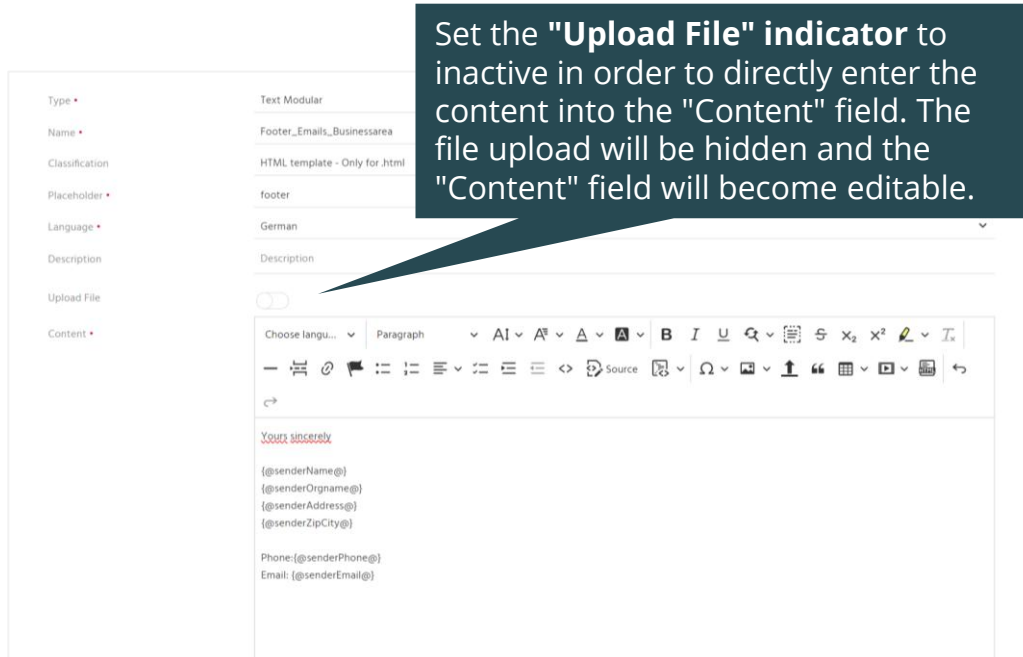
Please enter the "**placeholder name**" here (without "{@}"), which will be inserted in the next step within the other document template (based on HTML) **{@placeholder name@}**.

The screenshot shows the 'New' form for a 'Text Modular' entity. The 'Classification' field is highlighted with a red box and labeled 'Classification'. The 'Placeholder' field is labeled 'placeholder'. The 'Language' field is labeled 'English'. The 'Description' field is empty. Below the fields is a rich text editor with a toolbar and the text 'Yours sincerely'.



Document template: Sub document template

Creating a sub document template as the example „Email signature“



Set the **"Upload File" indicator** to inactive in order to directly enter the content into the "Content" field. The file upload will be hidden and the "Content" field will become editable.

Alternatively, an externally created template file (in HTML format) can be uploaded if the **"Upload file" indicator is active**. The file upload will then be available and the "Content" field cannot be edited; instead, it is used as a preview.

Document template: Sub document template

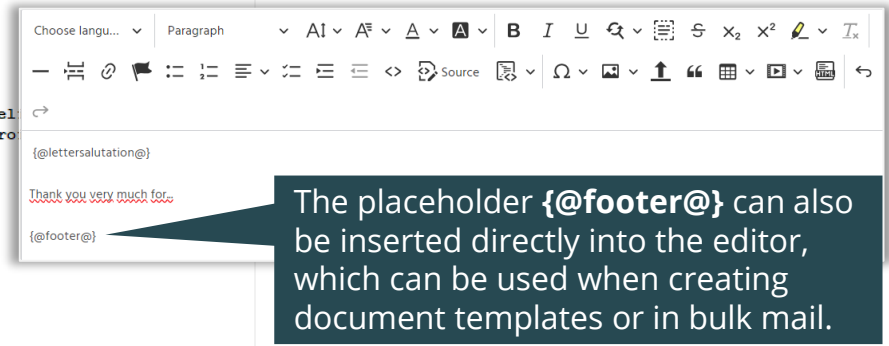
Usage of sub document template in an email document template

```
<html>
<head>
<meta content="text/html; charset=iso-8859-1" http-equiv="Content-Type" />
<title>Beispielmail </title>
</head>
<body bgcolor="#efefef">
<table border="0" width="700" height="100%" bgcolor="#ffffff" align="center" cellpadding="3" cellspacing="3">
<tr><td valign="top">
<p>
<br/><br/>
</p>
<font face="Verdana" size="2" color="#000000">
<n>
-->
erwendet werden!
liqua.
mco laboris nisi
na commodi consequat. Quis aute iure reprehenderit in voluptate vel
re eu fugiat nulla pariatur. Excepteur sint obcaecat cupiditat non pro
nulpia qui officia deserunt mollit anim id est laborum.
</p>
</font>
</td></tr>
</table>
</body>
</html>
```

The placeholder `{@footer@}` is used to insert the text module into the template files of the email (in this example, the HTML was created with an external tool).

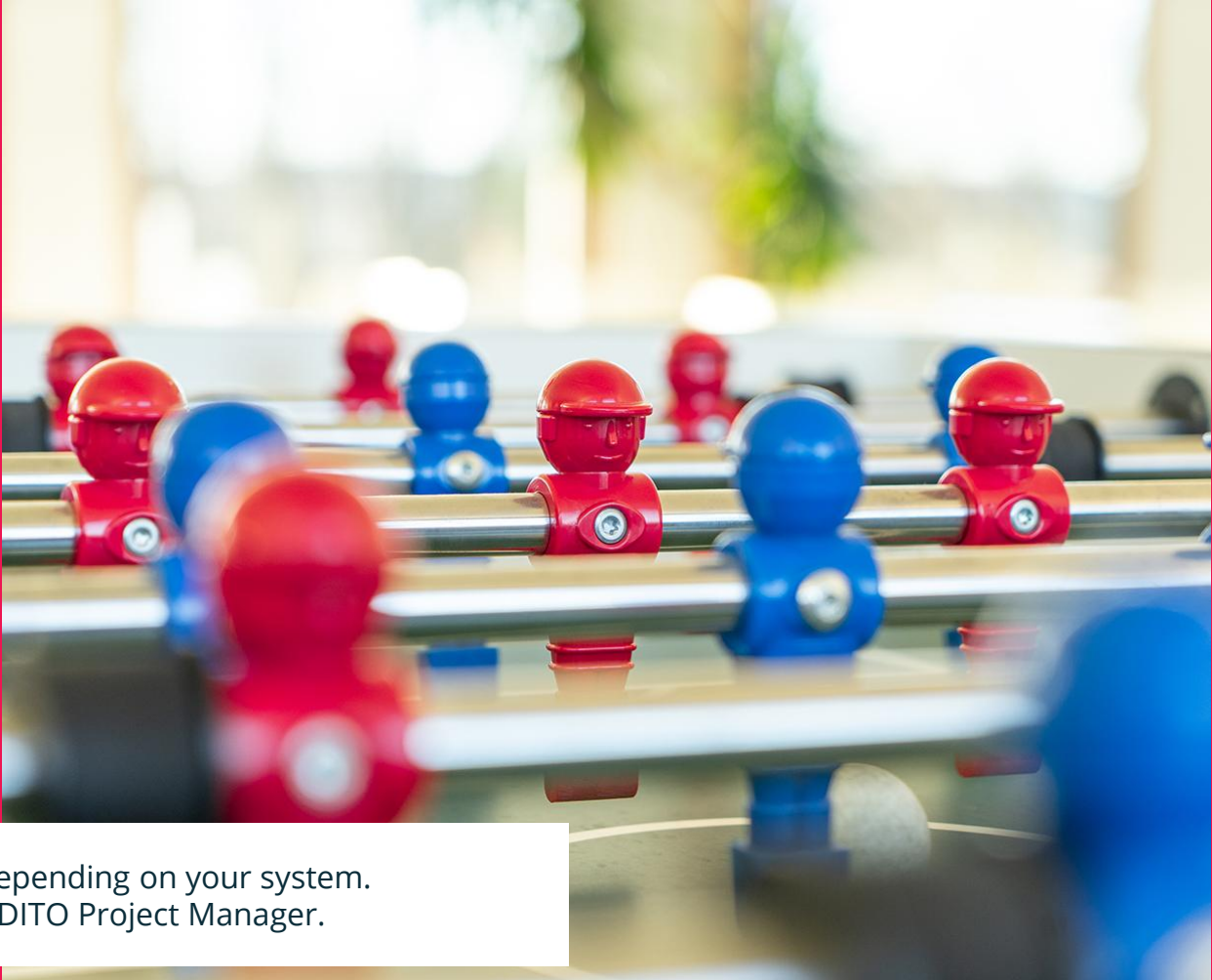
`{@footer@}`

- If the signature is altered, it is not necessary to change the entire signature in each individual email document template with personalized placeholders, but only **the sub-document template** (potentially in different languages).



The placeholder `{@footer@}` can also be inserted directly into the editor, which can be used when creating document templates or in bulk mail.

Overview: File formats



The list of file formats can differ depending on your system.
In this case, please refer to your ADITO Project Manager.

Document template: file format

In which file format can documents be stored for specific template types?

Type	Classification						
	File format						
Letter	Single	Serial	Single (Serial/All)				
	ODT, DOCX	ODT	ODT, DOCX				
Email	Single	Serial	Digital signature	Single (Service/All)	Single (Service/Internal)	Single (Service/External)	Single (Service/auto-matic Response)
	HTML	HTML	HTML	HTML	HTML	HTML	HTML
Text Modular	Offer Header text	Offer Footer text	Receipt Header text	Receipt Footer text	Dunning text	Operation-report	HTML template – Only for .html
	TXT	TXT	TXT	TXT	TXT	TXT	HTML
Project	Project description	Description	Comment				
	HTML	HTML	HTML				

Document template: file format

In which file format can documents be stored for specific template types?

Type	Classification
	File format
Signature	-
	HTML, TXT
HTML	Content template
	HTML
Download	-
	All file formats

Overview: placeholders



The placeholders in the list can differ depending on the available placeholders in your system. Please refer to your system administrator or ADITO Project Manager.
The available placeholders in the system can be found via **Placeholder_Lib**, or individually adjusted placeholders in **CustomPlaceholder_Lib**.

Possible placeholders for the recipient

Placeholder	Name of placeholder	Description	Example
fullAddress	{@fullAddress@}	Name, company name, postal address	
orgname	{@orgname@}	Company name with company form	<i>Baufirma GmbH</i>
address	{@address@}	Street, house number	<i>Hauptstraße 12</i>
zipCode	{@zipCode@}	ZIP code	<i>84034</i>
city	{@city@}	City	<i>Landshut</i>
district	{@district@}	District	
region	{@region@}	Region	
country	{@country@}	Country	<i>Germany</i>
date	{@date@}	Date	

Possible placeholders for the recipient

Placeholder	Name of placeholder	Description	Example
name	{@name@}	Salutation, first name, middle name, last name	<i>Mrs Birgit Leicht</i>
salutation	{@salutation@}	Salutation	<i>Mrs</i>
letterSalutation	{@letterSalutation@}	Letter salutation	<i>Dear Mrs,</i>
letterSalutation2	{@letterSalutation2@}	Informal letter salutation	<i>Dear</i>
firstname	{@firstname@}	First name	<i>Birgit</i>
middlename	{@middlename@}	Middle name	
lastname	{@lastname@}	Surname	<i>Leicht</i>
title	{@title@}	Title	<i>Dr.</i>
phone	{@phone@}	Phone number	
email	{@email@}	Email	

Possible placeholders for the sender



Placeholder	Name of placeholder	Description	Example
senderFullAdress	{@senderFullAdress@} (für odt)	Name, company, postal address	
senderOrgname	{@senderOrgname@}	Company name with company form	
senderAddress	{@senderAddress@}	Street, house number	
senderZipCity	{@senderZipCity@}	Country – ZIP code city	<i>Germany - 53111 Bonn</i>
senderName	{@senderName@}	Name	<i>Mr Tim Admin</i>
senderPhone	{@senderPhone@}	Phone number	
senderEmail	{@senderEmail@}	Email	



Placeholders

Service specific (will only be used for signatures in Service): {@service@}

The placeholder marks the position in the email where employees can write or insert additional document templates as modules.

Digital signature: {@signateLink@}

The placeholder is used in email document templates that are utilized to send offers or contracts that necessitate a digital signature. The placeholder will then be substituted with the link to the document that needs to be signed.

Self-defined text modules (sub document templates): {@self-definedName@}

Text modules with the classification "HTML template - only for .html" can be created, for which a "self-defined name" can be called up as a placeholder in other document templates.

[Creation and example](#)

Placeholders

Enter placeholders correctly...

- Placeholders are case-insensitive, so you don't need to worry about upper or lower case.
- Always „newly“ add the placeholders by typing in the brackets and @ signs.
Copy & Paste from other documents may transfer formatting (such as bold text) in the background, potentially causing resolution issues and preventing the placeholder from being filled with the correct value.

Placeholders

Placeholders cannot be filled, because...

Case 1:

There is **no data** available for this placeholder.
Example, a contact was created without address.

- In this case, the placeholder will be replaced with a **blank space**.

Case 2:

A template uses a **non-defined placeholder**, or the **placeholder is falsely written** and doesn't deliver any results.

- In this case, the **placeholder is printed** and may be corrected or removed.



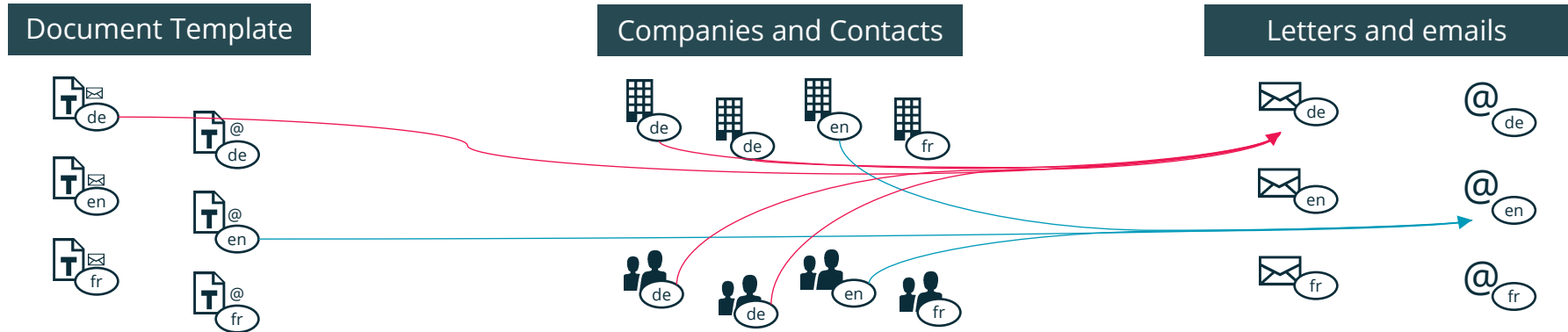
Language dependency

Language dependency

Correctly using the communication language

The language in which communication (written/telephone) with the customer takes place is recorded in the company or contact dataset in the “preferred language” filed. Written communication templates (letters, emails) must be available in the corresponding languages. This selects the template that corresponds to the preferred language of the contact/company, for example, to correctly fill in the placeholders in a letter.

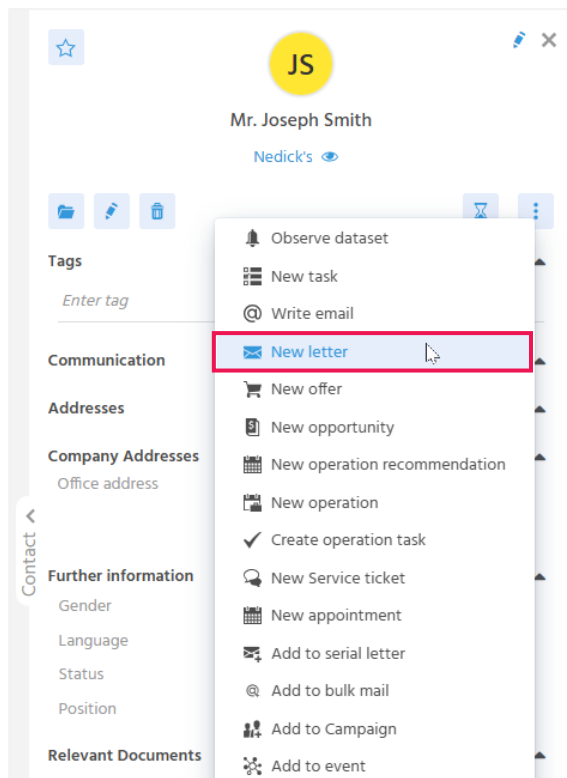
In the example provided (graphic illustration), the connecting line indicates that a template with the corresponding language needs to be selected for a **letter**/**email** addressed to a contact/company.





Write a letter

Writing a letter: select template



JS

Mr. Joseph Smith

Nedick's

Tags

Enter tag

Communication

Addresses

Company Addresses

Office address

Further information

Gender

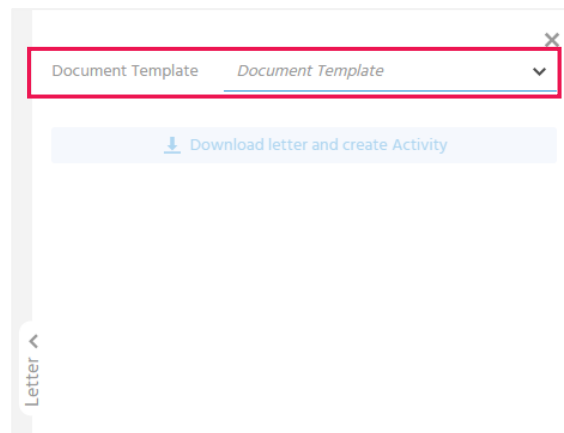
Language

Status

Position

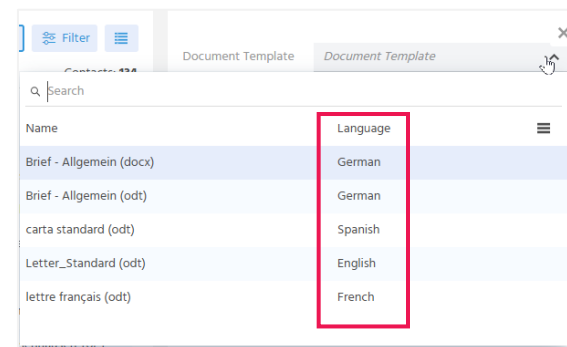
Relevant Documents

- Observe dataset
- New task
- Write email
- New letter**
- New offer
- New opportunity
- New operation recommendation
- New operation
- Create operation task
- New Service ticket
- New appointment
- Add to serial letter
- Add to bulk mail
- Add to Campaign
- Add to event



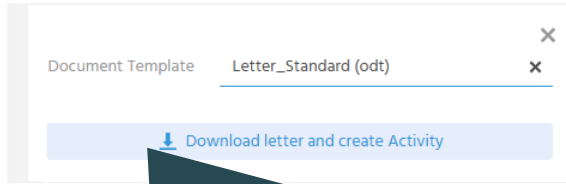
Document Template *Document Template*

[Download letter and create Activity](#)



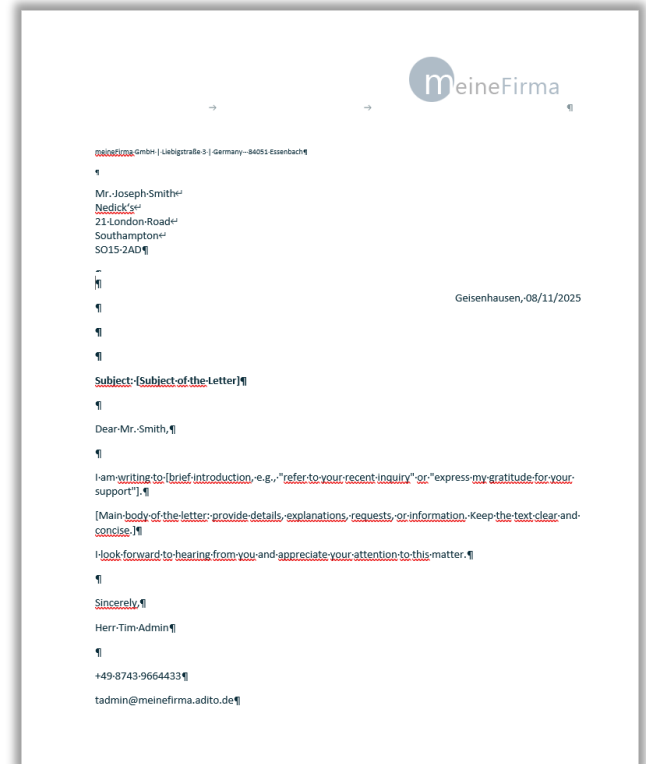
Name	Language
Brief - Allgemein (docx)	German
Brief - Allgemein (odt)	German
carta standard (odt)	Spanish
Letter_Standard (odt)	English
lettre français (odt)	French

Writing a letter: download letter



The letter will be downloaded, and an Activity will open (see next slide).

The placeholders are now filled. The letter can be opened locally to create the content or adjust it. **Save the changes in the required file format and upload the letter in the opened Activity.**



Writing a letter: edit Activity

Subject •

Template

Description

Choose langu... Paragraph AI A A B I U Source HT

Geschäftspapiere

Geisenhausen, 08/11/2025
meineFirma GmbH | Liebigstraße 3 | Germany - 84051 Essenbach

Subject: [Subject of the Letter]

Dear Mr. Smith,

I am writing to [brief introduction, e.g., "refer to your recent inquiry" or "express my gratitude for your support"].
[Main body of the letter: provide details, explanations, requests, or information. Keep the text clear and concise.]
I look forward to hearing from you and appreciate your attention to this matter.

Sincerely,
Herr Tim Admin

+49 8743 9664433
tadmin@meinefirma.adito.de

Seite von

Save Cancel

Required value is missing

In the field „Description“, the content of the unedited letter is displayed.

CAUTION: in the field, editing is possible, **but** the changes are **not** taken over into the document of the letter.

Direction • Outgoing

Responsible Herr Tim Admin

Key activity

Connection

+ Contact Mr. Joseph Smith

Company Nedick's

Add Attribute

+ Attribute Value

Document

+ Upload files

Drop file here

Filename

Description

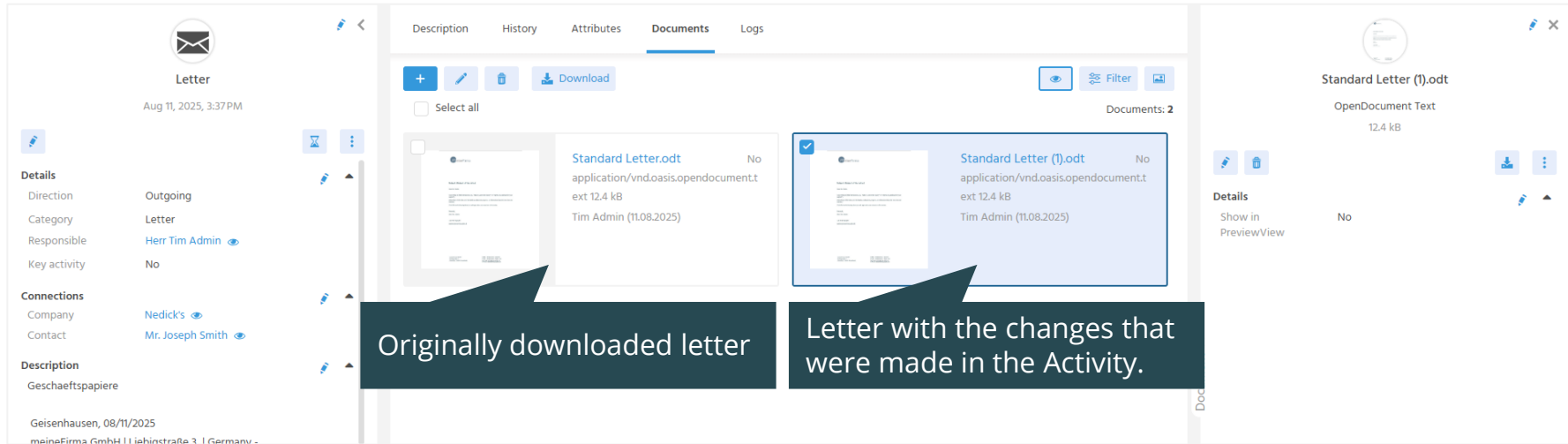
Save Cancel

Required value is missing

Upload here the document of the edited letter.

Writing a letter

After saving, the MainView of the Activity opens with the letter(s) in the Tab „Documents“.



The screenshot displays the ADITO interface. On the left, a sidebar shows details for a 'Letter' dated 'Aug 11, 2025, 3:37 PM'. The main area is divided into three panes. The central pane, titled 'Documents', shows two document cards for 'Standard Letter.odt'. The first card, labeled 'Originally downloaded letter', is greyed out. The second card, labeled 'Letter with the changes that were made in the Activity', is highlighted with a blue border and a checkmark. The right pane shows details for the selected document, 'Standard Letter (1).odt', which is an 'OpenDocument Text' file of 12.4 kB. The interface includes various icons for actions like download, edit, and filter.

You can download, edit and upload another version of the letter once more in the tab „Documents“, if a subsequent change needs to be done. Or you open the letter to print it out.

Writing a letter

When is user-defined letter content adjusted?

To edit the letter's content:

- a) Select the required template and execute the Action „Download letter and create Activity“.
- b) Edit the letter locally, then upload it as a new version in the editing view of the activity or in the "Documents" tab of the activity.
- c) Mark the current version of the letter with the "Show in PreviewView" indicator in order to display it as a link in the preview of the activity in the "Relevant documents" area.



Write emails

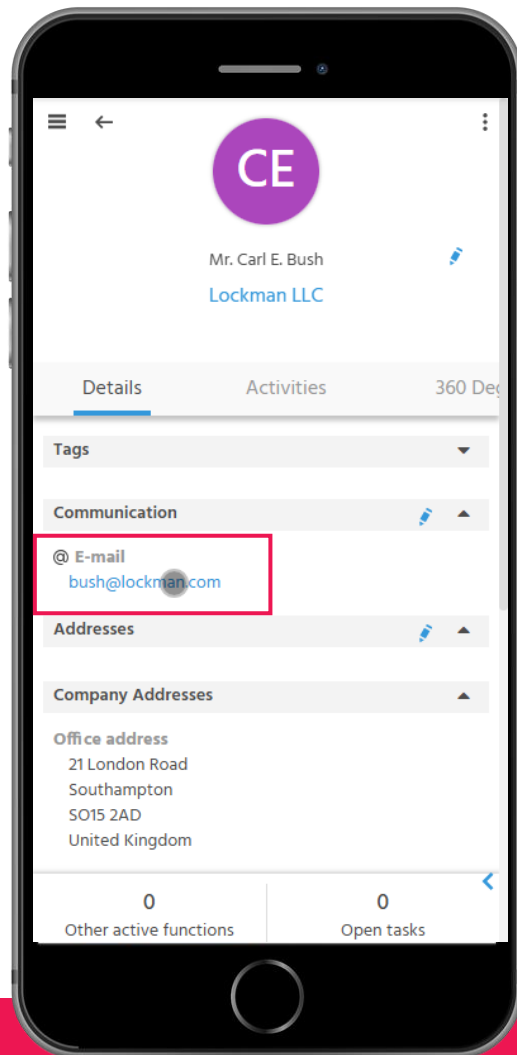
—

**Mobile
application**

Write emails

Mobile application

If you are using the ADITO client on your mobile device, clicking on the email address (or the “Write email” action) will open the email app on your device using the “mailto function.”





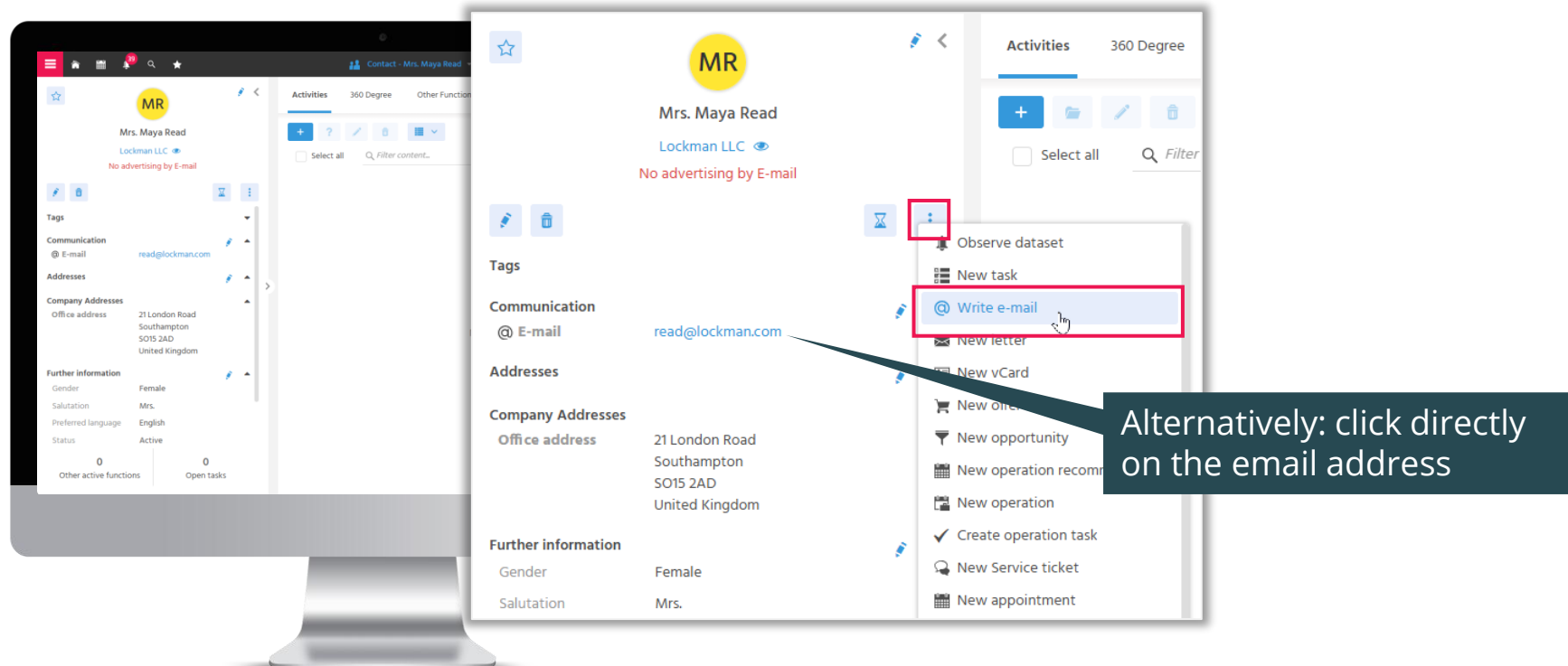
Write emails

—

**Desktop
application**

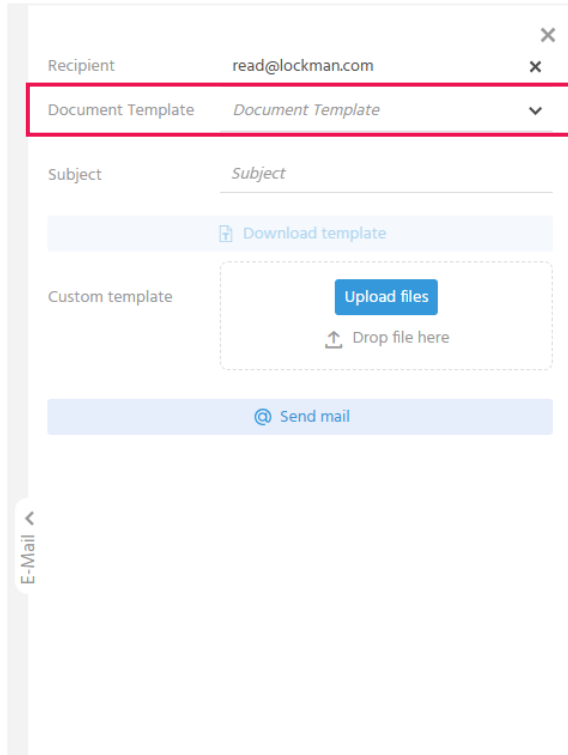
Write emails

Desktop application



The screenshot displays the ADITO desktop application interface. The main window shows a contact profile for Mrs. Maya Read, associated with Lockman LLC. The profile includes fields for Tags, Communication (E-mail: read@lockman.com), Addresses (Office address: 21 London Road, Southampton, SO15 2AD, United Kingdom), and Further information (Gender: Female, Salutation: Mrs.). A context menu is open over the email address, listing various actions such as 'Observe dataset', 'New task', 'Write e-mail', 'New letter', 'New vCard', 'New offer', 'New opportunity', 'New operation recommendation', 'New operation', 'Create operation task', 'New Service ticket', and 'New appointment'. The 'Write e-mail' option is highlighted with a red box. A callout box points to this option with the text: 'Alternatively: click directly on the email address'.

Write emails: select template



Recipient: read@lockman.com

Document Template: Document Template

Subject: Subject

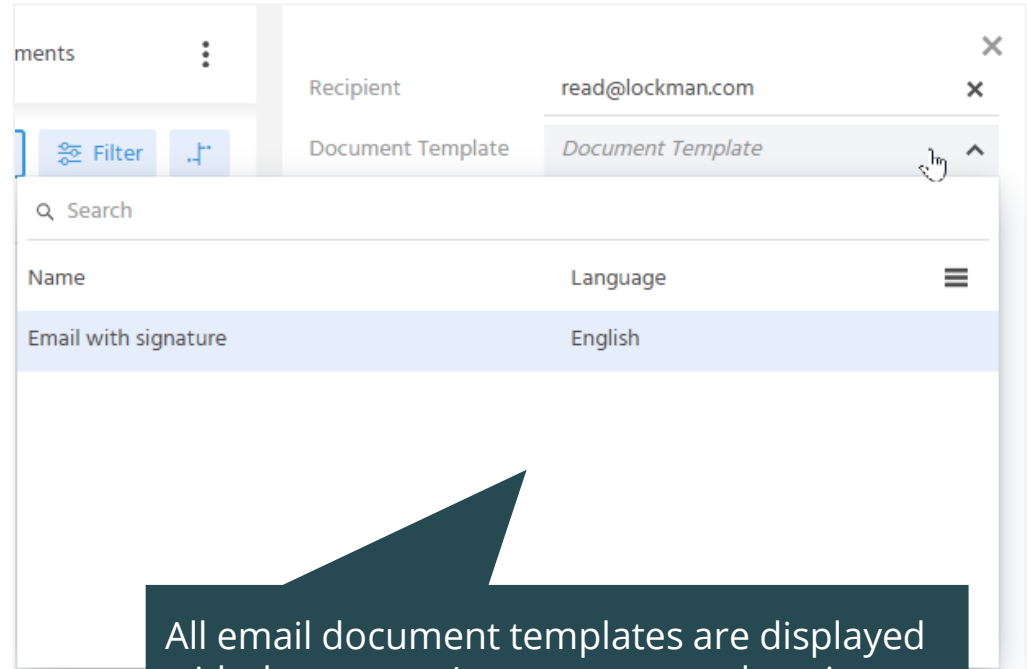
Download template

Custom template

Upload files

Drop file here

Send mail



Recipient: read@lockman.com

Document Template: Document Template

Filter

Search

Name	Language
Email with signature	English

All email document templates are displayed with the contact/company usage location.

Write emails: download/view template

Recipient _____

Document _____

Subject Subject

 Download template

Custom template  Upload files

 Drop file here

 Send mail

E-Mail <

Download the template with placeholders and open them in the download folder.

{@letterSalutation@},

Kind regards,
{@senderName@}

{@senderOrgname@}
{@senderAddress@}
{@senderZipCity@}

Fon: {@senderPhone@}
E-Mail: {@senderEmail@}
Internet: meinefirma.adito.de



meineFirma GmbH | CEO: Susanne Lustig, Tim Admin
Registergericht AG Landshut HRB 2403 | Ust-IdNr. DE 1289465

```
{@letterSalutation@},  
<br><br>  
Kind regards,<br>  
{@senderName@}<br>  
<br><br>  
<b>{@senderOrgname@}</b><br>  
{@senderAddress@}<br>  
{@senderZipCity@}  
<br><br>  
Fon: {@senderPhone@}<br>  
E-Mail: {@senderEmail@}<br>  
Internet: <a href="https://meinefirma.adito.de">  
<br><br>  
<p><a href="https://meinefirma.adito.de/">  
<data:image/png;base64,iVBORw0KGgoAAAANSU...  
4OnhtcG1ldGEgeG1sbnM6eD0iYWVvYmU6bnM6bWV0Y...  
j4gPHJkZjppEZXNjcmlwdGlvbiByZGY6YWJvdXQ9IiI...  
jZVJlZiMiIHhtcDpDcmVhdG9yVGV9vbdD0iQWRvYmUgU...  
UMiPiA8eG1wTU06RGVyaXZlZEZyb20gc3RSZWY6aW5...  
GPiA8L3g6eG1wbWV0YT4gPD94cGFja2V0IGVuZD0i...  
+QSiAREkUAFAMiIPGAKBIQRSIBURRkPerlycY+/NR...  
Owlmycz7mAbinyQ5xXgJjCOX38s2MzxCa0sf5iQTEf...  
YdNdfXnbWt5vpJmbj8Qew+SGHALT768LxxhA88/q2Y...  
ecvHLVbWxffb0S78Yft8thiAeha2cQu4LsBQgyDX01j...  
GUo3oTLMSJubVvRY0QzjCxn5KM9J47h/swilzvK71N...  
aE3gAMqI9Jb9mGMZ+j+toN5Muag/KgGpPFqXPQ0a8N...  
fwYd8l+K0f5JMI6gyUAUjWGbost5SG9PgyDCBCePh...  
2spFXssYEIldipRoY1g1R9k2uj2/lj3h5J0WV3cBQm...  
AD+CfjtNm7H5QAAAAABJRU5ErkJggg==" /> </a><b>  
<br />  
<span style="font-family:Calibri">meineFirm...  
<span style="font-family:Calibri">Register...
```

Write emails: edit and upload template

{@letterSalutation@},
Kind regards,
{@senderName@}

{@senderOrgname@}
{@senderAddress@}
{@senderZipCity@}

Fon: {@senderPhone@}
E-Mail: {@senderEmail@}
Internet: meinefirma.adito.de

 meineFirma

meineFirma GmbH | CEO: Susanne Lustig, Tim Admin
Registergericht AG Landshut HRB 2403 | Ust-IdNr. DE 1289465

Edit text and placeholders
and save the changes locally.

Upload the edited template.

Alternatively:
Upload a document, which has
not been selected as template,
downloaded and edited.
Consider the format and the
possible placeholders in the
document.

Recipient read@lockman.com

Document Template Email with signature

Subject Subject

Download template

Custom template

Upload files

Drop file here

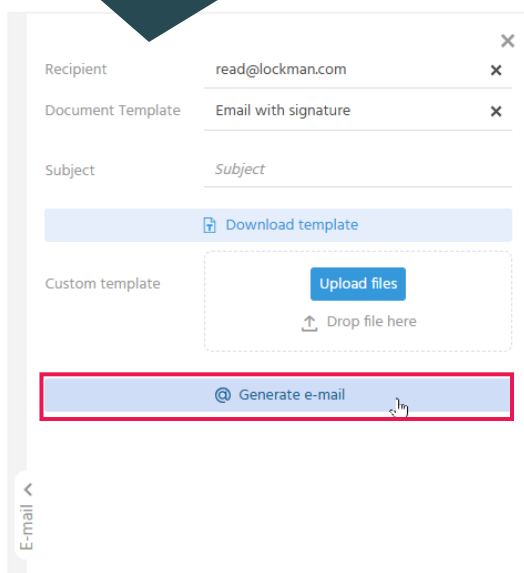
Send mail

Download and send emails

1) Click on the Action „**Generate e-mail**“ to open the e-mail with the filled in placeholders in the overlay.

2) Add content, attachments, or the signature if necessary.

3) Click on the “Download generated e-mail” action to open the e-mail locally in your mail client, edit it again if necessary, and send it.



Recipient: read@lockman.com

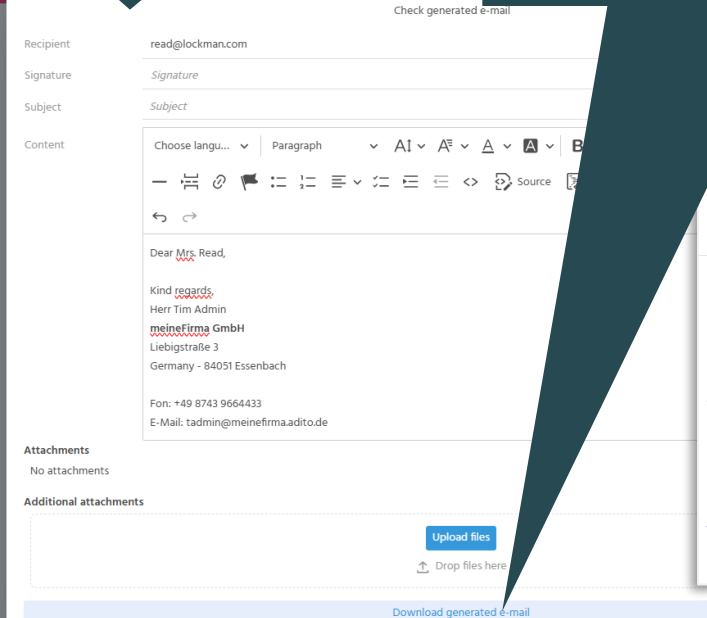
Document Template: Email with signature

Subject: Subject

[Download template](#)

Custom template: [Upload files](#) or [Drop file here](#)

[Generate e-mail](#)



Recipient: read@lockman.com

Signature: Signature

Subject: Subject

Content: Choose language, Paragraph, AI, A, B, Bold, Italic, Underline, Link, Unlink, Source, Undo, Redo

Dear Mrs. Read,

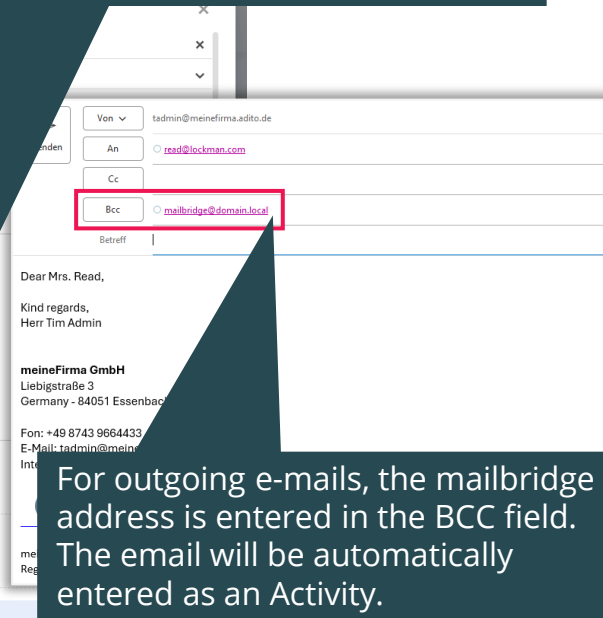
Kind regards,
Herr Tim Admin
meineFirma GmbH
Liebigstraße 3
Germany - 84051 Essenbach

Fon: +49 8743 9664433
E-Mail: tadmin@meinefirma.adito.de

Attachments: No attachments

Additional attachments: [Upload files](#) or [Drop files here](#)

[Download generated e-mail](#)



Von: tadmin@meinefirma.adito.de

An: read@lockman.com

Cc:

Bcc: mailbridge@domain.local

Betreff:

Dear Mrs. Read,

Kind regards,
Herr Tim Admin

meineFirma GmbH
Liebigstraße 3
Germany - 84051 Essenbach

Fon: +49 8743 9664433
E-Mail: tadmin@meinefirma.adito.de

For outgoing e-mails, the mailbridge address is entered in the BCC field. The email will be automatically entered as an Activity.



**Write emails
with AI**

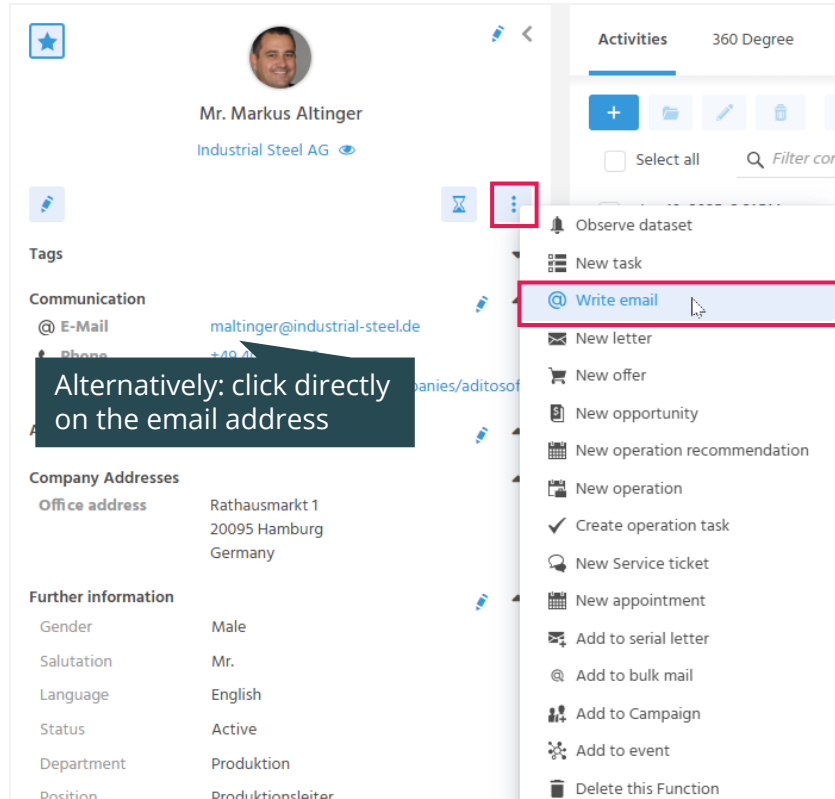
Write emails with AI

Requirement



In order to use the AI functions for generating email texts, **the AI modules must be used.**
If the AI modules are not used, emails can be created as described [here](#).

Write emails with AI



Mr. Markus Altinger
Industrial Steel AG

Tags

Communication

@ E-Mail maltinger@industrial-steel.de

Company Addresses

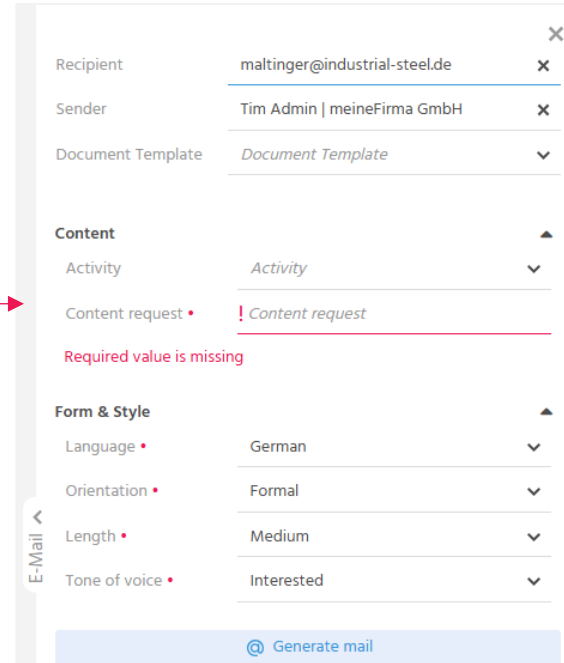
Office address
Rathausmarkt 1
20095 Hamburg
Germany

Further information

Gender: Male
Salutation: Mr.
Language: English
Status: Active
Department: Produktion
Position: Produktionsleiter

Activities 360 Degree

- Observe dataset
- New task
- @ Write email**
- New letter
- New offer
- New opportunity
- New operation recommendation
- New operation
- Create operation task
- New Service ticket
- New appointment
- Add to serial letter
- Add to bulk mail
- Add to Campaign
- Add to event
- Delete this Function



Recipient: maltinger@industrial-steel.de

Sender: Tim Admin | meineFirma GmbH

Document Template: Document Template

Content

Activity: Activity

Content request: ! Content request

Required value is missing

Form & Style

Language: German

Orientation: Formal

Length: Medium

Tone of voice: Interested

[@ Generate mail](#)

Here you can decide whether you want to create the email using a document template or with the AI functions.

Write emails with AI

Create email with document template

E-Mail <

Recipientmaltinger@industrial-steel.de

SenderTim Admin | meineFirma GmbH

Document TemplateDocument Template

Content

ActivityActivity

Content request • ! Content request

Required value is missing

Form & Style

Language • German

Orientation • Formal

Length • Medium

Tone of voice • Interested

Generate mail

E-Mail <

Recipientmaltinger@industrial-steel.de

Document TemplateE-Mail_mit_Signatur

Generate mail

Once you have selected a document template, the AI-specific fields are hidden.

Check generated e-m

Recipientmaltinger@industrial-steel.de

Signature

SubjectMail for

Content

Choose langua...Paragraph

AI v A v A v A v B I U Q S X x

The content is taken from the document template.

Leibgottstraße 3
Germany - 84091 Essenbach

Attachments

No attachments

Additional attachments

Upload files

Drop files here

Download generated

Write emails with AI



Create emails with AI features

Recipient: maltinger@industrial-steel.de

Sender: Tim Admin | meineFirma GmbH

Document Template: Document Template

Content

Activity: Activity

Content request: ! Content request

Required value is missing

Form & Style

Language: German

Orientation: Formal

Length: Medium

Tone of voice: Interested

@ Generate mail

Recipient: maltinger@industrial-steel.de

Sender: Tim Admin | meineFirma GmbH

Document Template: Document Template

Content

Activity: Activity

Content request: Invitation to the Annual General Meeting

Form & Style

Language: English

Orientation: Formal

Length: Medium

Tone of voice: Interested

@ Generate mail

Specify a prompt to generate email text from it.

Form & style can be selected accordingly to generate the text in the desired language and length, for example.



Write emails with AI



Create an email with AI features – with reference to a previous activity

E-Mail <

Recipientmaltinger@industrial-steel.de

SenderTim Admin | meineFirma GmbH

Document TemplateDocument Template

Content

ActivityActivity

Content request • ! Content request

Required value is missing

Form & Style

Language • German

Orientation • Formal

Length • Medium

Tone of voice • Interested

@ Generate mail

E-Mail <

Recipientmaltinger@industrial-steel.de

SenderTim Admin | meineFirma GmbH

Document TemplateDocument Template

Content

ActivityActivity

Content request • Invitation to the Annual General Meeting

Form & Style

Language • English

Orientation • Formal

Length • Medium

Tone of voice • Interested

@ Generate mail

To refer to an activity associated with the contact or company, it can be selected here.

The email text is then generated from the contents of the selected activity and the specified prompt.



Write emails with AI

Generate/customize email

Regardless of whether the email was created using a document template or a prompt, this view opens after clicking on "Create email."

Here you will see either the information from the document template or the AI-generated information. You can also edit the information later.

The subject line is

- Taken from the document template (if maintained)
- Generated by AI
- Entered or added manually

The content is

- Taken from the document template
- Generated by AI
- Entered or added manually

Check generated e-mail

Recipient: `maltinger@industrial-steel.de`

Signature: *Signature*

Subject: Invitation to the Annual General Meeting

Content:

Choose langu... Paragraph AI

Dear Mr. Altinger,
I hope this message finds you well. We are pleased to invite you to our Annual General Meeting and engage with our valued stakeholders.
Your participation is highly valued, as your insights and contributions are essential for our success.
Please confirm your attendance at your earliest convenience by replying to this email or contacting our administrative office. We look forward to your presence and the opportunity to collaborate further. Should you have any questions or hesitate to reach out.

Attachments: No attachments

Additional attachments:

Upload files
Drop files here

The recipient's email address is transferred.

If the email does not yet contain a signature, one can be selected here. The signature(s) are maintained in the document templates of the type "Signature."

Write emails with AI

Attachments

Check generated e-mail

Recipient

maltinger@industrial-steel.de

Signature

Signature

Subject

Invitation to the Annual General Meeting

Content

Choose langu... Paragraph A I U Q S x₂ x² I_x Source H1

Dear Mr. Altinger,
I hope this message finds you well. We are pleased to invite you to the Annual General Meeting of Industrial Steel AG, which will take place on [insert date] at [insert venue]. This event is an excellent opportunity to review our company's achievements, discuss future strategies, and engage with our valued stakeholders.
Your participation is highly valued, as your insights and contributions are instrumental to our continued success. The meeting will cover key financial updates, strategic initiatives, and important decisions that will shape the direction of our company in the coming year.
Please confirm your attendance at your earliest convenience by replying to this email or contacting our administrative office. We look forward to your presence and the opportunity to collaborate further. Should you have any questions or require additional information, do not hesitate to reach out.

Attachments

No attachments

Additional attachments

Upload files

Drop files here

If the document template already contained attachments, these are listed here.

If an offer is sent by email, the offer will also be listed here as a PDF file.

Additional attachments can be uploaded individually per email. It is possible to upload multiple files in this upload field.

- ☒ From: Sender address
- ☒ To: Recipient address
- ☒ Bcc: Mailbridge address
- ☒ Subject (if specified)
- ☒ All attachments
- ☒ Content
- ☒ Signature



Specific document templates

**Documents
with
QR Code**



Document templates with QR code

Provide documents with a QR code

To send a QR code in documents, it can “simply” be inserted as an image in the document template file.

Depending on the file format (letters/emails) in which the QR code is inserted, it can be integrated directly into the template as an image or as Base64.



Document template for Contact Management



Document templates for the Activity

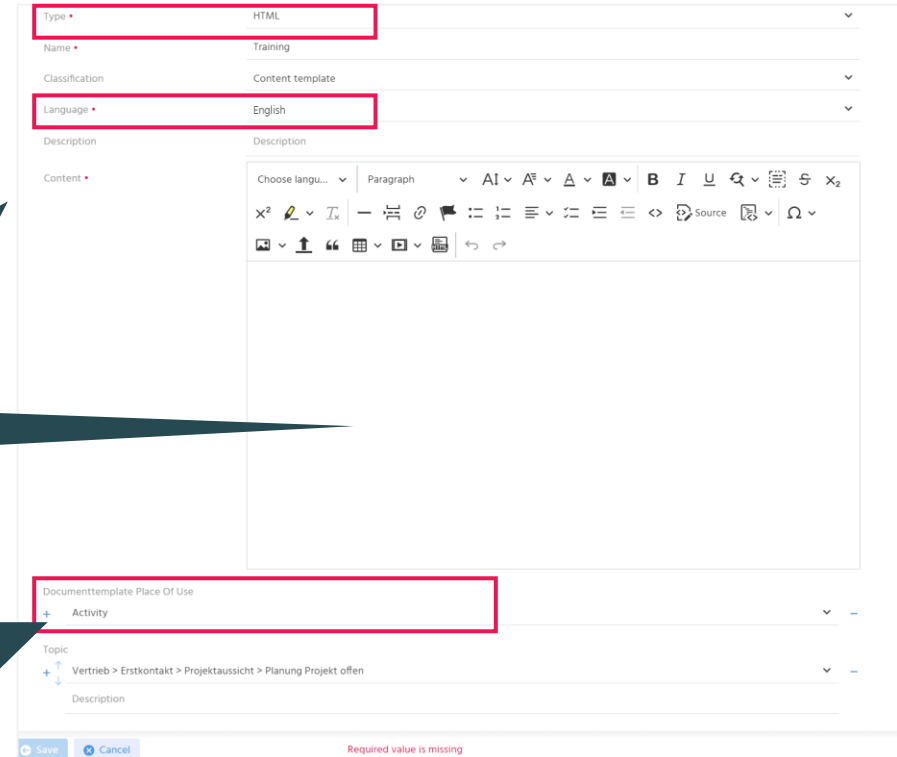
Content template for Activities

This document template can be selected as content template in an Activity and therefore be submitted as text block in the description.

In order to create a content template, the type „**HTML**“, the classification „**Content template**“ and place of use „**Activity**“ must be added.

The content is entered in the HTML editor and the layout can be customized using the editor's functions for use in the activity.

0-n topics can be added to the content template, and they will be transferred to the activity once the content template is chosen. In order to select topics, it is necessary for the "document template" to be saved on the topic for use (this can be done in the "Topic tree" context).



Type • HTML

Name • Training

Classification • Content template

Language • English

Description

Content •

Choose langu... Paragraph AI A A A B I U Source Ω

Documenttemplate Place Of Use

+ Activity

Topic

+ Vertrieb > Erstkontakt > Projektaussicht > Planung Projekt offen

Description

Save Cancel Required value is missing

Document template

Signature

To add a signature to AI-generated emails, it is created in the document templates of the "Signature" type.

The location of use must be specified as "Contact." This signature can then be selected if an email is created using AI from a contact, company, or offer.

Type •

Name •

Language •

Description

Upload File

Content •

Signature

Email Signature

English

Description

☐

Choose langu... ▾

Paragraph ▾

A1 ▾

A2 ▾

A ▾

A ▾

B

I

U

Q

☰

S

X₂

X²

—

Ω

▾

Best regards

{@senderName@}

{@senderOrgname@}

{@senderAddress@}

{@senderZipCity@}

Phone: {@senderPhone@}

Email: {@senderEmail@}

Internet: [meinefirma.adito.de](#)



[meineFirma GmbH](#) | Geschäftsführer: Susanne Lustig, Tim Admin
Registergericht AG Landshut HRB 2403 | Ust-IdNr. DE 128946565

Place of use

+ Contact

▾

—

Save

Cancel

The content of the document template can be entered as usual here in the HTML editor or uploaded.

The image is integrated into the source code as Base64.

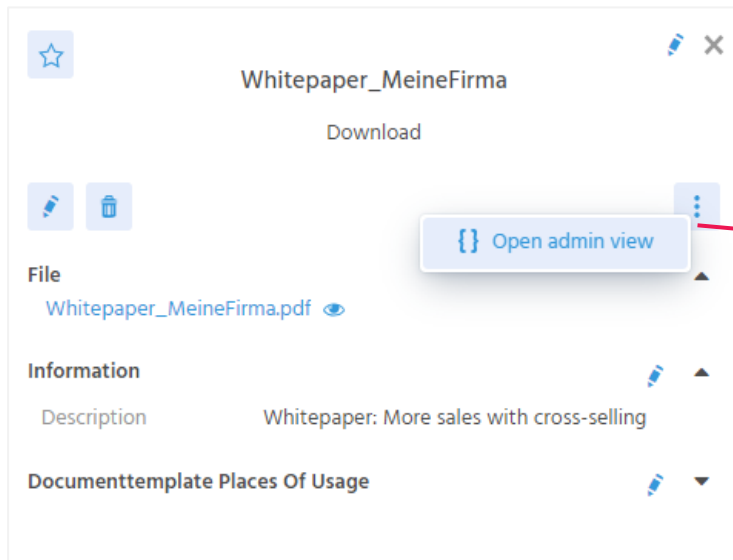
Document templates for Marketing



Marketing specific document templates

Making documents available for download

Create a document template of the type „**Download**“ and upload the required document. Remove, if needed, the field „Place of use“.



Whitepaper_MeineFirma

Download

File

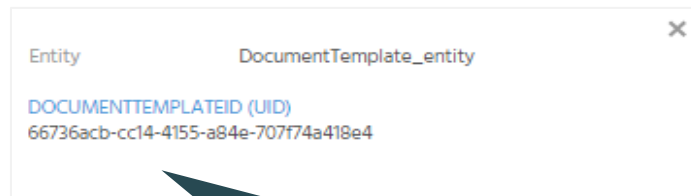
Whitepaper_MeineFirma.pdf

Information

Description Whitepaper: More sales with cross-selling

Documenttemplate Places Of Usage

{ } Open admin view



Entity DocumentTemplate_entity

DOCUMENTTEMPLATEID (UID)

66736acb-cc14-4155-a84e-707f74a418e4

You can find the **UID** necessary to access the web service in the admin view.

**Document
templates for
Service and
External work**



Document template

Signature

Signature that must be stored in the inbox of the mailboxes.

The placeholder `{@Service@}` is inserted here. This is only **used in the Service for signatures**, marking the location in the email where the employee can later write or insert other document templates as modules.

As place of use, use „Serviceticket“.

The screenshot shows a document template editor for a signature. The left sidebar contains fields for Type, Name, Language, Description, and Content. The main area displays a rich text editor with a toolbar and a preview of the signature template. The preview shows a dark box with a link, a box labeled 'Kundenservice', and a signature block containing the placeholder '{@Service@}'. Below the signature block is the company name 'meineFirma GmbH' and address. At the bottom, a 'Documenttemplate Place Of Use' section shows a list with 'Service ticket' selected.

Type •

Name •

Language •

Description

Content •

Signature

Service Signatur

English

Signatur für den Service

Choose langu... Choose heading A A B I U Source Ω

Kundenservice

`{@Service@}`

Mit freundlichen Grüßen

Ihr Kundenservice von meineFirma GmbH

meineFirma GmbH

Liebigstraße 3

Deutschland - 84051 Fessenbach

Documenttemplate Place Of Use

+ Service ticket

Response mails

These templates are stored in the inboxes when the mailboxes are assigned.

72

Document template

Templates for internal and external communication per email

☐	Name ↕	Language ↕	Description ↕	Placeholder ↕	☰
☐	▼ Mail (39)				
☐	▶ Digital Signature (0)				
☐	▶ Serial (4)				
☐	▶ Single (12)				
☐	▼ Single (Service/All) (1)				
☐	Allgemein_Standardvorlage	German	Allgemeine, anpassbare Standardvorlage		
☐	▼ Single (Service/automatic Response) (3)				
☐	Automatische Standardvorlage	German	Standard automatische Antwortmail		
☐	Geschäftszeiten_Standardvorlage	German	Standardvorlage für Geschäftszeiten		
☐	Vorlage_Produkt_nicht_vorhanden	German	Antwortmail, dass das Produkt nicht vorhanden ist.		
☐	▼ Single (Service/External) (10)				
☐	Beschwerde_Standardvorlage	German	Standardvorlage für Beschwerden		
☐	Betriebsferien_Standardvorlage	German	Übermittlung der diesjährigen Betriebsferien		
☐	Feedback negativ_Standardvorlage	German	Antwort auf negatives Feedback		
☐	Feedback positiv_Standardvorlage	German	Antwort auf positives Feedback		
☐	Geschäftszeiten_Standardvorlage	German	Antwort auf Frage nach den Geschäftszeiten		
☐	Handbuch_Standardvorlage	German	Antwort-E-Mail mit Handbuch im Anhang		
☐	Reklamation_Standardvorlage	German	Standardvorlage für Reklamationen		
☐	Retoune_Standardvorlage	German	Standardantwort für Retourenanfragen		
☐	Support_Standardvorlage	German	Anpassbare Antwort-E-Mail auf Supportanfragen		
☐	Werbung_Standardvorlage	German	Antwort auf zugeschnittenes Werbematerial		
☐	▼ Single (Service/Internal) (1)				
☐	Storno_Standardvorlage	German	Standardantwort für Stornierungen		

Document template

Select service ticket category

If the classification consists „Service“, you must specify for which service ticket categories the document template should be valid for.

If you want to create a document template for service tickets, select between:

- Single (Service/all)
- Single (Service/Intern) and
- Single (Service/Extern)

1

2

The screenshot shows a web form for creating a document template. It includes fields for 'Type', 'Name', 'Subject', 'Classification', 'Language', and 'Description'. The 'Classification' field is highlighted with a red box and a red '1' annotation, showing the value 'Single (Service/All)'. The 'Description' field is highlighted with a red box and a red '2' annotation, showing a toggle for 'Use all service ticket categories' and a list of 'Service ticket category' with 'Cancellation' selected. Below these is an 'Upload File' section with a toggle and a file upload area. At the bottom is a 'Content' section with a rich text editor. A red error message at the bottom right states: 'Required value is missing' and 'File needs to be uploaded'. A blue 'Save' button and a blue 'Cancel' button are at the bottom left.

Type •

Name •

Subject

Classification

Single (Service/All)

Language •

German

Description

Description

Use all service ticket categories

Service ticket category

+ Cancellation

Upload File

Upload files

Drop file here

Content

Choose langu... Paragraph A1 A2 A3 A4 B I U Source H1

Save Cancel

Required value is missing
File needs to be uploaded

If you have not selected a category (All or Individual) yet, a message will be displayed indicating that at least one category must be selected.

External work specific document templates

Text modulars for operating reports

These text modulars can be used for the documentation of an operating report.

Further information on the use of specific document templates can be found in the **external work specific documentation**.

The screenshot shows a web form for creating a 'Text Modular'. On the left is a sidebar with labels: 'Type', 'Name', 'Classification', 'Language', 'Description', 'Upload File', and 'Content'. The main area contains the following fields:

- 'Type' is a dropdown menu set to 'Text Modular'.
- 'Name' is a text input field with a red error message '! Name' above it.
- 'Classification' is a dropdown menu set to 'Operationreport'.
- 'Language' is a dropdown menu set to 'English'.
- 'Description' is a text input field.
- 'Upload File' is a toggle switch that is currently turned on.
- Below the toggle is a dashed box for file upload, containing an 'Upload file' button and the text 'Drop file here' with an upward arrow icon.
- 'Content' is a large text area.

At the bottom of the form, there are 'Save' and 'Cancel' buttons. A red error message at the bottom right states: 'Required value is missing' and 'File needs to be uploaded'.

Document templates for digital signatures



Document templates for digital signatures



Digital signatures for offers or contracts

				Document templates: 87	
				Filter	
☐	Name ↕	Language ↕	Description ↕	Placeholder ↕	
☐	► Download (1)				
☐	► HTML (2)				
☐	► Letter (6)				
☐	▼ Mail (39)				
☐	▼ Digital Signature (8)				
☐	Begleitmail Vertrag_signiert	German			
☐	Begleitmail_Angebot_Signiert	German			
☐	contrato de firma digital	Spanish			
☐	Courrier d'accompagnement Contrat Signé	French			
☐	Digital signature contract email	English			
☐	Digital_signature_accompanying_email	English			
☐	Firma_digital_que_acompaña_al_correo_ele	Spanish			
☐	Signature_numérique_accompagnant_l'e-mai	French			

For more information on how to use specific document templates, see the **sales-specific documentation**.



Document templates for collaboration



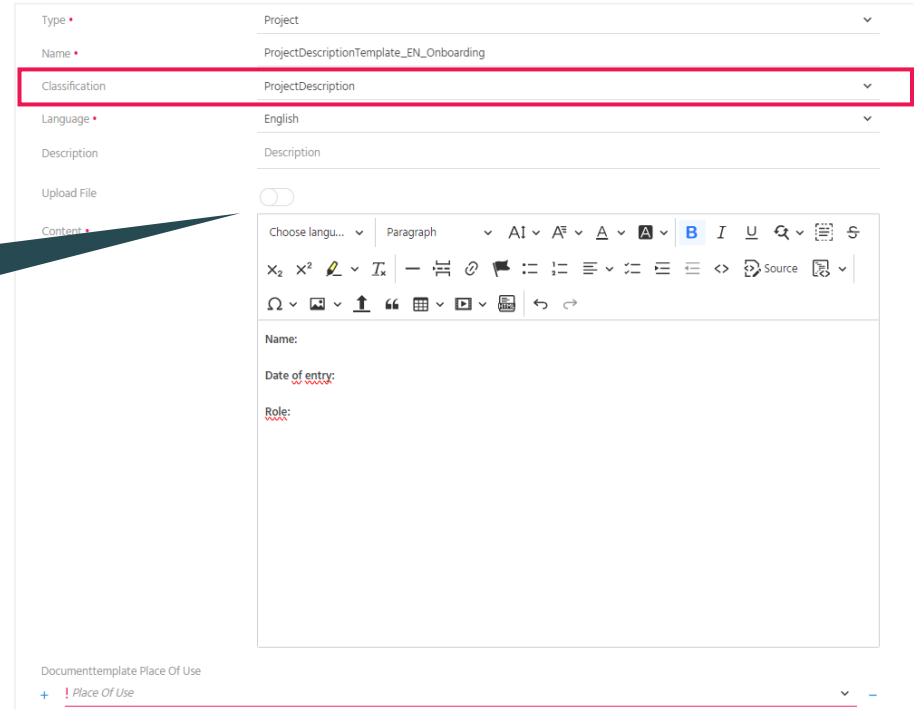
Document template: Project

Project description template

Document templates of the type "Project" with the classification "ProjectDescription" can be stored in the project type definition. This implies that the template is included in every project of this project type.

Set the indicator „**Upload file**“ to **inactive** to record content in the field „Content“. The file upload is hidden and the field „Content“ becomes editable.

To upload an externally created template file in HTML format, the **indicator "Upload file"** needs to be **activated**. Therefore, the file upload becomes available, and the field "Content" is no longer editable and will be used as a preview.



The screenshot shows the configuration for a document template of type "Project". The "Classification" is set to "ProjectDescription". The "Upload File" indicator is currently inactive, represented by a toggle switch. Below the form, there is a rich text editor with various formatting options (bold, italic, underline, link, etc.) and a "Source" view button. The editor content shows fields for "Name:", "Date of entry:", and "Role:".

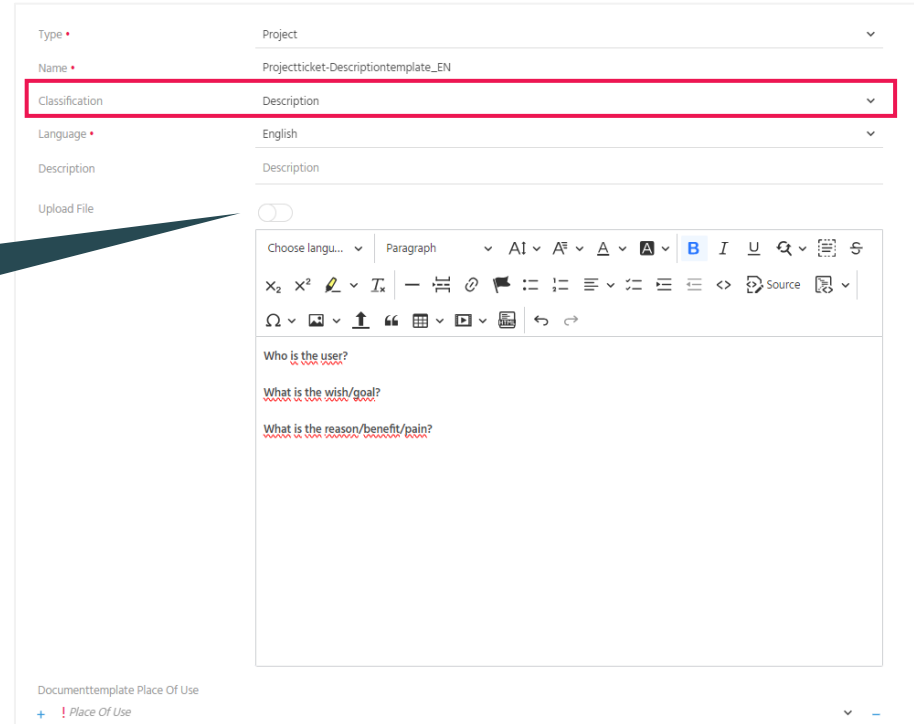
Document template: Project

Projectticket description template

Document templates of the type „Project“ with the classification „Description“ can be added in the ticket type definition. Therefore, this template will be added into every project ticket of this ticket type.

Set the indicator „**Upload file**“ to **inactive** to record content in the field „Content“. The file upload is hidden and the field „Content“ becomes editable.

To upload an externally created template file in HTML format, the **indicator "Upload file"** needs to be **activated**. Therefore, the file upload becomes available, and the field "Content" is no longer editable and will be used as a preview.



Type • Project

Name • Projectticket-Descriptiontemplate_EN

Classification • Description

Language • English

Description • Description

Upload File ☐

Choose langu... Paragraph AI A A B I U Source

Who is the user?

What is the wish/goal?

What is the reason/benefit/pain?

Documenttemplate Place Of Use

+ ! Place Of Use

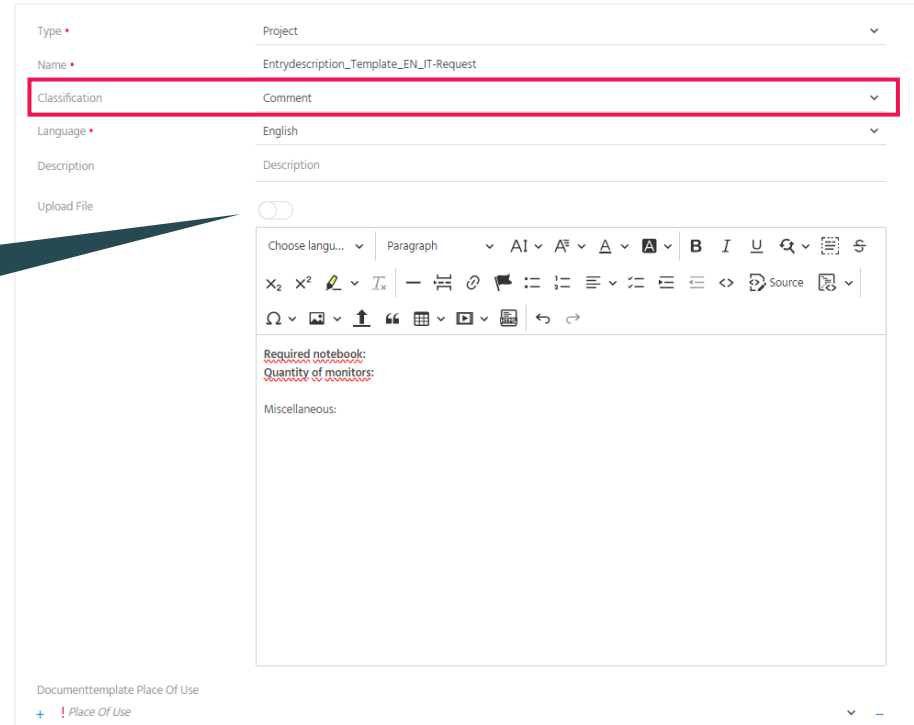
Document template: Project

Comment template

Document templates of the type „Project“ and the classification „Comment“ can be defined in the ticket type definition. Therefore, the template can be selected in every comment of a project ticket.

Set the indicator „**Upload file**“ to **inactive** to record content in the field „Content“. The file upload is hidden and the field „Content“ becomes editable.

To upload an externally created template file in HTML format, the **indicator "Upload file"** needs to be **activated**. Therefore, the file upload becomes available, and the field "Content" is no longer editable and will be used as a preview.



The screenshot shows the configuration interface for a document template. The 'Type' is set to 'Project' and the 'Name' is 'Entrydescription_Template_EN_IT-Request'. The 'Classification' is set to 'Comment', which is highlighted with a red box. The 'Language' is set to 'English'. The 'Description' field is empty. The 'Upload File' toggle is currently inactive (switched off). Below the toggle is a rich text editor with various formatting options (bold, italic, underline, link, etc.) and a text area containing the text 'Required notebook: Quantity of monitors: Miscellaneous:'. At the bottom, there is a section for 'Documenttemplate Place Of Use' with a '+' icon and the text 'Place Of Use'.

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Einzigartige Beziehungen