Sales

ADITO Software GmbH

As of version 2026.4.1 | June 2026

Screenshots

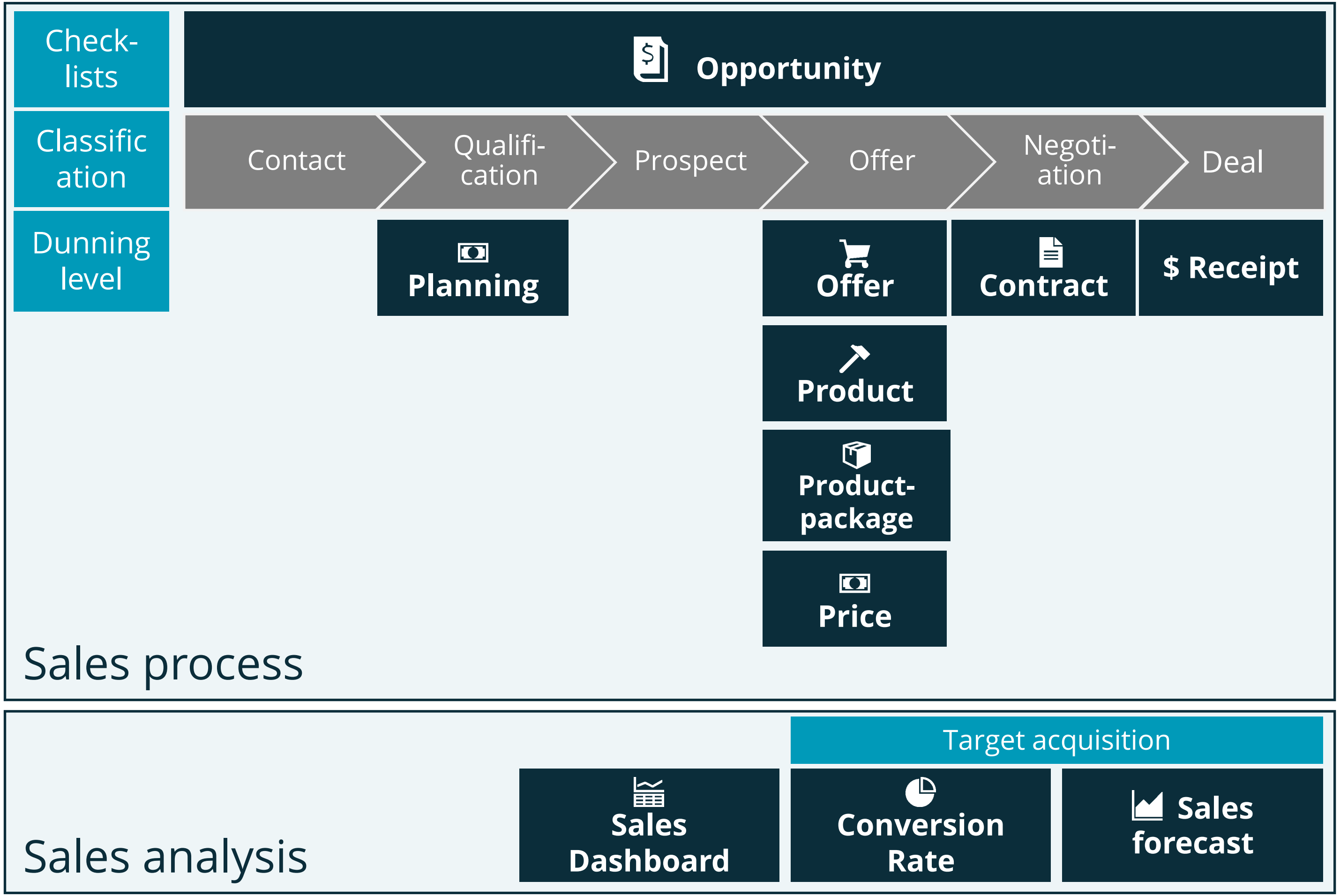
The UX design of ADITO is continuously optimised for you. Therefore, there may be deviations in the screenshots.

Agenda (1/3)

Agenda (2/3)

Agenda (3/3)

Overview sales

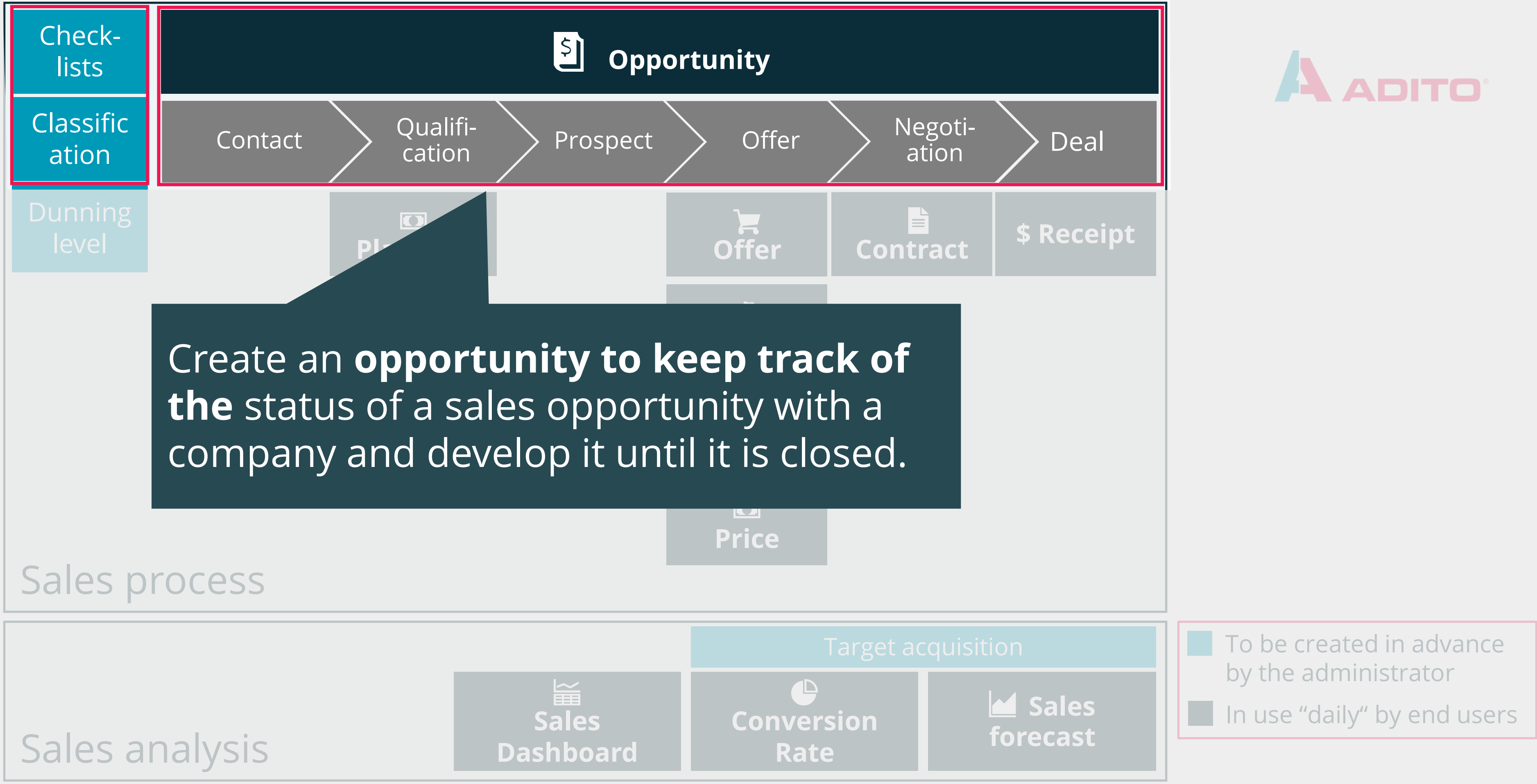


To be created in advance by the administrator

In use “daily” by end users

Sales process

Opportunity



Check-lists
Classification
Dunning level
Opportunity
Contact
Qualifi-cation
Prospect
Offer
Negoti-ation
Deal
Offer
Contract
$ Receipt
Create an **opportunity to keep track of the** status of a sales opportunity with a company and develop it until it is closed.
Price
Sales process
Target acquisition
Sales Dashboard
Conversion Rate
Sales forecast
Sales analysis
To be created in advance by the administrator
In use “daily“ by end users

Opportunity

Sales phases

Assignment of responsibilities:

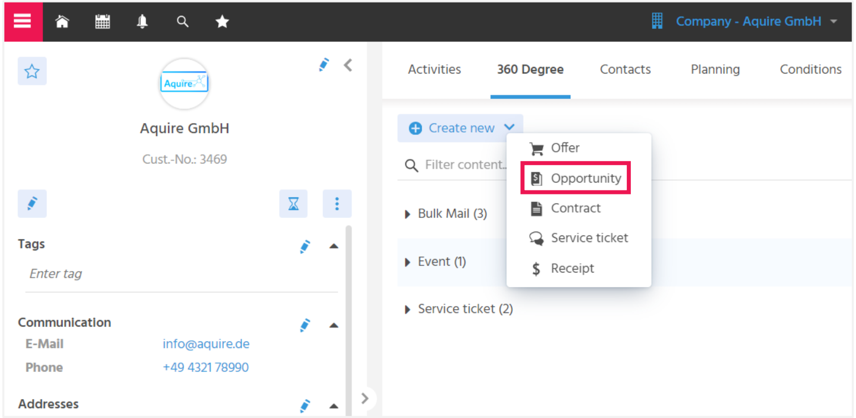
Opportunity

What information/processes are mapped in an opportunity?

- The opportunity is divided into **phases** and processed with the help of linked **checklists**.
- By **adding** contacts in the **Buying & Selling Center,** you can keep track of the people involved.
- The **classification** allows you to evaluate the opportunity.
- Enter **forecasts** in the opportunity that show the potential turnover generated by the opportunity.
- Use **activities** to document coordination, e-mails sent, telephone calls, etc. In addition, linked campaigns, offers, events, etc. can be viewed via **touchpoints**.
- Place files in a SharePoint folder and **link the SharePoint folder** in Opportunity.
- An evaluation shows you **how long** the opportunity was **in which phase**.
- You can record your **competitors to** document who is also interested in this project and why they lost or won the contract.
- **Operations** (on-site visits) linked to the opportunity can be viewed in the Operations/tasks tab.

Create opportunity

Start: Company

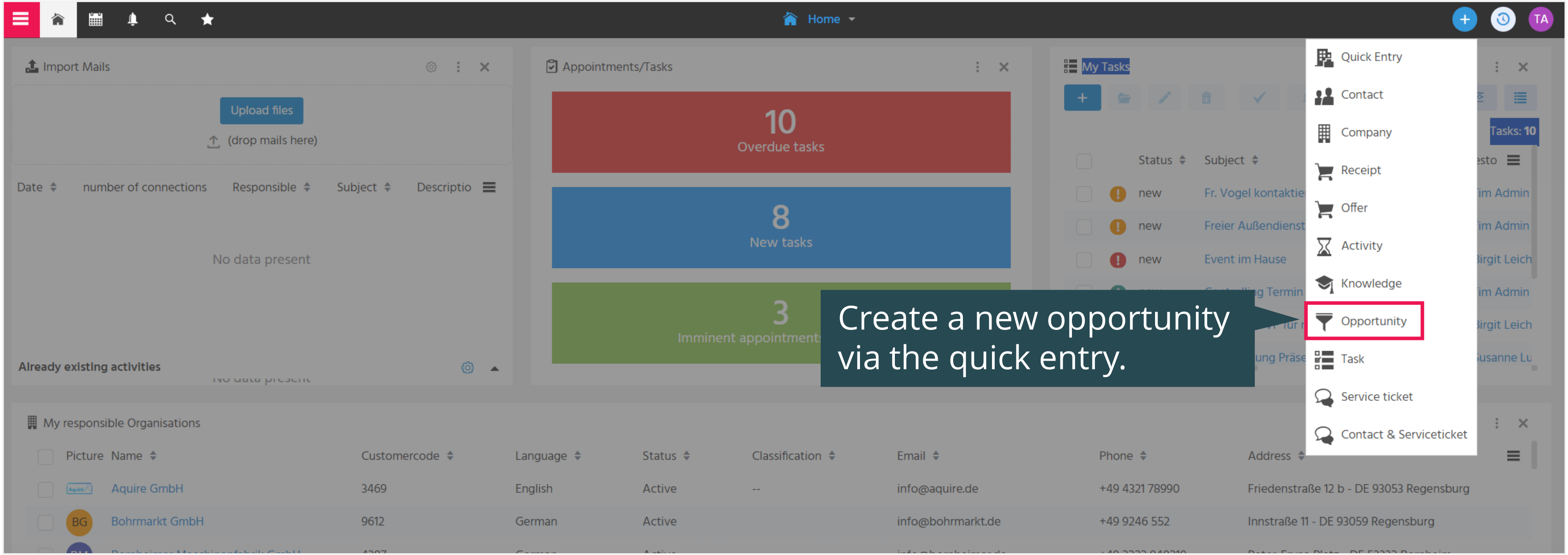


- Open company
- Open tab “360 Degree“
- Button “Create new“ => Opportunity

- Automatically links the company to the opportunity
- All opportunities of a company are listed in the “360 Degree“ view

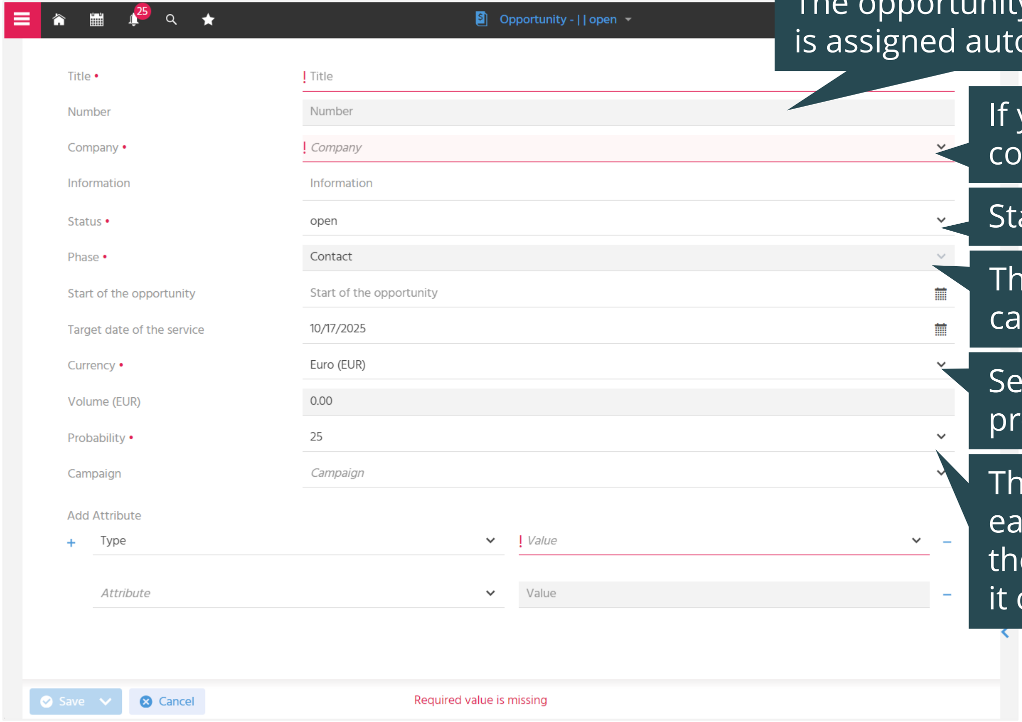
Create opportunity

Start: Global bar



Opportunity

Create new opportunity



The opportunity number is assigned automatically.

If you create an opportunity from a company, the company is automatically preset.

Status is automatically “Open“.

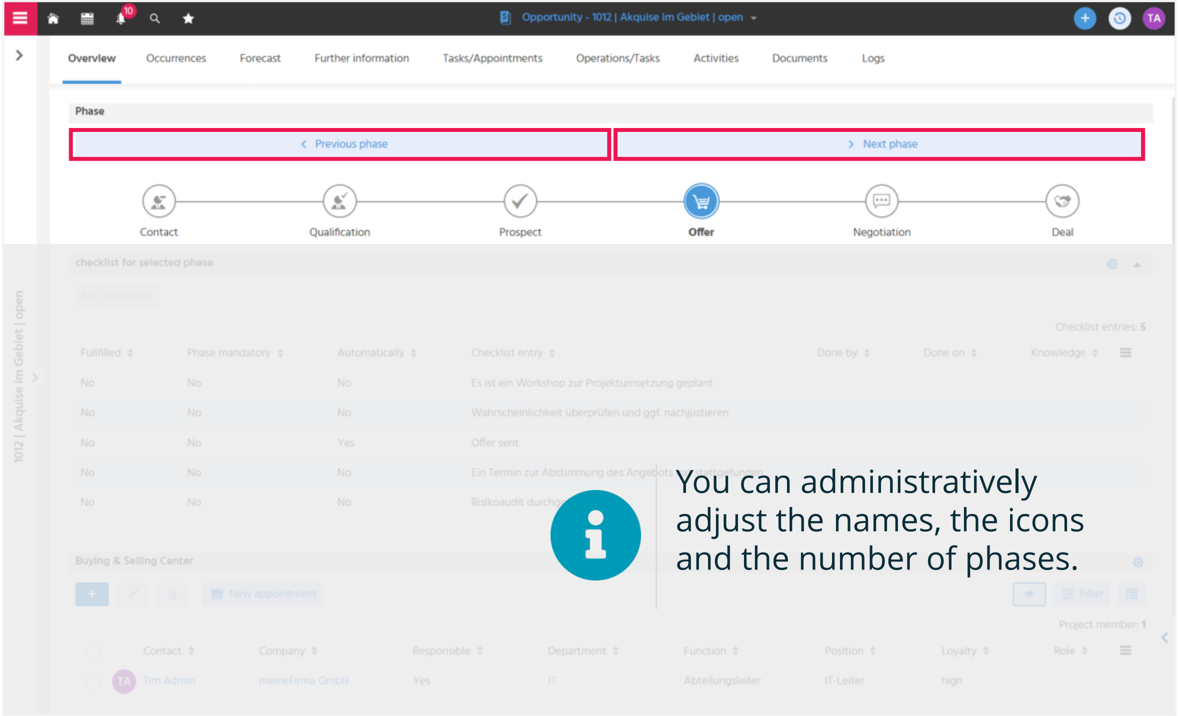
The first phase is automatically preset. The phase cannot be adjusted here.

Select here the currency in which the project is to be processed.

The administrator can assign a probability to each phase. Depending on the selected phase, the probability is filled automatically. However, it can be adjusted manually.

Opportunity

“Overview“ tab: Phases

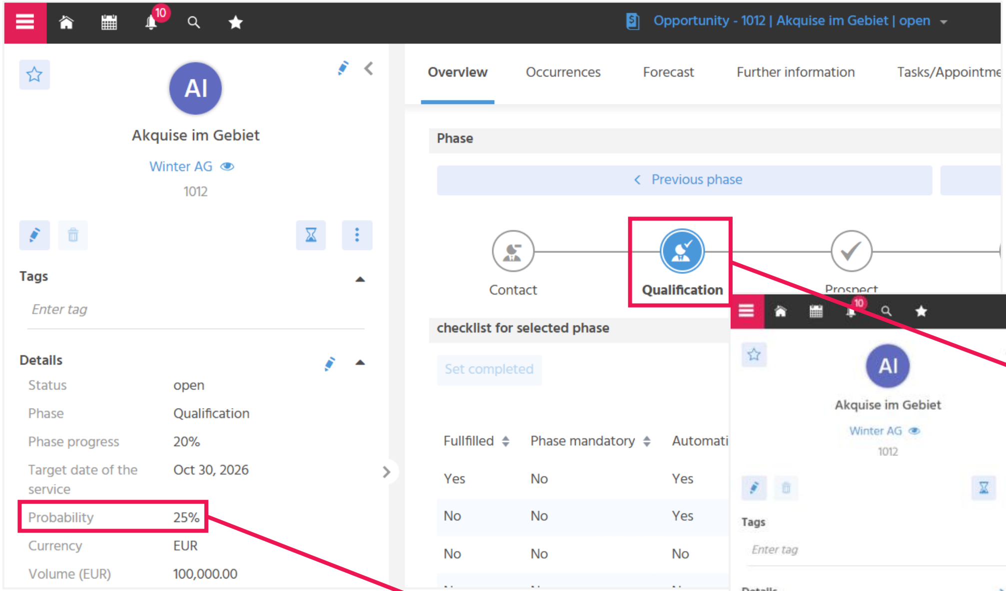


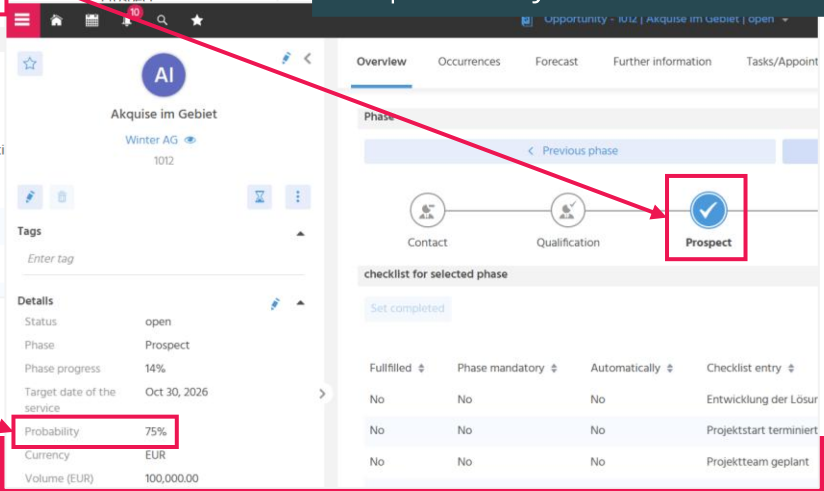
You can administratively adjust the names, the icons and the number of phases.

- In the upper area, the **opportunity phases** are shown in a stepper component.
- The **current** phase is highlighted in **blue.**
- **You can switch between the phases with** the help of the buttons “Previous phase“ and “Next phase“.

Opportunity

Probability: Automatic adjustment in case of phase change

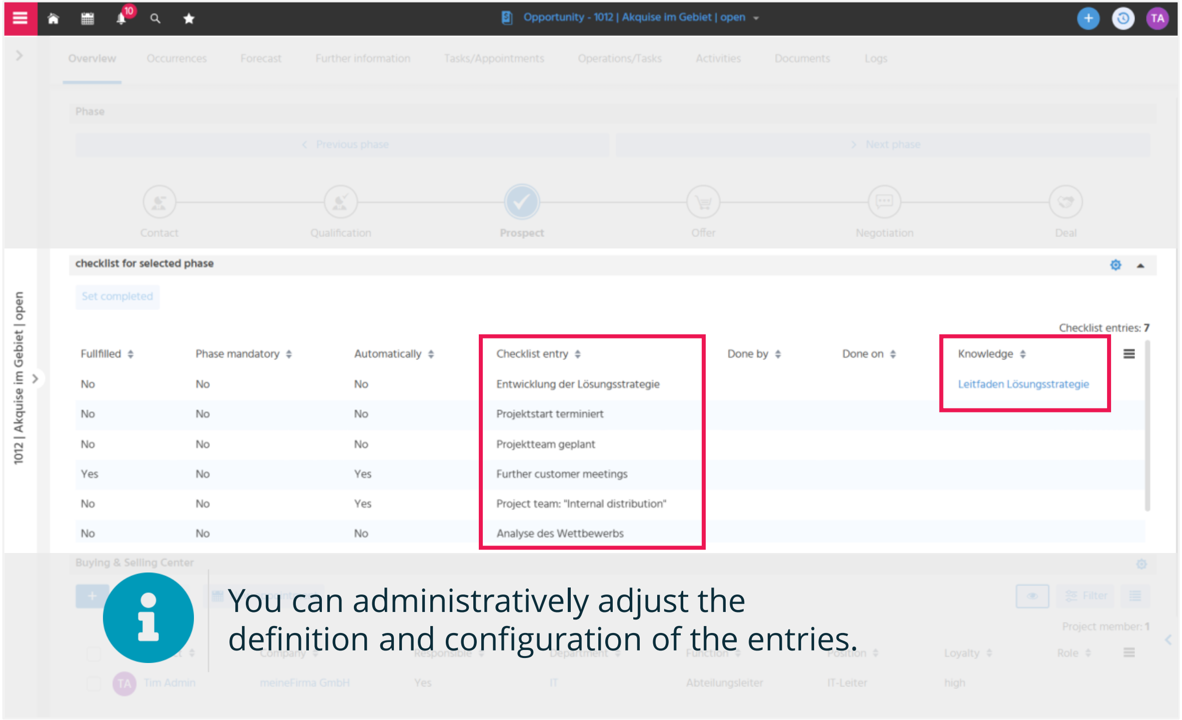




The administrator can assign a probability to each phase. When changing phases, the probability is filled automatically depending on the selected phase. However, it can be adjusted manually. If a manually entered probability is already higher than the automatic probability of the upcoming phase, the probability is not overwritten.

Opportunity

Tab “Overview“: Checklist for selected phase



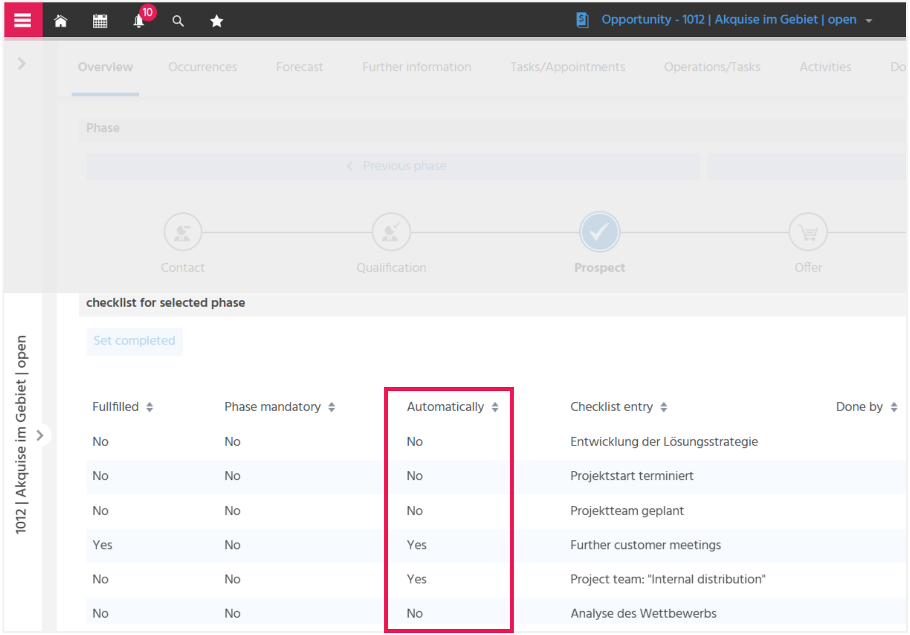
You can administratively adjust the definition and configuration of the entries.

The **checklist entries** belonging to the respective phase are displayed below the stepper component. The checklist entries are **to-dos that you must/should complete in the respective phase.**

A **knowledge entry** can be stored with a checklist entry if the checklist is not meaningful enough on its own.

Opportunity

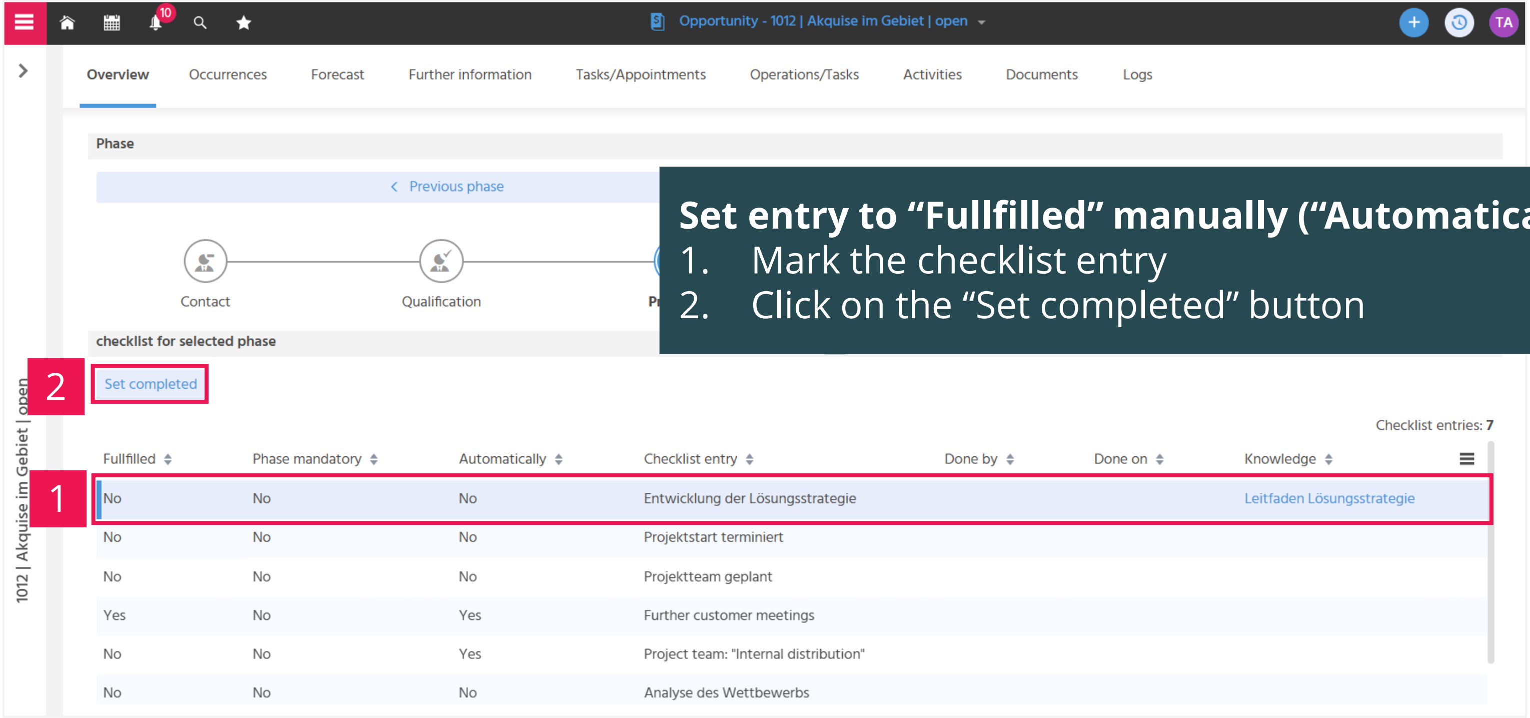
Tab “Overview“: Checklist for selected phase



- A checklist can contain entries that must be manually set to “Fullfilled“ and entries that are automatically set to “Fullfilled“.
- Entries which are set to “Fullfilled“ **manually** are checked by the user and set to “Fullfilled“.
- Entries which are set to “Fullfilled“ **automatically** are checked by the system and set to “Fullfilled“ as soon as the user has entered the required information in the system (e.g. Buying & Selling Center has at least one entry).

Opportunity

Set entry to “Fullfilled” manually

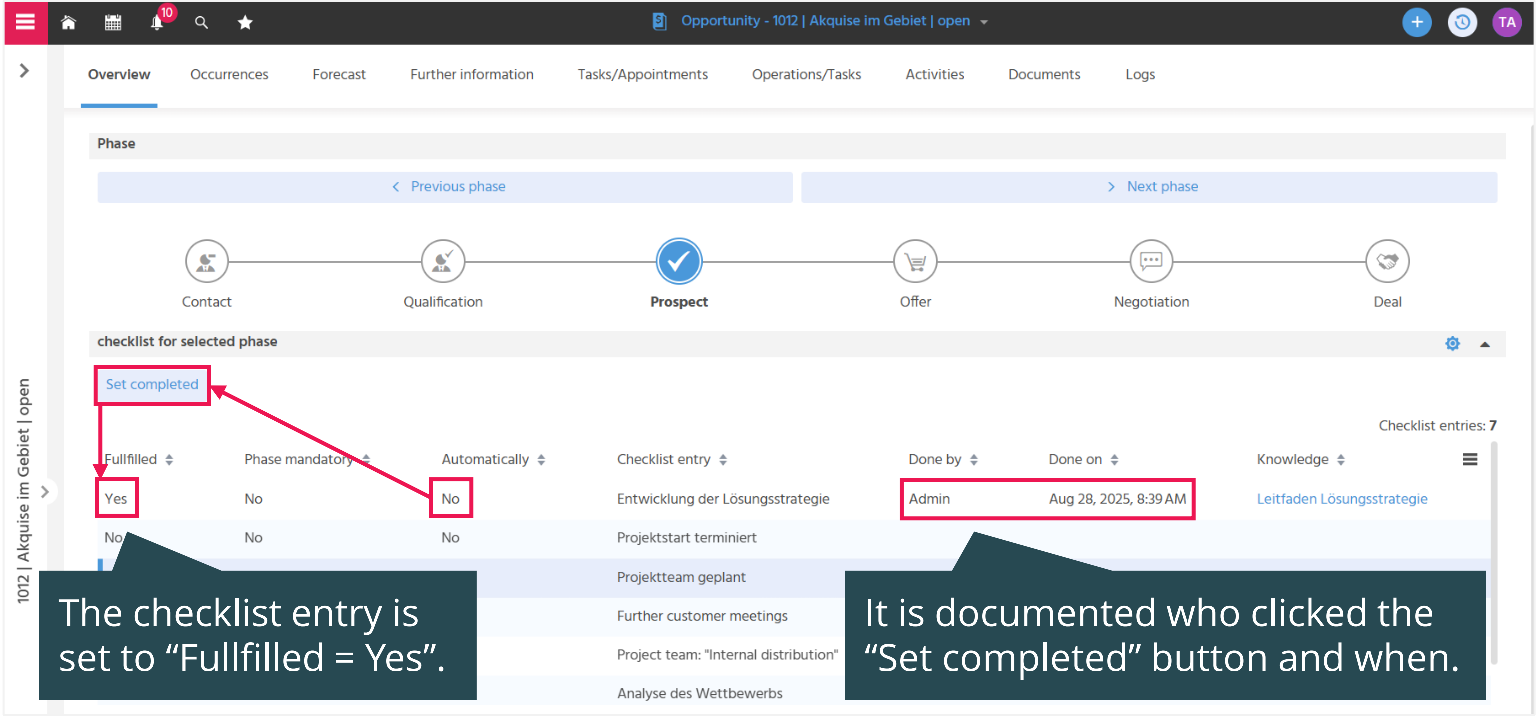


Set entry to “Fullfilled” manually (“Automatically“ = “No“)

1. Mark the checklist entry
2. Click on the “Set completed” button

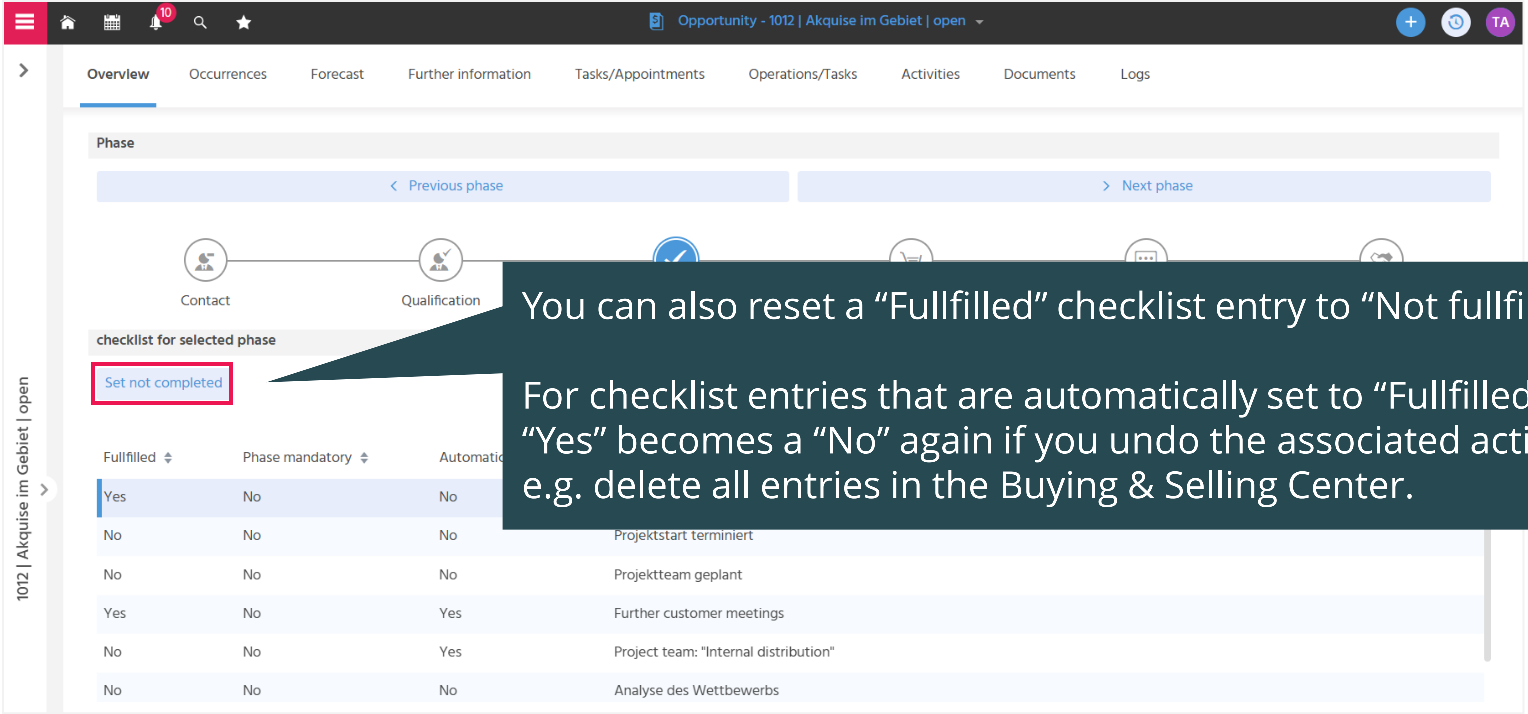
Opportunity

Set entry to “Fullfilled” manually



Opportunity

Set entry to “Fullfilled” manually



You can also reset a “Fullfilled” checklist entry to “Not fullfilled”.

For checklist entries that are automatically set to “Fullfilled”, the “Yes” becomes a “No” again if you undo the associated action, e.g. delete all entries in the Buying & Selling Center.

Opportunity - Excursus filter view

Progress

Opportunity

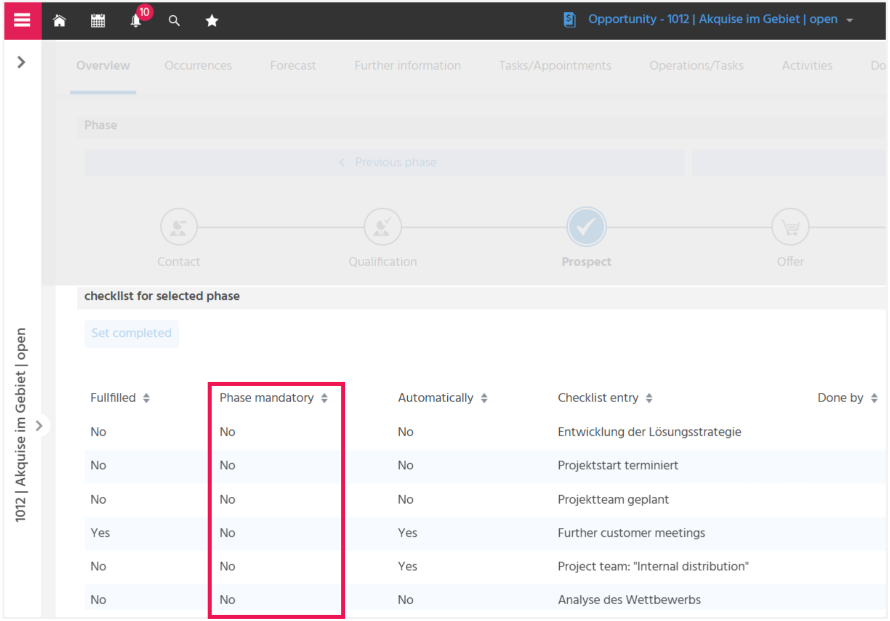
Opportunities: 15

Number	Title	Company	Classification	Days inactive	Created on	Start of the opportunity	Target date of the service	Phase	Status	Phase progress	Probability	Volume Weigh
1012	Akquise im Gebiet	Winter AG	BC	41	Dec 30, 2023, 7:49:04 AM		Dec 25, 2025	Offer	open	0%	25%	25,000.00
1006	Bucher Neuprojekt	Bucher Unternehmensgruppe	BC	29	Dec 22, 2023, 12:22:17 PM	Jun 11, 2024	Aug 1, 2025	Offer	won	60%	75%	525,000.00
1007	Einführung DPR Version 3.5	Glob Group	BB	29	Jan 27, 2024, 12:22:17 PM	Jul 3, 2024		Qualification	open	60%	50%	17,267.00
1002	Erstprojekt	Industrial Steel AG	AB	23	Oct 19, 2023, 1:22:17 PM	Mar 22, 2024		Negotiation	won	80%	75%	412,500.00
1010	FSA Projekteinführung	Fahey, Spencer and Armstrong	BB	42	Feb 26, 2024, 9:07:56 AM	Mar 9, 2024		Prospect	open	0%	75%	201,000.00
1005	Kronen Pilotprojekt	Kronen AG	AC	52	Dec 11, 2023, 12:22:17 PM	Jul 23, 2024	Aug 1, 2025	Offer	open	0%	50%	12,500.00
1001	Magic Gray - Produkteinführung	Magic Gray	BD	316	Jul 29, 2022, 11:18:33 AM	Dec 27, 2022	Dec 25, 2025	Contact	open	100%	25%	
1008	Meister Messebau	Meister Messebau GmbH	BB	42	Feb 16, 2024, 1:32:50 PM	Mar 10, 2024	Sep 7, 2025	Negotiation	partially wor	20%	75%	75,000.00
1009	Meister Messebau/ Umsetzung	Meister Messebau GmbH	CC	79	Feb 26, 2024, 7:27:52 AM	Mar 12, 2024		Qualification	open	20%	0%	
1015	Neddick's - Process Refactoring	Nedick's	BC						open	100%	50%	92,000.00
1014	OmniTech - Erstprojekt	OmniTech	BC						[illegible]	100%	75%	74,250.00
1011	Projekt - Fortsetzung	Industrial Steel AG	AB						open	60%	75%	319,816.50
1013	Schäferland Handelswelt / Neukundenprojekt	Schäferland Handelswelt GmbH							open	14%	25%	
1003	Skyscraper / Pilotprojekt	Skyscraper Bau GmbH	BC						open	20%	50%	73,000.00
1004	Transatlantik Initialprojekt	Transatlantik Logistics GmbH	BC						open	20%	75%	281,250.00

The progress column shows the percentage of checklist entries that have been completed in the respective phase. For phases that do not contain any checklist entries, "100%" is displayed.

Opportunity

Tab “Overview“: Phase mandatory



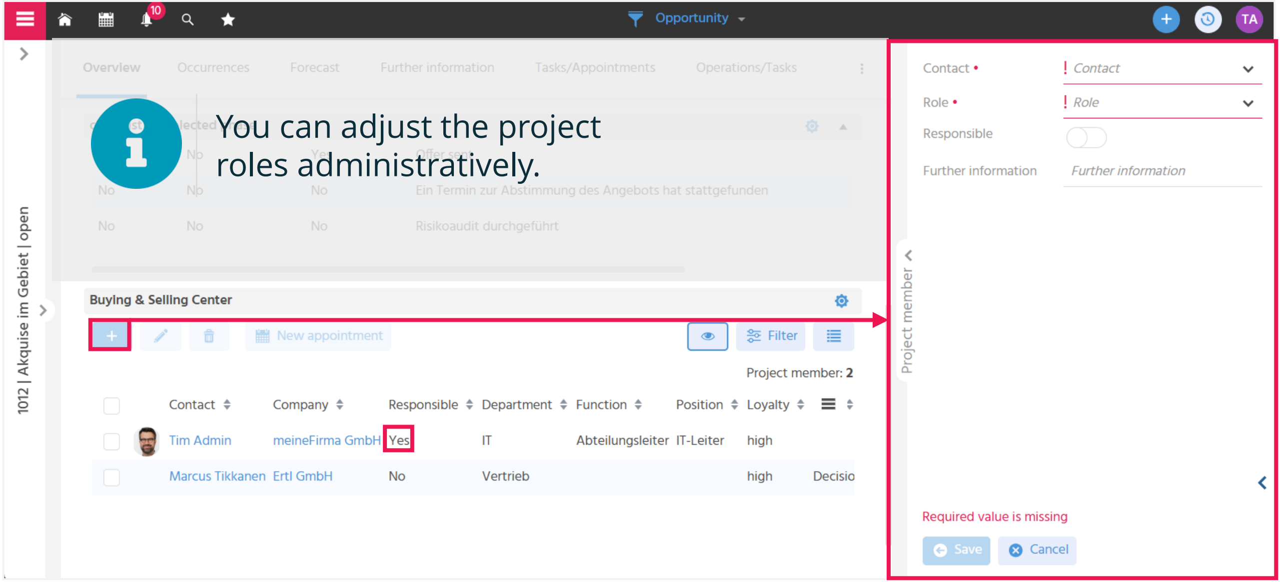
In the column **“Phase mandatory“** you can see whether a checklist entry must be fullfilled so that you can switch to the next phase or whether you can switch to the next phase without having set the checklist entry to “Fullfilled“.

“Yes“ means that the checklist entry must be set to “Fullfilled“ in order to move to the next phase.

Users with the Administrator role can also change the phase if a checklist entry with “Phase mandatory = Yes” has not been fullfilled.

Opportunity

“Overview“ tab: Buying & Selling Center



In the **Buying & Selling Center** area, contacts are recorded with a role.

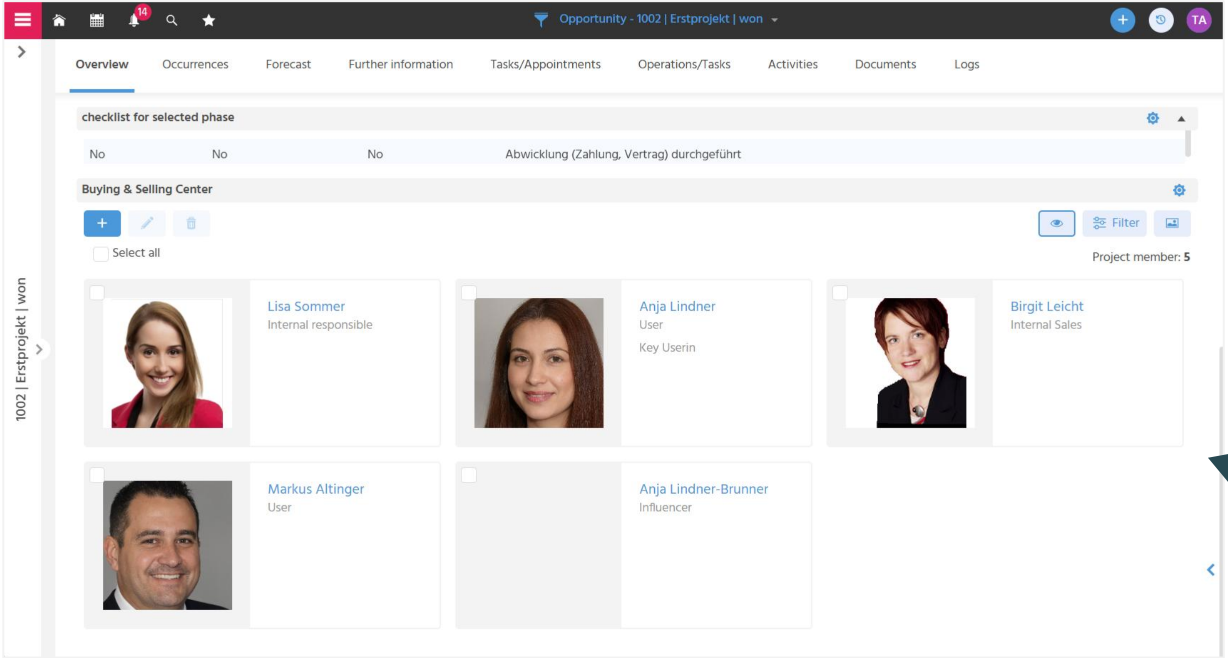
The person who creates the opportunity is **automatically entered** and marked as the person **responsible**.

Another team member can be marked as “responsible“ at any time via the editing view.

Enter important transaction- and role-related information in the “Further information” field that may increase the likelihood of closing the deal.

Opportunity

“Overview“ tab: Buying & Selling Center



You can also open the Buying & Selling Center in tile view so that you can quickly identify people in an appointment based on their photos, for example.

Opportunity

Buying Center and...

Each contact is given a specific role in an opportunity:

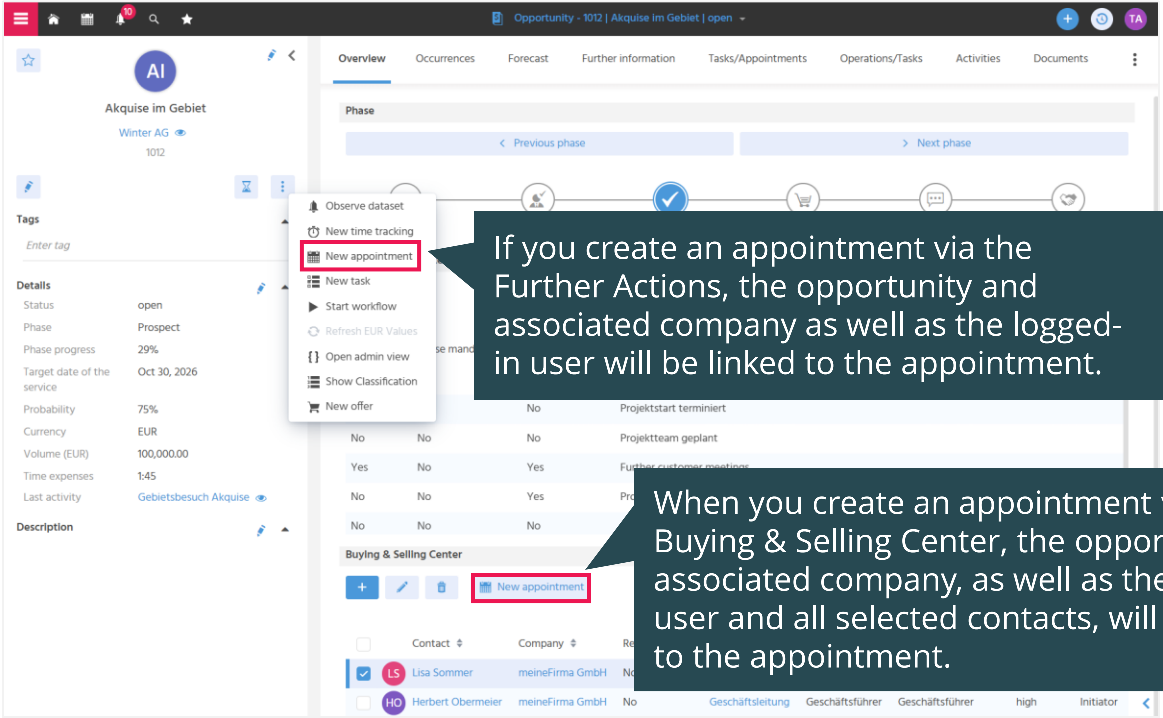
- The **initiator** identifies a need that is to be purchased in order to be able to achieve a goal.
- The **decision-maker** strengthens the company through his decisions.
- The **influencer** supports the profiling of the new problem solution.
- **The user**'s work is made easier by the application of the innovation.
- The **buyer** negotiates the conditions.

...Selling Center

- internal sales

Opportunity

Appointments

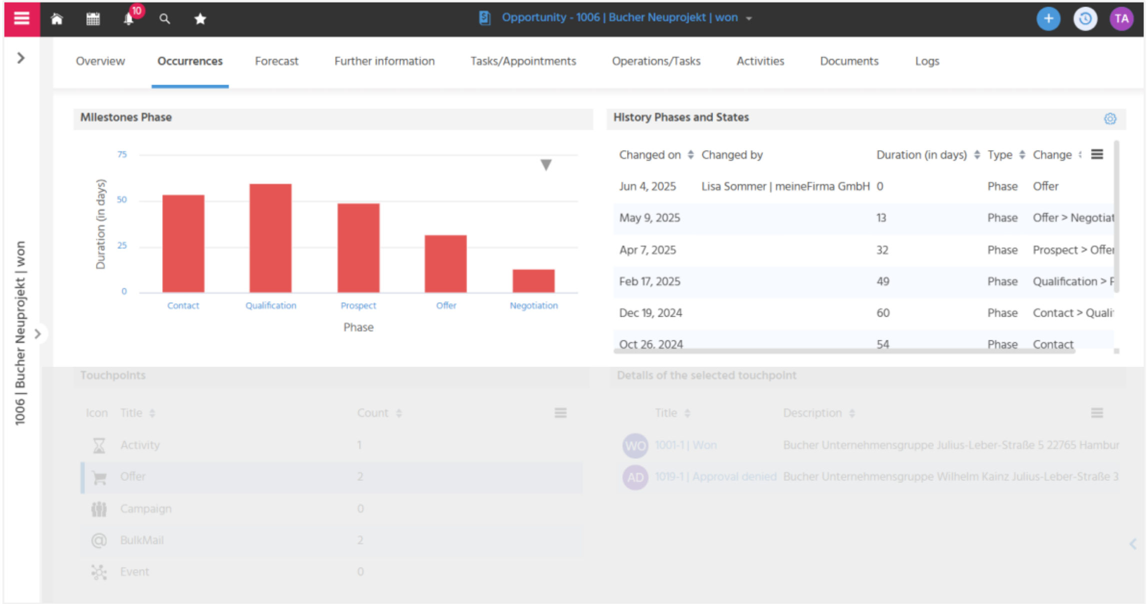


If you create an appointment via the Further Actions, the opportunity and associated company as well as the logged-in user will be linked to the appointment.

When you create an appointment via the Buying & Selling Center, the opportunity and associated company, as well as the logged-in user and all selected contacts, will be linked to the appointment.

Opportunity

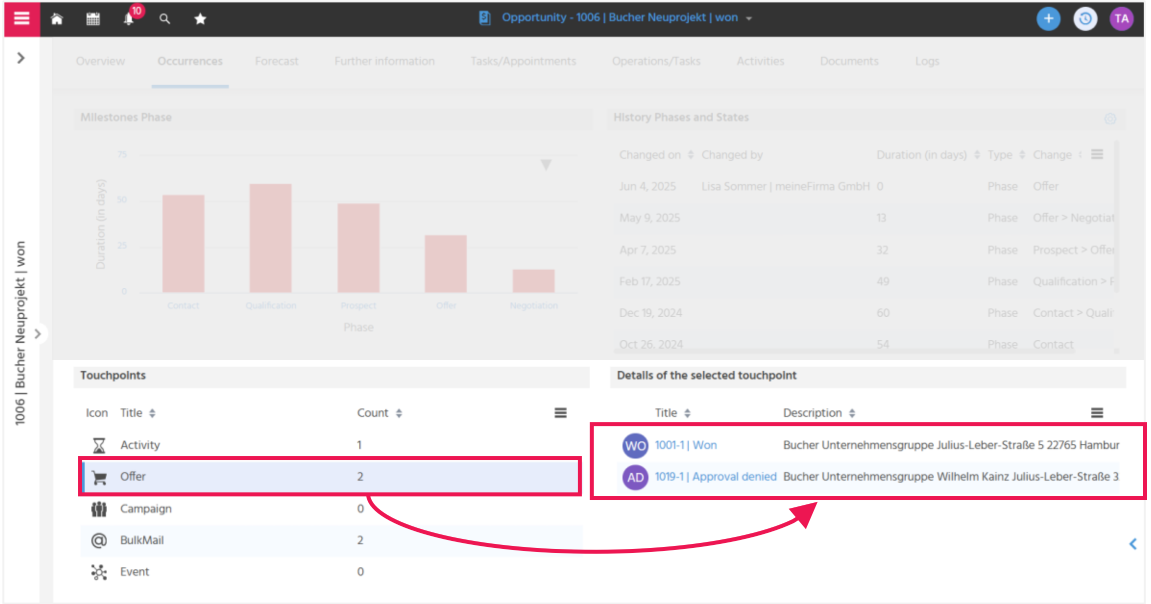
Tab “Occurrences“ - “Phases“ and “States“



- In the **“Milestones phase“** section, the length of time the opportunity has been in which phase is shown graphically.
- In the **“History Phases and States“** section, you will find the data on how long an opportunity was in which phase and in which state.

Opportunity

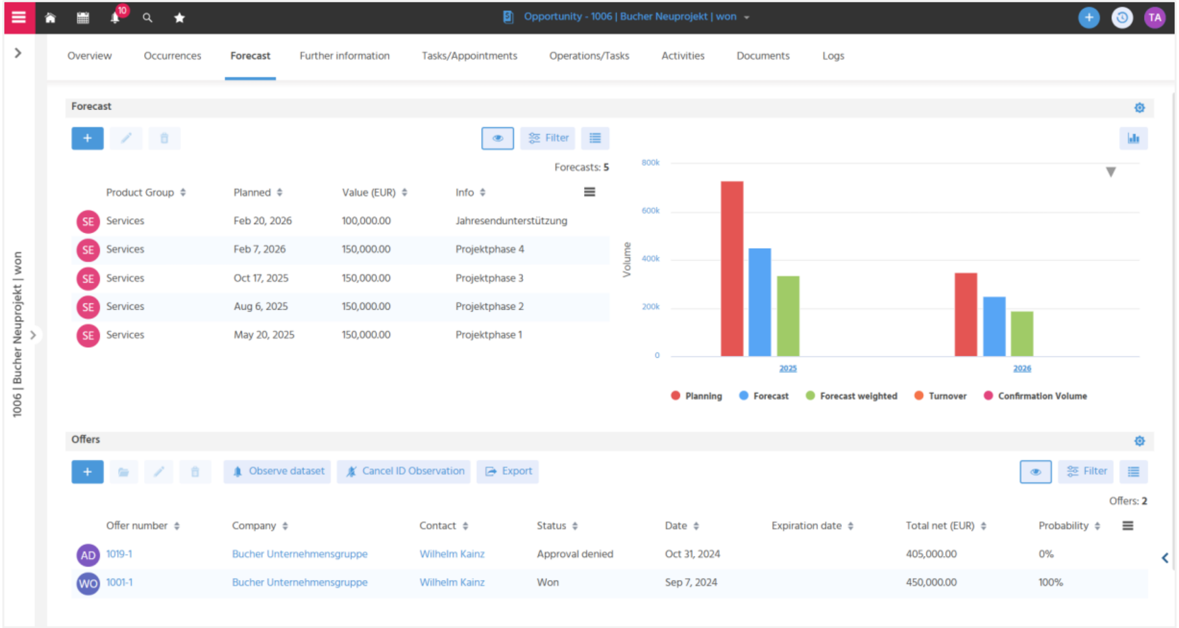
Tab “Occurrences“ - Touchpoints and related details



By selecting one of the points in the **“Touchpoints“** area, you can view the records associated with that touchpoint in the **“Details of Selected Touchpoint“** area. Only records associated with the company for which the opportunity was created are displayed. The number of touchpoints indicates how many records are linked.

Opportunity

Tab “Forecast“

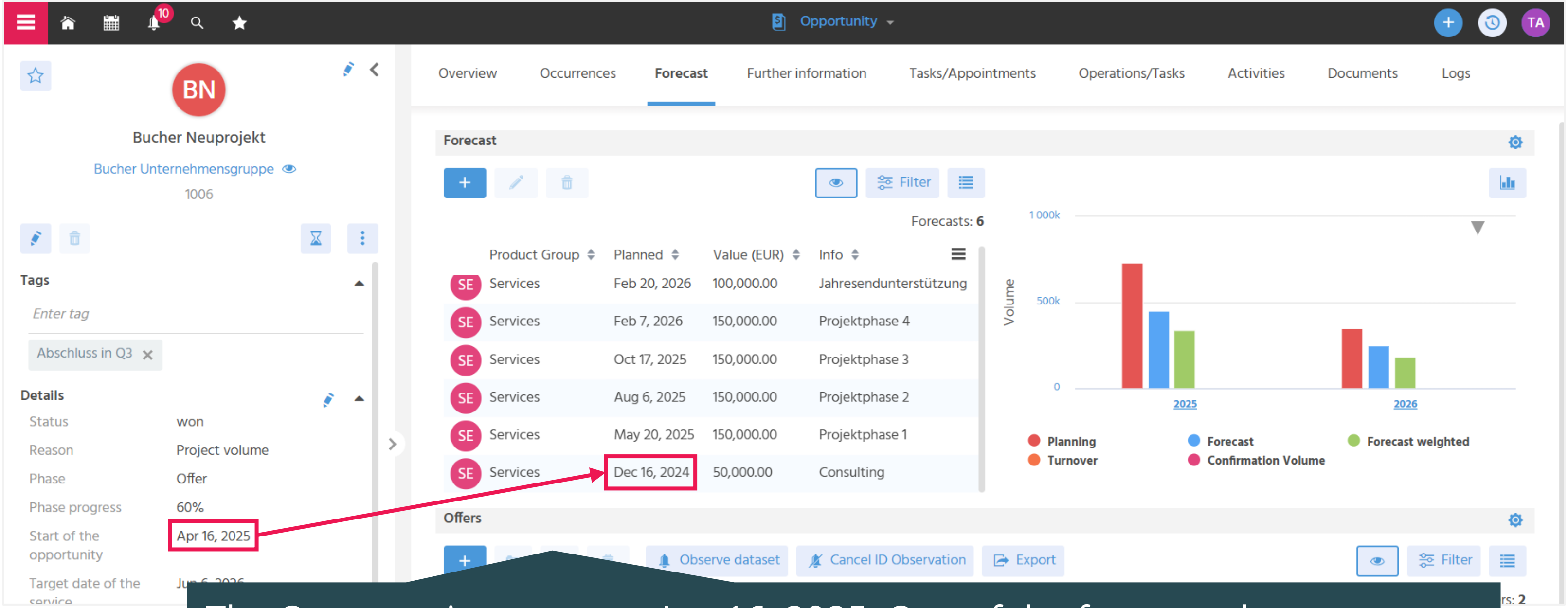


In the **“Forecast“** area, you can enter forecasts for the opportunity on the left. Forecasts **with planning dates after the start date of the opportunity** are shown graphically on the right and are compared with the following values:

- the Planning recorded in the company,
- the Turnover that resulted from the opportunity (net totals from invoices sent but not canceled),
- the Confirmation volume that resulted from the opportunity (net totals from order confirmations sent but not canceled).

Opportunity

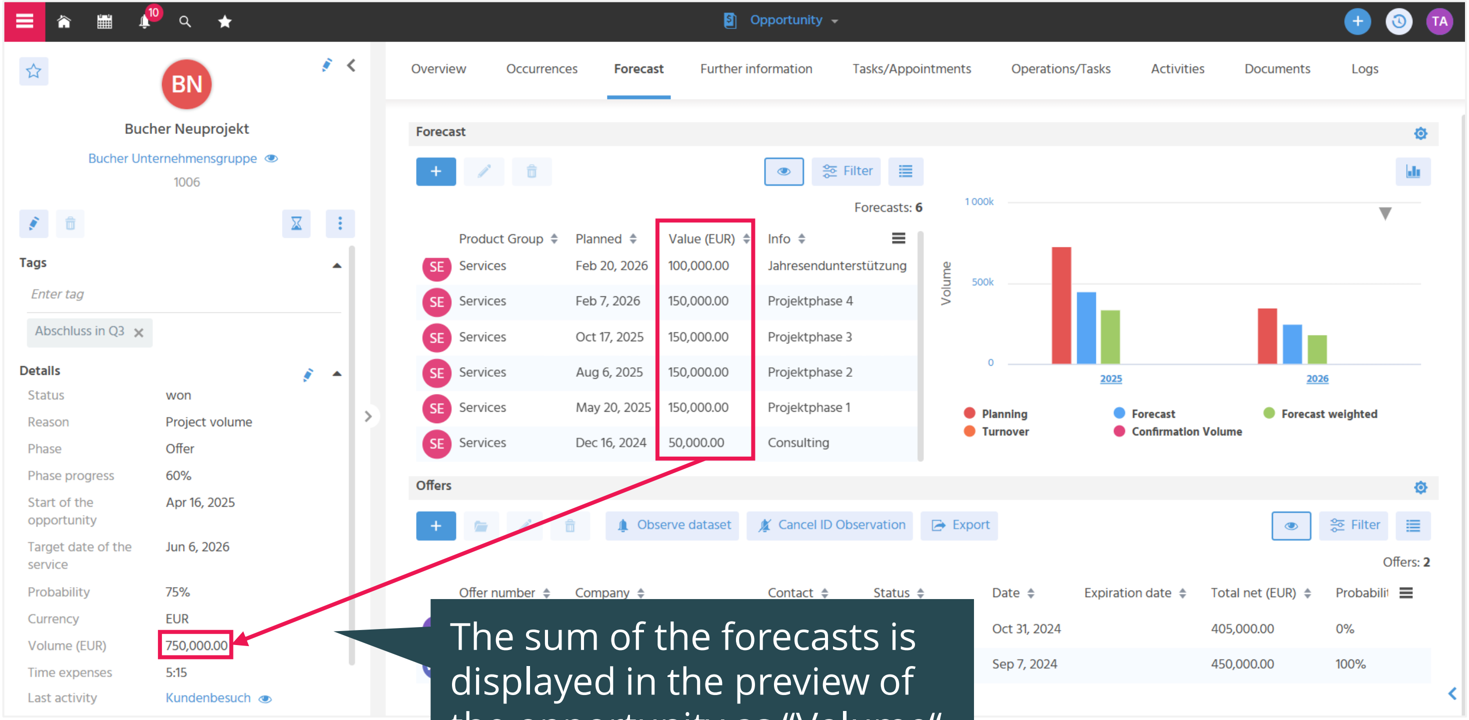
Tab “Forecast“



The Opportunity starts on Apr 16, 2025. One of the forecasts has a planning date in the year before the start of the Opportunity (Dec 16, 2024) => The forecast for 2024 is not shown in the diagram.

Opportunity

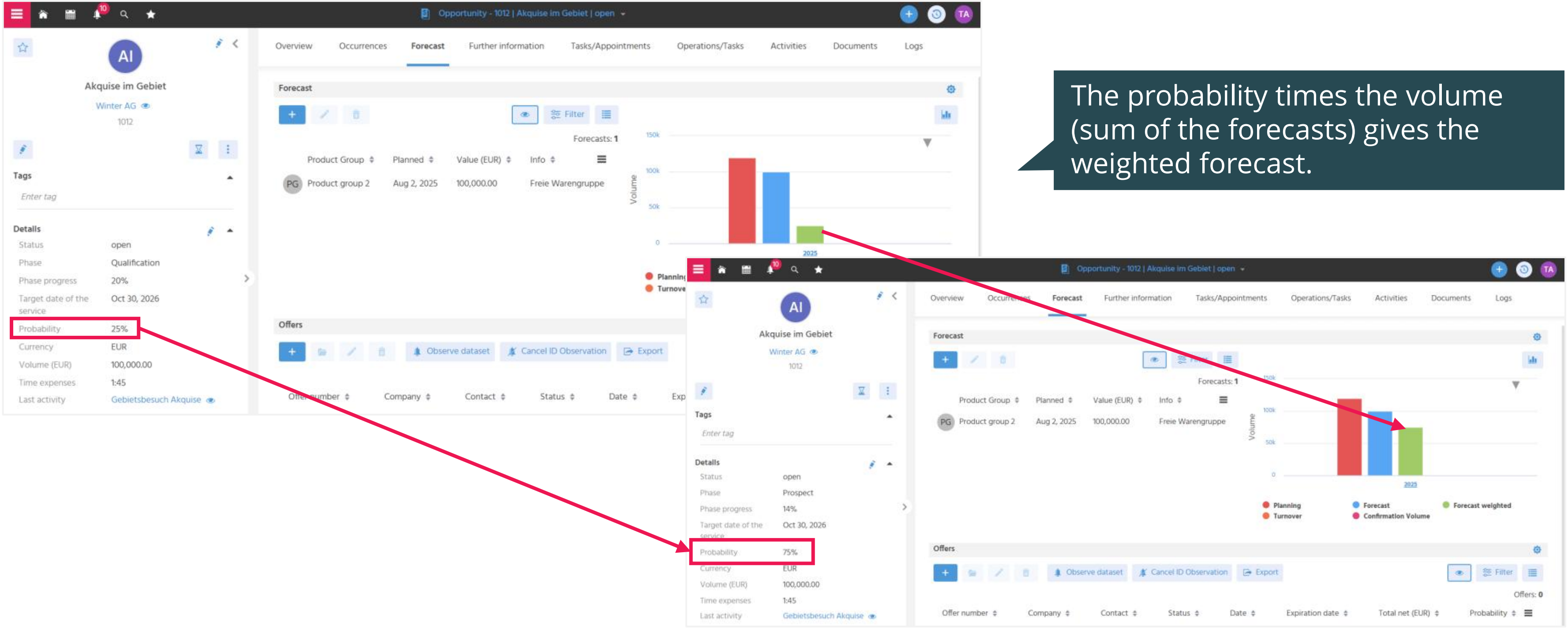
Tab “Forecast“



The sum of the forecasts is displayed in the preview of the opportunity as “Volume“.

Opportunity

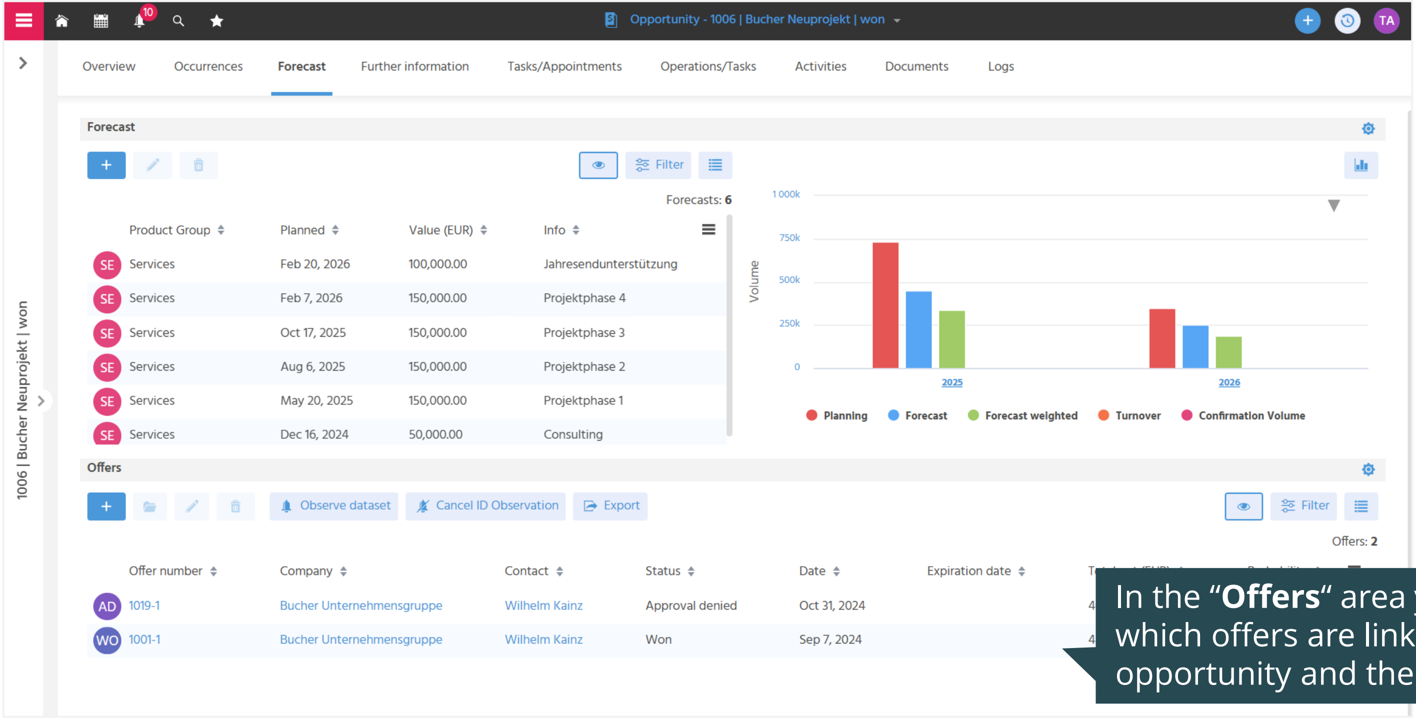
Probability: Forecast weighted



The probability times the volume (sum of the forecasts) gives the weighted forecast.

Opportunity

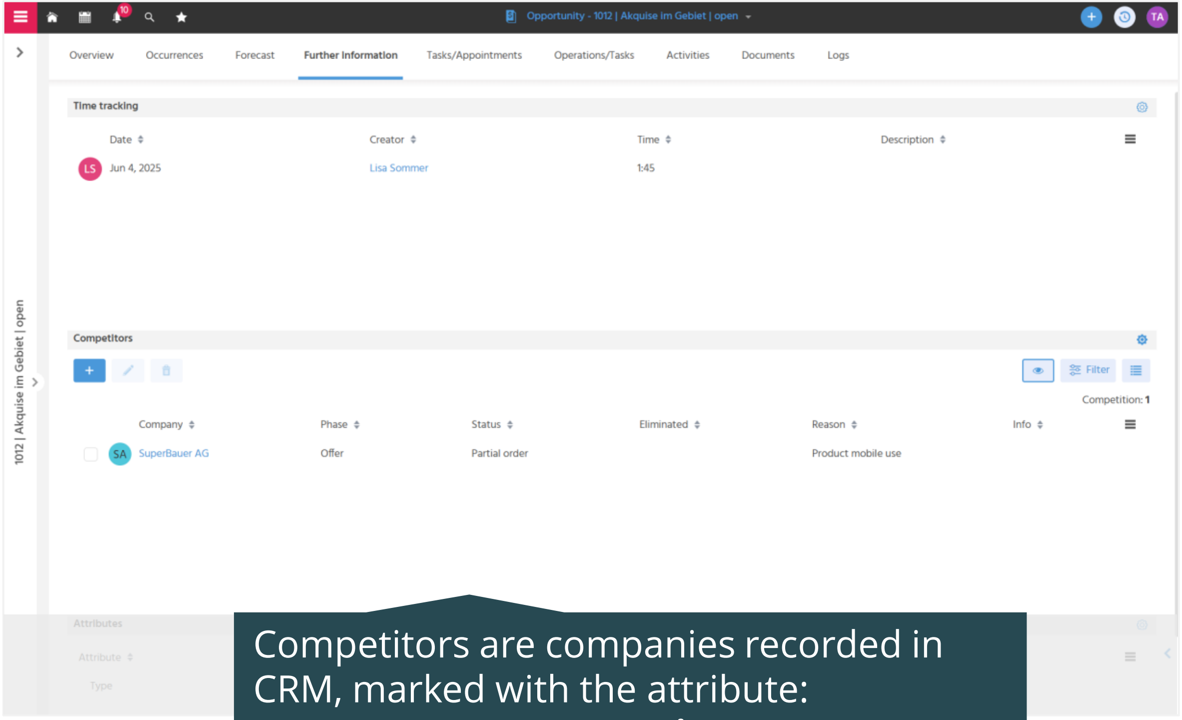
Tab “Forecast“



In the “**Offers**“ area you can see which offers are linked to the opportunity and their status.

Opportunity

Tab “Further Information“

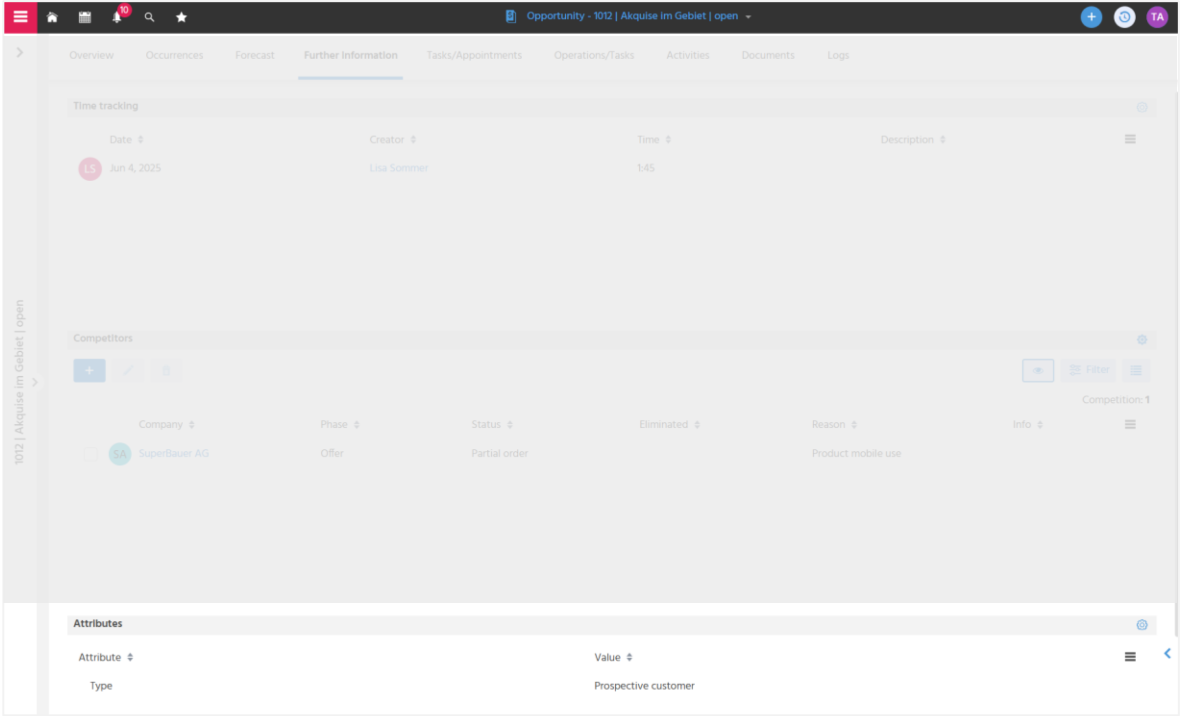


Competitors are companies recorded in CRM, marked with the attribute: **Target group = Competitor**.

- In the **“Timetracking“** area, you can record who was occupied for how long and with what.
- In the **“Competitors“** area you can enter the competitors who are also interested in this opportunity.

Opportunity

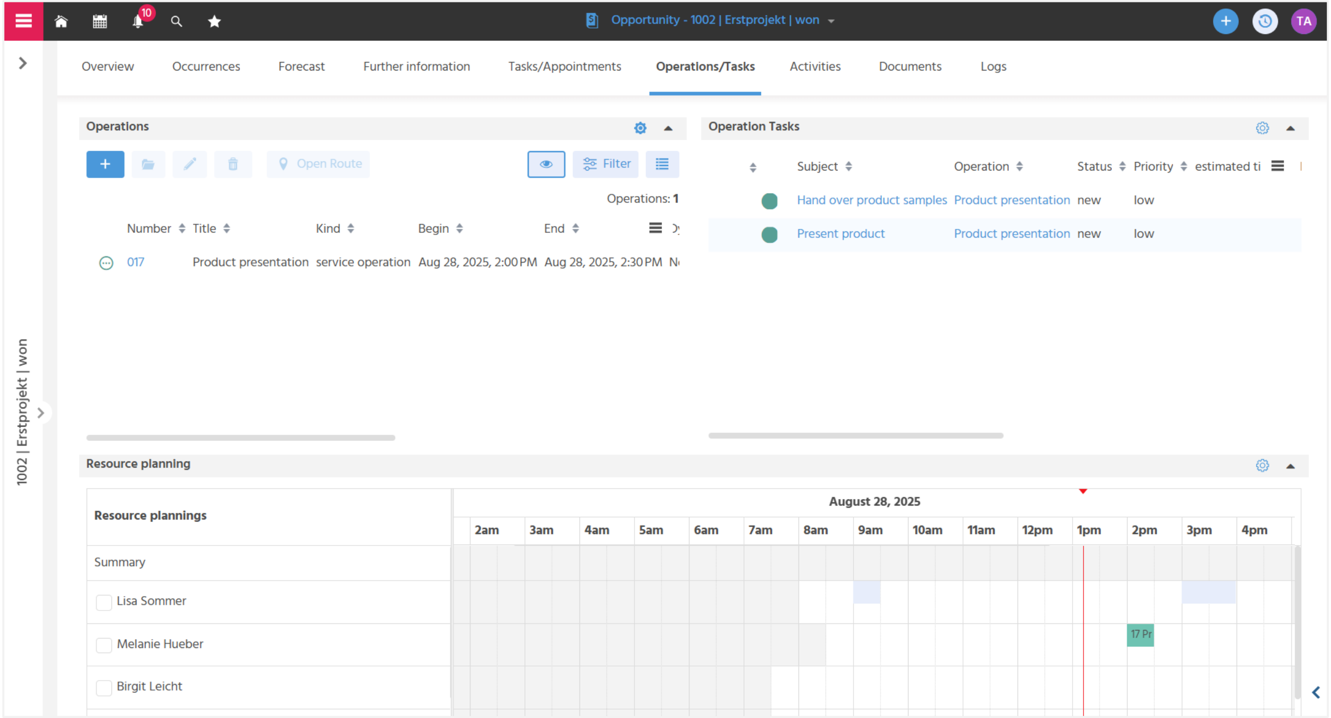
Tab “Further Information“



Use attributes to qualify the opportunity with **additional information.**

Opportunity

Tab "Operations/Tasks"



Here you can see linked **operations, associated operation tasks** and have **access to resource planning**.

Opportunity

More tabs

- **Tab “Tasks/Appointments“:** Tasks and appointments associated with the opportunity are displayed here.
- **Tab „Activities“:** Activities associated with the opportunity are displayed here.
- **Tab “Documents“:** Binary files can be stored in the document folder.
- **Tab “Logs“:** Here, changes to the opportunity are documented by the system.

Evaluate opportunity AI-supported according to BANT criteria

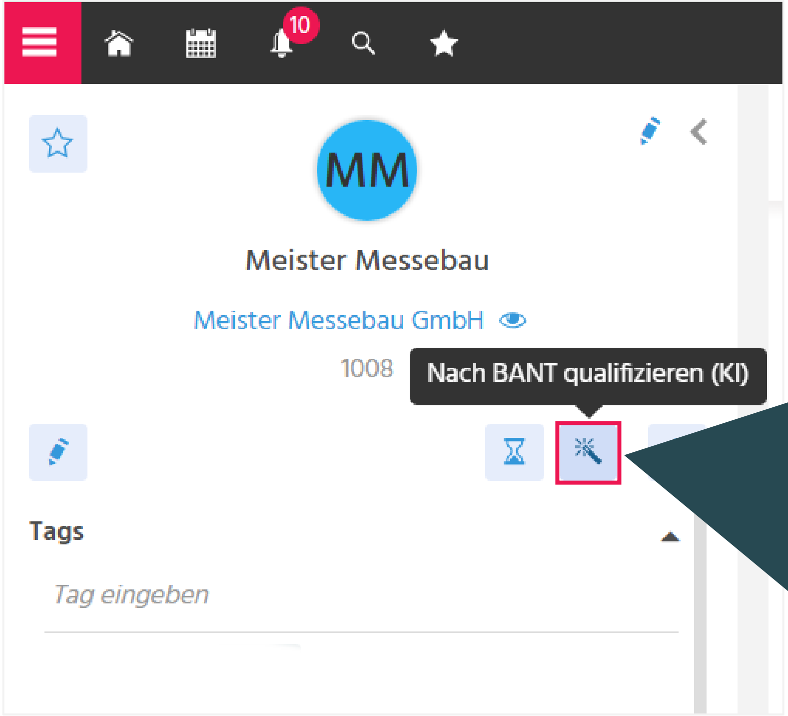
What is the BANT method?

The BANT method is a four-dimensional qualification framework developed by IBM in the 1960s. The acronym BANT stands for:

- **B**udget: Is there a budget?
- **A**uthority: Does my contact person have decision-making authority?
- **N**eed: Is there a clear need/pain point?
- **T**iming: Is there a specific timeframe?

Evaluate opportunity AI-supported according to BANT criteria

Action „Qualify by BANT (AI)“



When you perform the ‘Qualify by BANT (AI)’ action, an overlay opens where you can view the assessment created by the AI. The following data is evaluated for the assessment :

Budget
- Activities
- Opportunity Description

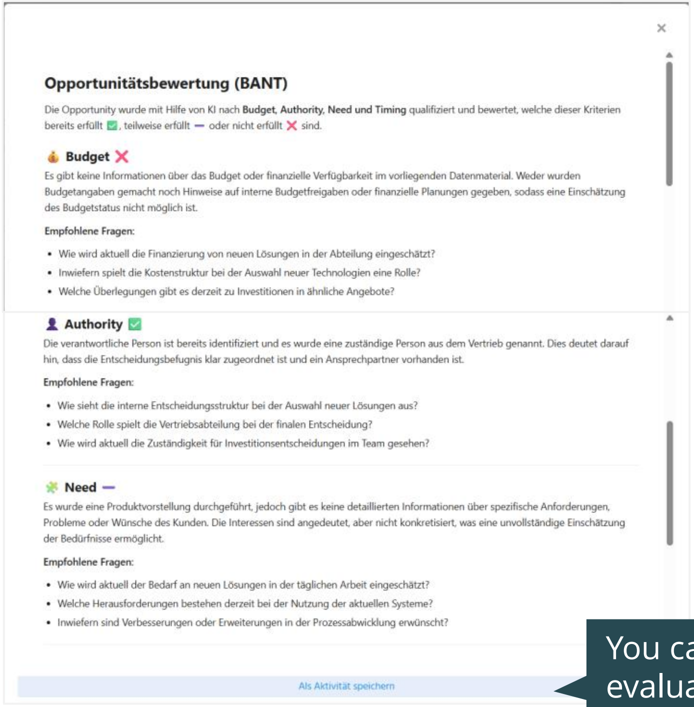
Authority
- Activities
- Opportunity Description
- Buying Center

Need
- Activities
- Opportunity Description
- Forecast: Field „Product Group“

Timing
- Activities
- Opportunity Description
- Start of the Opportunity
- Target Date of the Service

Opportunty KI-gestützt nach BANT-Kriterien bewerten

Aktion „Nach BANT qualifizieren (KI)“



Opportunitätsbewertung (BANT)

Die Opportunity wurde mit Hilfe von KI nach **Budget, Authority, Need und Timing** qualifiziert und bewertet, welche dieser Kriterien bereits erfüllt ✅, teilweise erfüllt ➖ oder nicht erfüllt ❌ sind.

Budget ❌

Es gibt keine Informationen über das Budget oder finanzielle Verfügbarkeit im vorliegenden Datenmaterial. Weder wurden Budgetangaben gemacht noch Hinweise auf interne Budgetfreigaben oder finanzielle Planungen gegeben, sodass eine Einschätzung des Budgetstatus nicht möglich ist.

Empfohlene Fragen:

- Wie wird aktuell die Finanzierung von neuen Lösungen in der Abteilung eingeschätzt?
- Inwiefern spielt die Kostenstruktur bei der Auswahl neuer Technologien eine Rolle?
- Welche Überlegungen gibt es derzeit zu Investitionen in ähnliche Angebote?

Authority ✅

Die verantwortliche Person ist bereits identifiziert und es wurde eine zuständige Person aus dem Vertrieb genannt. Dies deutet darauf hin, dass die Entscheidungsbefugnis klar zugeordnet ist und ein Ansprechpartner vorhanden ist.

Empfohlene Fragen:

- Wie sieht die interne Entscheidungsstruktur bei der Auswahl neuer Lösungen aus?
- Welche Rolle spielt die Vertriebsabteilung bei der finalen Entscheidung?
- Wie wird aktuell die Zuständigkeit für Investitionsentscheidungen im Team gesehen?

Need ➖

Es wurde eine Produktvorstellung durchgeführt, jedoch gibt es keine detaillierten Informationen über spezifische Anforderungen, Probleme oder Wünsche des Kunden. Die Interessen sind angedeutet, aber nicht konkretisiert, was eine unvollständige Einschätzung der Bedürfnisse ermöglicht.

Empfohlene Fragen:

- Wie wird aktuell der Bedarf an neuen Lösungen in der täglichen Arbeit eingeschätzt?
- Welche Herausforderungen bestehen derzeit bei der Nutzung der aktuellen Systeme?
- Inwiefern sind Verbesserungen oder Erweiterungen in der Prozessabwicklung erwünscht?

Als Aktivität speichern

You can save the evaluation as an activity.

The evaluation shows you whether the BANT criteria are
✅ fullfilled,
➖ partially fulfilled or
❌ not fullfilled.

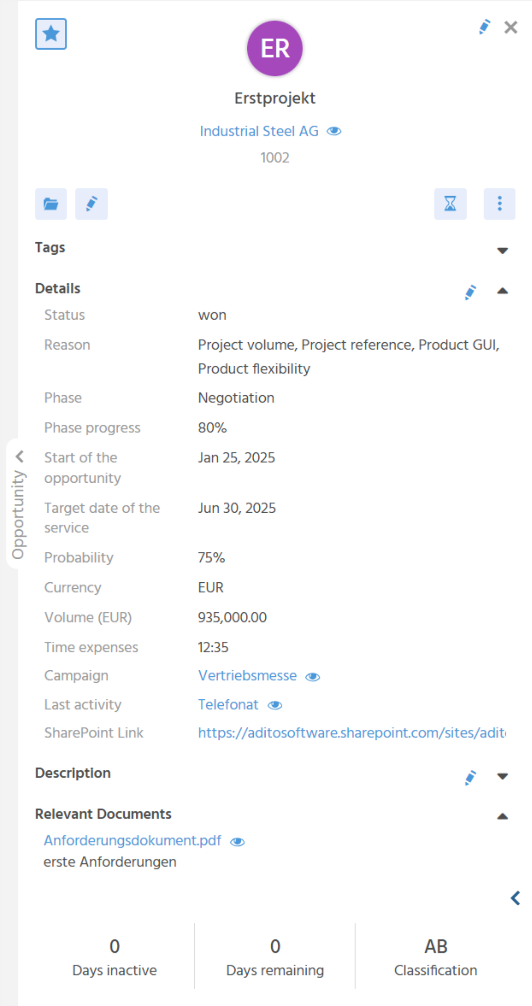
For each criterion, you will find a brief **summary** as well as **questions** that are recommended for further communication with the prospective customer. At the end of the evaluation, the recommended **next steps** are also listed.

Opportunity

Preview

Detail **area -** depending on which phase the opportunity is in, there may be only a little or already very detailed information in the detail area.

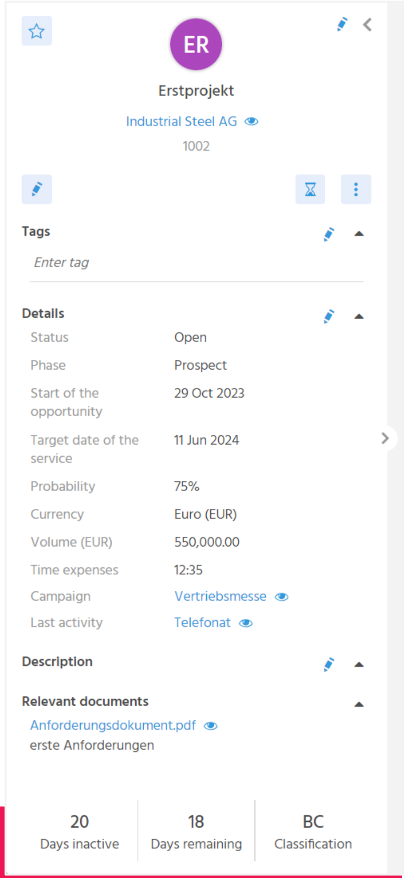
- Status, Phase, Start of the opportunity, Target date of the service and Probability can be edited.
- A reason can be specified for the statuses “aborted”, “partially won”, “won” or “lost.”
- The phase can only be adjusted using the buttons in the “Overview” tab.
- The “Currency“ field can be edited as long as no forecast has been entered in the opportunity.
- The volume is the sum of all forecasts recorded in the opportunity.
- The displayed “Time expenses“ results from the times recorded in the tab “Further information“.
- In the “Campaign“ field you can choose from all current campaigns in which the company linked to the opportunity or an employee of the company are participants. This way you link campaign and opportunity.
- Under “Last activity“ you can see the activity that was last created with a link to the opportunity.
- You can link a SharePoint folder.



Opportunity

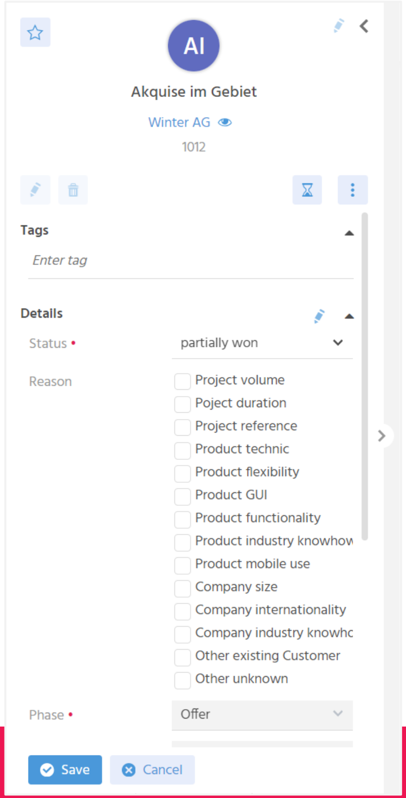
Preview

- **Description -** here you can enter information as free text.
- **Relevant documents** - Documents for which the button “Show in preview“ has been activated in the documents tab are shown in the preview.
- **Days inactive** - Period in which no new activities with a link to the opportunity have been recorded (since the opportunity was created or since the last activity).
- **Days remaining** - period between today and the “Target date of the service“.
- **Classification** - rating calculated on the basis of the information collected.



Opportunity

Justify status

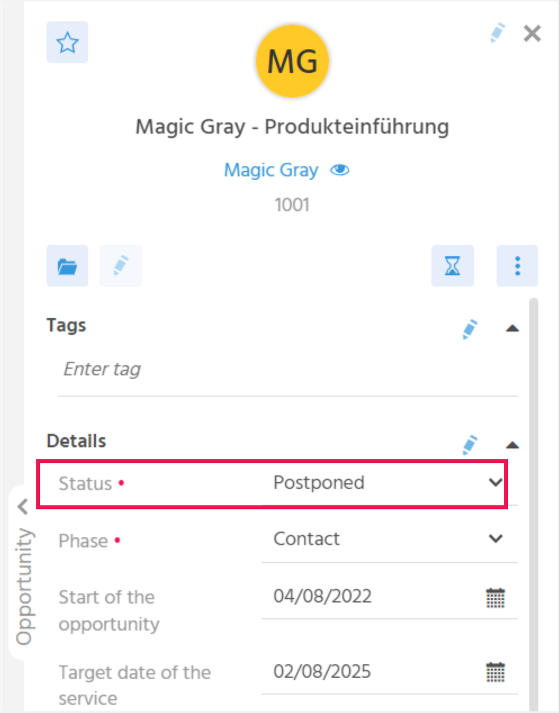


If you select one of the following status values, you can select reasons why this status was set :

- aborted
- partially won
- won
- lost

Excursus "Postpone opportunity"

State "Postponed"



If you set the **state of** the opportunity to **"Postponed"** and confirm the pop-up, a task is automatically created with the responsible person, which is due six months later. So you do not have to resubmit this task yourself. The person who set the opportunity to "Postponed" is entered as the "Requester" of the task.

Opportunity

Classification

Why is the classification used in opportunities?

If you were to assess opportunities only according to the company classification, you might come to the wrong conclusions when prioritising.

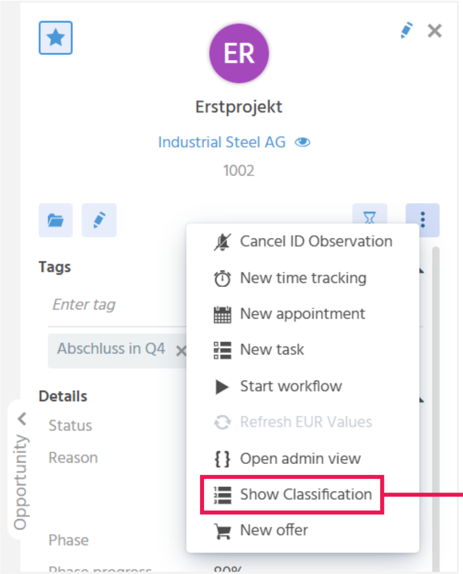
As an example, let's take two possible opportunities of a car dealer:

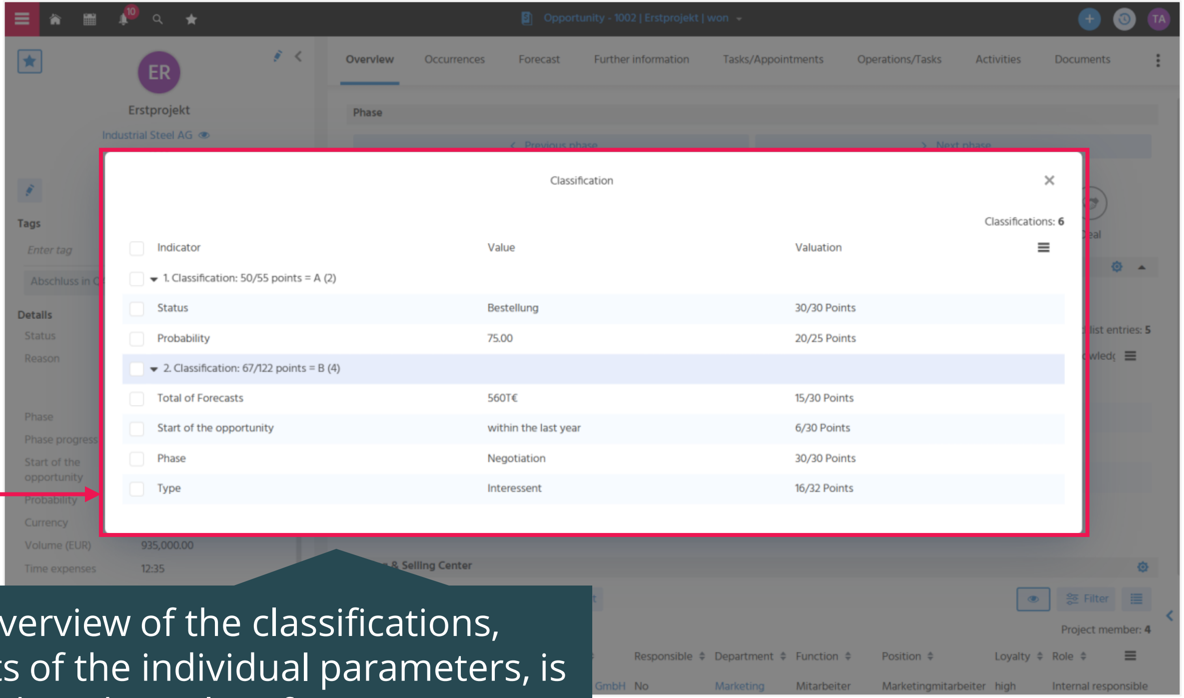
- An A-customer wants to buy a new car for his fleet.
- A C-customer only wants cars of your brand in his fleet in future and therefore orders 10 of them at once.

Your C-client's project would be more important to you in this case.

Opportunity

Classifications

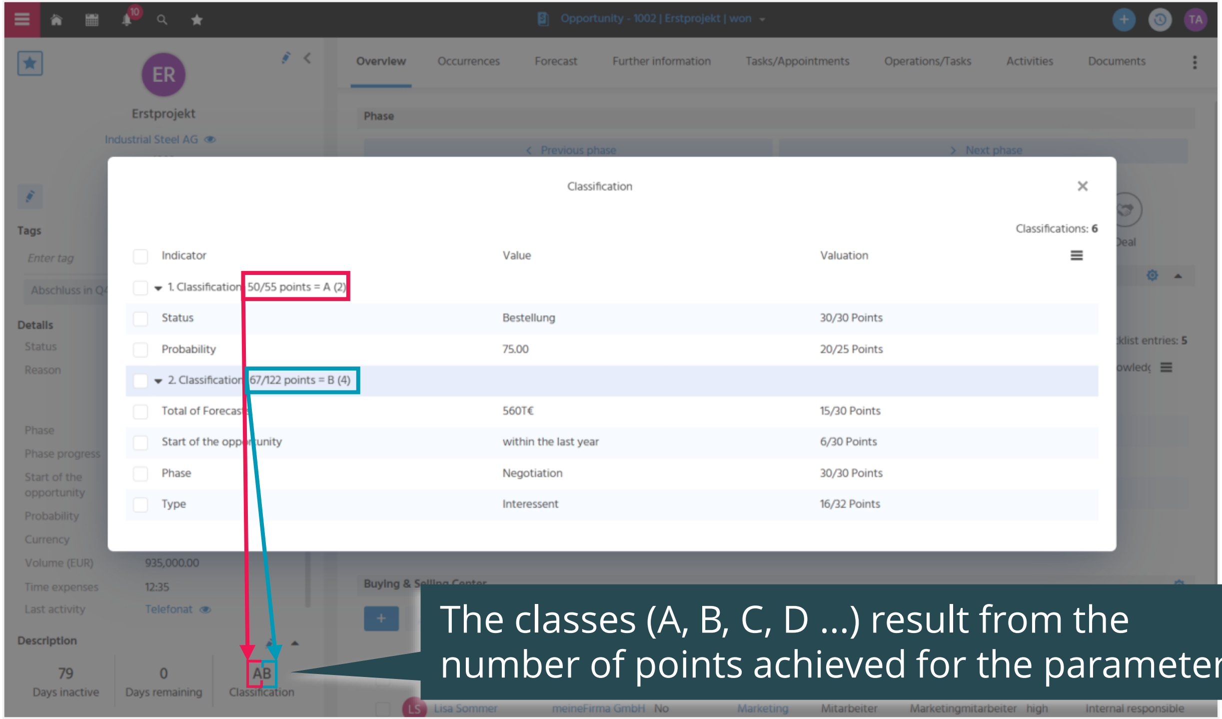




The detailed overview of the classifications, with the results of the individual parameters, is called up with the “Show classification” action.

Opportunity

Classifications

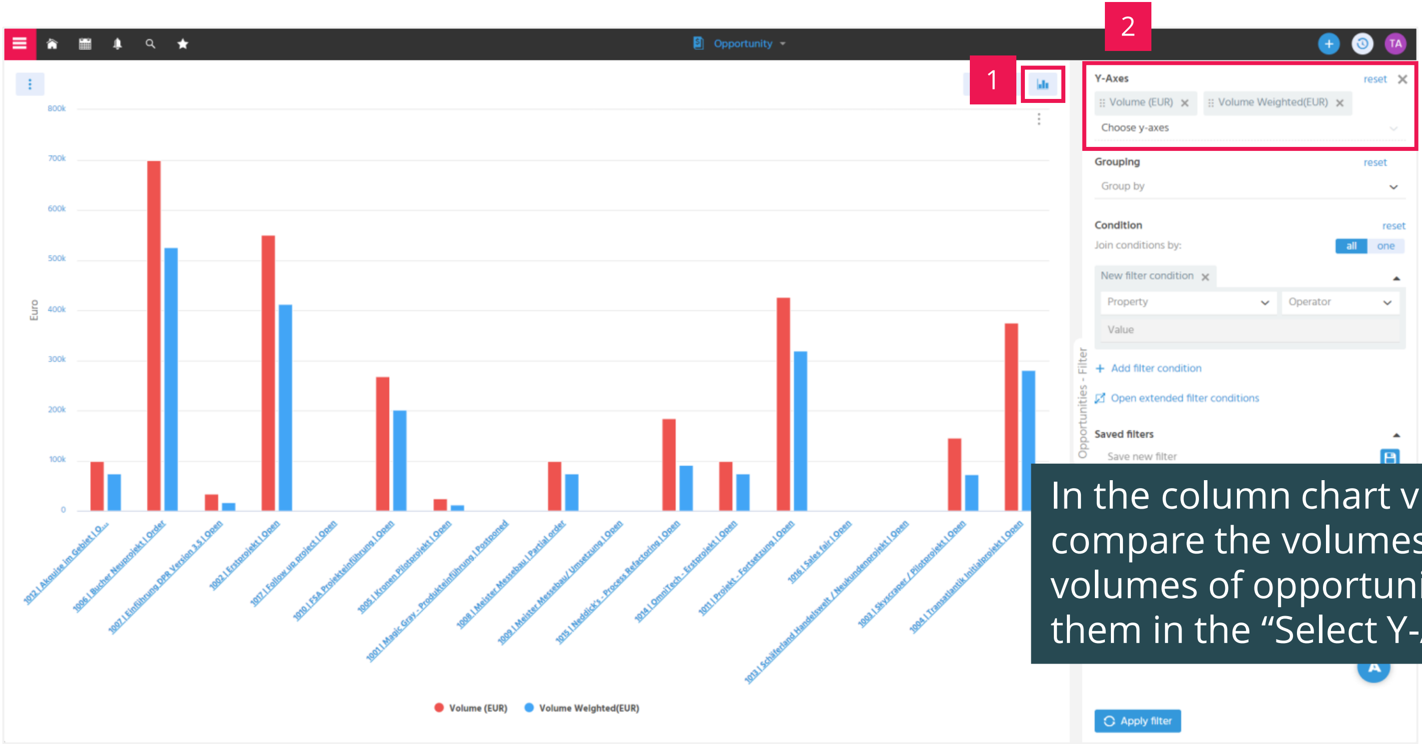


The classes (A, B, C, D ...) result from the number of points achieved for the parameters.

The classifications with their indicators, values and valuations can be created by the administrator.

Opportunity

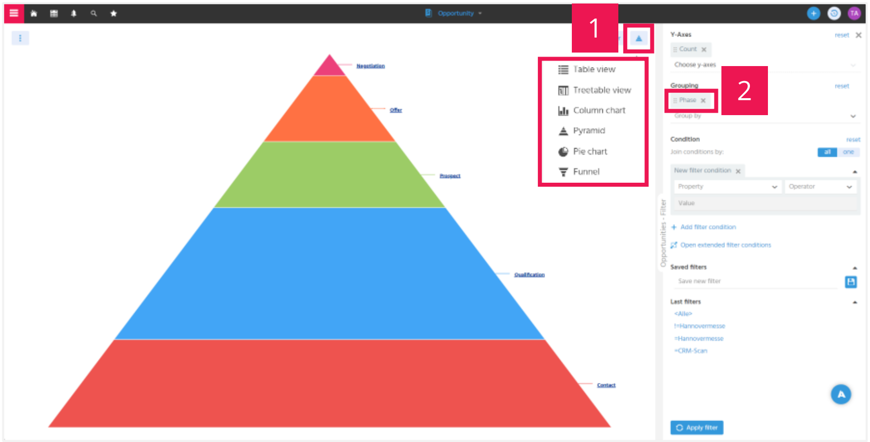
Column chart view

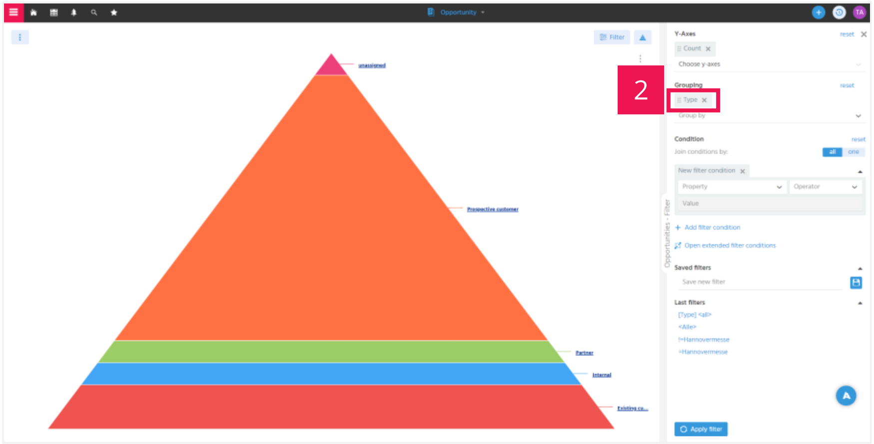


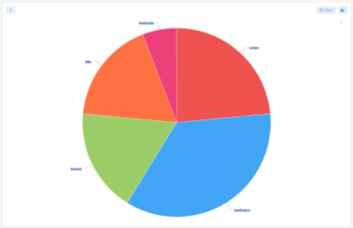
In the column chart view (1), you can compare the volumes and/or weighted volumes of opportunities by selecting them in the “Select Y-Axes“ field (2).

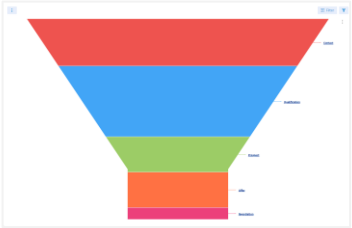
Opportunity

Pyramid, Pie chart, Funnel





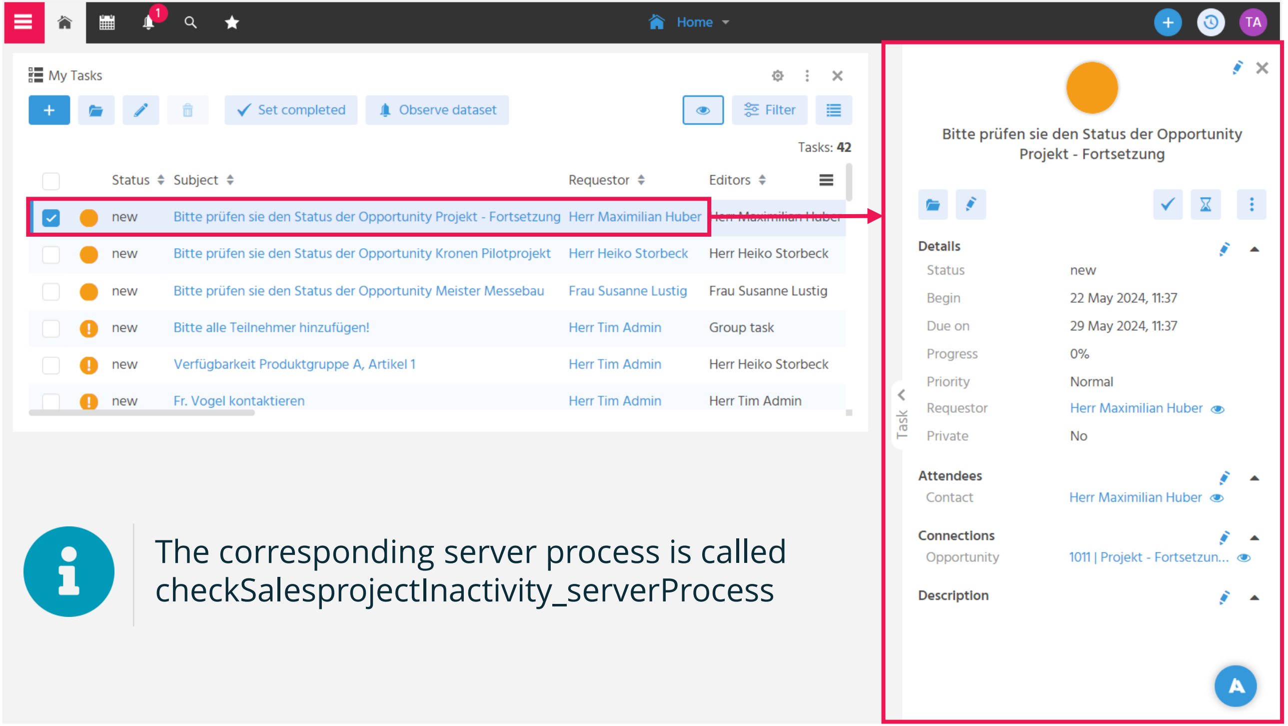




You can also display the opportunities as a pyramid, pie chart or funnel (1). This gives you a visual overview of various parameters that you can select via the grouping (2).

Excursus server process

Task when opportunity is inactive

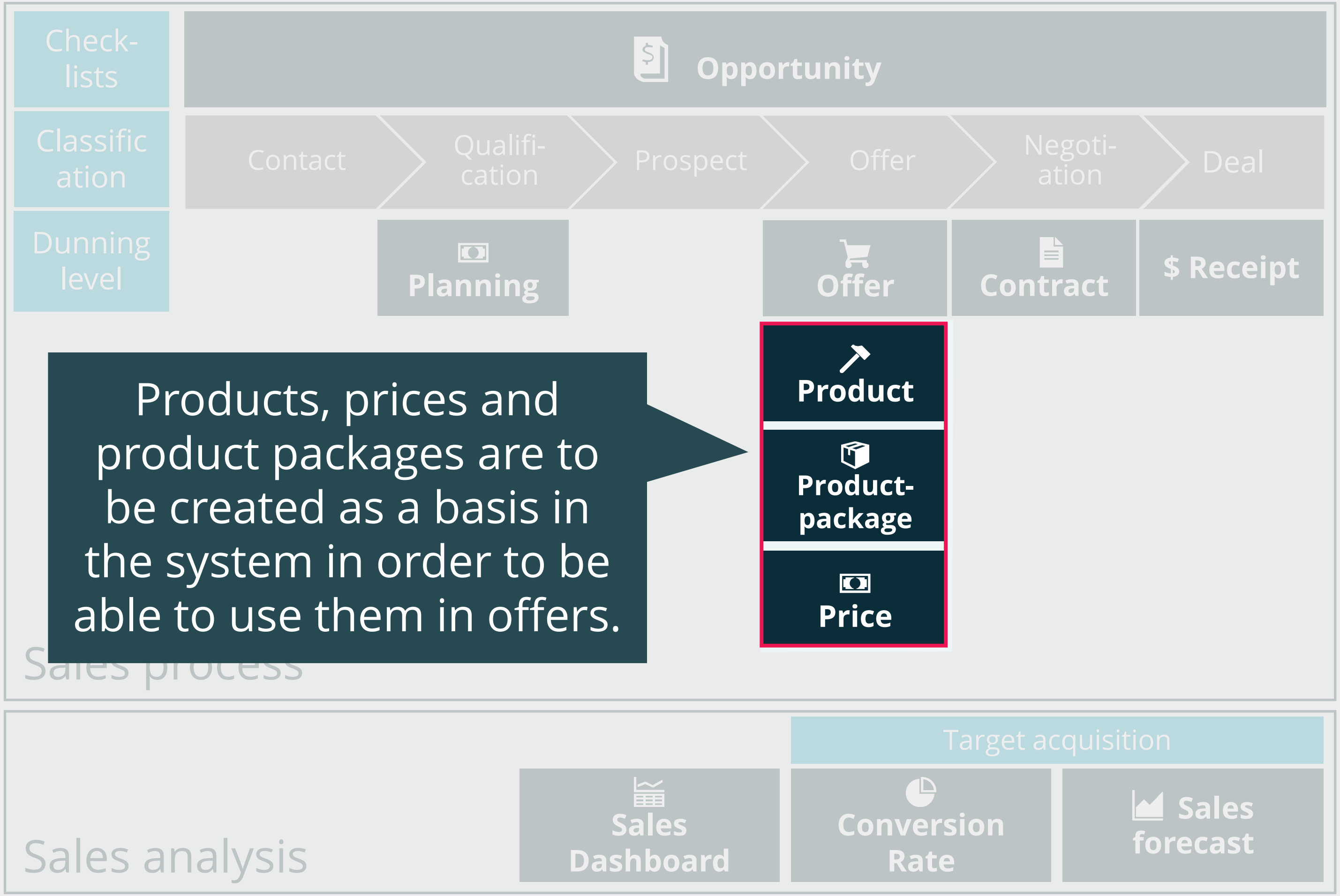


The corresponding server process is called checkSalesprojectInactivity_serverProcess

You can have **the system create tasks for the person responsible for an opportunity** if no activity with a link to the opportunity has been created within a certain period of time. The following criteria are defined in the standard system:

- Opportunity with A classification
  => task after 7 days
- Opportunity with B classification
  => task after 14 days
- Opportunity with C classification
  => task after 21 days

Products, Product packages
&
Prices



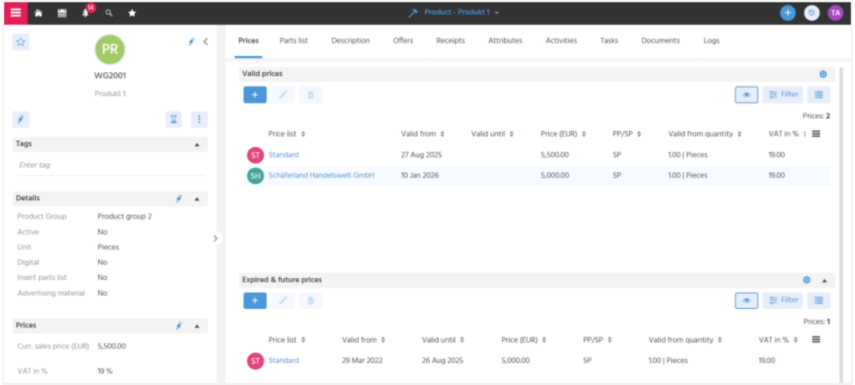
To be created in advance by the administrator

In use “daily“ by end users

Product

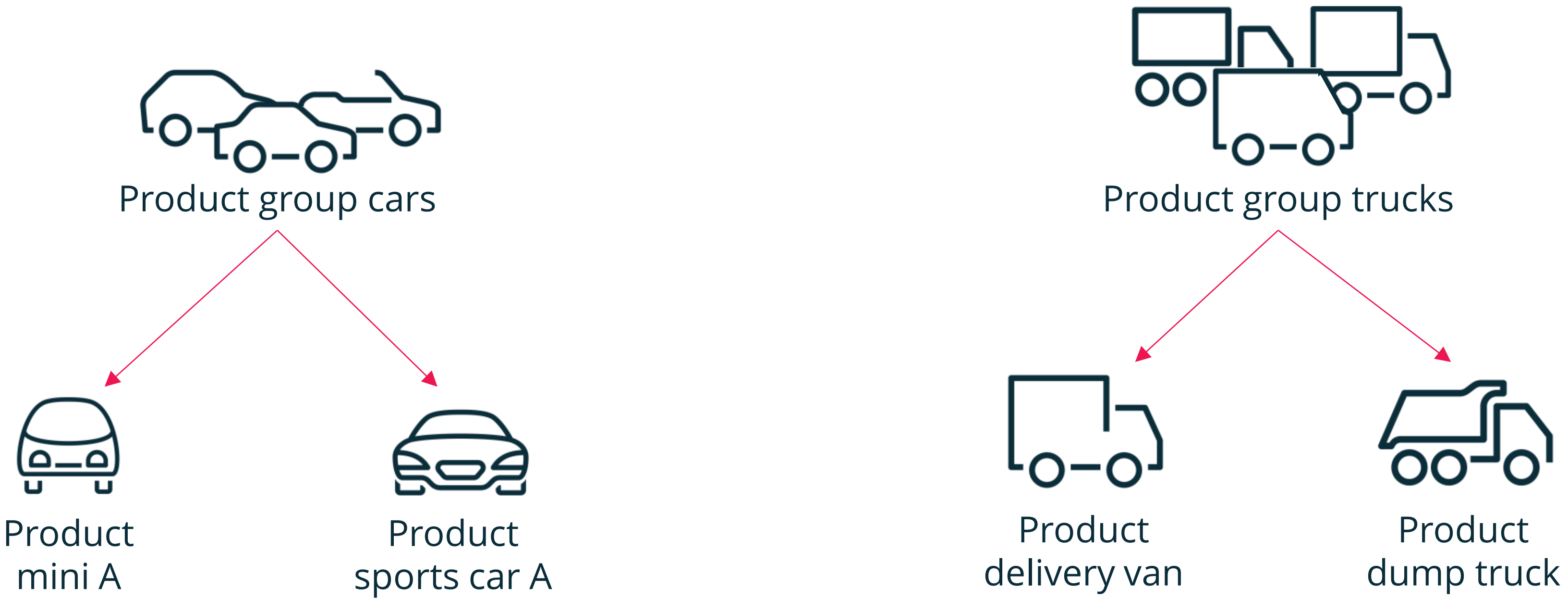
What information can be recorded at the product?

- Product image
- Product description multilingual
- Product parts lists
- Product prices
- Product specific documents
- Product indicators: e.g. product groups, attributes



Product

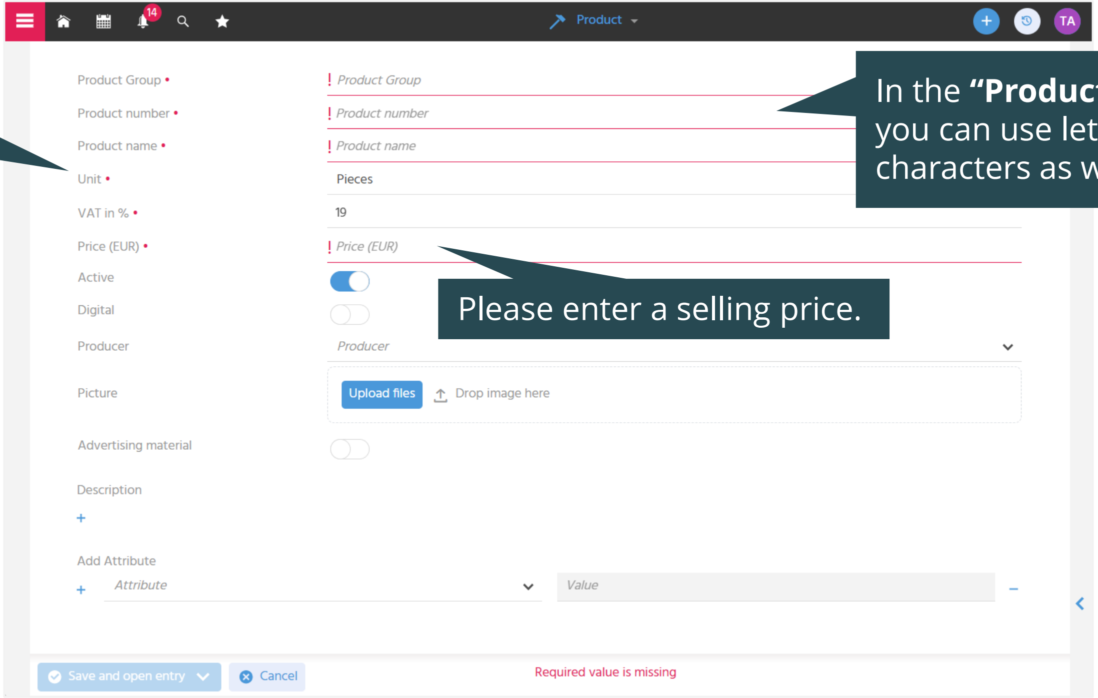
Product groups for product segmentation



Product

Create new

Select the **unit** of the product, e.g. piece, kg, hours, etc.

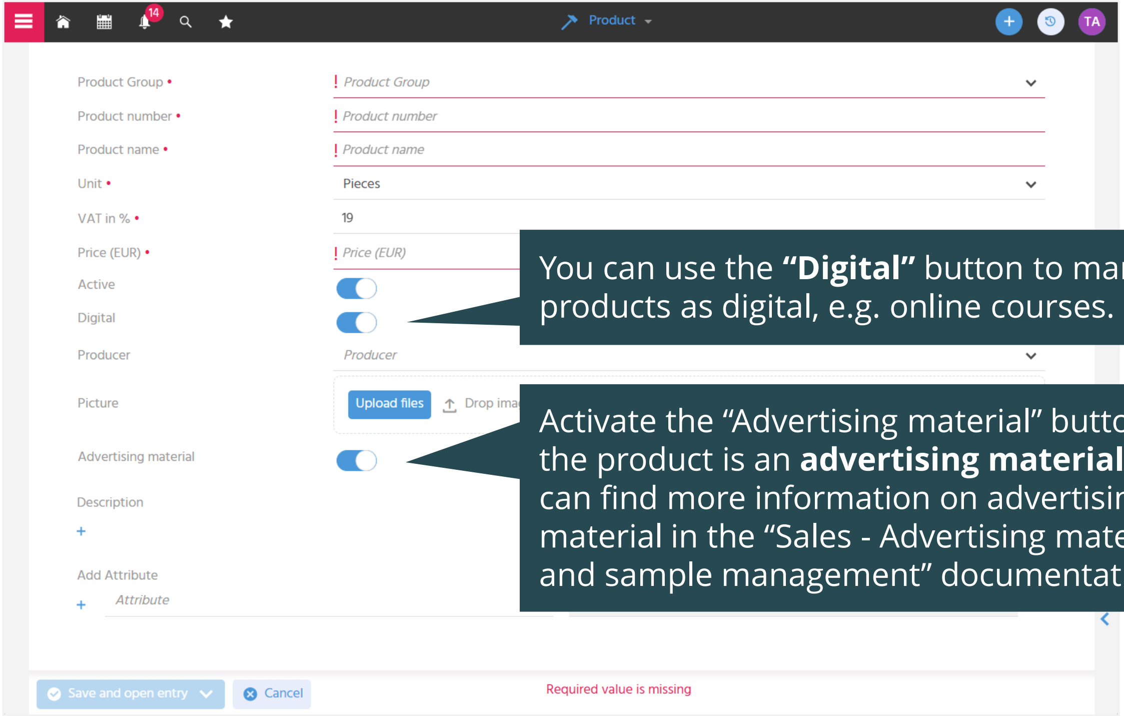


In the **"Product number"** field, you can use letters and special characters as well as numbers.

Please enter a selling price.

Product

Create new

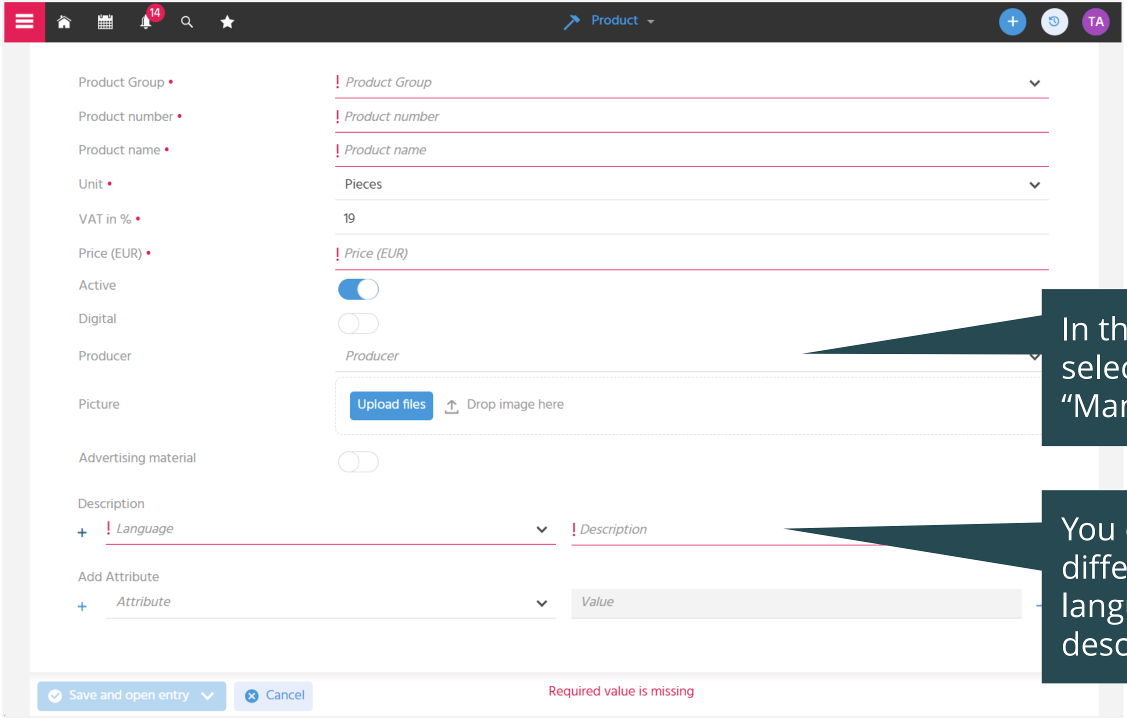


You can use the **“Digital”** button to mark products as digital, e.g. online courses.

Activate the “Advertising material” button if the product is an **advertising material**. You can find more information on advertising material in the “Sales - Advertising material and sample management” documentation.

Product

Create new

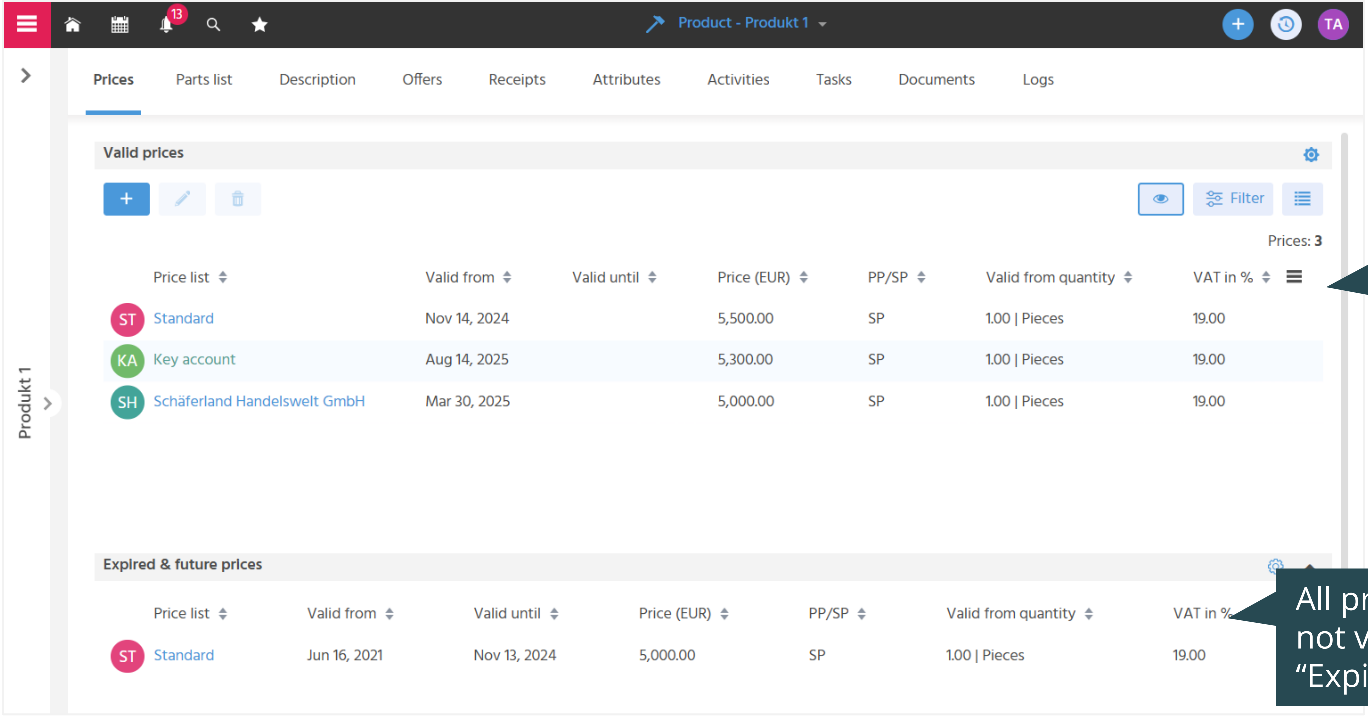


In the "Producer" field, you can select all companies of the type "Manufacturer".

You can enter short product descriptions in different languages. Depending on the language selected in the offer, the appropriate description will be displayed on the product.

Product

Tab “Prices“

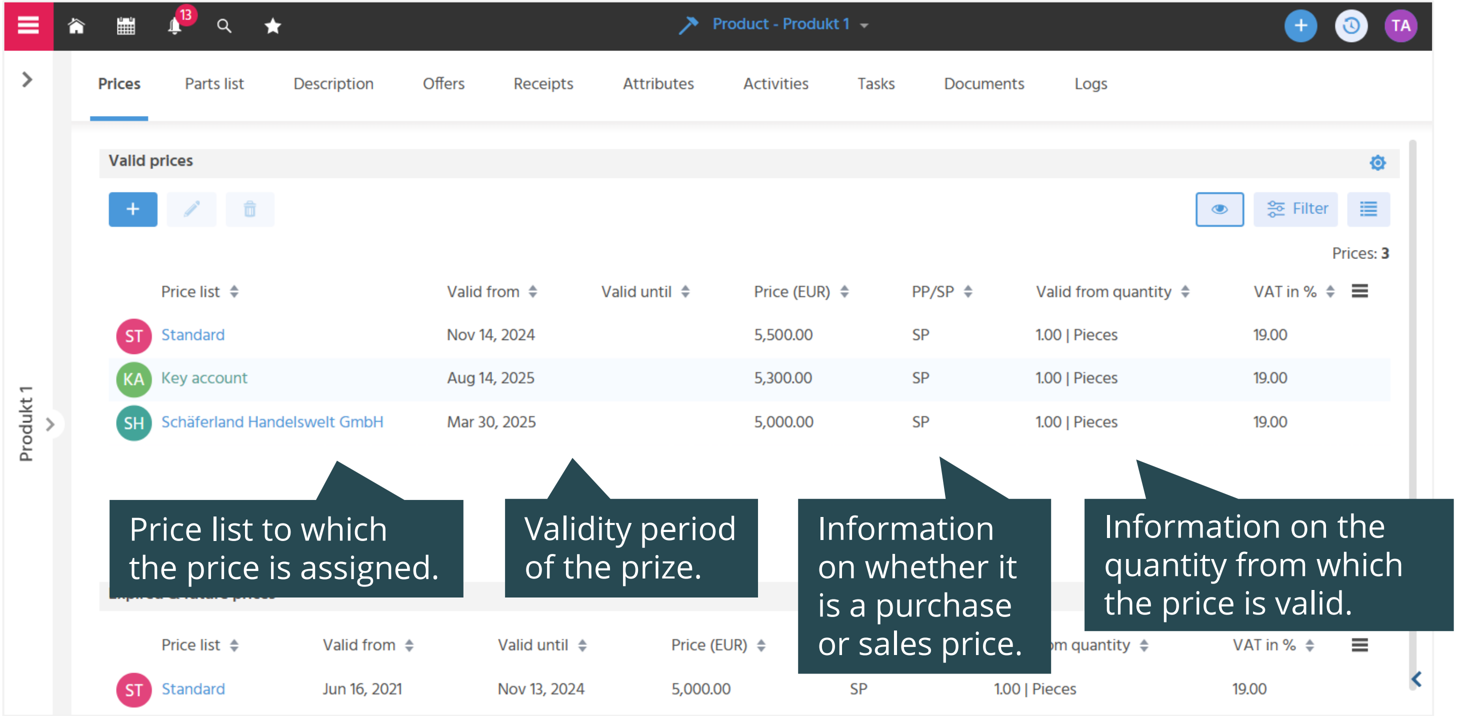


All currently valid prices are displayed in the “Valid prices” area.

All prices that are currently not valid are displayed in the “Expired & future prices” area.

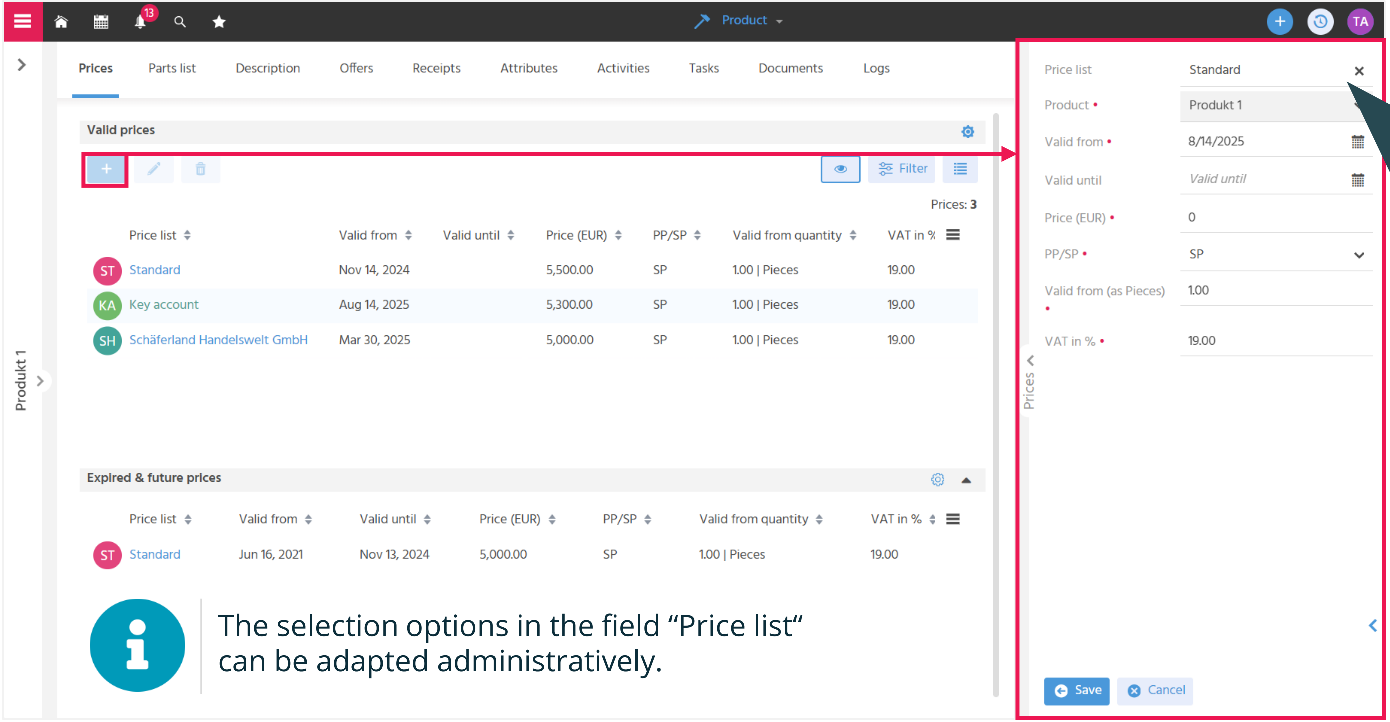
Product

Tab “Prices“



Product

Tab “Prices“ - Add price

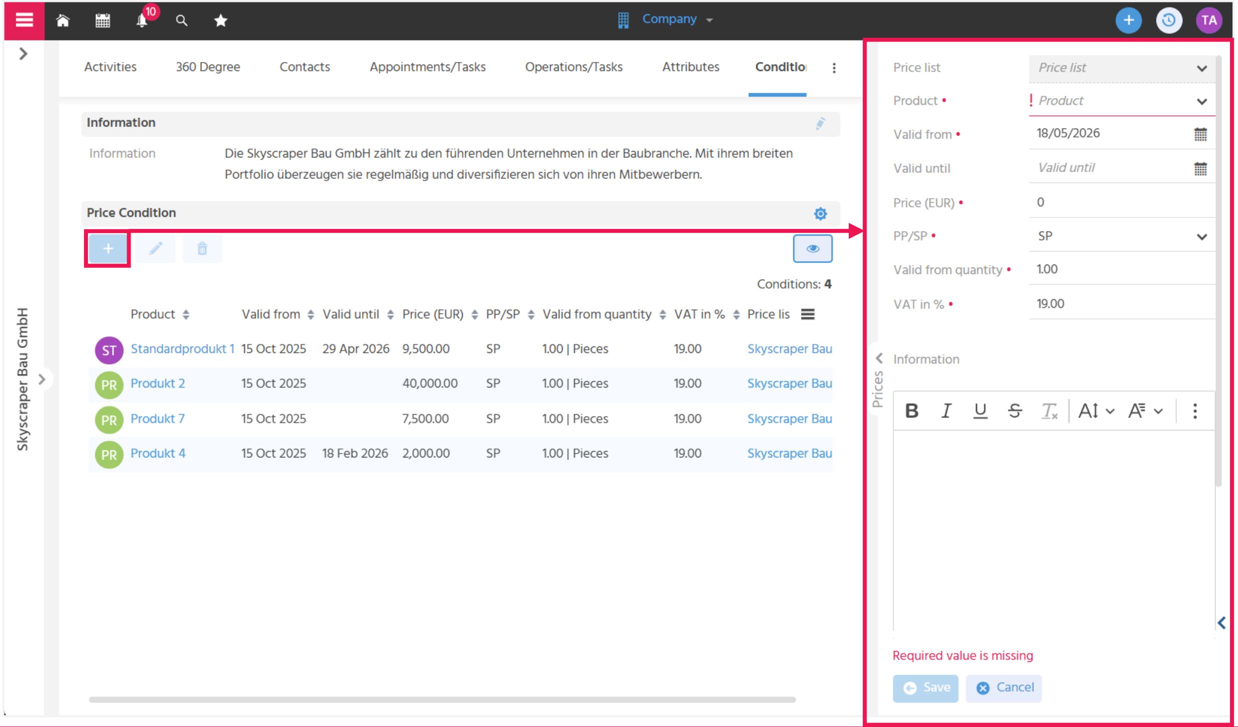


The selection options in the field “Price list“ can be adapted administratively.

Here you select to which price list the price should belong, e.g. Standard, Special price list, etc. Company price lists cannot be selected. They are generated automatically if you enter a company-specific price for the company.

Excursus into the company

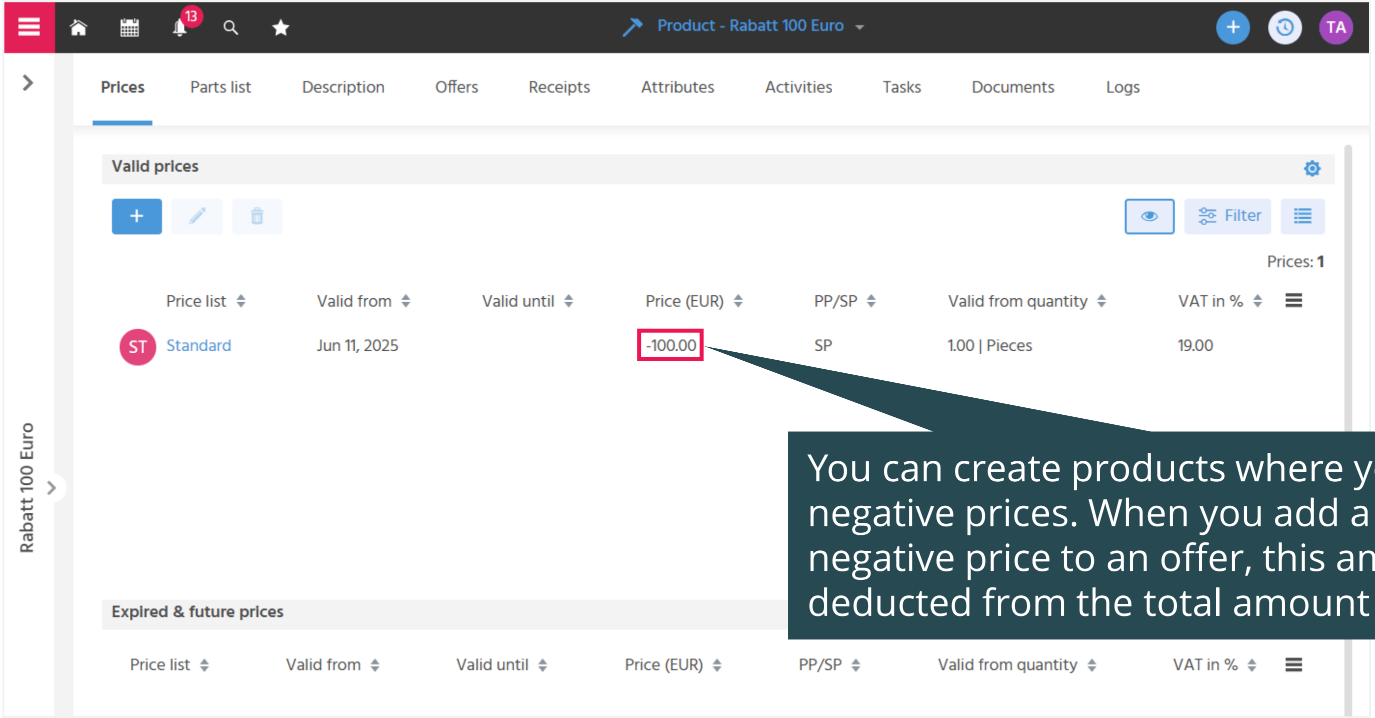
Maintenance of customer-specific prices at the company



In the “Conditions“ tab at a company, you can create company-specific prices that only apply to this company. This automatically creates a price list that is given the name of the company.

Prices

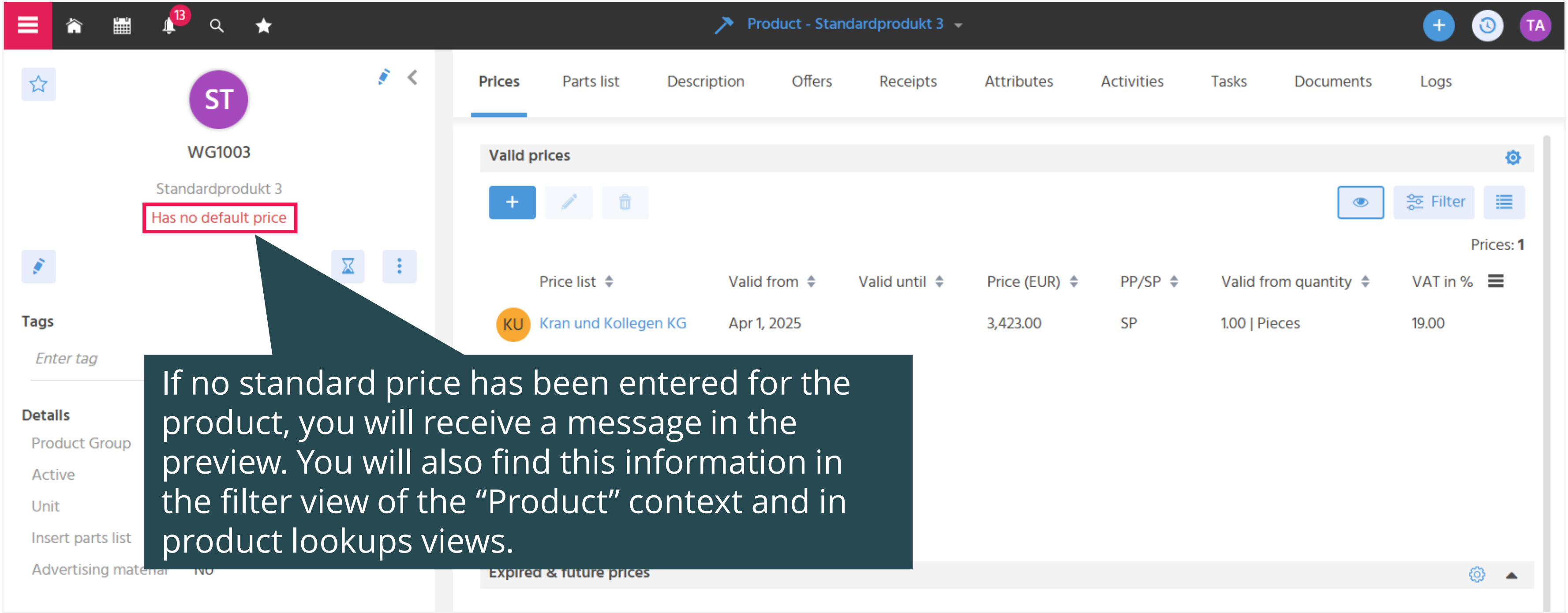
Negative prices



You can create products where you create negative prices. When you add a product with a negative price to an offer, this amount is deducted from the total amount of the offer.

Prices

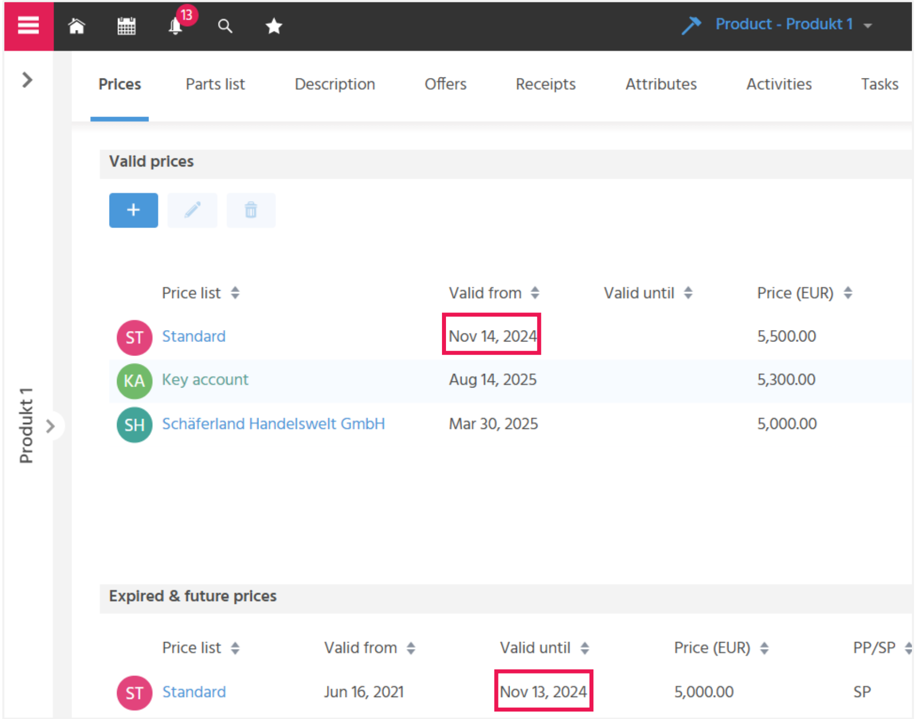
Standard price



If no standard price has been entered for the product, you will receive a message in the preview. You will also find this information in the filter view of the “Product” context and in product lookups views.

Prices

Validity period



A price has been entered for a product and assigned to the “Standard” price list, for example. If you now enter a new price that you assign to the “Standard” price list, the **valid until** date of the previous price is **automatically set to one day before the valid from date** of the new price.

Pricing logic in the offer

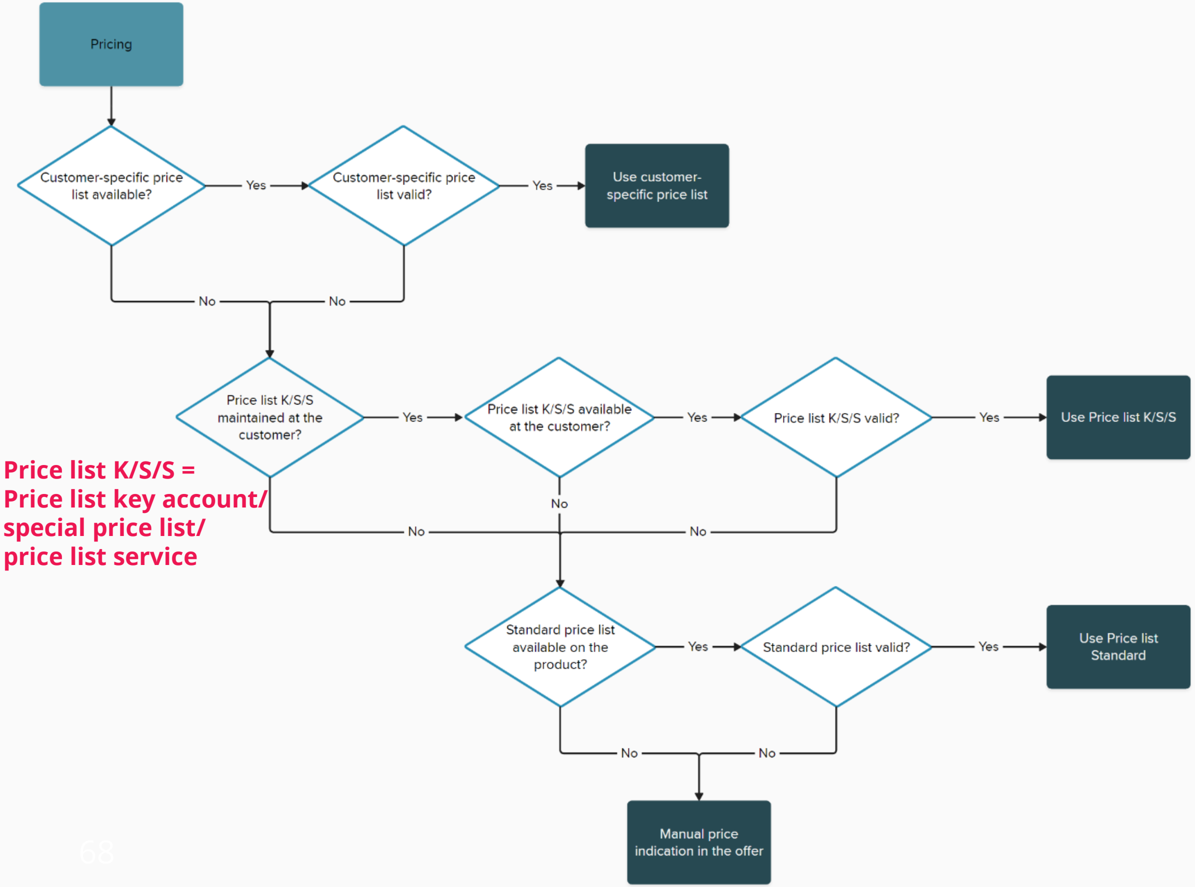
What price is drawn in the offer?

1. Check whether a customer-specific price is stored for the product at the company
   If yes: **transfer customer-specific price to the offer**
   If no:

2. Check for the value of the "Price list" attribute in the "Attributes" tab in the company and check whether there is a price for this price list on the product (e.g. special price list)
   If match: (e.g. special price list attribute in the company and product price with special price list), then **drag the price of this price list**
   If <u>no</u> match: (e.g. special price list attribute in the company, but no product price with special price list),

3. **Drag the standard price**

Pricing logic in the offer

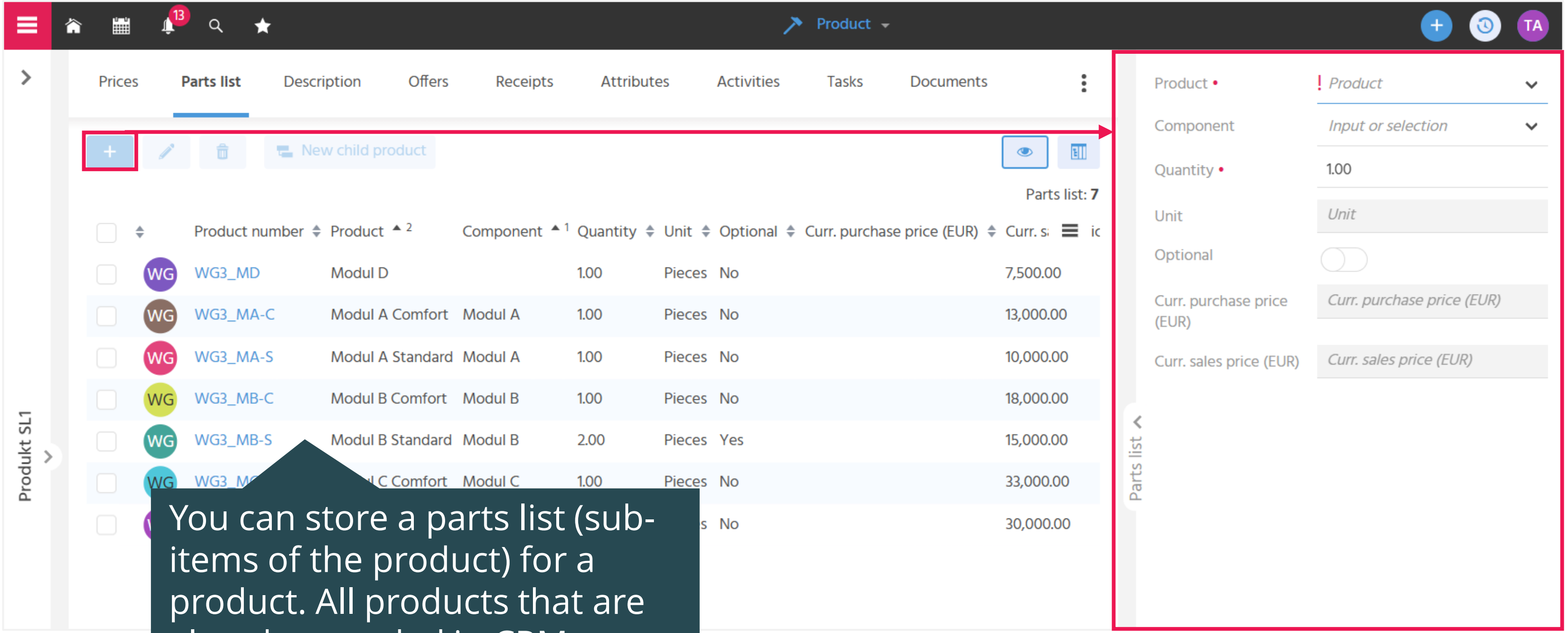


Price list K/S/S = Price list key account/ special price list/ price list service

Further price list types, in addition to standard, key account, special price list and service, can be added administratively as keyword entries for PRODUCTPRICELIST.

Product parts list

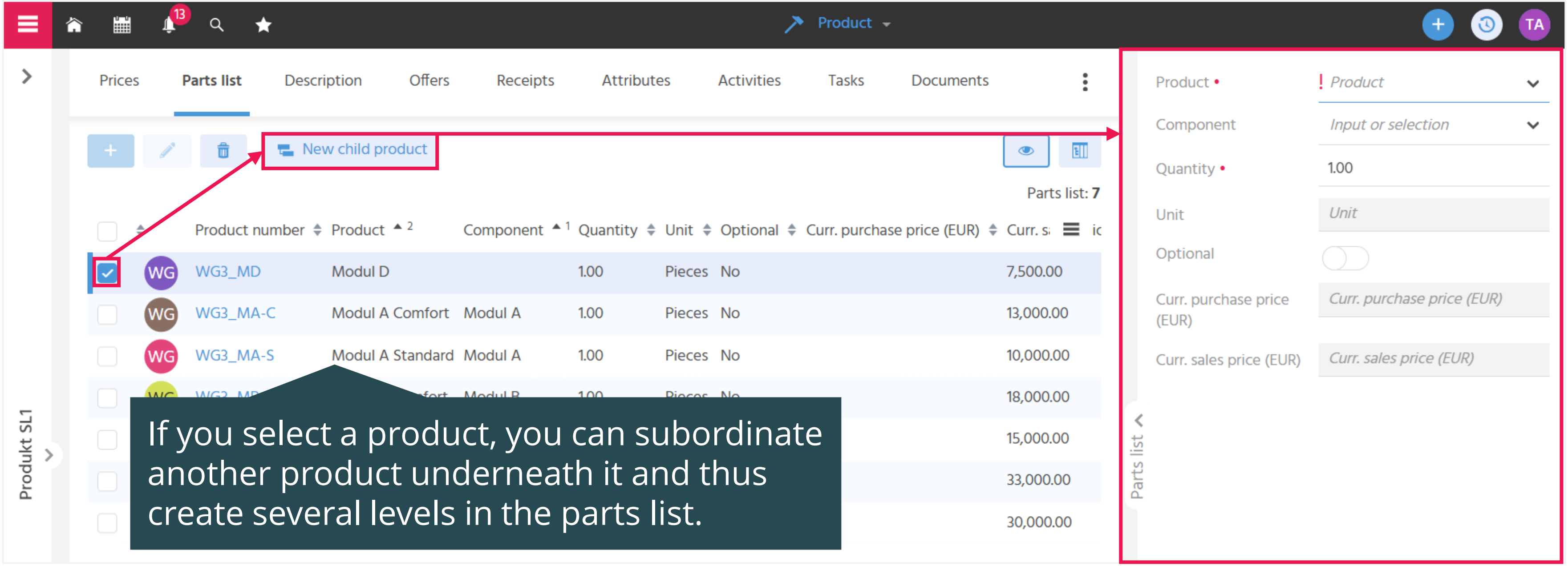
Maintain parts lists on the product



You can store a parts list (sub-items of the product) for a product. All products that are already recorded in CRM are available for the parts list.

Product parts list

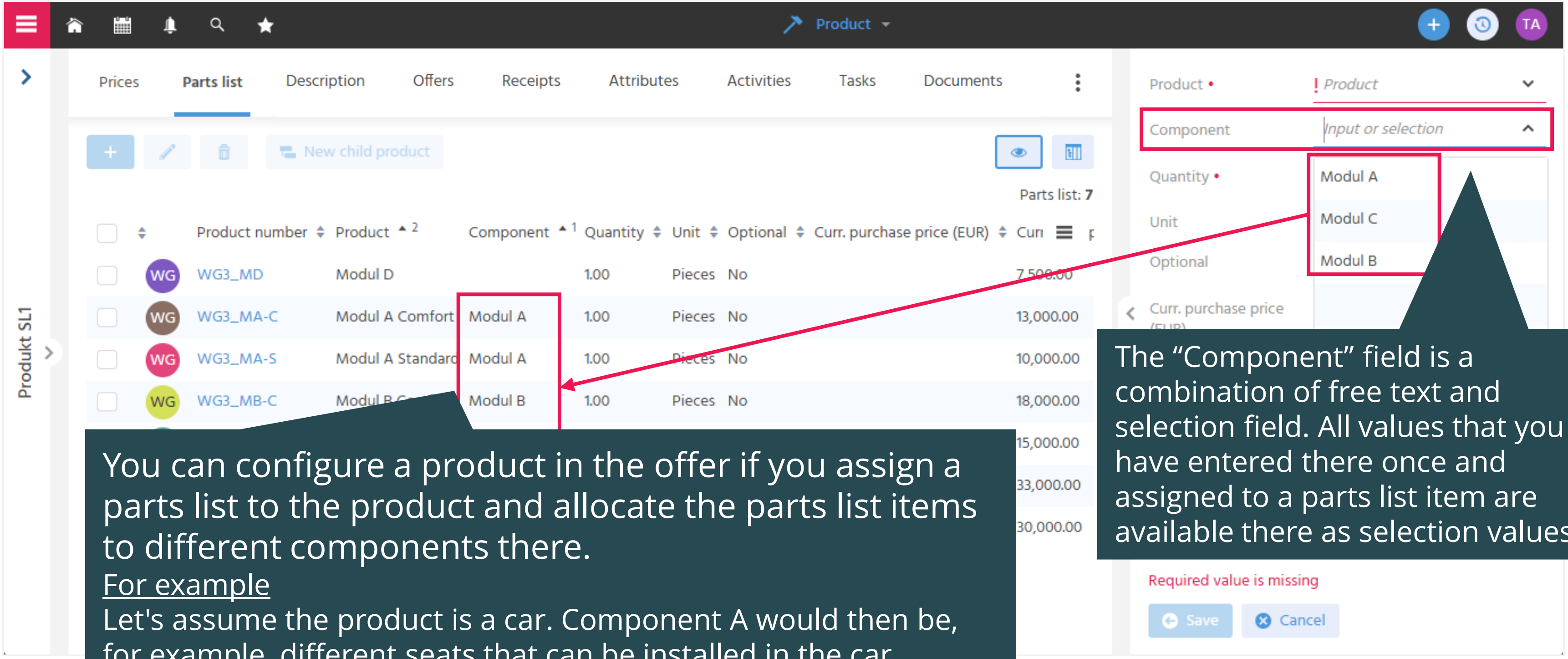
Maintain parts lists on the product



If you select a product, you can subordinate another product underneath it and thus create several levels in the parts list.

Product parts list

Making a product configurable



You can configure a product in the offer if you assign a parts list to the product and allocate the parts list items to different components there.

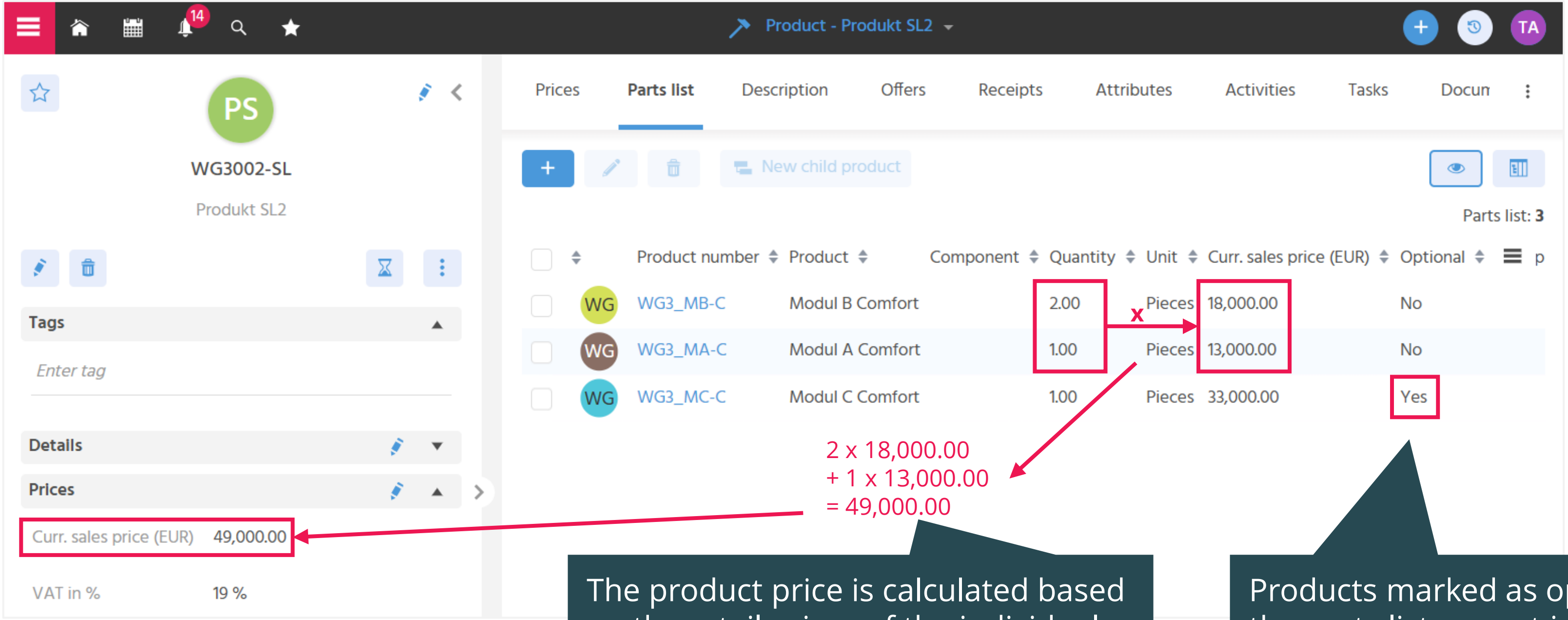
<u>For example</u>

Let's assume the product is a car. Component A would then be, for example, different seats that can be installed in the car. Component B would be the colors in which the car is available.

The "Component" field is a combination of free text and selection field. All values that you have entered there once and assigned to a parts list item are available there as selection values.

Product parts list

Automatic total price calculation

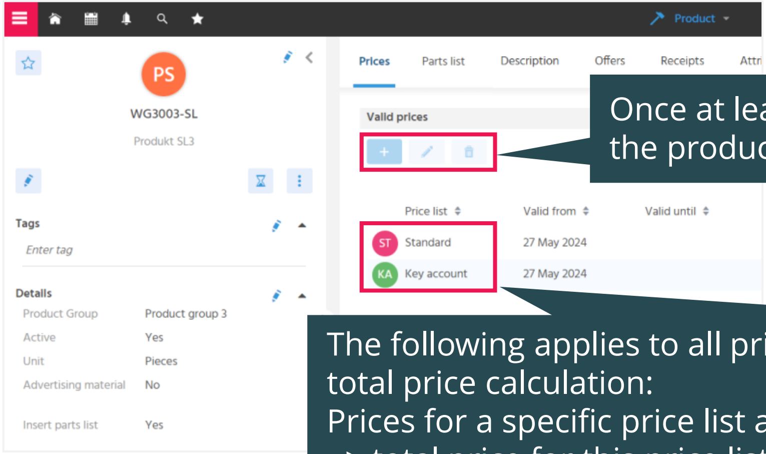


The product price is calculated based on the retail prices of the individual items in the parts list.

Products marked as optional in the parts list are not included in the total product price.

Product parts list

Automatic total price calculation



Once at least one parts list item has been entered, the product price can no longer be edited manually.

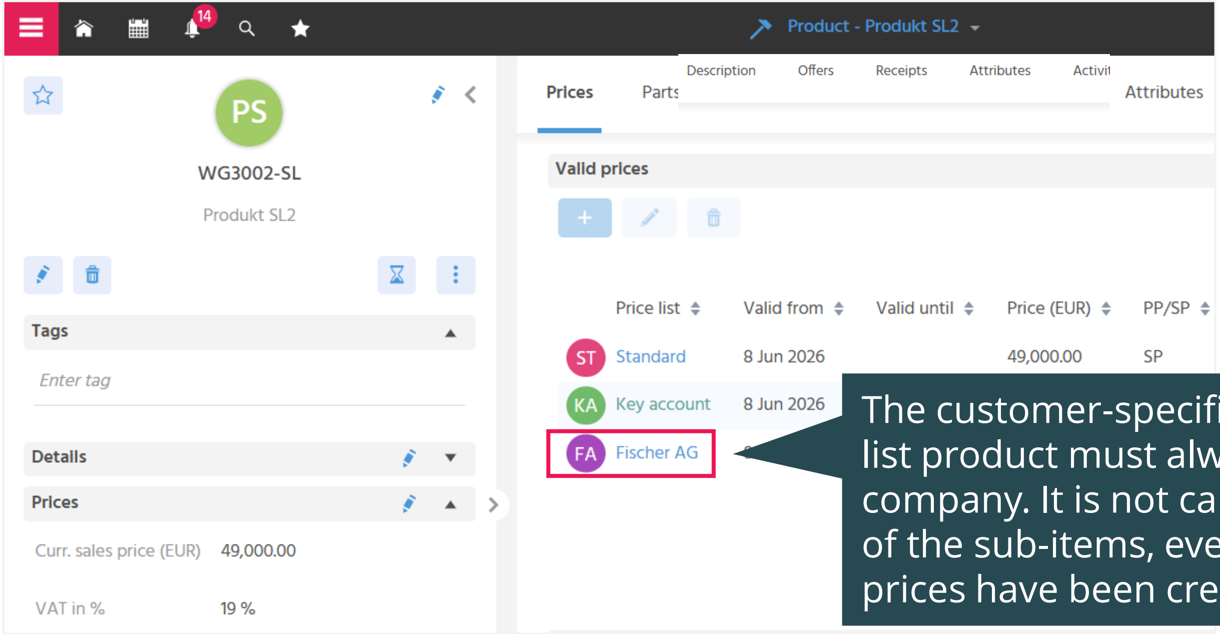
The following applies to all price lists (except customer-specific price lists) for the automatic total price calculation:
Prices for a specific price list are stored **for all non-optional sub-items** of a parts list product => total price for this price list is calculated automatically.
For example:

- Prices for price list “Standard” are stored for **all** non-optional sub-items
  => total price “Standard” is calculated automatically.
- Prices for price list “Key account” are stored for **all** non-optional sub-items
  => total price “Key account” is calculated automatically.

If the price for a price list is missing for at least one sub-item, no total price is calculated for this price list.

Product parts list

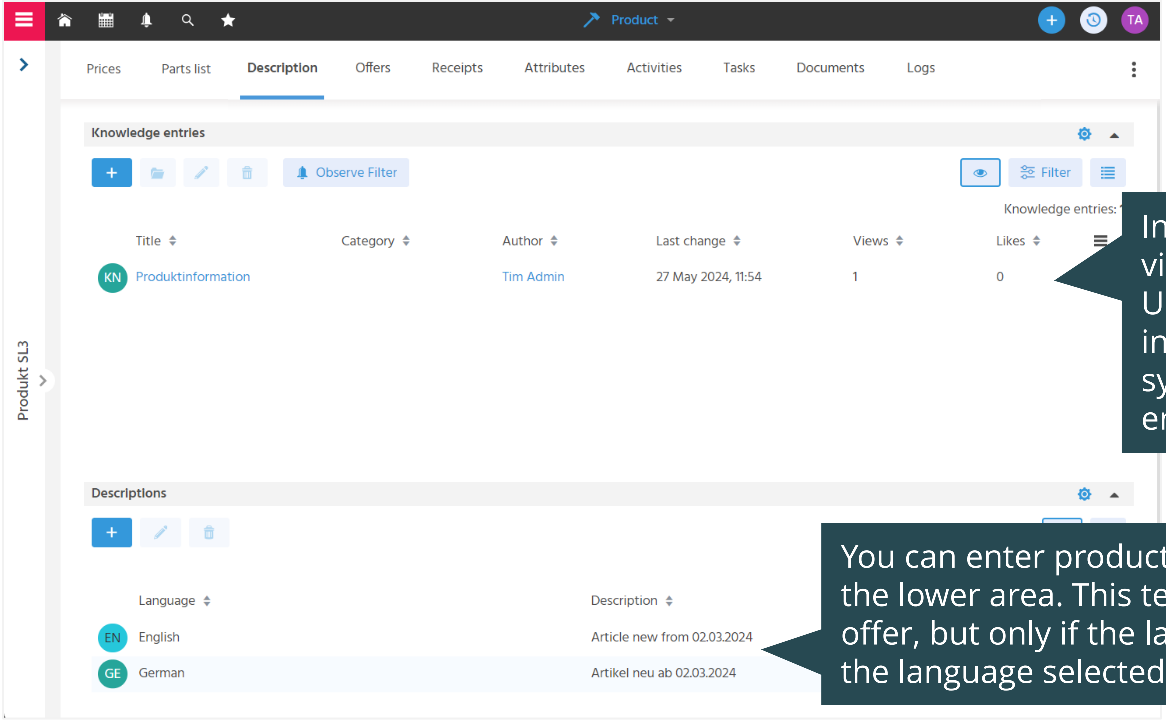
Automatic total price calculation



The customer-specific total price of a parts list product must always be stored at the company. It is not calculated from the prices of the sub-items, even if customer-specific prices have been created for all sub-items.

Product description

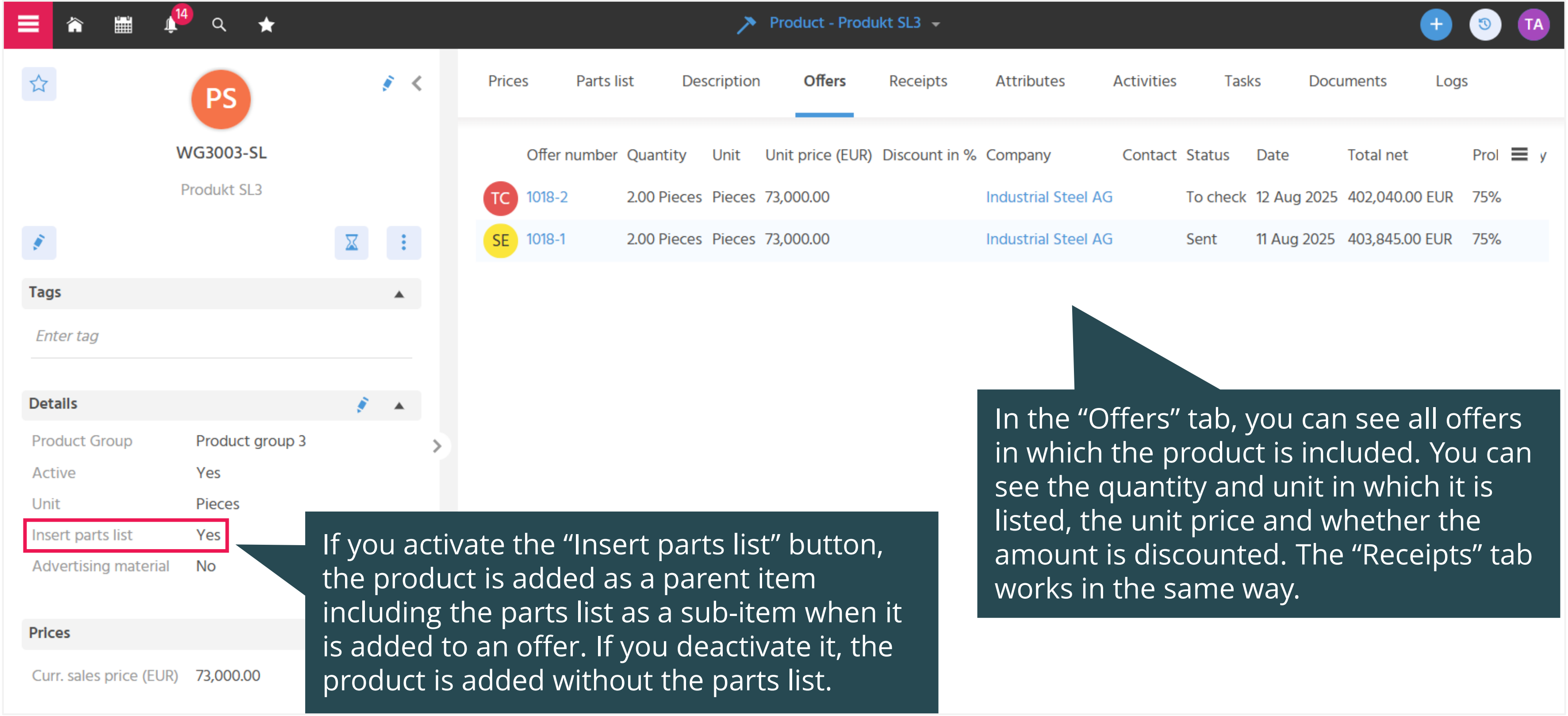
Complete the description on the product



In the upper area, you can create and view knowledge entries for this product. Use this, for example, to store extensive information about the product in the system. You can also call up knowledge entries via the “Knowledge” context.

You can enter product information in different languages in the lower area. This text is displayed below the product in the offer, but only if the language selected here corresponds to the language selected in the offer.

Product in offers/receipts

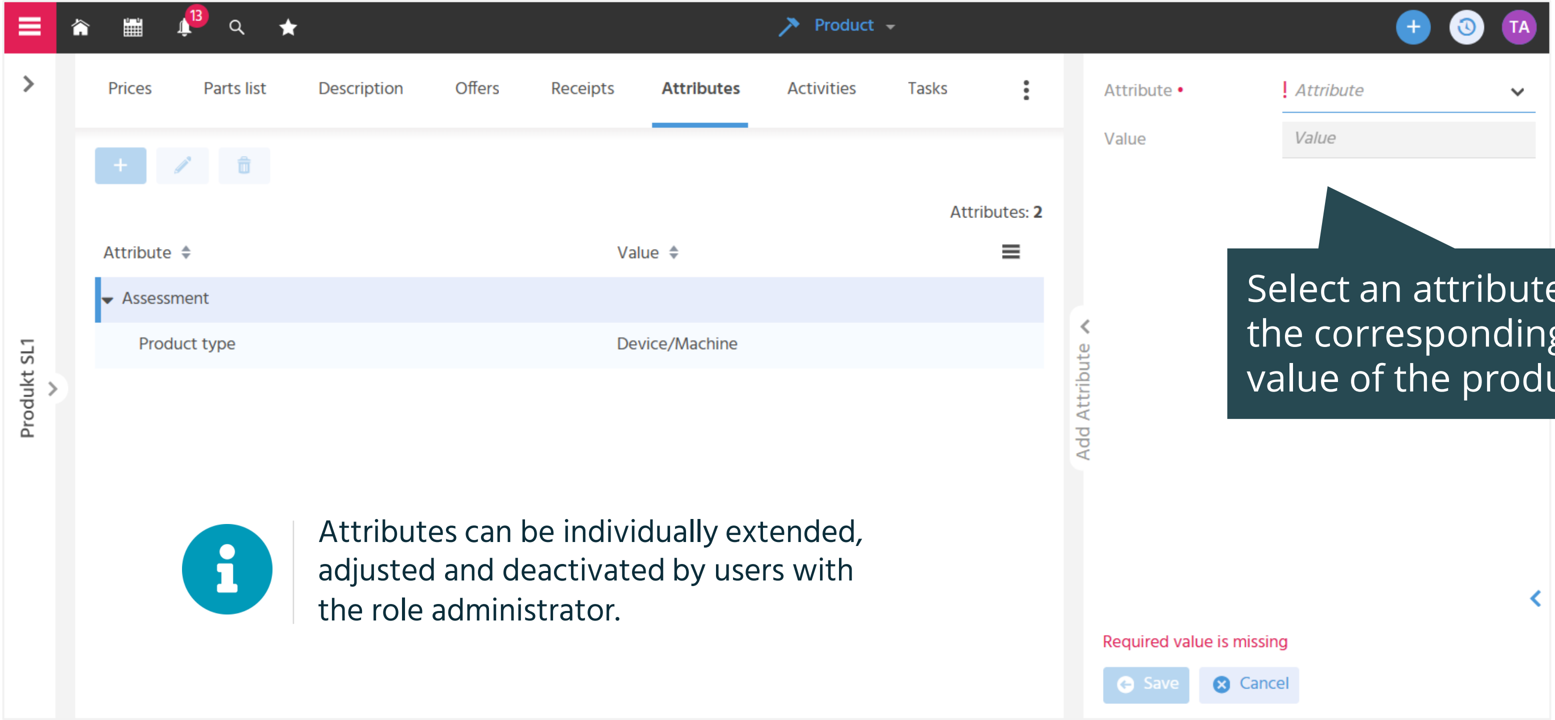


In the “Offers” tab, you can see all offers in which the product is included. You can see the quantity and unit in which it is listed, the unit price and whether the amount is discounted. The “Receipts” tab works in the same way.

If you activate the “Insert parts list” button, the product is added as a parent item including the parts list as a sub-item when it is added to an offer. If you deactivate it, the product is added without the parts list.

Product features

Maintain attributes on the product

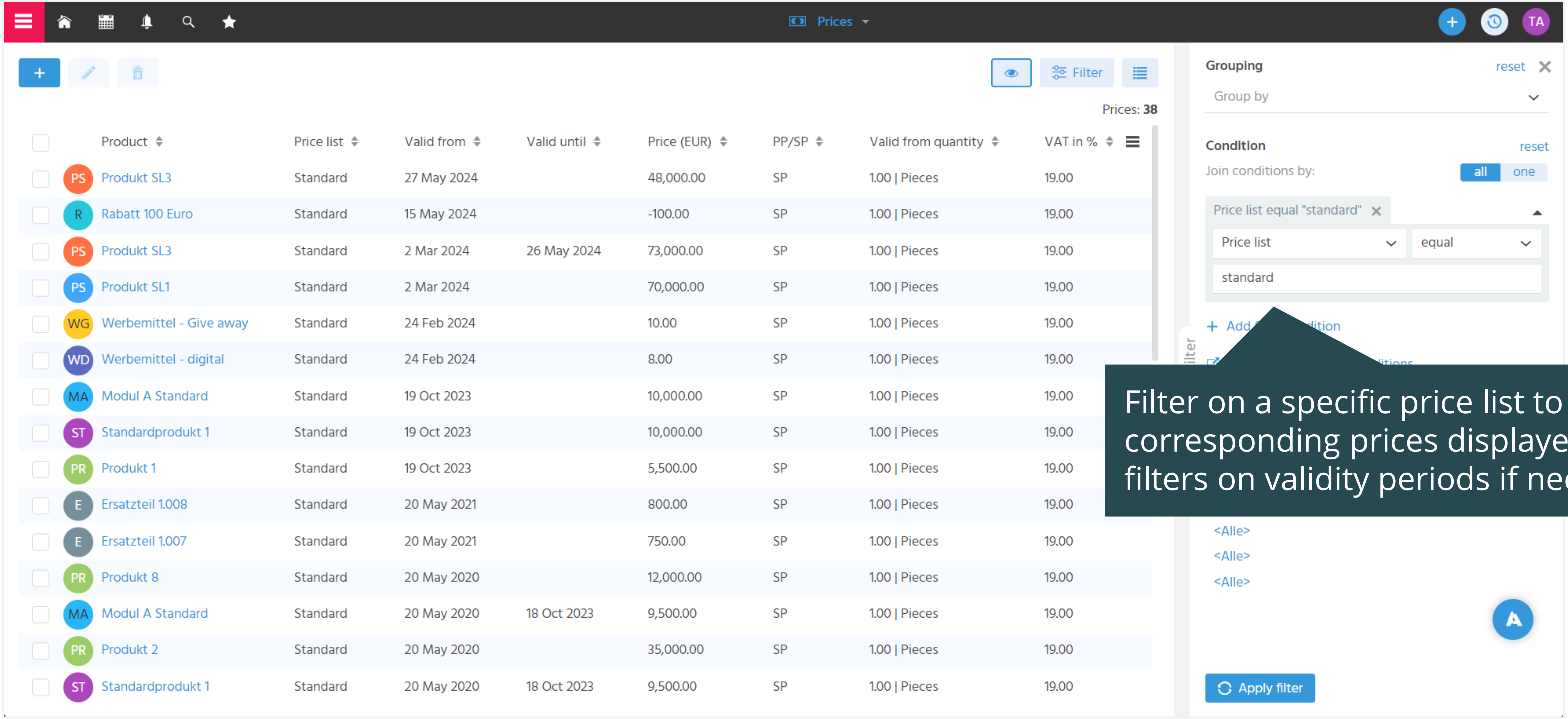


Select an attribute and enter the corresponding attribute value of the product.

Attributes can be individually extended, adjusted and deactivated by users with the role administrator.

Context "Prices"

Filter by price list



Filter on a specific price list to get only the corresponding prices displayed and add filters on validity periods if necessary.

Product package

Definition

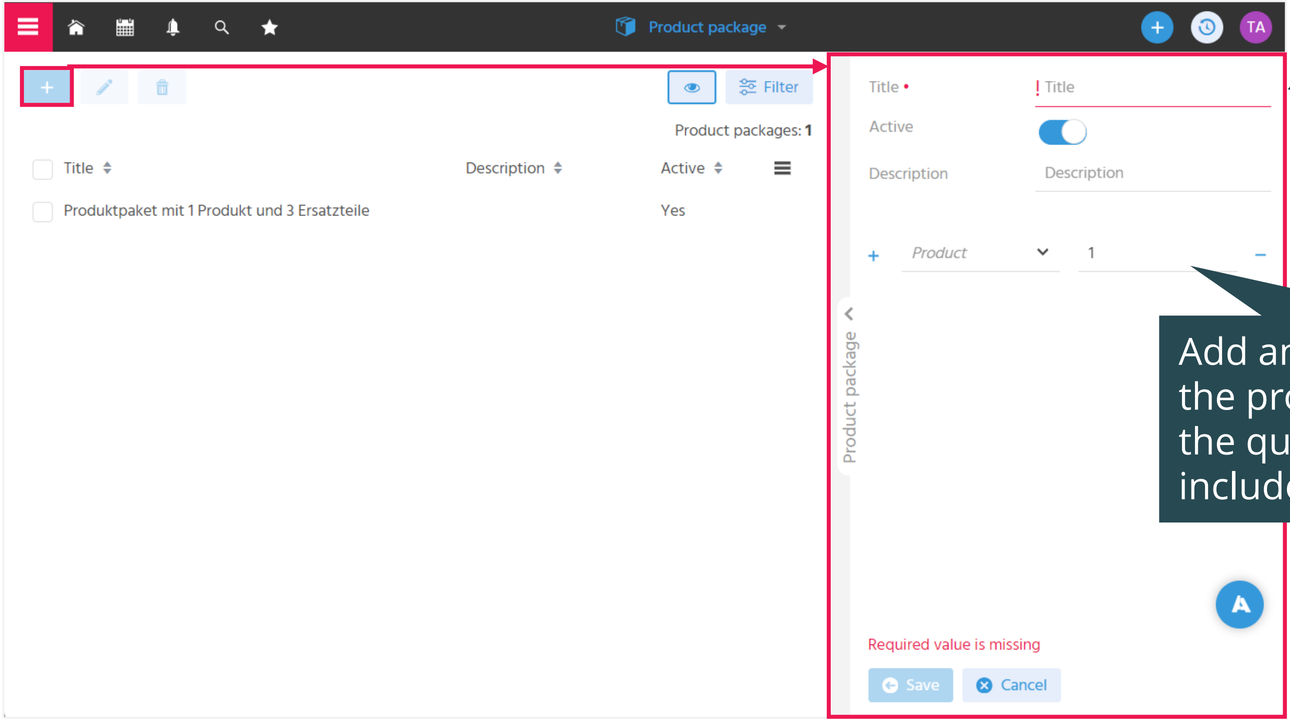
You create a product package if you always offer the same product combinations in offers.

Example:

You sell furniture and always offer a dining table, dining chairs and a corner bench as a dining room set as a package.

Product package

Create Product package

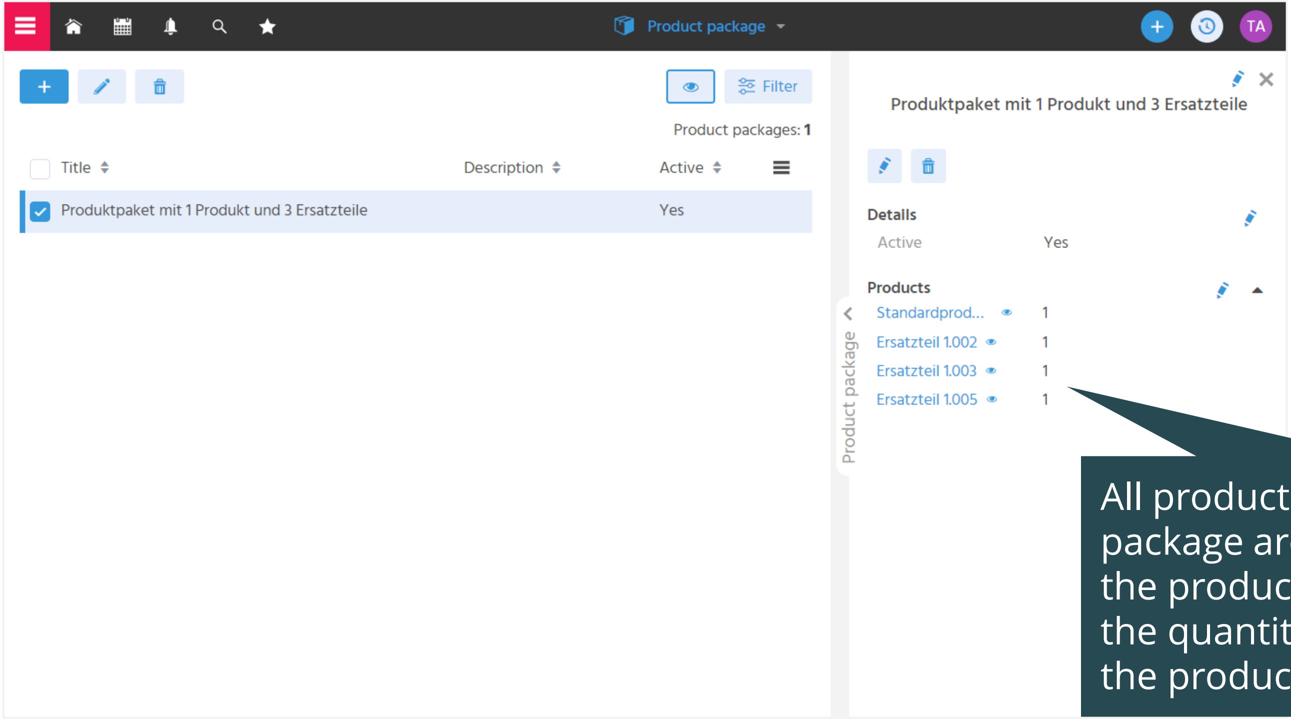


Give the product package a title.

Add any number of products to the product package and specify the quantity of the product to be included in the product package.

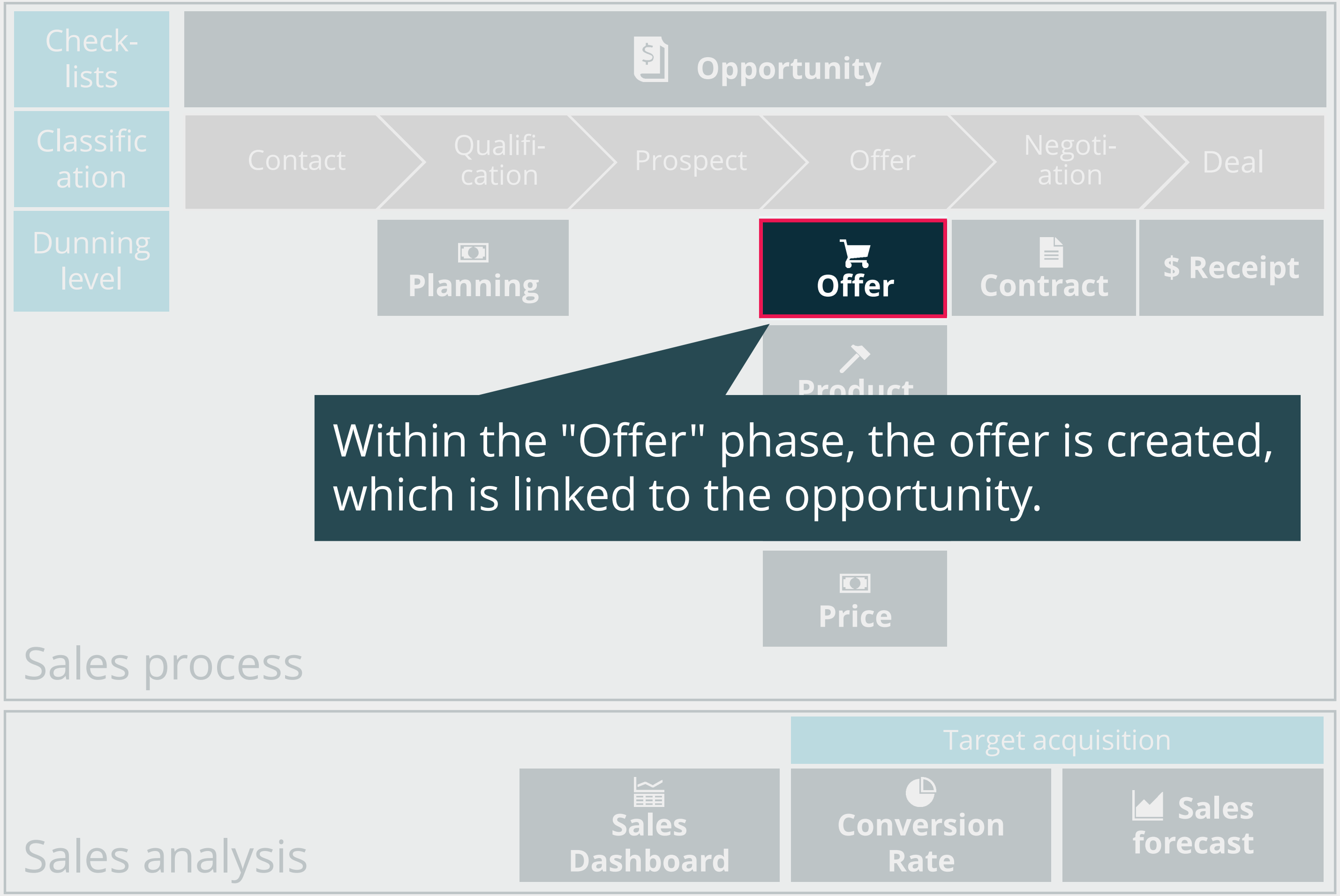
Product package

Preview



All products included in the product package are listed in the preview of the product package. It also shows the quantity of products included in the product package.

Offer



Within the "Offer" phase, the offer is created, which is linked to the opportunity.

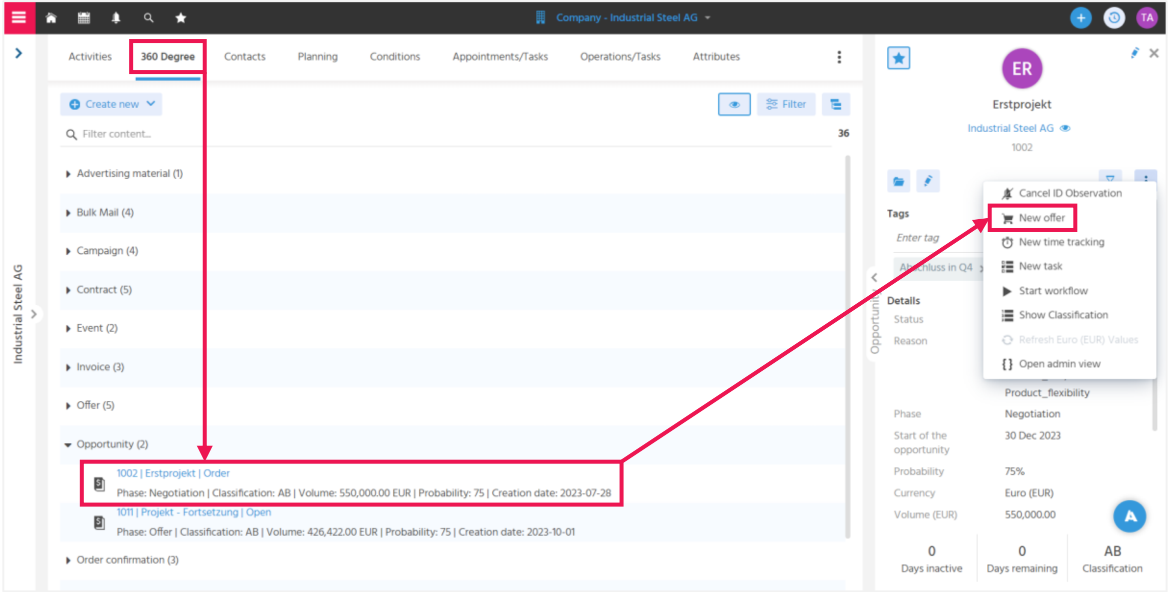
To be created in advance by the administrator

In use “daily“ by end users

Offer in general

Offer

Create offer (option 1)

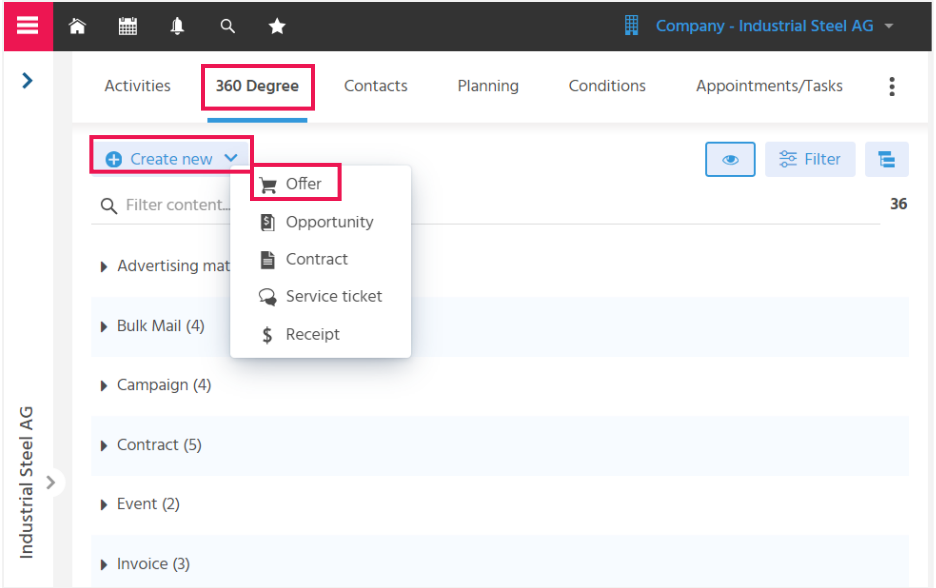


1. Open company
2. Open tab “360 Degree“
3. Open a preview of an opportunity
4. Further actions: Create an offer

- ➢ Automatically links the offer to the company and the opportunity
- ➢ All offers of a company are displayed in the 360 Degree view

Offer

Create offer (option 2)

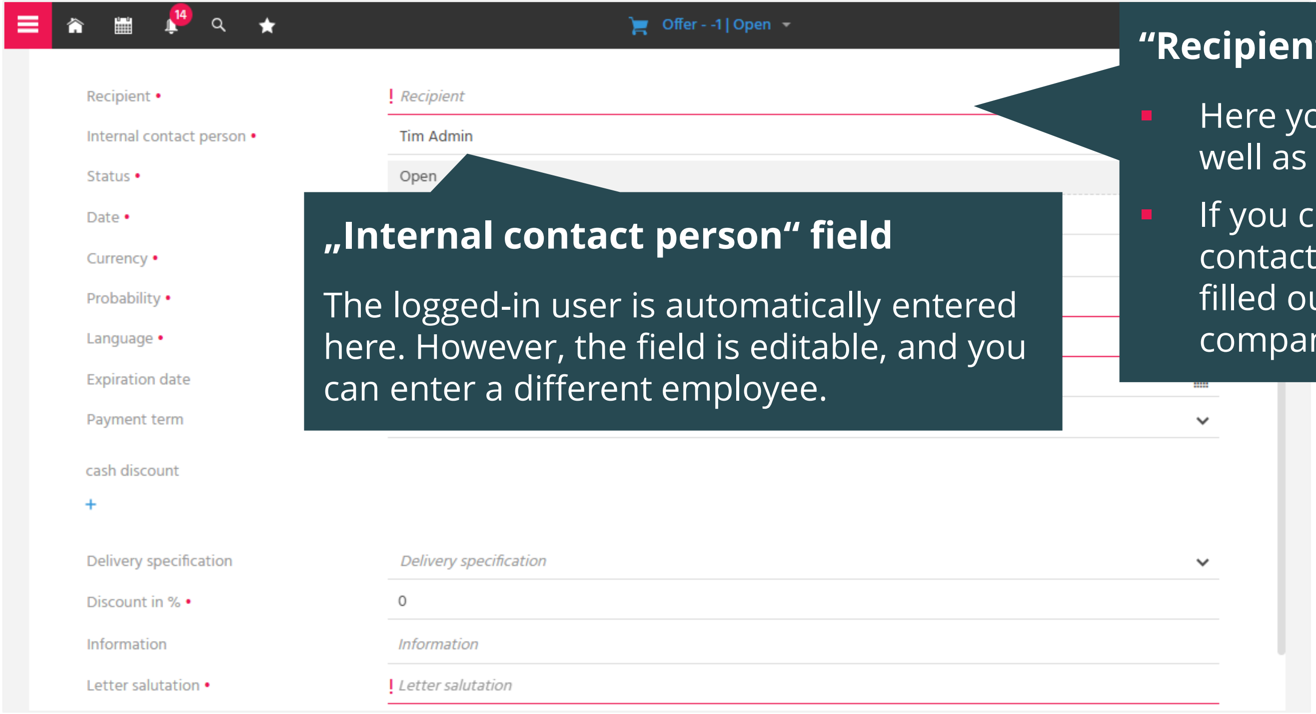


1. Open company
2. Open tab “360 Degree“
3. Button “Create new“: Offer

➢ Automatically links the offer to the company and the opportunity **if there is only one opportunity.**

Offer

Create offer



„Internal contact person“ field

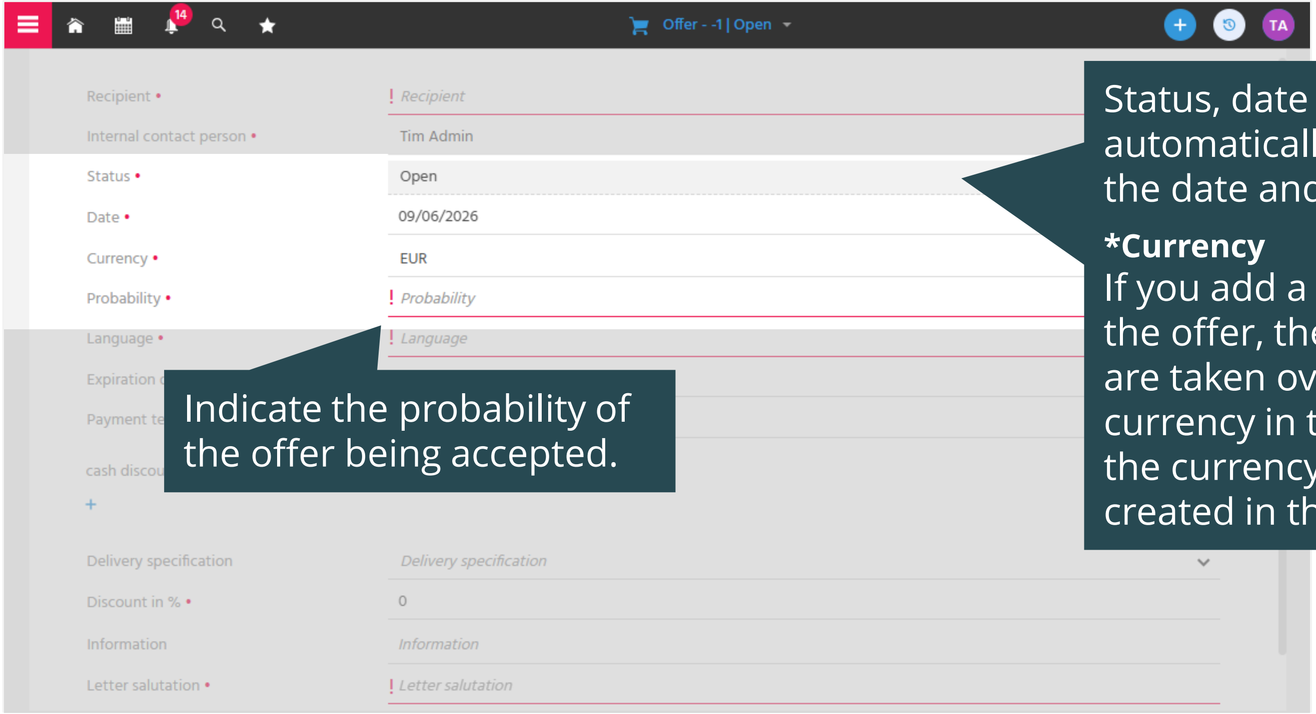
The logged-in user is automatically entered here. However, the field is editable, and you can enter a different employee.

“Recipient“ field

- Here you can select contacts as well as companies.
- If you create the offer from a contact or company, this field is filled out with the contact or company.

Offer

Create offer



Indicate the probability of the offer being accepted.

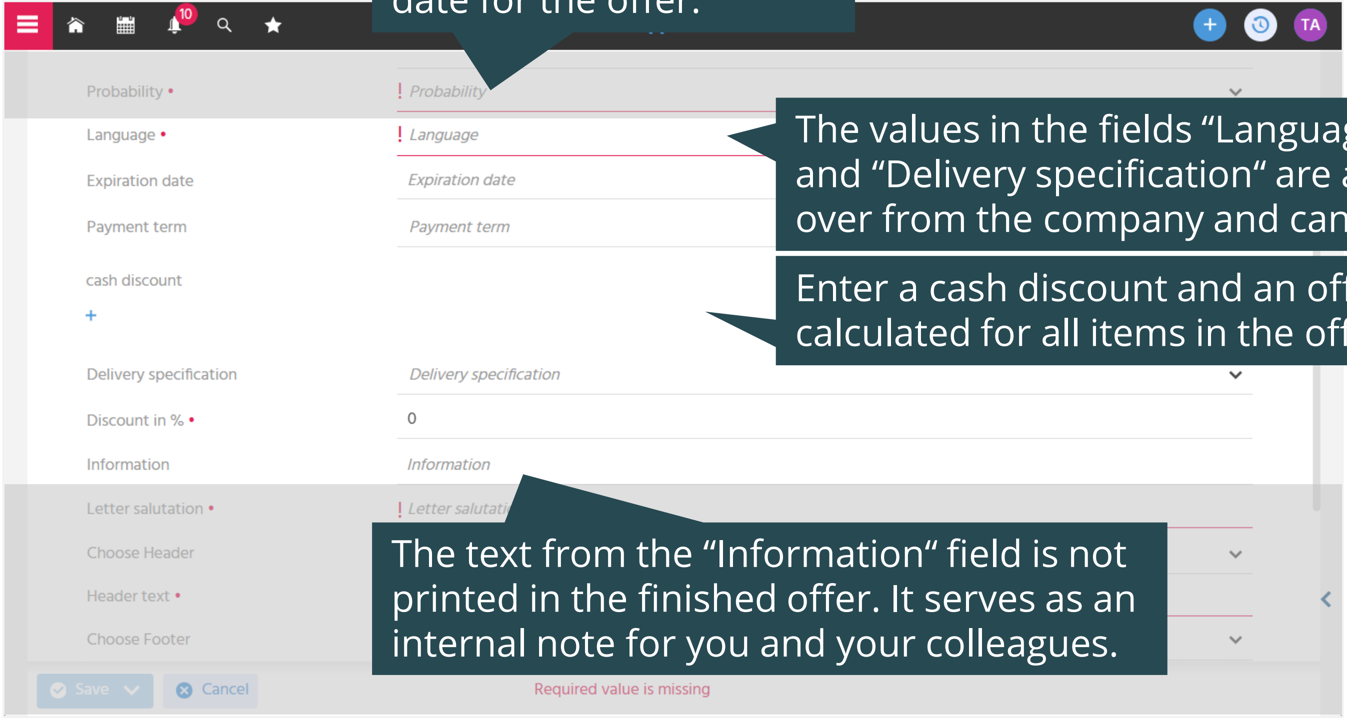
Status, date and currency* are automatically preset. You can adjust the date and currency manually.

***Currency**
If you add a product after creating the offer, the prices from the product are taken over according to the currency in the offer. You can change the currency as long as no items are created in the offer.

Offer

Create offer

You can set an Expiration date for the offer.



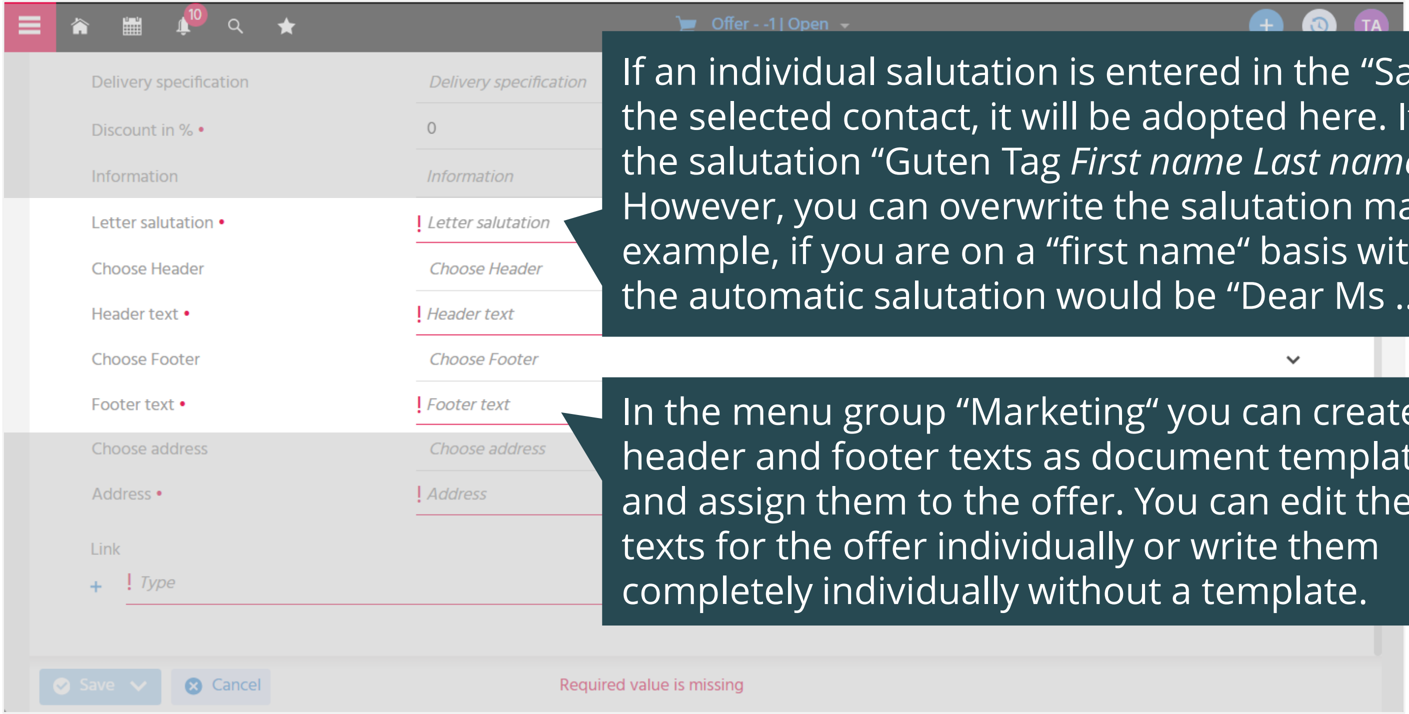
The values in the fields “Language“, “Payment term“ and “Delivery specification“ are automatically taken over from the company and can be adjusted manually.

Enter a cash discount and an offer discount that will be calculated for all items in the offer.

The text from the “Information“ field is not printed in the finished offer. It serves as an internal note for you and your colleagues.

Offer

Create offer

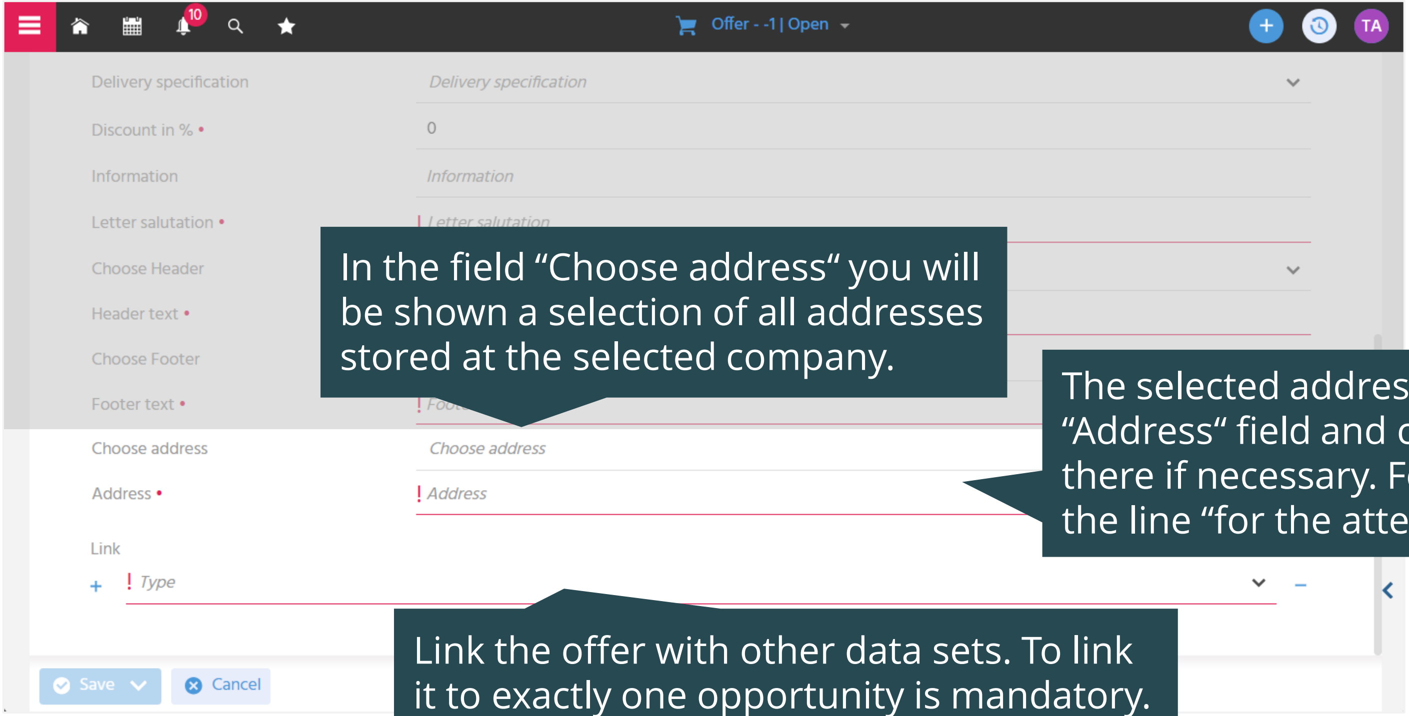


If an individual salutation is entered in the "Salutation" field of the selected contact, it will be adopted here. If the field is empty, the salutation "Guten Tag *First name Last name*" is entered here. However, you can overwrite the salutation manually. For example, if you are on a "first name" basis with the contact, but the automatic salutation would be "Dear Ms ...".

In the menu group "Marketing" you can create header and footer texts as document templates and assign them to the offer. You can edit the texts for the offer individually or write them completely individually without a template.

Offer

Create offer



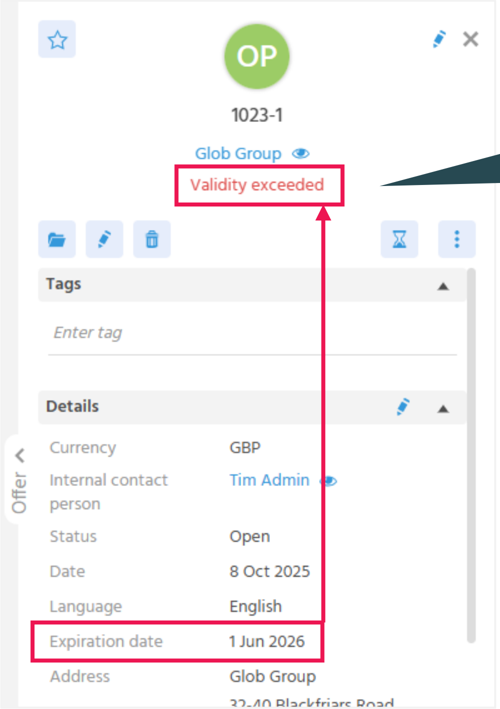
In the field “Choose address“ you will be shown a selection of all addresses stored at the selected company.

The selected address is displayed in the “Address“ field and can be adjusted there if necessary. For example, add the line “for the attention of ...“.

Link the offer with other data sets. To link it to exactly one opportunity is mandatory.

Offer

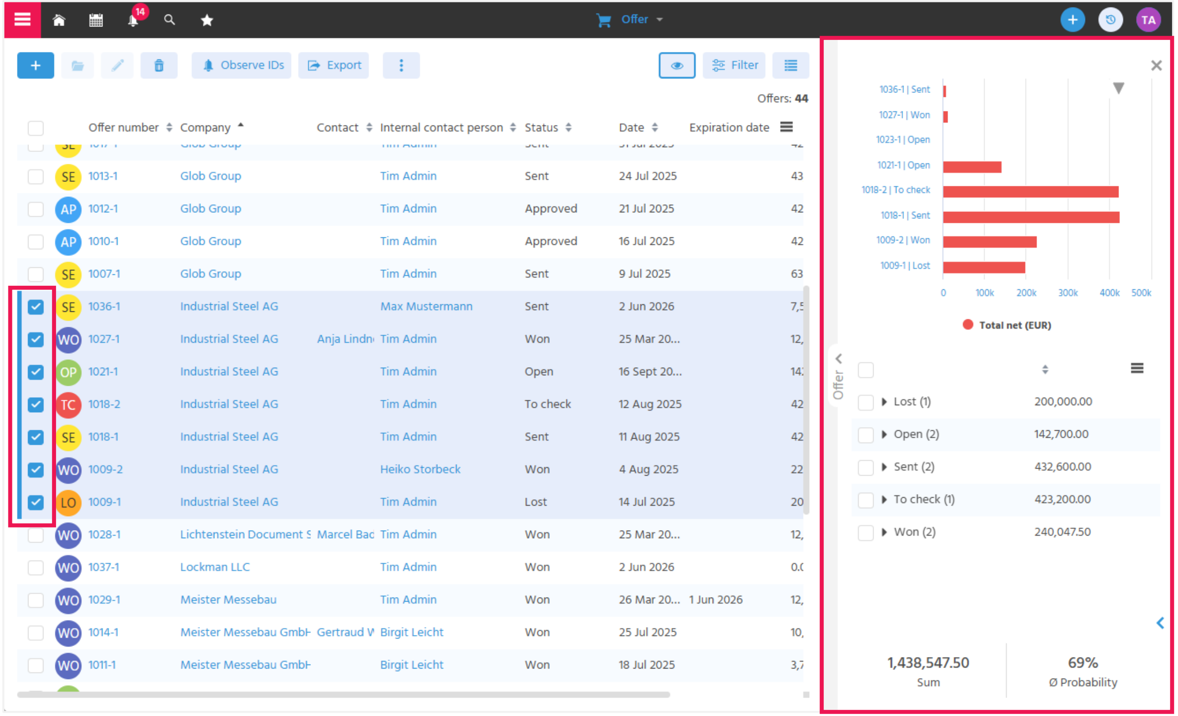
Validity exceeded



If the “Valid until” date is in the past, a note is displayed in the preview of the offer.

Offer

Overview in the filter view

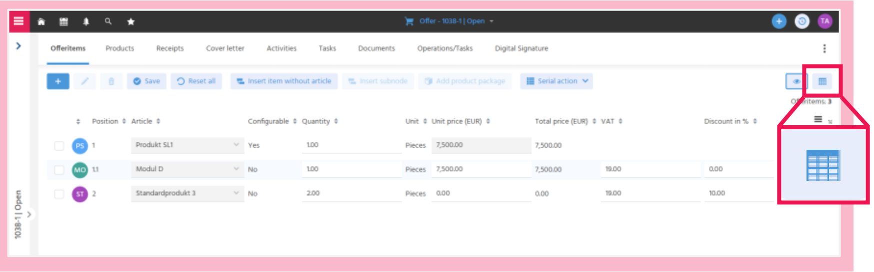


The net amounts and the status values of the **selected records** are shown in a bar chart on the right. In the table below, the net amounts are grouped by status.

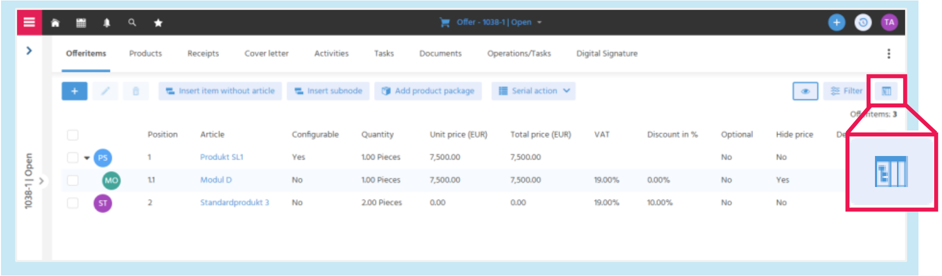
Offer

Different views

Multiedit-table



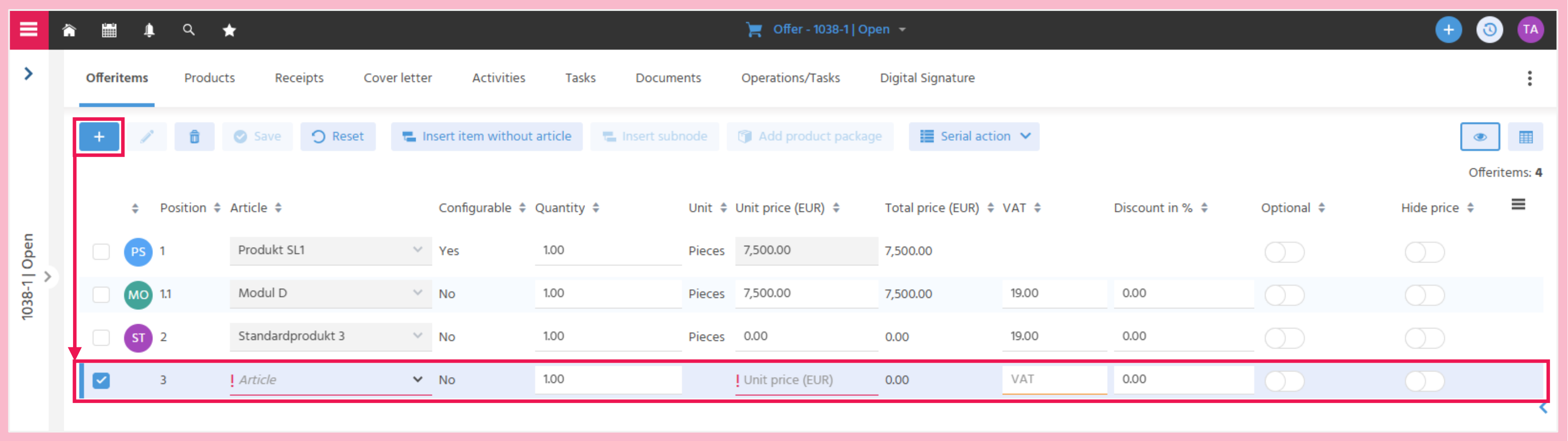
Treetable



You can display the offer as a **multiedit table** or as a **tree table**. **The functions in the respective view differ slightly**. In the multiedit table, you can, for example, edit offer items directly. In the tree table view, you can, for example, adjust the order of the offer items using drag and drop. In the following, the screenshots of the **multiedit view** are highlighted in **light red**, the screenshots of the **tree table view** are highlighted in **light blue**.

Offer

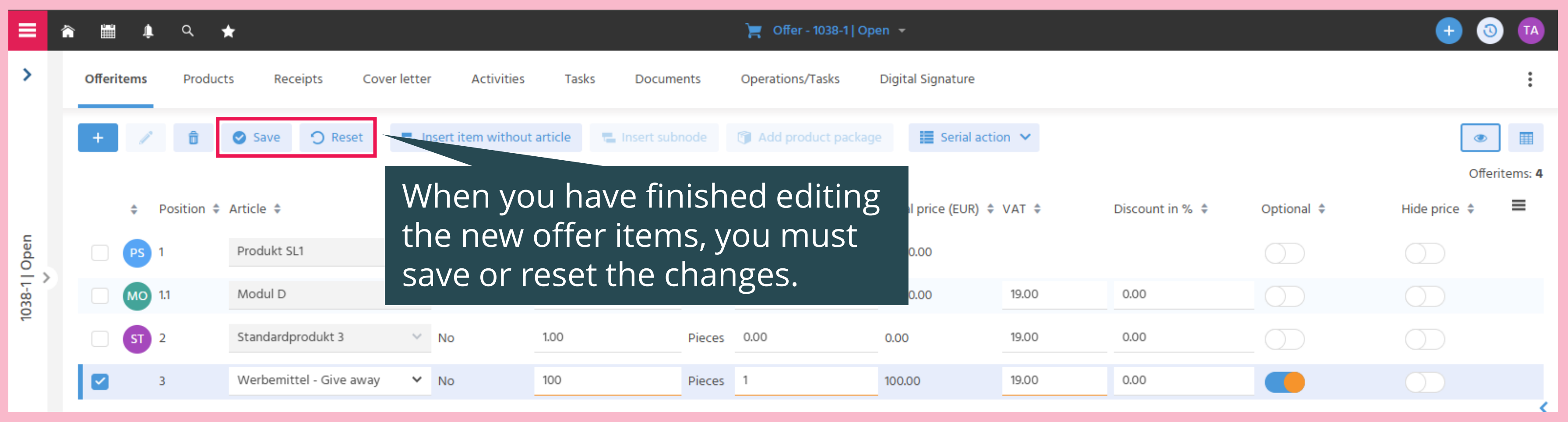
Insert items – multiedit table



If you insert an offer item while you have selected the multiedit view, a new line is added at the end of the table. Select the desired product there and adjust the fields “Quantity”, “Unit price (EUR)”, “VAT”, “Discount in %”, “Optional” and “Hide price” as required. You can also **add several lines first and then edit them one after the other**.

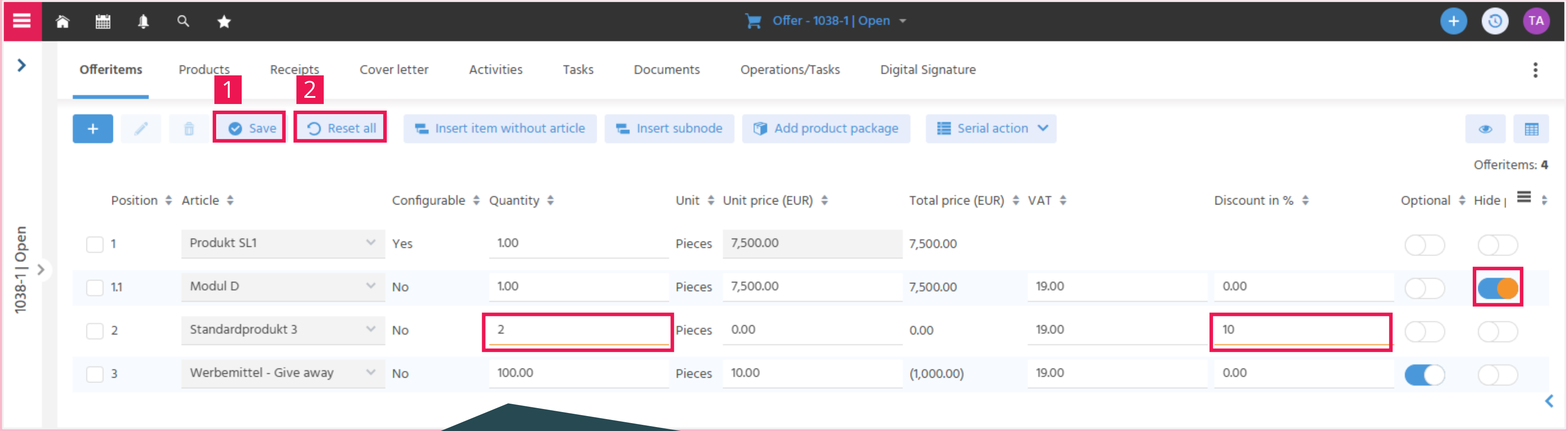
Offer

Insert items – multiedit table



Offer

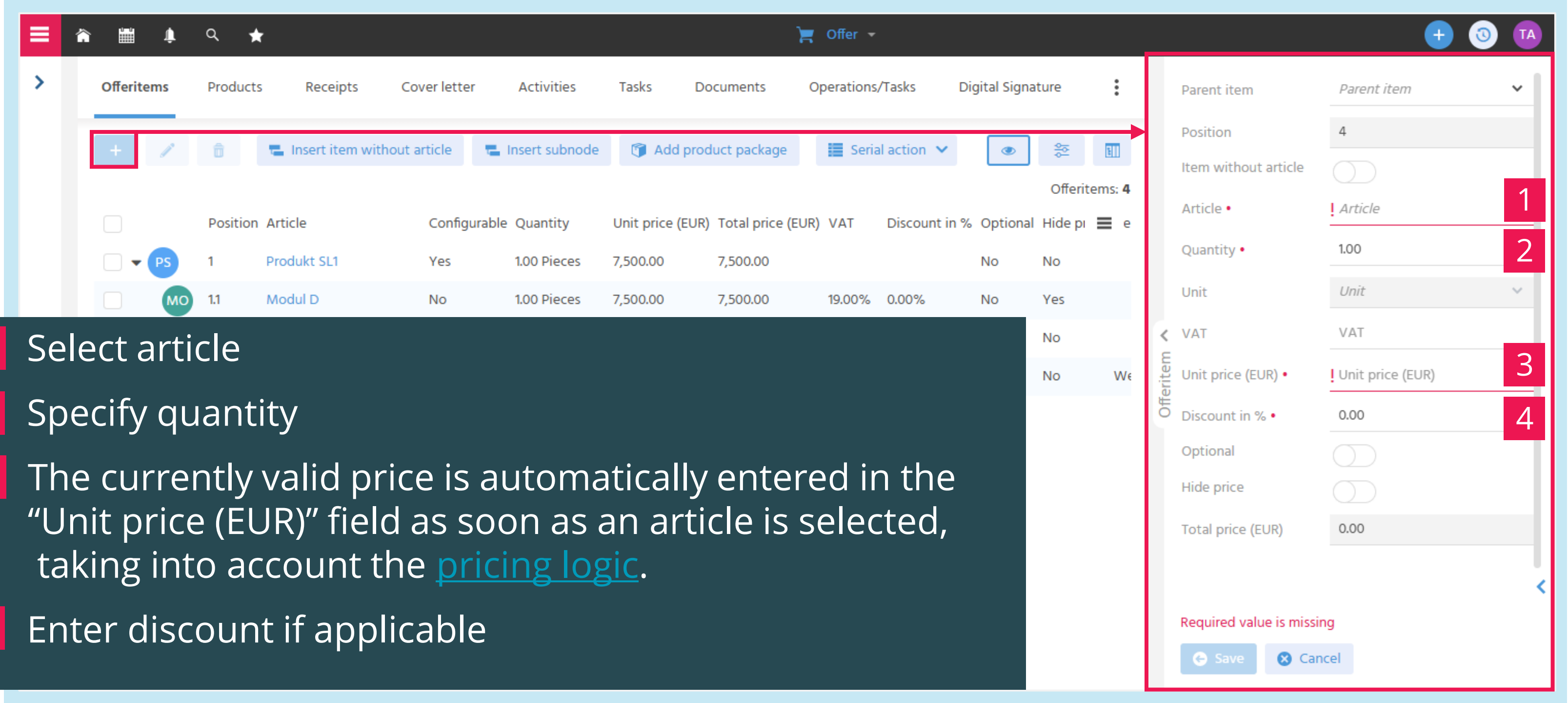
Make adjustments – multiedit table



If you make adjustments to offer items, whether to new or existing items, the corresponding fields or buttons are highlighted in orange so that you can keep track of the changes. When you save the changes (1), the orange markings are removed and the changes are permanently applied. If you do not want to apply the changes, reset them (2) instead of saving them.

Offer

Insert items – tree table



1 Select article

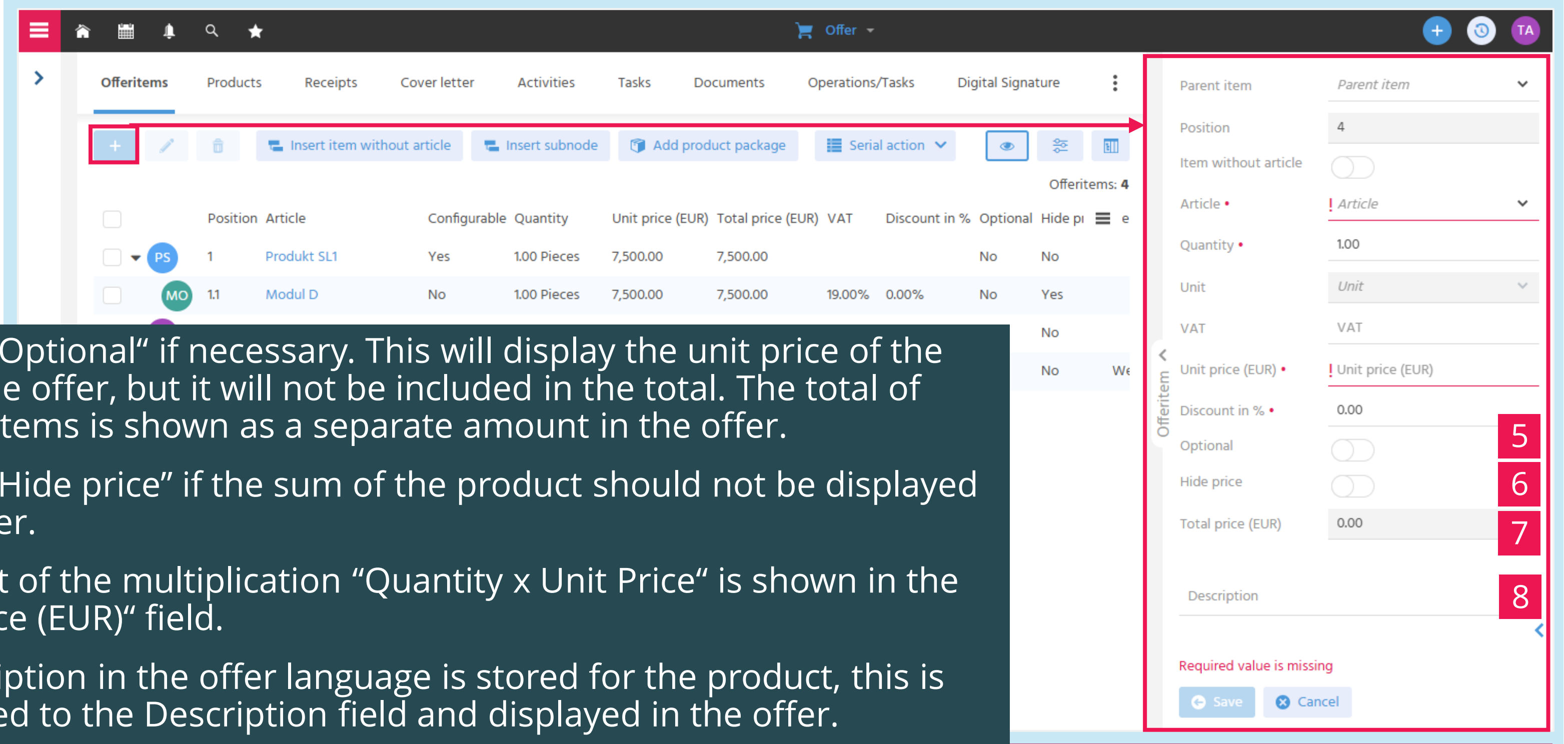
2 Specify quantity

3 The currently valid price is automatically entered in the "Unit price (EUR)" field as soon as an article is selected, taking into account the pricing logic.

4 Enter discount if applicable

Offer

Insert items – tree table



5 Activate “Optional“ if necessary. This will display the unit price of the item in the offer, but it will not be included in the total. The total of optional items is shown as a separate amount in the offer.

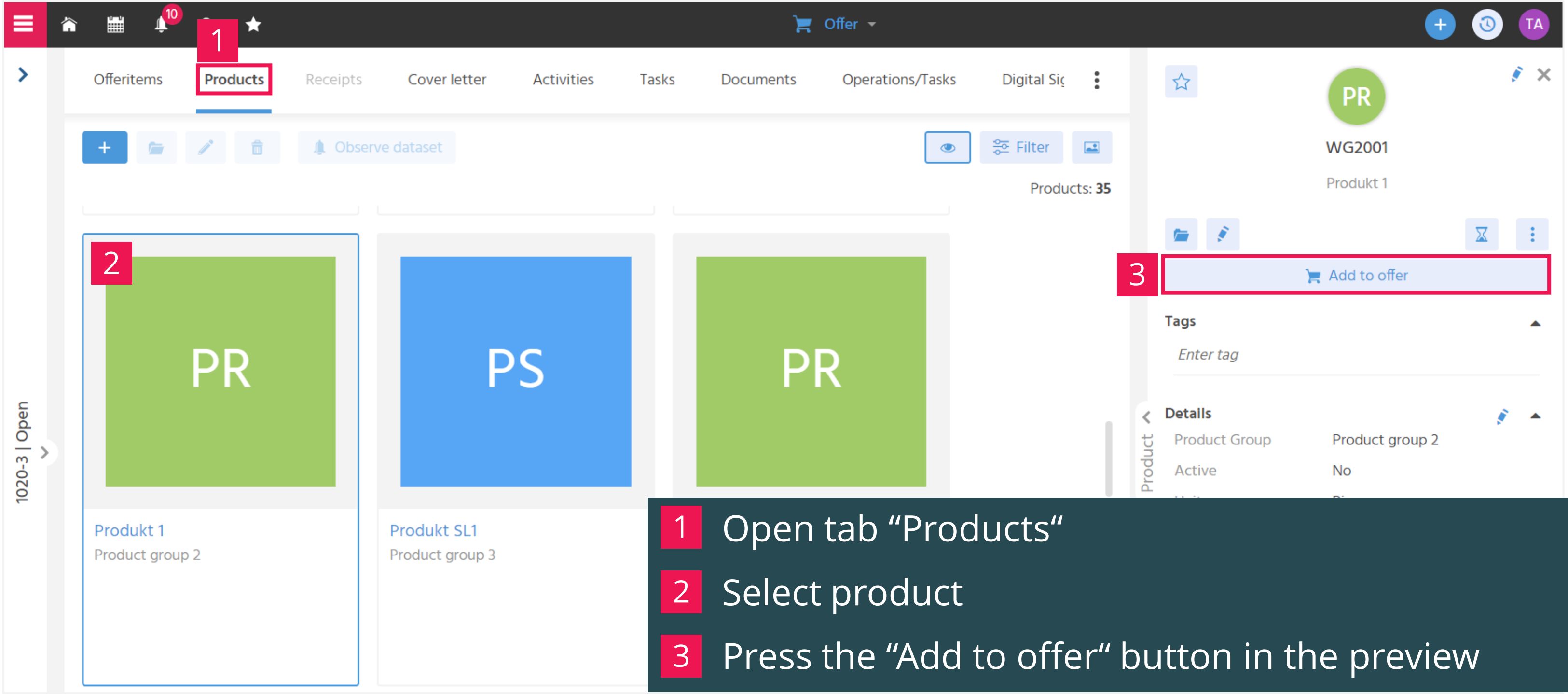
6 Activate “Hide price” if the sum of the product should not be displayed in the offer.

7 The result of the multiplication “Quantity x Unit Price“ is shown in the “Total price (EUR)“ field.

8 If a description in the offer language is stored for the product, this is transferred to the Description field and displayed in the offer.

Offer

Insert item - Alternative way in the “Products“ tab



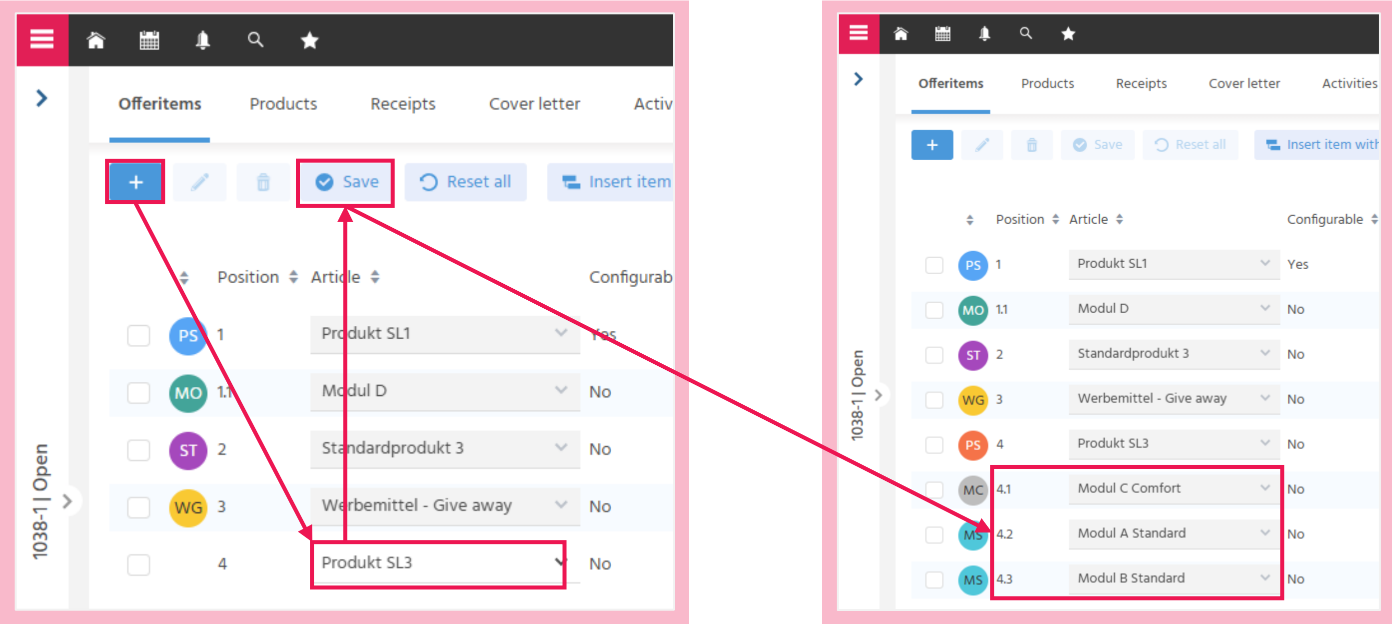
1 Open tab “Products“

2 Select product

3 Press the “Add to offer“ button in the preview

Offer

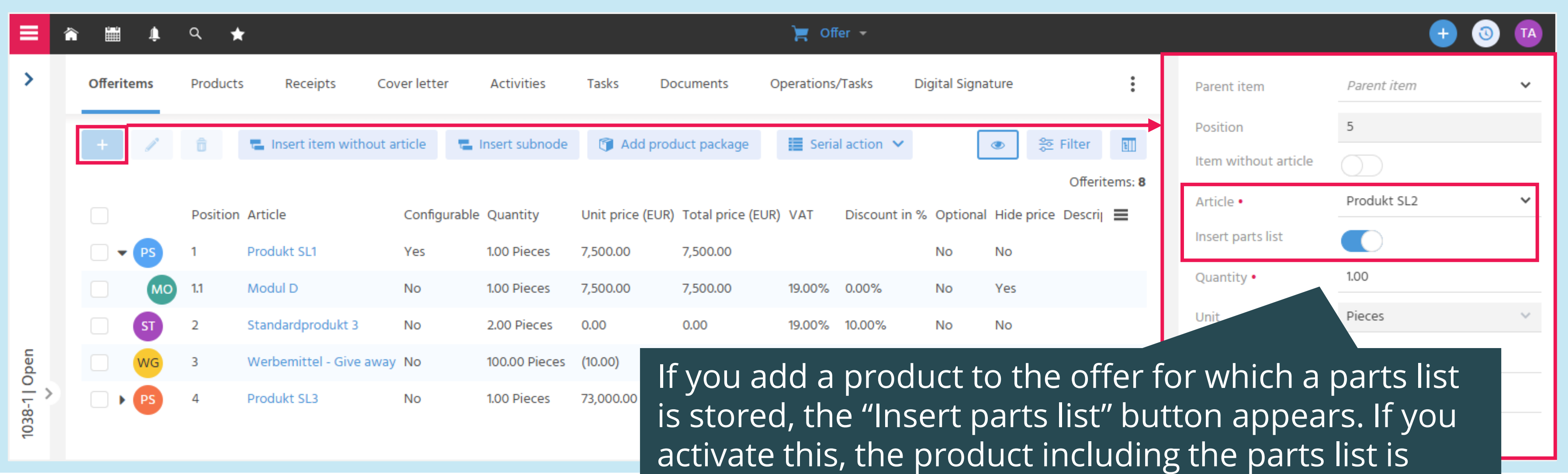
Insert parts list items – multiedit table



If you add an item in the multiedit table for which a parts list is stored and save it, all items in the parts list are automatically adopted as sub-items if no component is assigned to them.

Offer

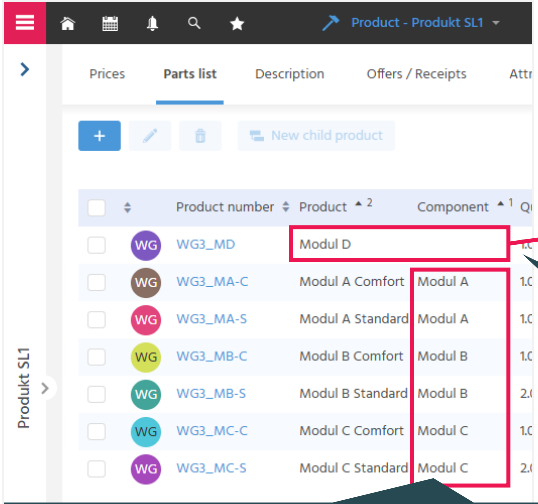
Insert parts list items – tree table

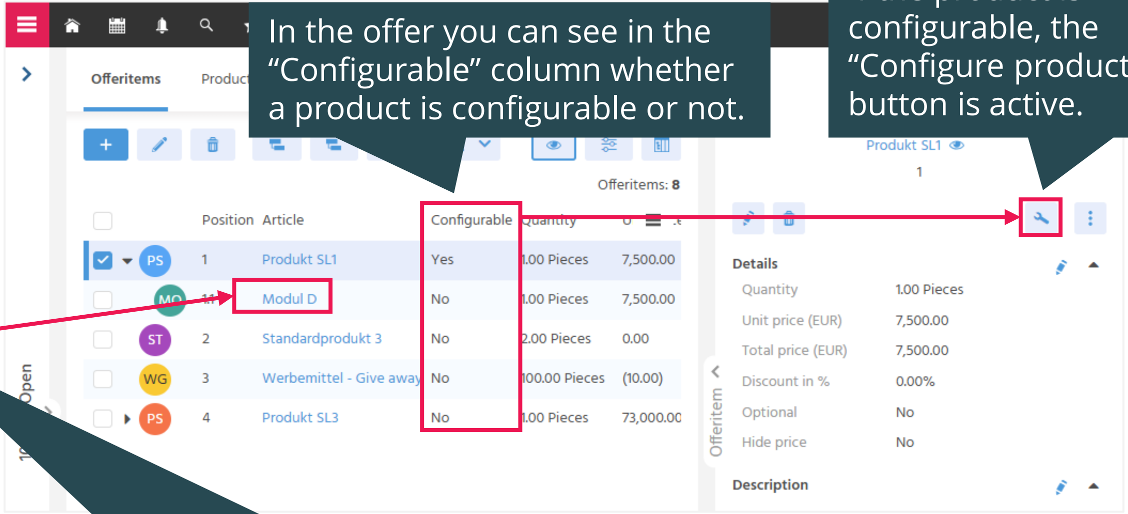


If you add a product to the offer for which a parts list is stored, the “Insert parts list” button appears. If you activate this, the product including the parts list is added, except for the parts list items that are assigned to a component. If you deactivate the button, the product is displayed without the parts list item.

Offer

Product configuration





In the offer you can see in the “Configurable” column whether a product is configurable or not.

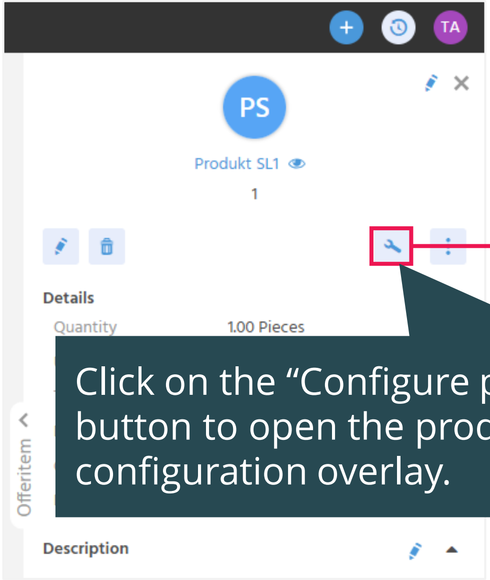
If the product is configurable, the “Configure product” button is active.

A product is configurable if at least one product in the parts list has been assigned to a component.

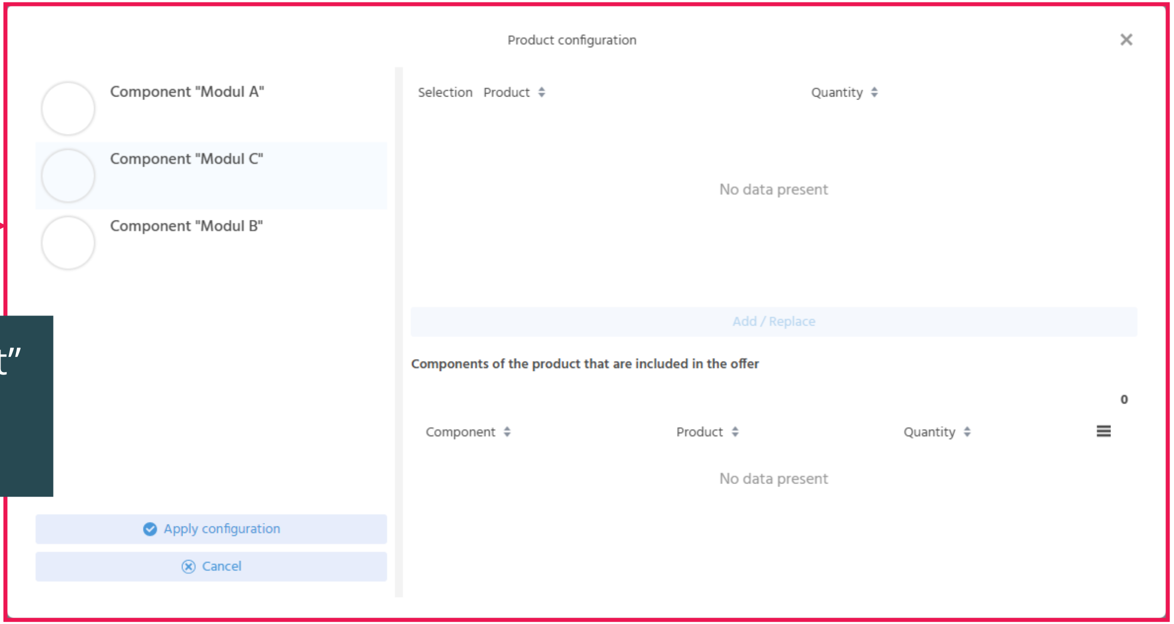
Products in the parts list that are not assigned to a component are always transferred to the offer as parts list item if the “Insert parts list” button was active when the main product was added to the offer.

Offer

Product configuration



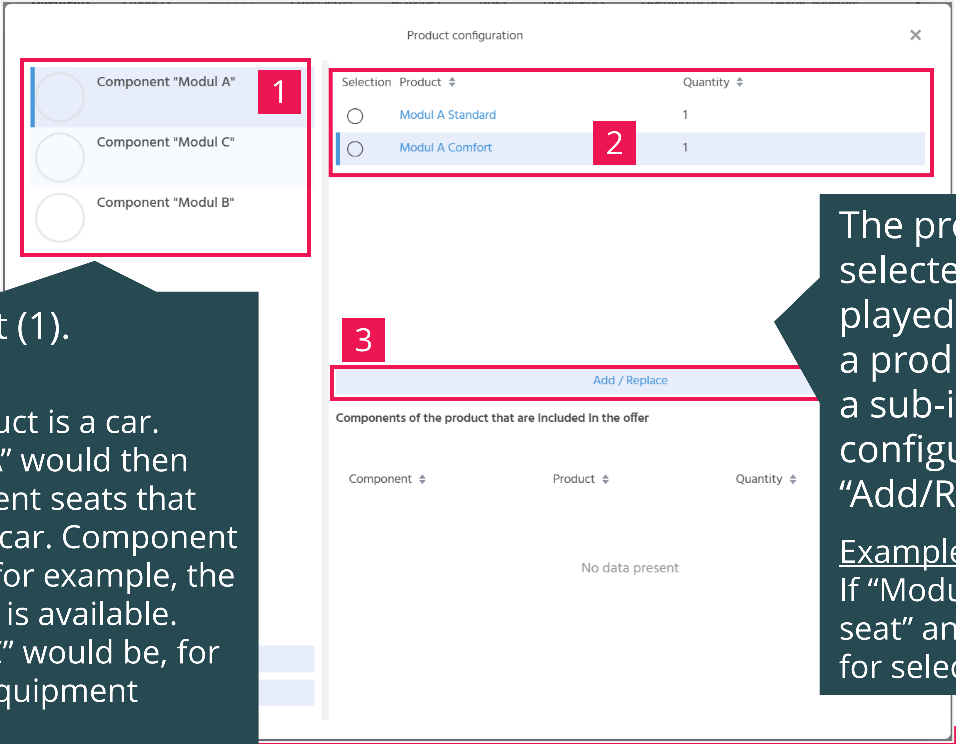
Click on the “Configure product” button to open the product configuration overlay.



Offer

Configure product

All components of the product are available for selection in the overlay.



Select a component (1).

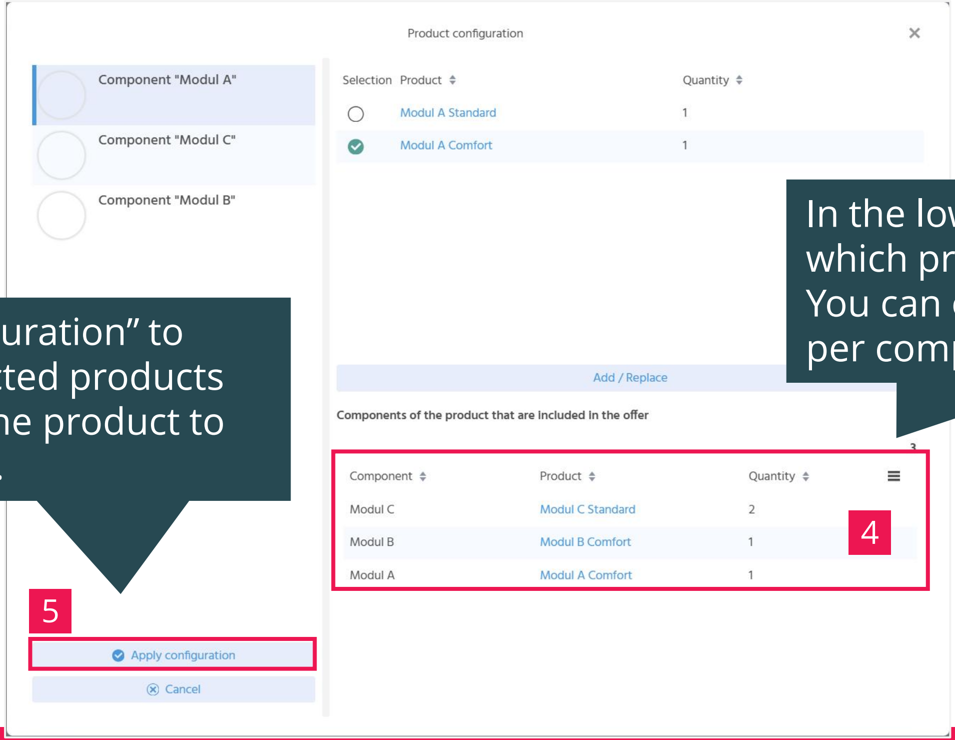
For example
Let's assume the product is a car. Component “Module A” would then be, for example, different seats that can be installed in the car. Component “Module B” would be, for example, the colors in which the car is available. Component “Module C” would be, for example, the special equipment “windshield heating”.

The products belonging to the selected component are displayed in the upper area. Select a product (2) to be displayed as a sub-item of the product to be configured and perform the “Add/Replace” action (3).

Example
If “Module A” is the seats, “Standard seat” and “Sports seat” are available for selection.

Offer

Configure product

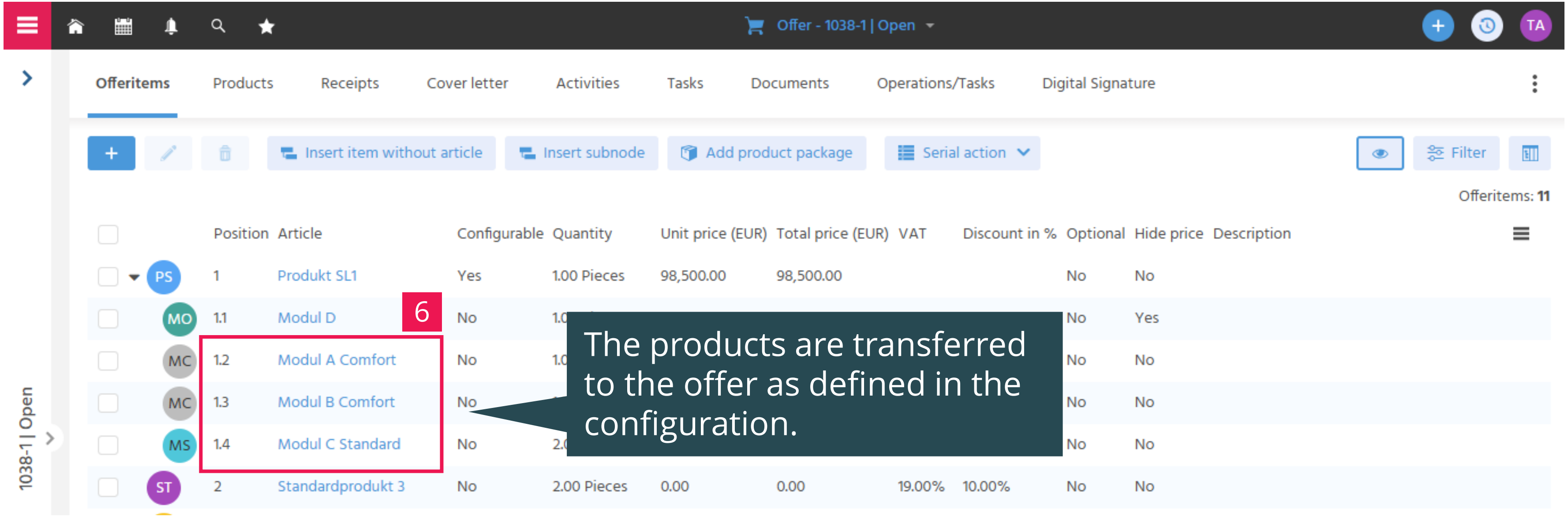


Use “Apply configuration” to transfer the selected products as sub-items to the product to be configured (5).

In the lower area, you can see which products you have added (4). You can only transfer one product per component to the lower area.

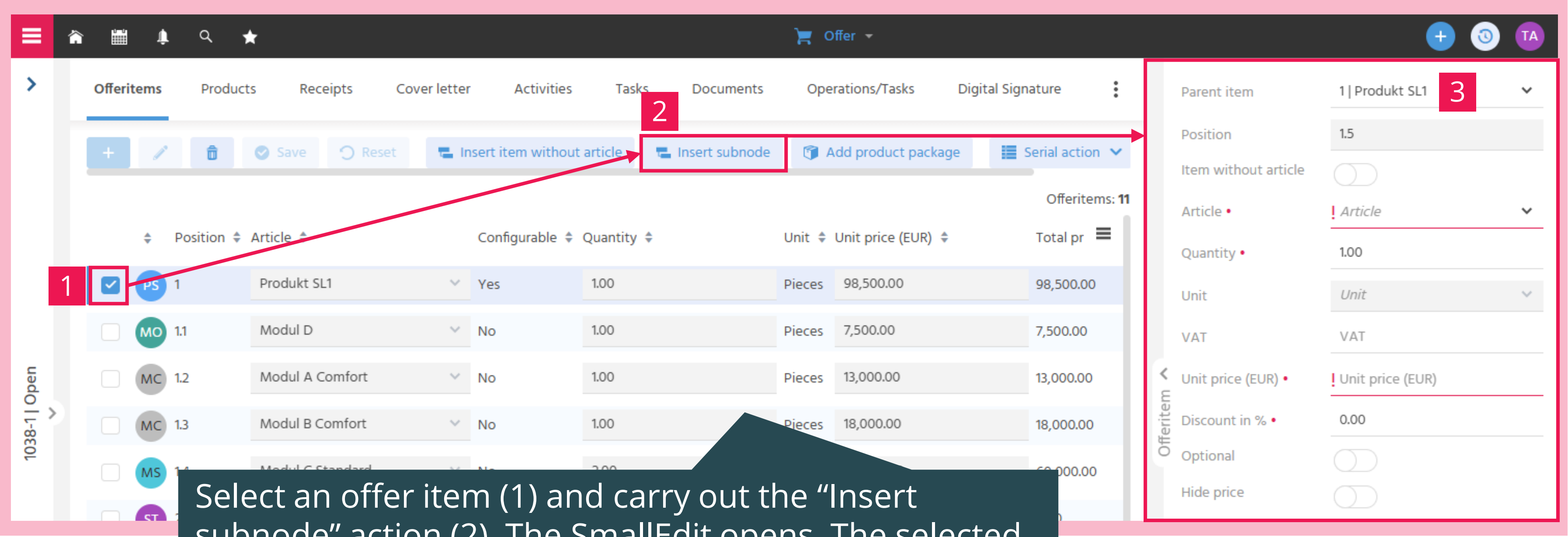
Offer

Configure product



Offer

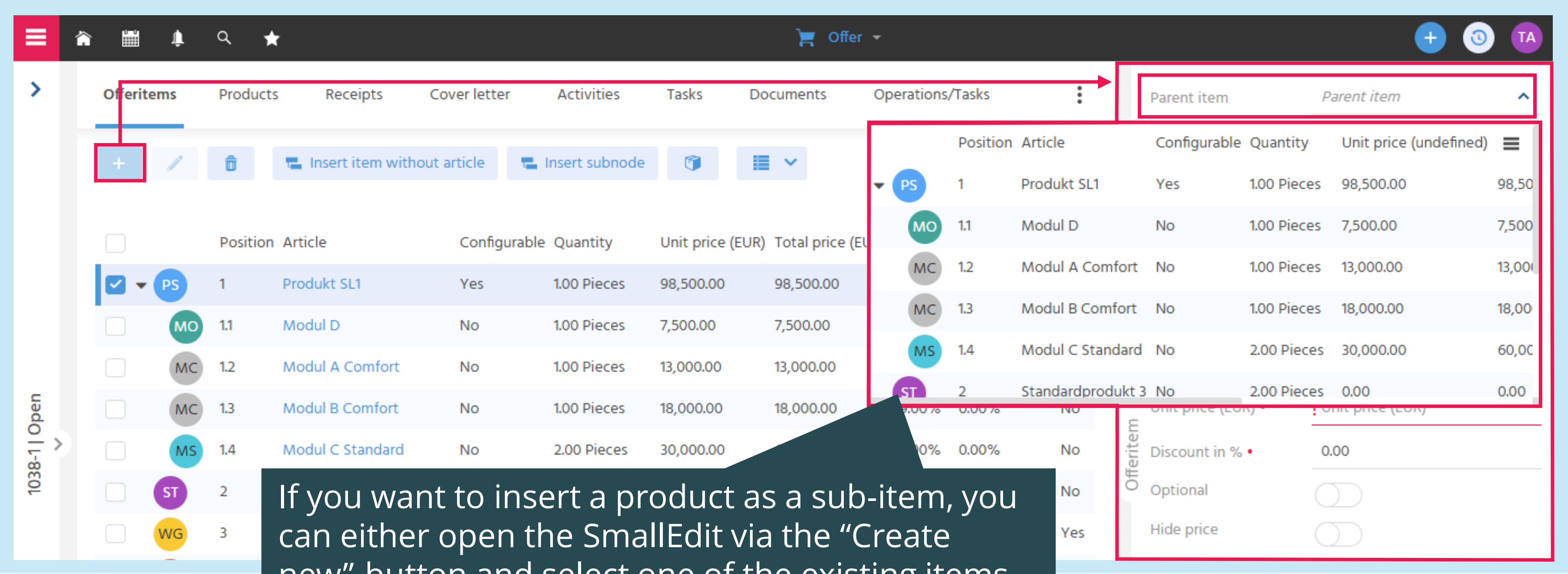
Insert product as subnode – multiedit table



Select an offer item (1) and carry out the “Insert subnode” action (2). The SmallEdit opens. The selected item is automatically entered there as a parent item (3). Subnodes added in the offer are not transferred to the “Parts list” tab of the parent item.

Offer

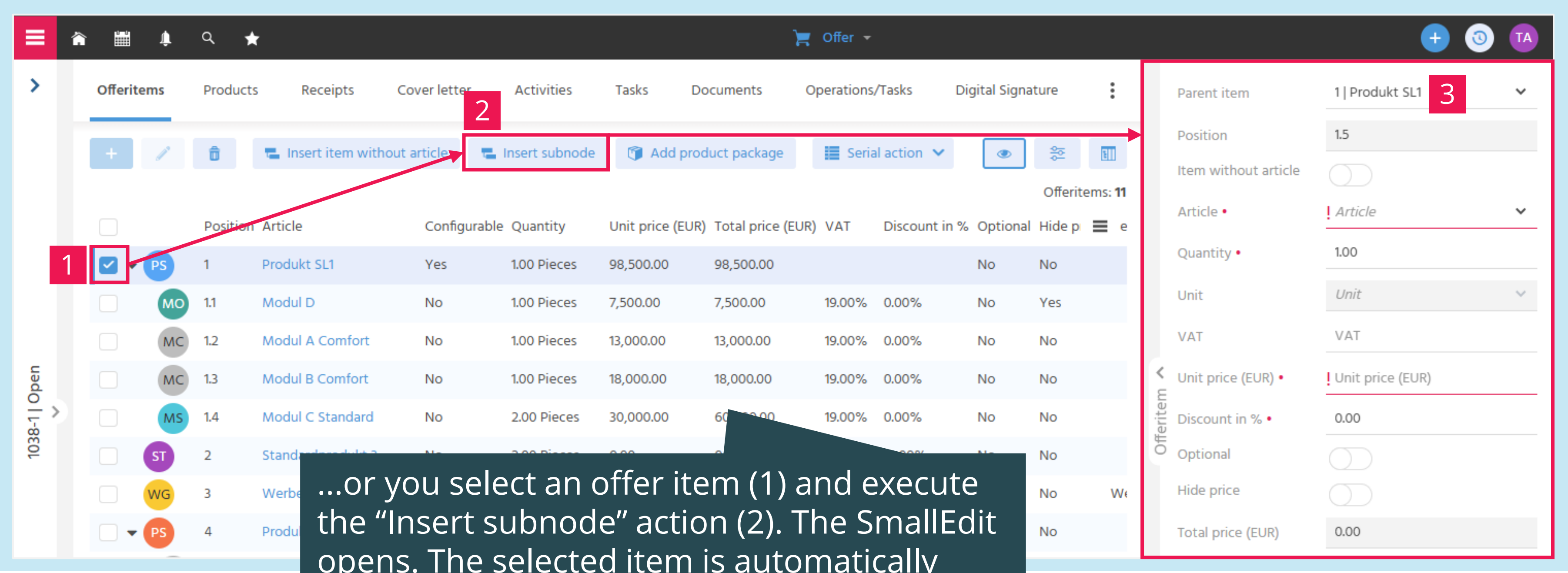
Insert product as subnode – tree table



If you want to insert a product as a sub-item, you can either open the SmallEdit via the “Create new”-button and select one of the existing items in the offer as the parent item…

Offer

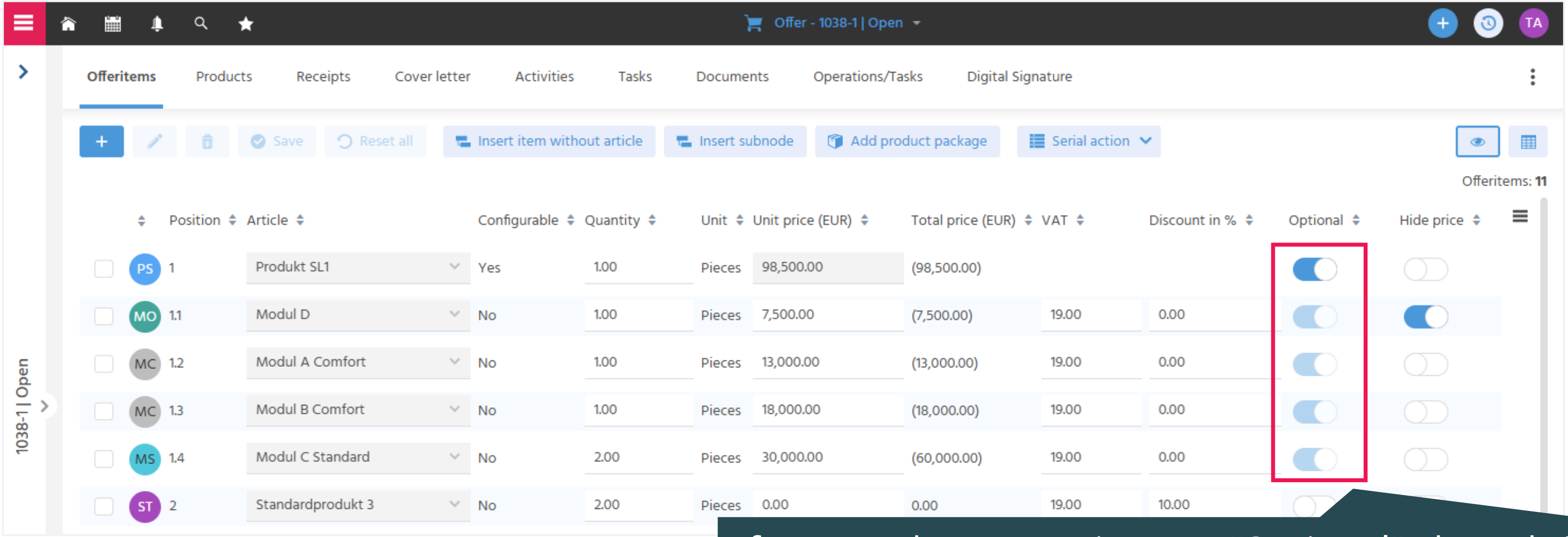
Insert product as subnode – tree table



...or you select an offer item (1) and execute the “Insert subnode” action (2). The SmallEdit opens. The selected item is automatically entered as the parent item (3).

Offer

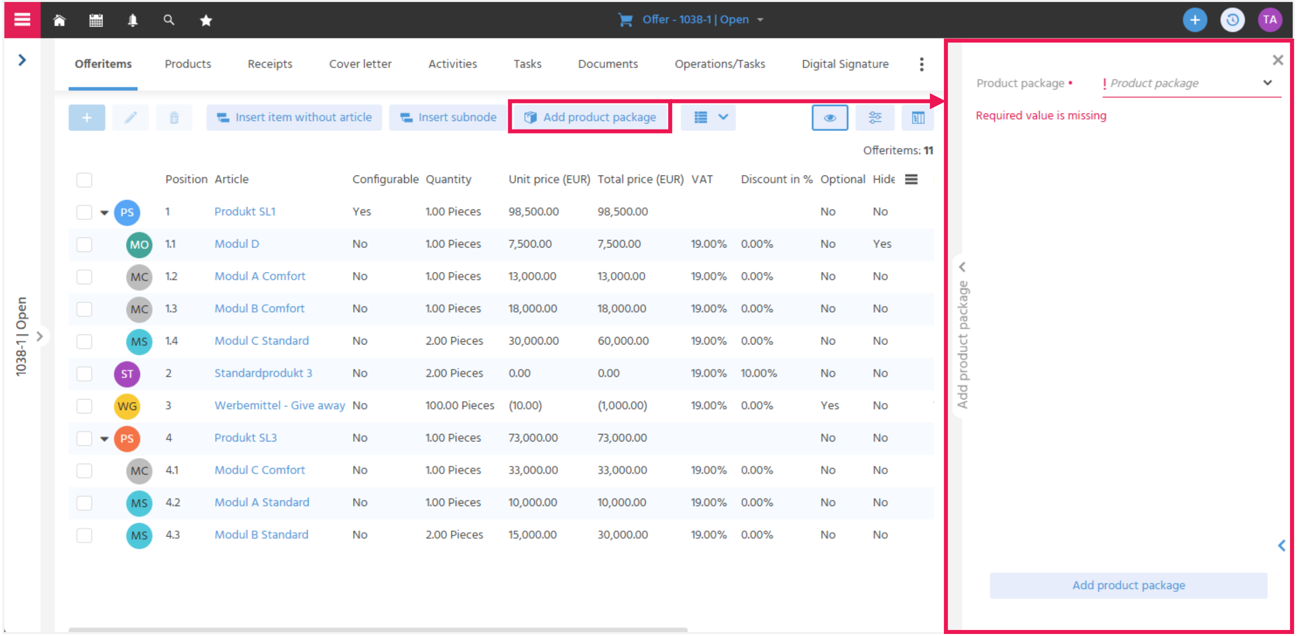
Optional parent item



If you mark a parent item as “Optional”, the sub-items are also automatically set to “Optional” and the button can no longer be deactivated for the sub-items.
If a parent item is not “Optional”, you can mark the sub-items as “Optional” or “Not optional” as you wish.

Offer

Add Product package



You can **add product packages** that you have stored in the CRM to the offer. If you have selected an offer item before executing the action, the products of the product package are added there as sub-items.

Only those products in a product package that are active and for which a price can be determined for the offer are adopted.

Offer

Calculation of the prices in the offer

The quantity (1) multiplied by the unit price (2) and minus the products discount (3) gives the total price of a product (4).

If the product is marked as “optional” (5), the unit price and total price of the item are placed in brackets (6). Optional and non-optional products are displayed in separate totals in the offer report.

1038-1 | Open

Position	Article	Configurable	Quantity	Unit price (EUR)	Total price (EUR)	VAT	Discount in %	Optional	Hide price	Descri
1	Produkt SL1	Yes	1.00 Pieces	98,500.00	98,500.00			No	No	
1.1	Modul D	No	1.00 Pieces	7,500.00	7,500.00	19.00%	0.00%	No	Yes	
1.2	Modul A Comfort	No	1.00 Pieces	13,000.00	13,000.00	19.00%	0.00%	No	No	
1.3	Modul B Comfort	No	1.00 Pieces	18,000.00	18,000.00	19.00%	0.00%	No	No	
1.4	Modul C Standard	No	2.00 Pieces	30,000.00	60,000.00	19.00%	0.00%	No	No	
2	Standardprodukt 3	No	2.00 Pieces	5,000.00	9,000.00	19.0	10.00%	No	No	
3	Werbemittel - Give away	No	100.00 Pieces	(10.00)	(1,000.00)	19.00%	0.00%	Yes	No	Werbe

Offer

Behavior when changing the quantity of a parent item

	Position	Article	Configurable	Quantity	Unit price (EUR)	Total price (EUR)	VAT
PS	1	Produkt SL1	Yes	1.00 Pieces	98,500.00	98,500.00	
MO	1.1	Modul D	No	1.00 Pieces	7,500.00	7,500.00	19.00%
MC	1.2	Modul A Comfort	No	1.00 Pieces	13,000.00	13,000.00	19.00%
MC	1.3	Modul B Comfort	No	1.00 Pieces	18,000.00	18,000.00	19.00%
MS	1.4	Modul C Standard	No	2.00 Pieces	30,000.00	60,000.00	19.00%

	Position	Article	Configurable	Quantity	Unit price (EUR)	Total price (EUR)	VAT
PS	1	Produkt SL1	Yes	2.00 Pieces	98,500.00	197,000.00	
MO	1.1	Modul D	No	2.00 Pieces	7,500.00	15,000.00	19.00%
MC	1.2	Modul A Comfort	No	2.00 Pieces	13,000.00	26,000.00	19.00%
MC	1.3	Modul B Comfort	No	2.00 Pieces	18,000.00	36,000.00	19.00%
MS	1.4	Modul C Standard	No	4.00 Pieces	30,000.00	120,000.00	19.00%

If you change the quantity of a parent item, the quantities of the sub-items are automatically adjusted when saving (reload page if necessary). All total prices are also recalculated.

In the example, the quantity of “Product SL1” is increased from 1 to 2. The quantities of “Module D”, “Module A Comfort”, “Module B Comfort” and “Module C Standard” are also automatically doubled when saving. The totals are recalculated accordingly.

The prices of optional sub-items are not included in the total price of the parent item.

Offer

Behavior when changing quantity or price of a sub-item

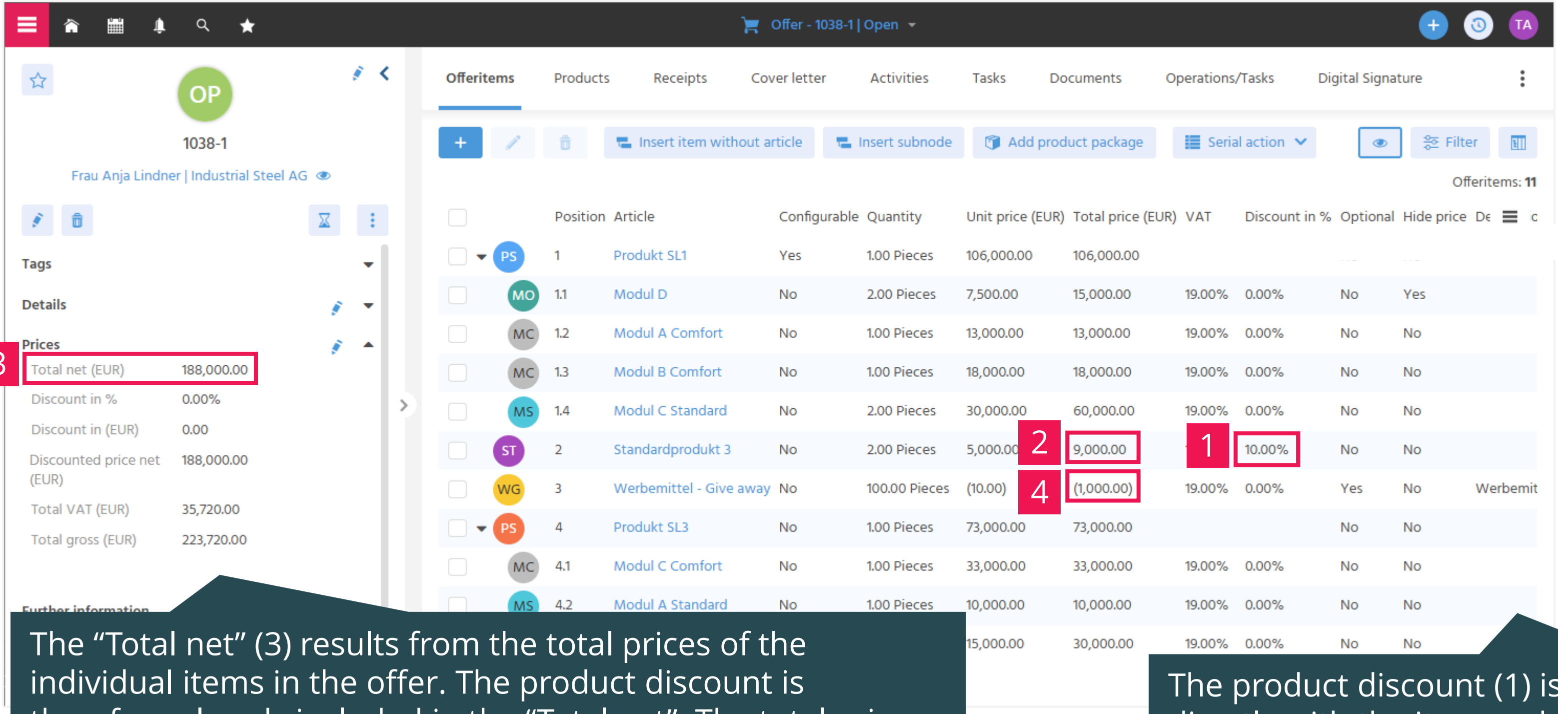
Position	Article	Configurable	Quantity	Unit price (EUR)	Total price (EUR)
1	Produkt SL1	Yes	1.00 Pieces	98,500.00	98,500.00
1.1	Modul D	No	1.00 Pieces	7,500.00	7,500.00
1.2	Modul A Comfort	No	1.00 Pieces	13,000.00	13,000.00
1.3	Modul B Comfort	No	1.00 Pieces	18,000.00	18,000.00
1.4	Modul C Standard	No	2.00 Pieces	30,000.00	60,000.00

Position	Article	Configurable	Quantity	Unit price (EUR)	Total price (EUR)
1	Produkt SL1	Yes	1.00 Pieces	106,000.00	106,000.00
1.1	Modul D	No	2.00 Pieces	7,500.00	15,000.00
1.2	Modul A Comfort	No	1.00 Pieces	13,000.00	13,000.00
1.3	Modul B Comfort	No	1.00 Pieces	18,000.00	18,000.00
1.4	Modul C Standard	No	2.00 Pieces	30,000.00	60,000.00

The unit price of the parent item is automatically calculated from the total prices of the sub-items. This means that if you change the quantity or the unit price of a sub-item, the unit price and total price of the parent item are recalculated.

Offer

Discounts



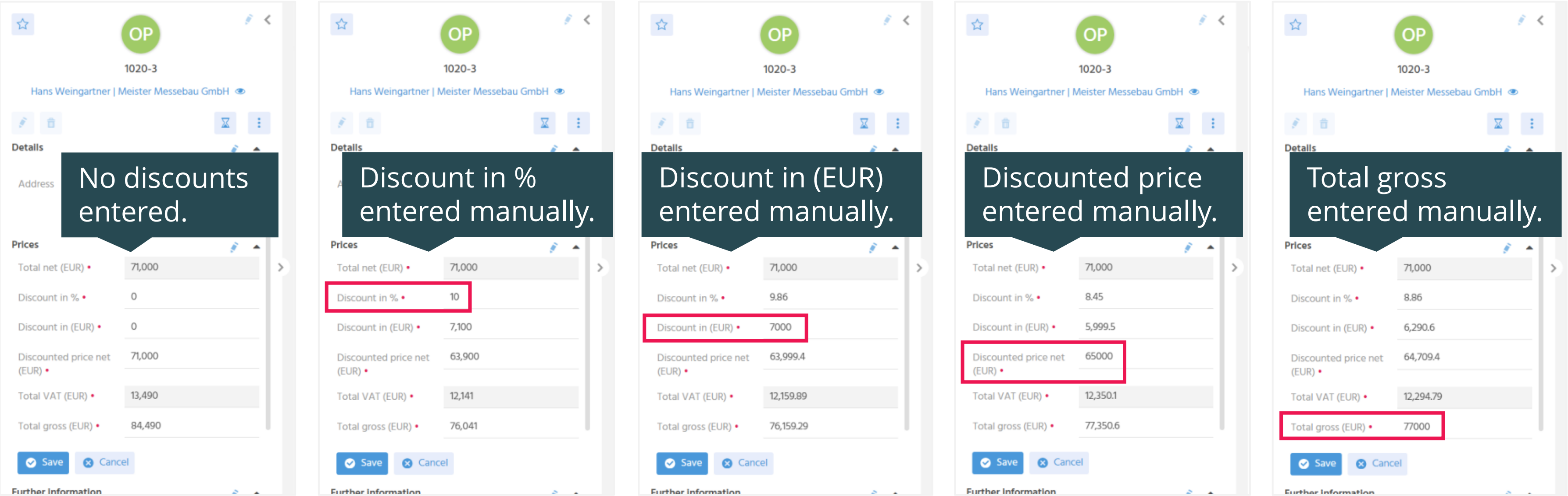
The “Total net” (3) results from the total prices of the individual items in the offer. The product discount is therefore already included in the “Total net”. The total prices of optional offer items (4) are not included in the “Total net”.

The product discount (1) is entered directly with the item and there included in the total price (2).

Offer

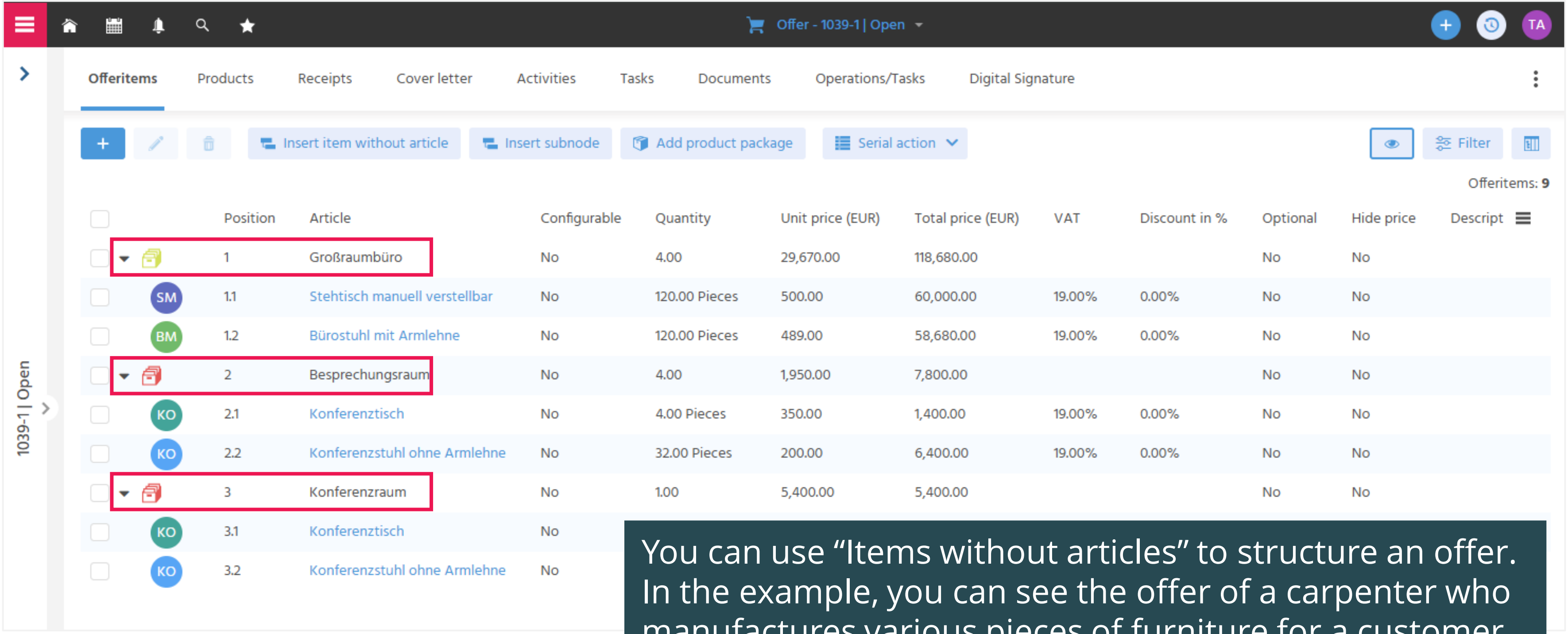
Discounts

You can also specify a discount in %, a discount in (EUR), a discounted price net or a total gross in the offer (and in the receipt). The values depend on each other mathematically. If you specify one value manually, the other values are calculated automatically.



Offer

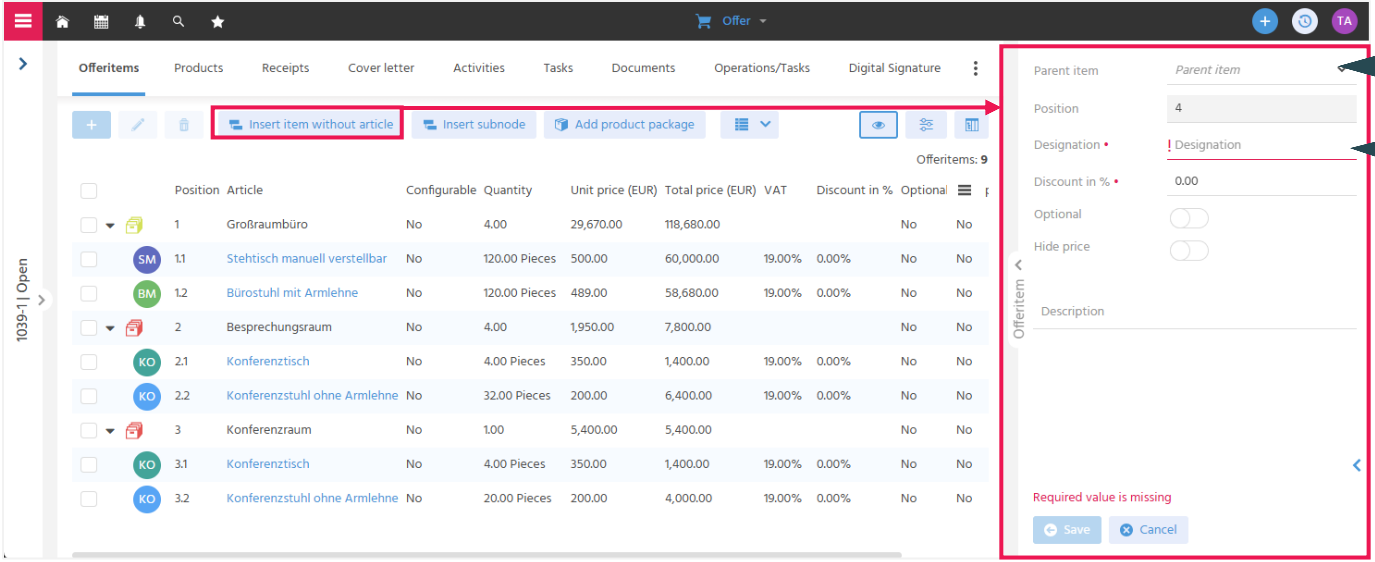
Item without article



You can use “Items without articles” to structure an offer. In the example, you can see the offer of a carpenter who manufactures various pieces of furniture for a customer and organizes them in the offer according to living space.

Offer

Button „Insert item without article“



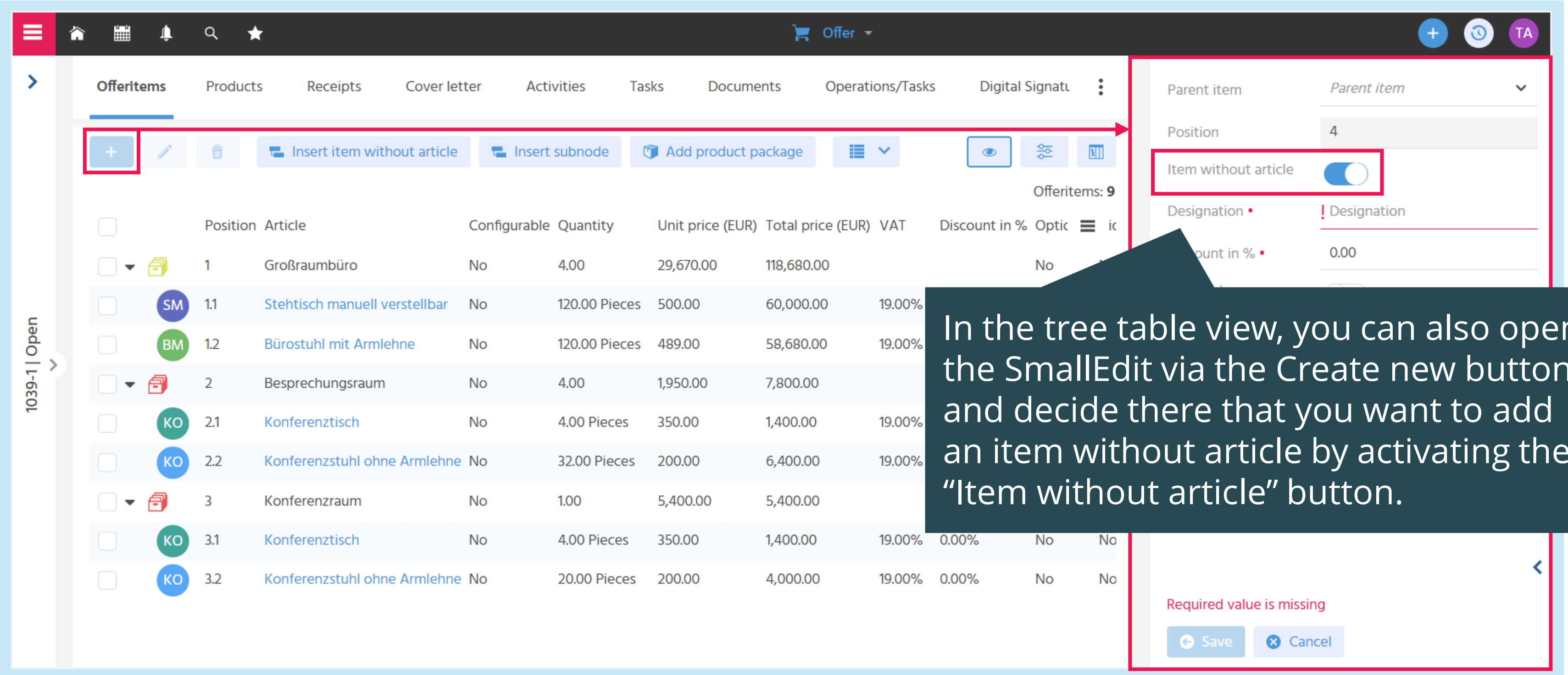
You can assign a parent item to the item without article.

Give the item without article a name.

The “Insert item without article” action is available in both the tree table view and the multiedit view.

Offer

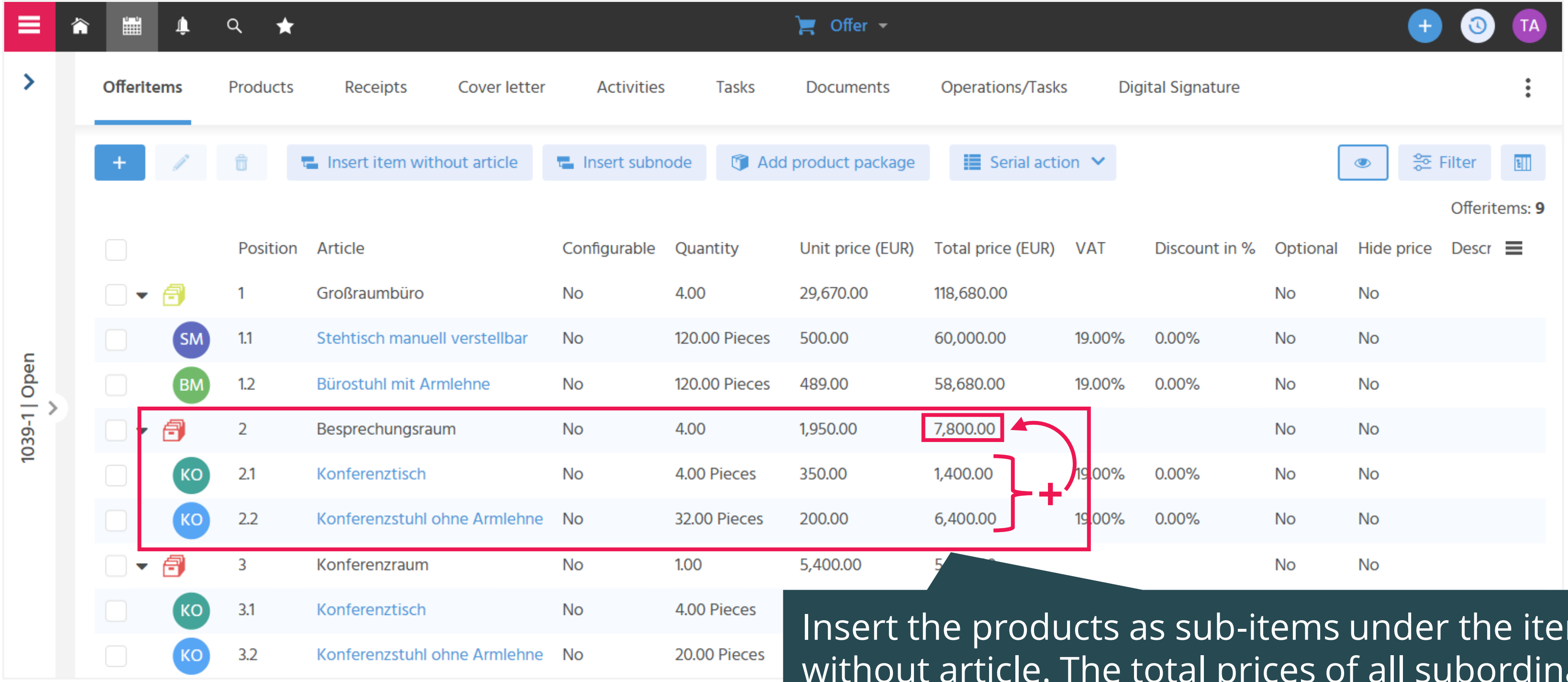
Insert item without article – tree table



In the tree table view, you can also open the SmallEdit via the Create new button and decide there that you want to add an item without article by activating the "Item without article" button.

Offer

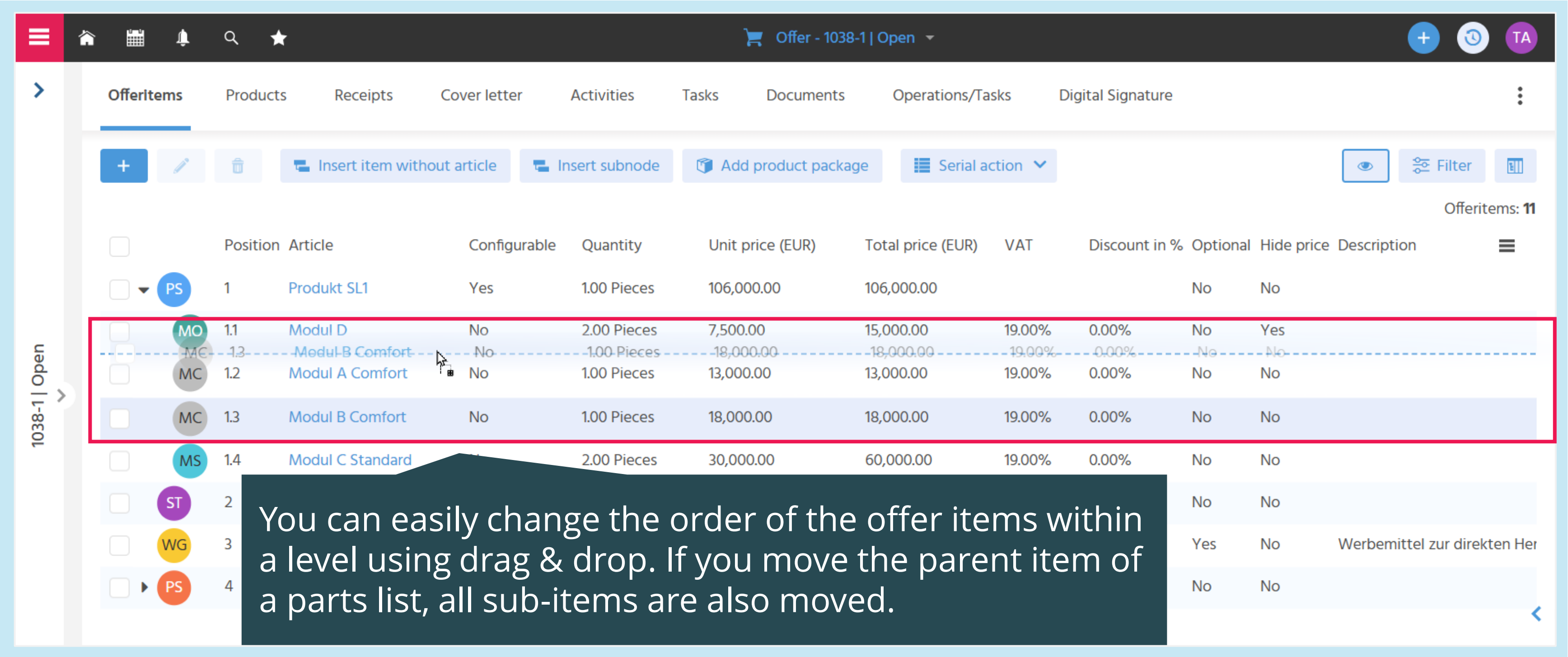
Item without article – total price calculation



Insert the products as sub-items under the items without article. The total prices of all subordinate products are displayed in the item without article.

Offer

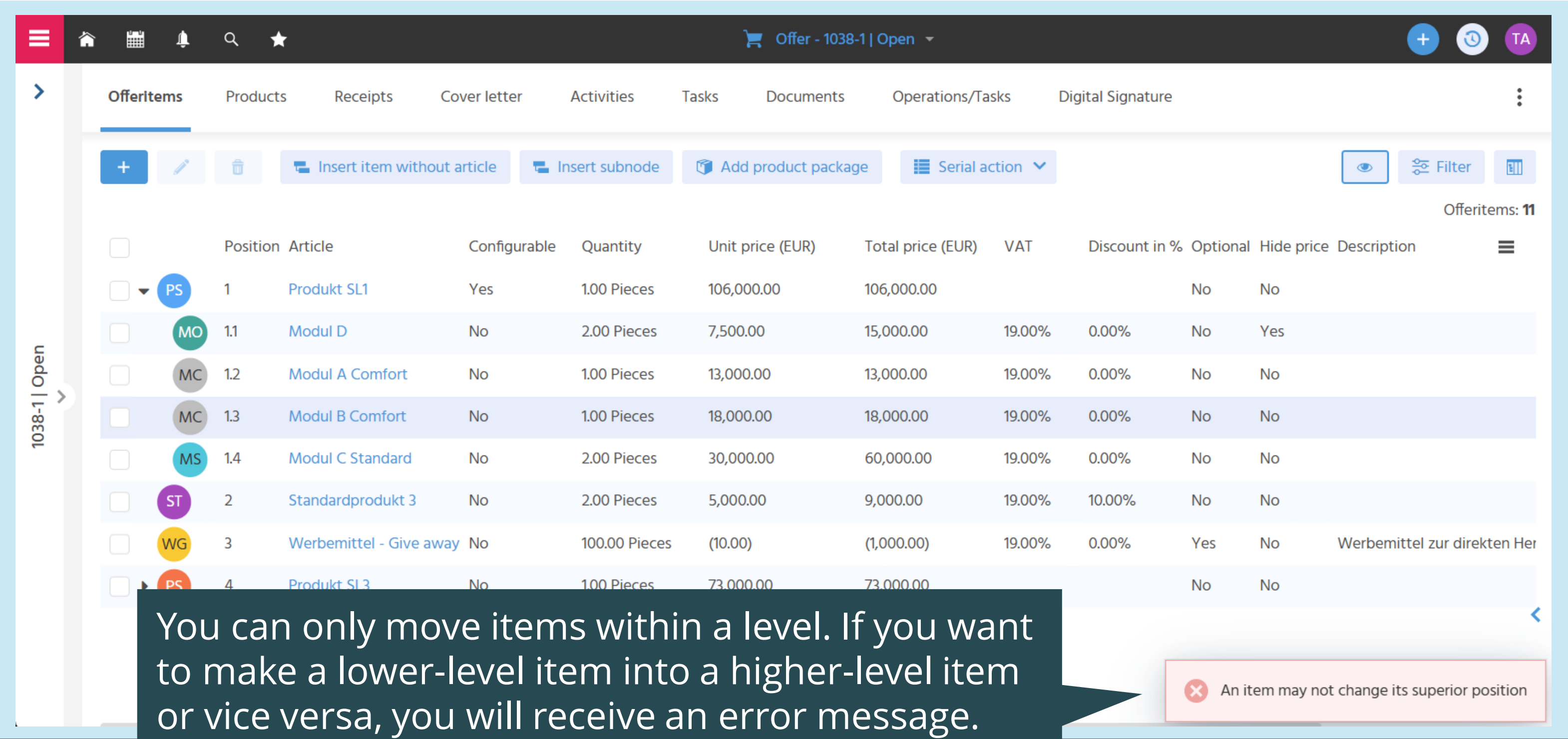
Adjust the order of the offer items – tree table



You can easily change the order of the offer items within a level using drag & drop. If you move the parent item of a parts list, all sub-items are also moved.

Offer

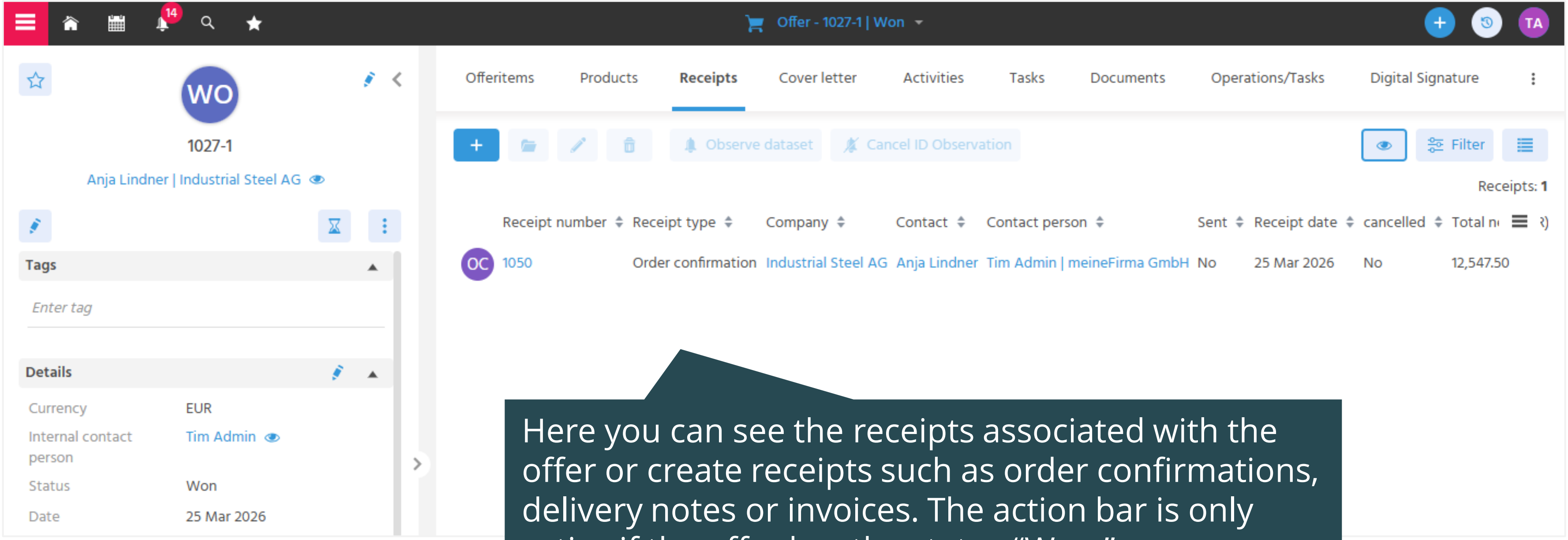
Adjust the order of the offer items – tree table



You can only move items within a level. If you want to make a lower-level item into a higher-level item or vice versa, you will receive an error message.

Offer

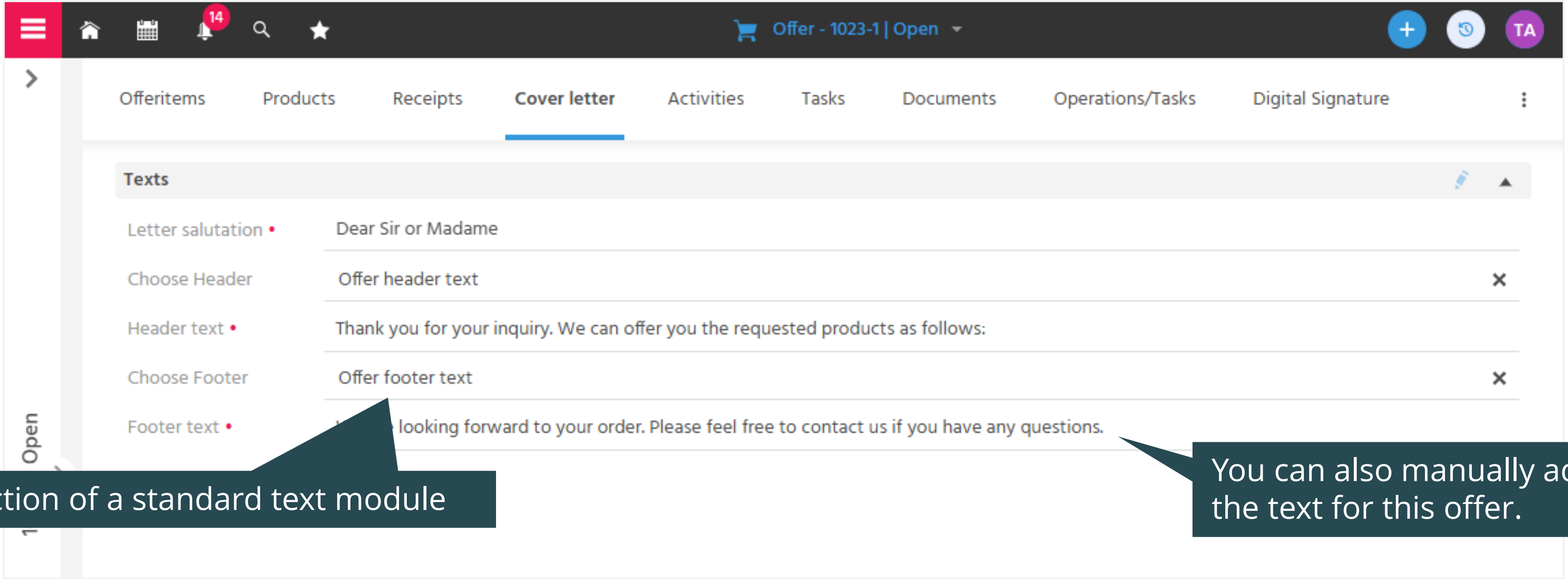
Overview of all receipts generated from an offer



Here you can see the receipts associated with the offer or create receipts such as order confirmations, delivery notes or invoices. The action bar is only active if the offer has the status “Won.”

Offer

Adapt text elements in the cover letter



Selection of a standard text module

You can also manually adjust the text for this offer.

Once an offer has been sent, you can no longer edit the texts in the “Cover letter” tab.

Offer

More tabs

“Activities“ tab: Here you have an overview of all activities linked to the offer and you can also directly create further activities.

“Tasks“ tab: Here you have an overview of all tasks linked to the offer and you can also directly create further tasks.

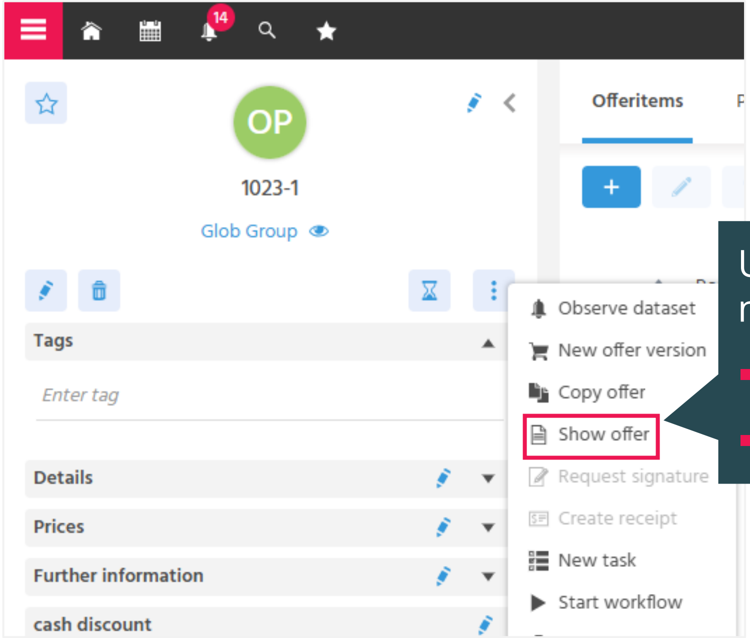
“Documents“ tab: Here you can upload documents belonging to the offer.

“Operations/tasks“ tab: Here you can see the operations and tasks linked to the offer and the associated resource planning.

“Digital signature“ tab: You can store contacts here who are to be given the option of a digital signature (see documentation in digital signature).

Send offer

Show offer



Use the action “Show offer“ to open the PDF report (see next slide),

- which you can print and send by post,
- which you can send directly by e-mail.

The action “Show offer“ is only active if items are available in the offer.

Show offer

Offer report

Offer

Dispatch as mail

Automatic zoom

1 /1

Pos.	Article Number	Article title	Quantity	Discount %	Optional	Unitprice EUR	VAT %	Total price EUR
1	S001	Serviceeinsatz	10.00 Hours	10.00	No			
2	WG3_MB-C	Modul B Comfort	1.00 Pieces		No	18,000.00	19.00	18,000.00
3	WG3001-SL	Produkt SL1	2.00 Pieces		No	83,000.00	19.00	166,000.00
3.1	WG3_MA-S	Modul A Standard	2.00 Pieces		No	10,000.00	19.00	20,000.00
3.2	WG3_MB-S	Modul B Standard	4.00 Pieces		Yes	2,500.00	0.00	(10,000.00)
3.3	WG3_MC-S	Modul C Standard	4.00 Pieces		No	30,000.00	19.00	120,000.00
3.4	WG3_MA-C	Modul A Comfort	2.00 Pieces		No	13,000.00	19.00	26,000.00

Total net excl. opt. items	184,900.00
25.00 % Invoice Discount	46,225.00
Total EUR without Vat	138,675.00
Plus Salestax	26,348.25
Total gross excl. opt. items	165,023.25

Total opt. item net	10,000.00
25.00 % Invoice Discount	2,500.00
Total EUR without Vat	7,500.00
Total opt. item gross	7,500.00

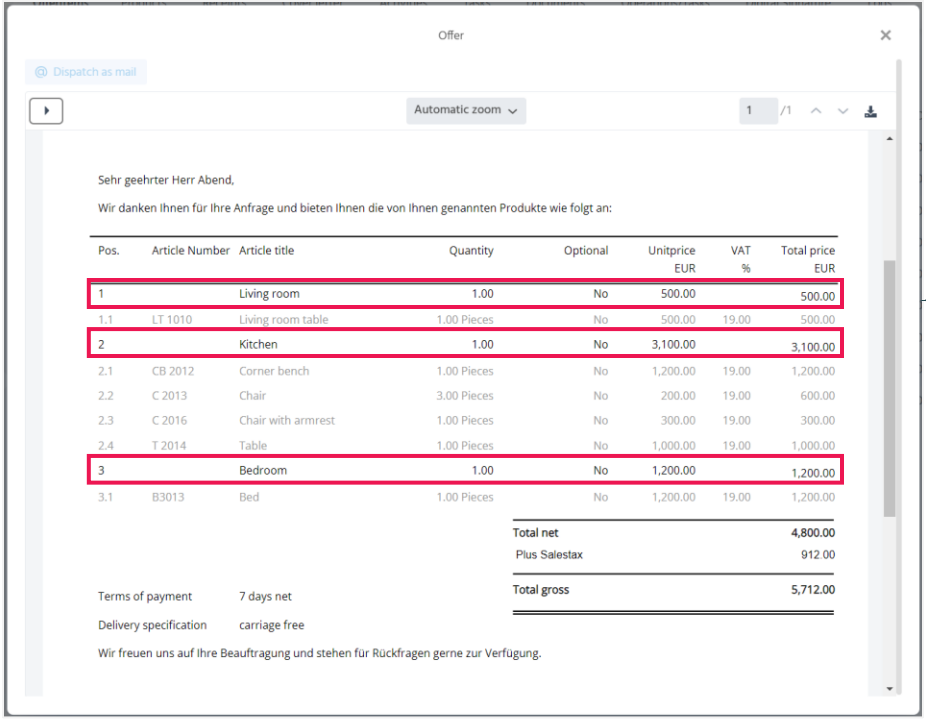
Terms of payment 8 days 2% discount, 30

If you have activated the “Hide price” button for a product in the offer, the unit price, VAT and total price are not displayed in the offer report.

The amounts of the items marked as “optional” are displayed in brackets and shown as a separate total.

Show offer

Offer report



Offer

@ Dispatch as mail

Automatic zoom 1 /1

Sehr geehrter Herr Abend,

Wir danken Ihnen für Ihre Anfrage und bieten Ihnen die von Ihnen genannten Produkte wie folgt an:

Pos.	Article Number	Article title	Quantity	Optional	Unitprice EUR	VAT %	Total price EUR
1		Living room	1.00	No	500.00		500.00
1.1	LT 1010	Living room table	1.00 Pieces	No	500.00	19.00	500.00
2		Kitchen	1.00	No	3,100.00		3,100.00
2.1	CB 2012	Corner bench	1.00 Pieces	No	1,200.00	19.00	1,200.00
2.2	C 2013	Chair	3.00 Pieces	No	200.00	19.00	600.00
2.3	C 2016	Chair with armrest	1.00 Pieces	No	300.00	19.00	300.00
2.4	T 2014	Table	1.00 Pieces	No	1,000.00	19.00	1,000.00
3		Bedroom	1.00	No	1,200.00		1,200.00
3.1	B3013	Bed	1.00 Pieces	No	1,200.00	19.00	1,200.00

Total net	4,800.00
Plus Salestax	912.00
Total gross	5,712.00

Terms of payment 7 days net

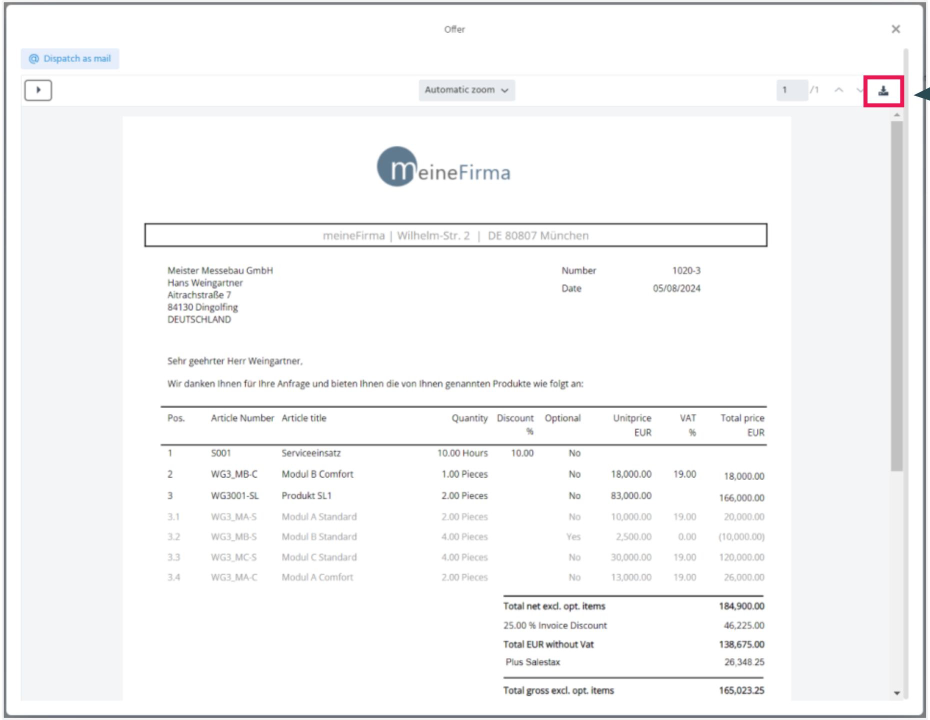
Delivery specification carriage free

Wir freuen uns auf Ihre Beauftragung und stehen für Rückfragen gerne zur Verfügung.

Display of items without articles in the offer report.

Send offer

Print offer for mailing



Offer

Dispatch as mail

Automatic zoom

1 /1

meineFirma

meineFirma | Wilhelm-Str. 2 | DE 80807 München

Meister Messebau GmbH
Hans Weingartner
Aitrachstraße 7
84130 Dingolfing
DEUTSCHLAND

Number 1020-3
Date 05/08/2024

Sehr geehrter Herr Weingartner,

Wir danken Ihnen für Ihre Anfrage und bieten Ihnen die von Ihnen genannten Produkte wie folgt an:

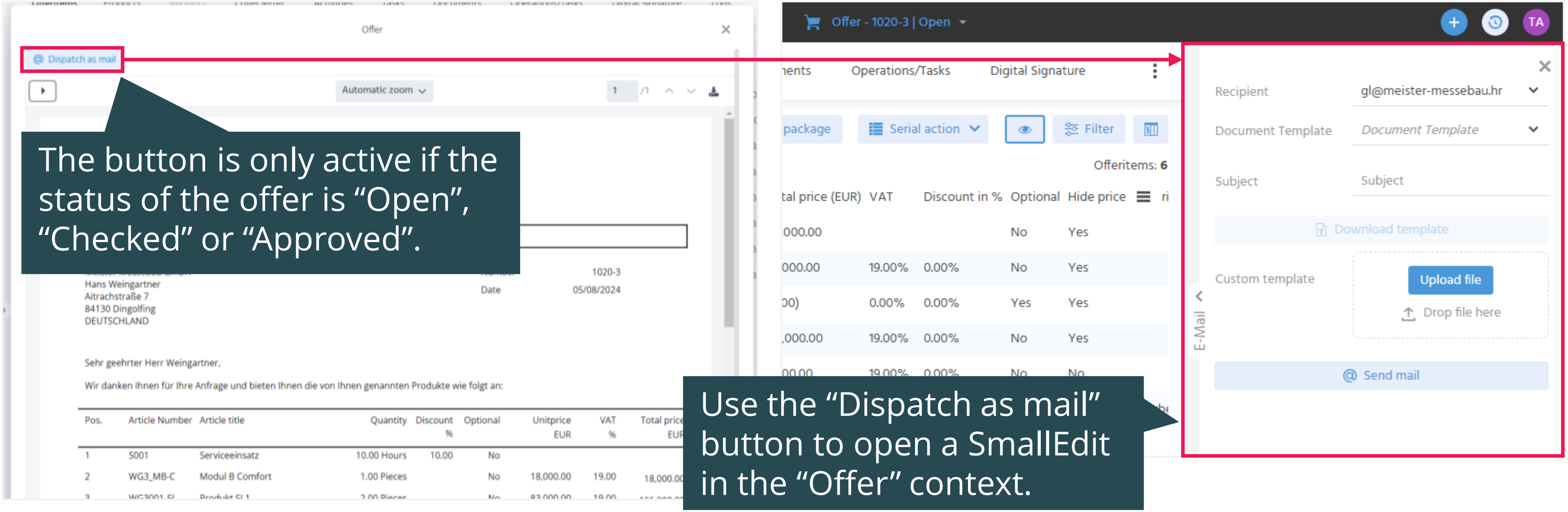
Pos.	Article Number	Article title	Quantity	Discount %	Optional	Unitprice EUR	VAT %	Total price EUR
1	S001	Serviceeinsatz	10.00 Hours	10.00	No			
2	WG3_MB-C	Modul B Comfort	1.00 Pieces		No	18,000.00	19.00	18,000.00
3	WG3001-SL	Produkt SL1	2.00 Pieces		No	83,000.00		166,000.00
3.1	WG3_MA-S	Modul A Standard	2.00 Pieces		No	10,000.00	19.00	20,000.00
3.2	WG3_MB-S	Modul B Standard	4.00 Pieces		Yes	2,500.00	0.00	(10,000.00)
3.3	WG3_MC-S	Modul C Standard	4.00 Pieces		No	30,000.00	19.00	120,000.00
3.4	WG3_MA-C	Modul A Comfort	2.00 Pieces		No	13,000.00	19.00	26,000.00

Total net excl. opt. items	184,900.00
25.00 % Invoice Discount	46,225.00
Total EUR without Vat	138,675.00
Plus Salestax	26,348.25
Total gross excl. opt. items	165,023.25

Print the offer if you wish to send it by post and set the status in the offer to “sent” once you have sent the offer.

Send offer

Send offer by e-mail



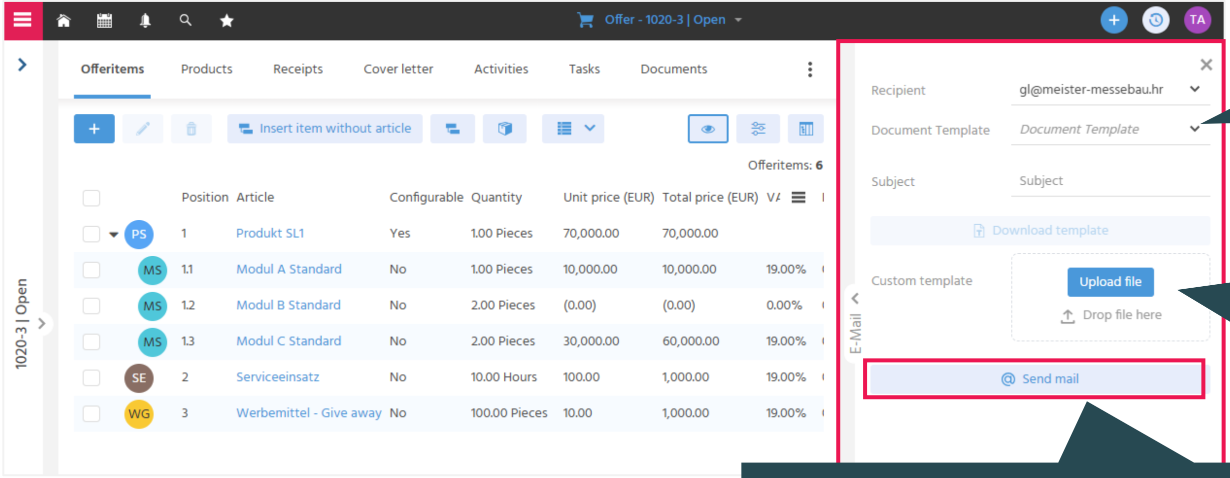
The button is only active if the status of the offer is “Open”, “Checked” or “Approved”.

Use the “Dispatch as mail” button to open a SmallEdit in the “Offer” context.

You can **use AI features when creating emails** if you are authorized to do so. For more information, see the documentation “Document templates, writing letters & emails.”

Send offer

Send offer by e-mail



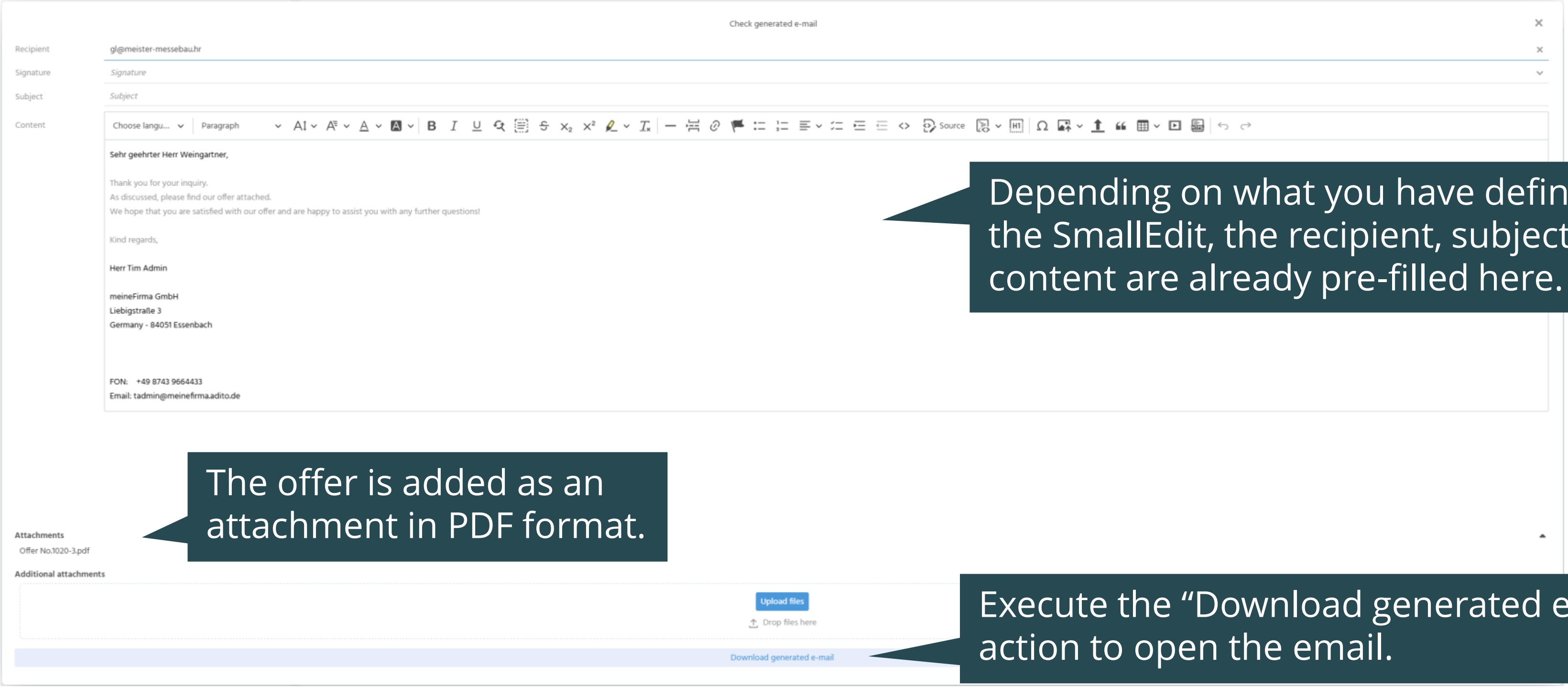
If you select a document template here, the text stored there will be displayed in the e-mail.

Here you can upload a custom template from which the email text is drawn.

Clicking on the “Send email” button opens an overlay.

Send offer

Send offer by e-mail



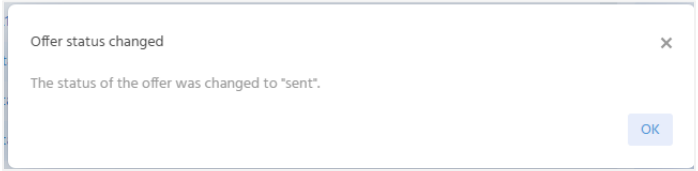
Depending on what you have defined in the SmallEdit, the recipient, subject, and content are already pre-filled here.

The offer is added as an attachment in PDF format.

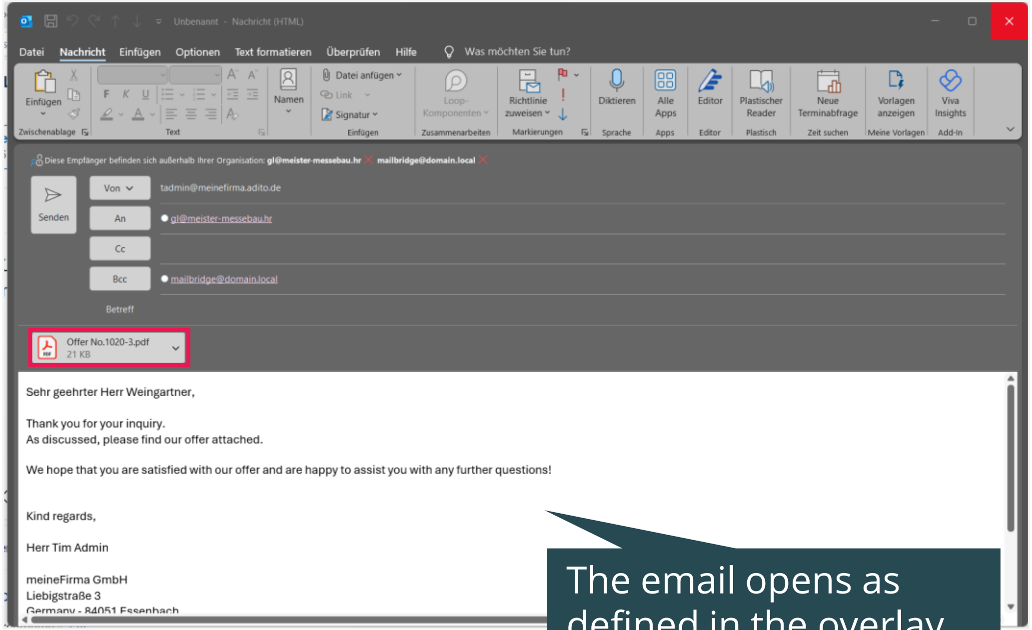
Execute the “Download generated e-mail” action to open the email.

Send offer

Send offer by e-mail



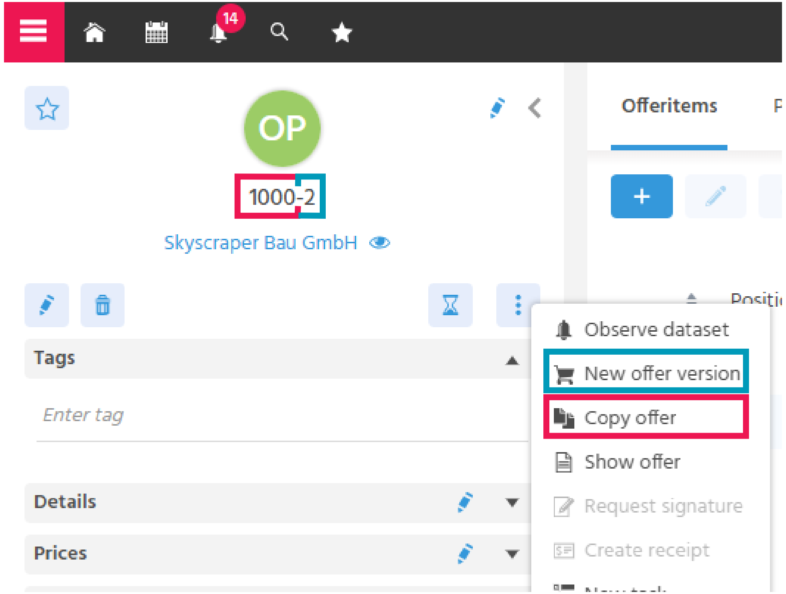
The system informs you that the offer status has been set to „sent“.



The email opens as defined in the overlay.

Versioned offers

Offer number - Version number

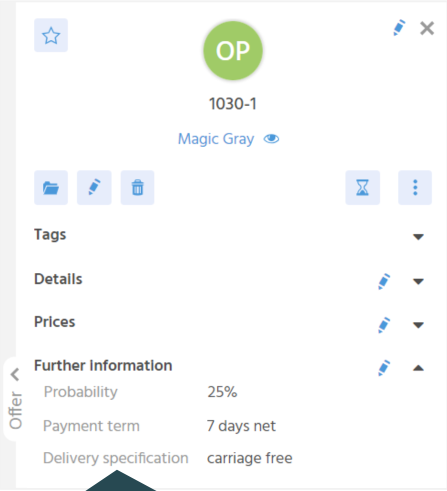


New offer version:
Offer items are to be adjusted. Version number is increased.

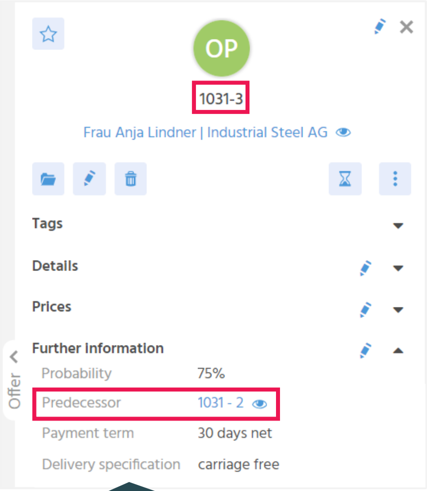
Copy offer:
A recurring identical offer is created for a customer. If necessary, create a new sales project. A new offer number is assigned.

Versioned offers

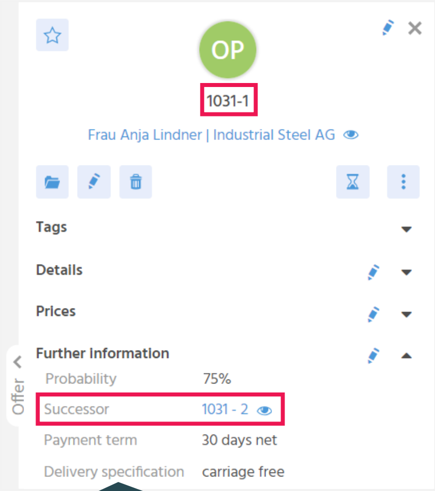
Predecessor and successor in the preview of the offer



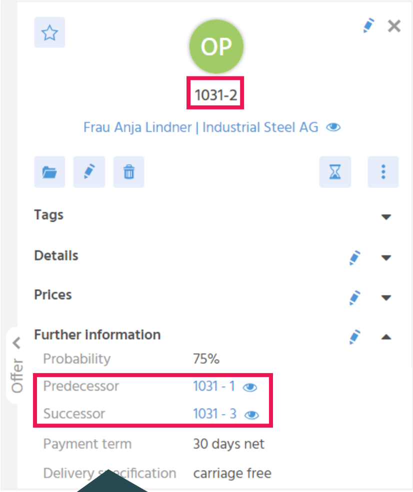
Offer without predecessor and successor.



Offer with predecessor.



Offer with successor.

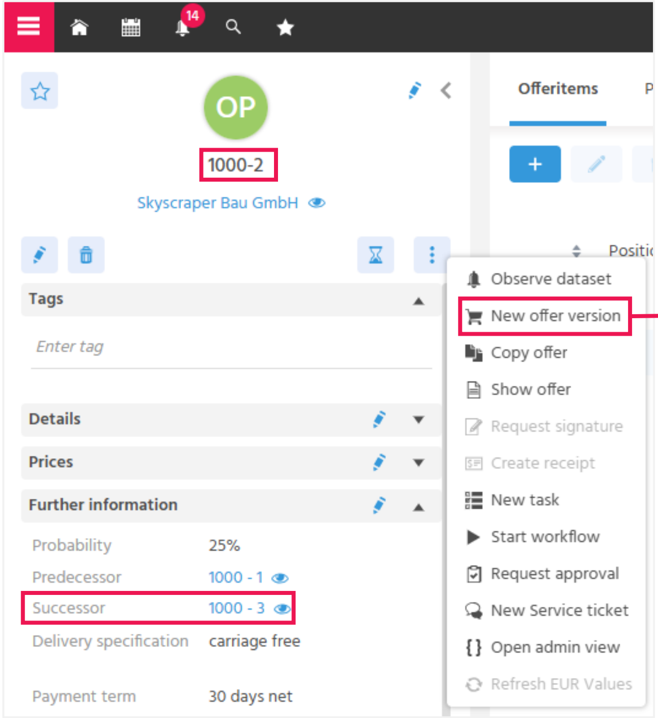


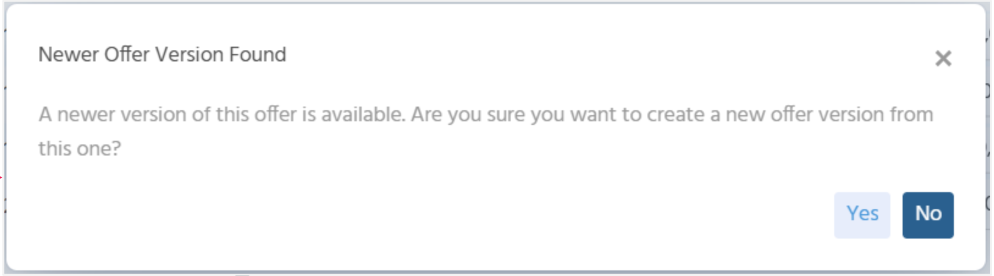
Offer with predecessor and successor.

Once the feature has been implemented, it only works for newly created offers. Predecessors and successors are still not displayed for existing offers with multiple offer versions.

Versioned offers

New offer version not from the latest version





If you do not create a new offer version from the latest offer version, you will be asked the above question. If you don't affirm the question, the new version will be given the highest version number, but the version in which you carried out the action will be used as the template.

Offer status

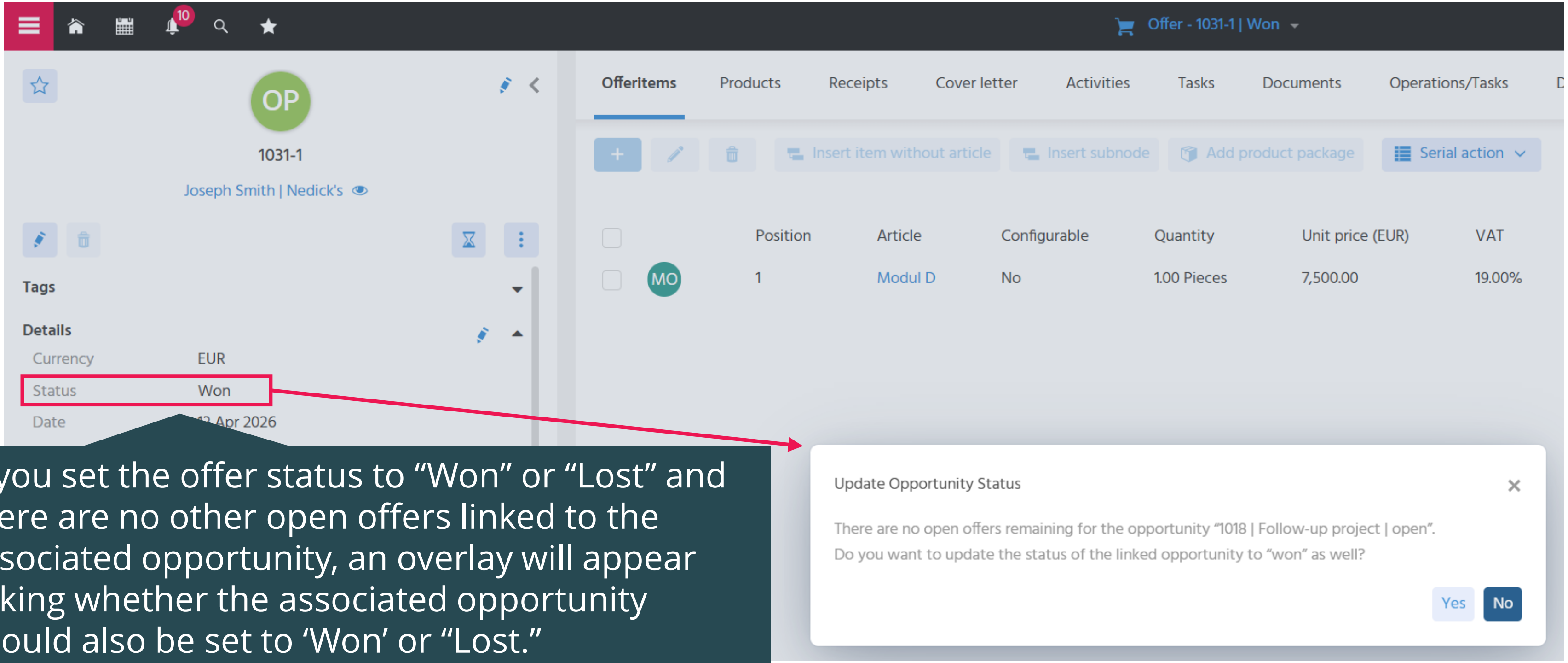
Offer status

Depending on the status, an offer can be processed as follows

Status	Processing option
Open	The offer can be edited.
To check	The offer cannot be edited. The approver may change the status.
Checked	The offer cannot be edited, but may be sent.
Approval denied	The offer may be revised. No offer document may be created or sent.
Sent	The offer cannot be edited, but the status can be adjusted.
Won	The offer cannot be edited.
Lost	The offer cannot be edited.

Offer status

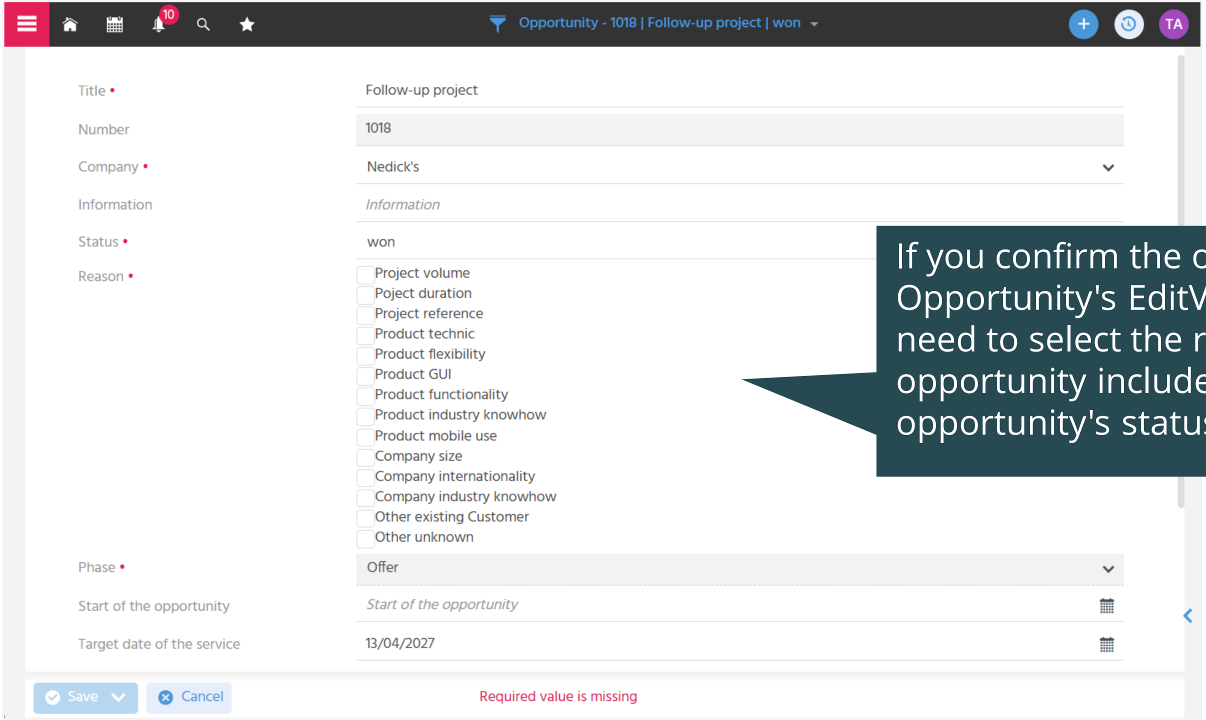
Automatically set the opportunity status based on the offer status



If you set the offer status to "Won" or "Lost" and there are no other open offers linked to the associated opportunity, an overlay will appear asking whether the associated opportunity should also be set to 'Won' or "Lost."

Offer status

Automatically set the opportunity status based on the offer status



If you confirm the overlay by clicking "Yes," the Opportunity's EditView will open, where you will need to select the reason for the closure. If the opportunity includes both won and lost deals, the opportunity's status will be set to "Partially Won."

Receipt

Check-lists

Classification

Dunning level

Opportunity

Contact | Qualification | Prospect | Offer | Negotiation | Deal

Planning

Offer

Contract

$ Receipt

Product

Price

As soon as the offer is won, receipts such as order confirmation, invoice or delivery note can be created from the offer.

Sales process

Target acquisition

Sales Dashboard

Conversion Rate

Sales forecast

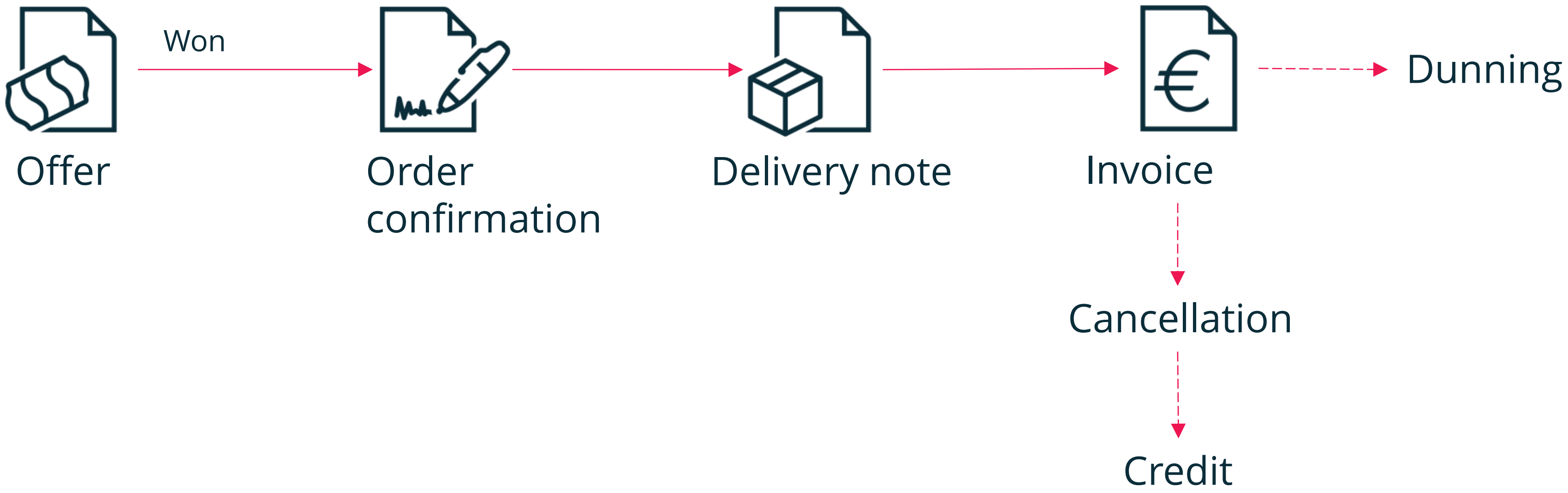
Sales analysis

To be created in advance by the administrator

In use “daily“ by end users

Receipt in general

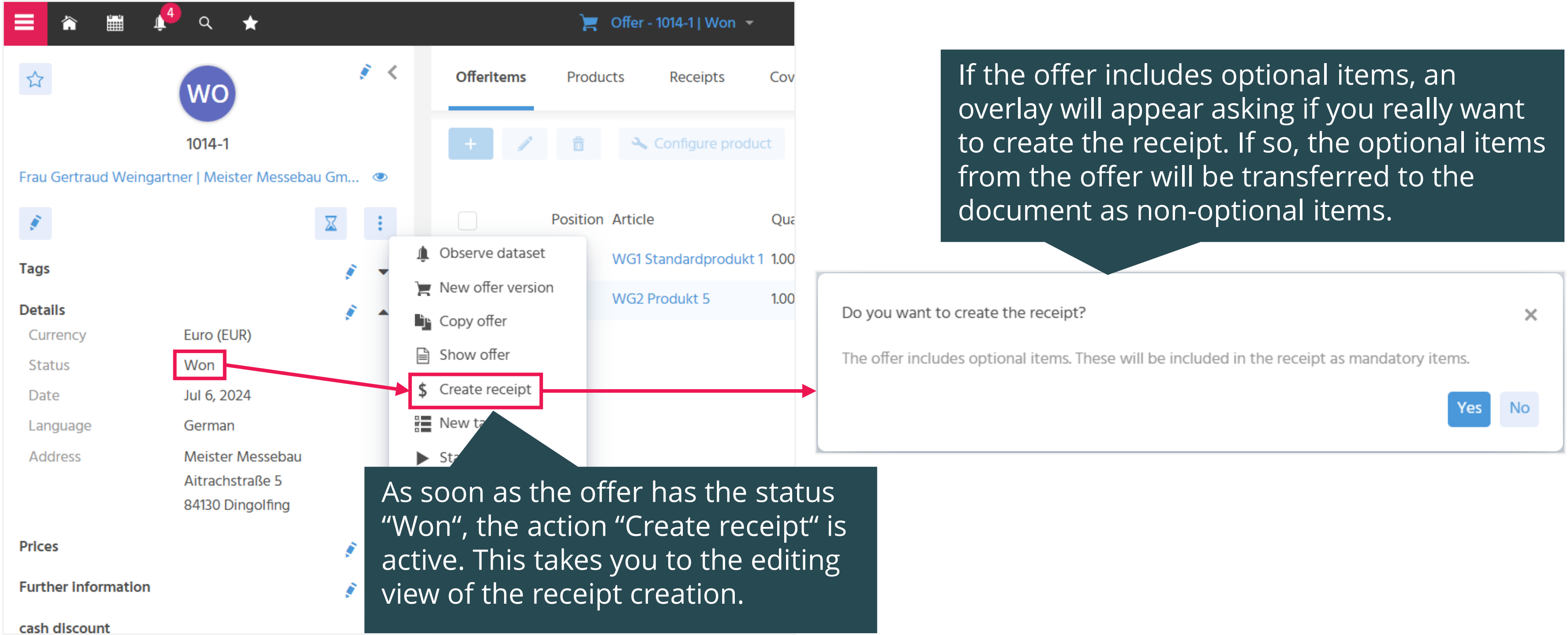
Receipt



Won
Offer
Order confirmation
Delivery note
Invoice
Dunning
Cancellation
Credit

Receipt

Excursus into the offer

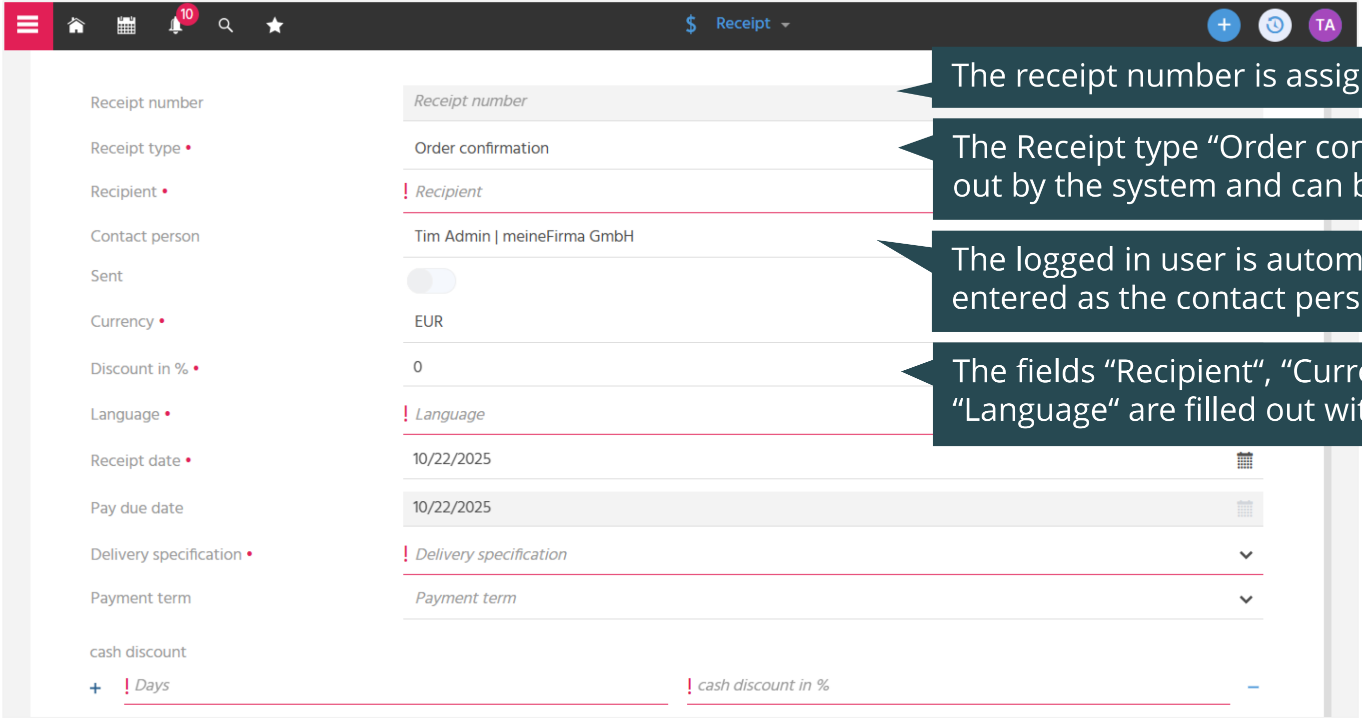


If the offer includes optional items, an overlay will appear asking if you really want to create the receipt. If so, the optional items from the offer will be transferred to the document as non-optional items.

As soon as the offer has the status “Won“, the action “Create receipt“ is active. This takes you to the editing view of the receipt creation.

Receipt

Create receipt



The receipt number is assigned by the system.

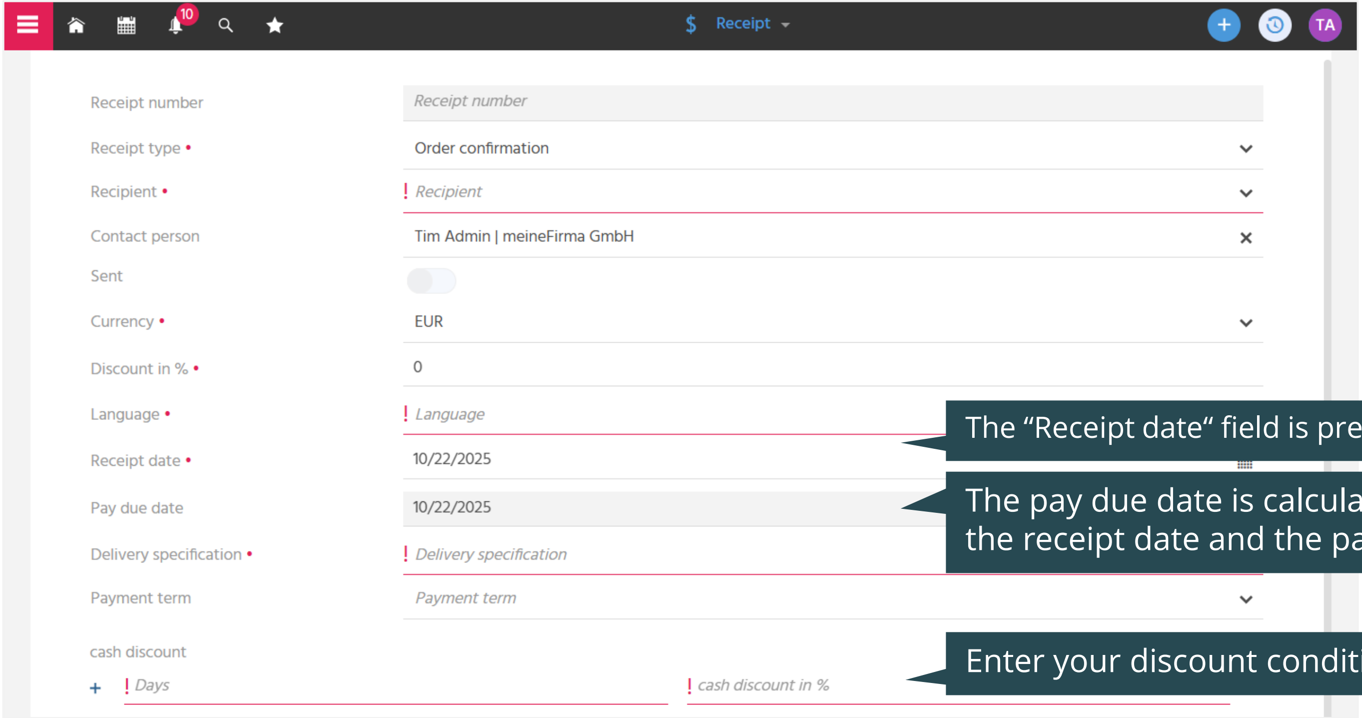
The Receipt type “Order confirmation” is filled out by the system and can be changed.

The logged in user is automatically entered as the contact person.

The fields “Recipient“, “Currency“, “Discount in %“ and “Language“ are filled out with the data from the offer.

Receipt

Create receipt



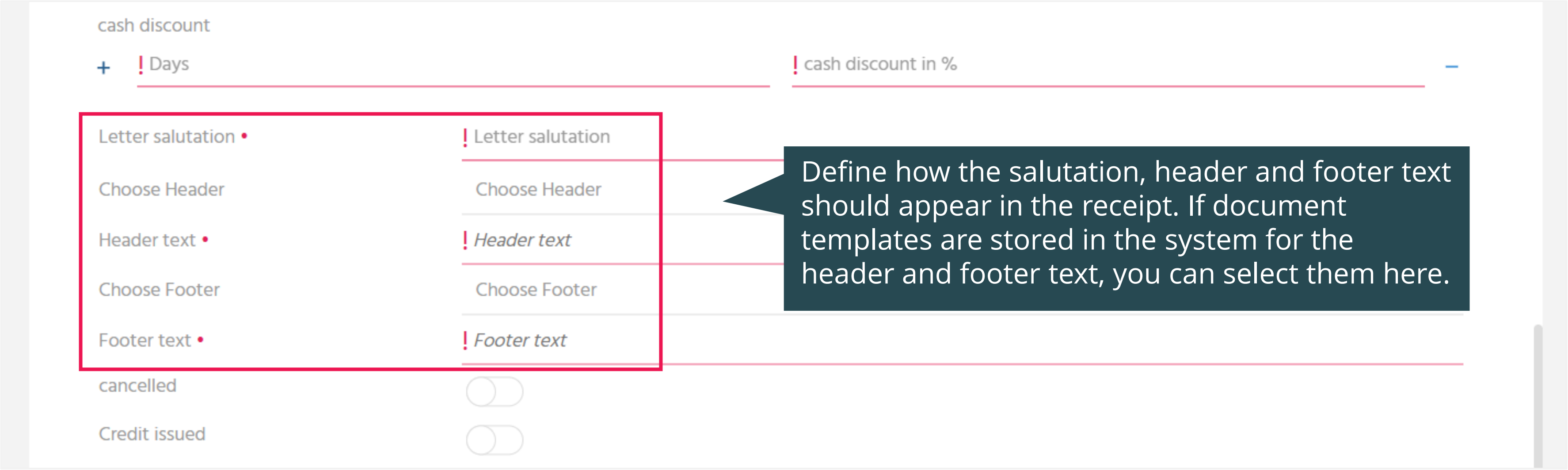
The “Receipt date“ field is preset with the current date.

The pay due date is calculated based on the receipt date and the payment terms.

Enter your discount conditions here.

Receipt

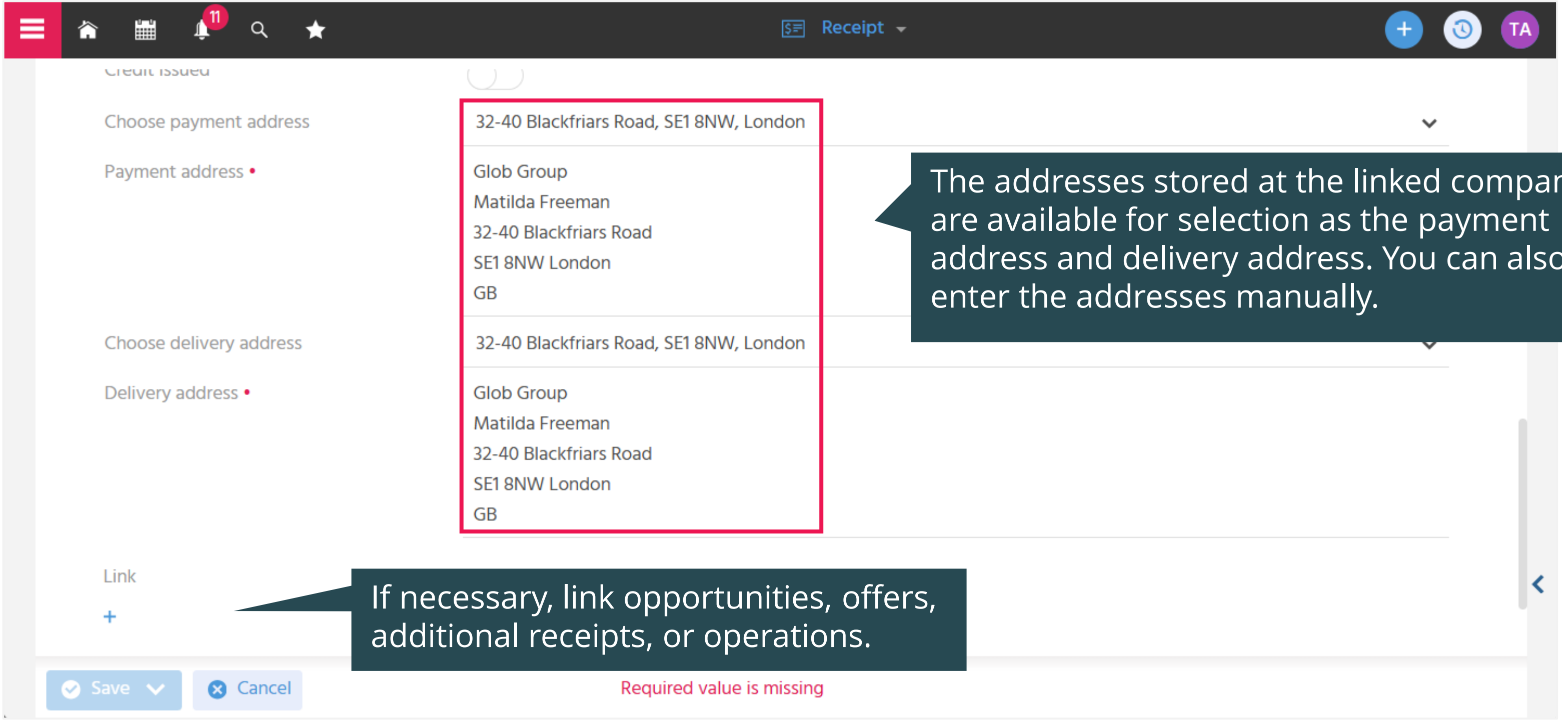
Create receipt



Define how the salutation, header and footer text should appear in the receipt. If document templates are stored in the system for the header and footer text, you can select them here.

Receipt

Create receipt

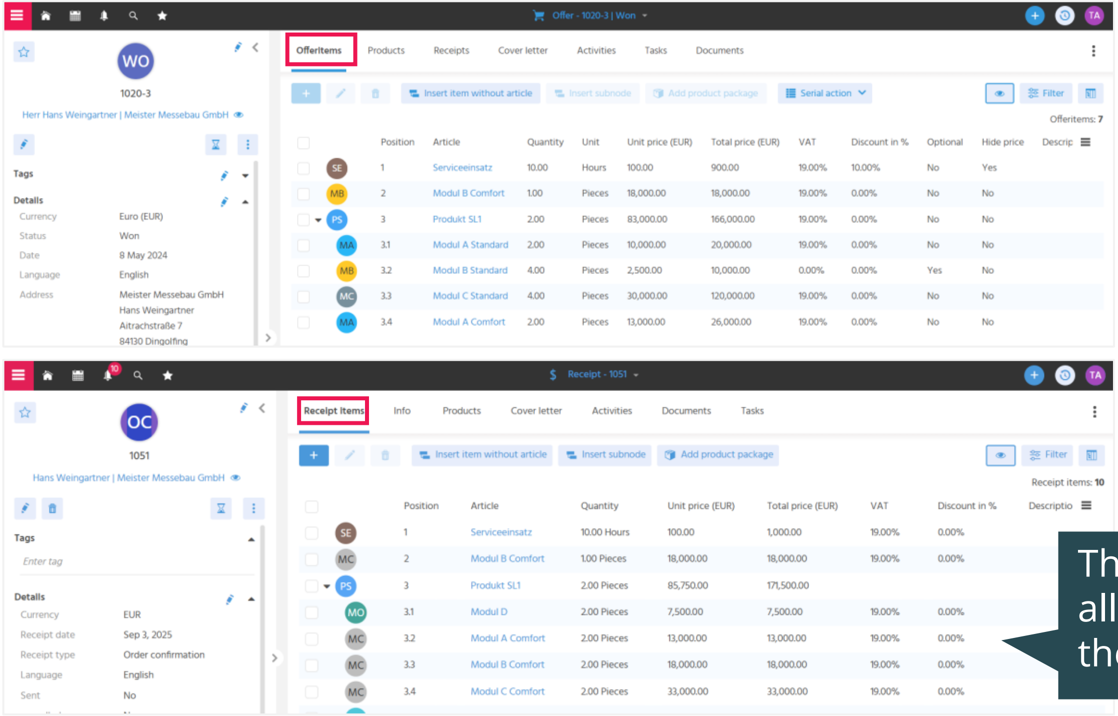


The addresses stored at the linked company are available for selection as the payment address and delivery address. You can also enter the addresses manually.

If necessary, link opportunities, offers, additional receipts, or operations.

Receipt

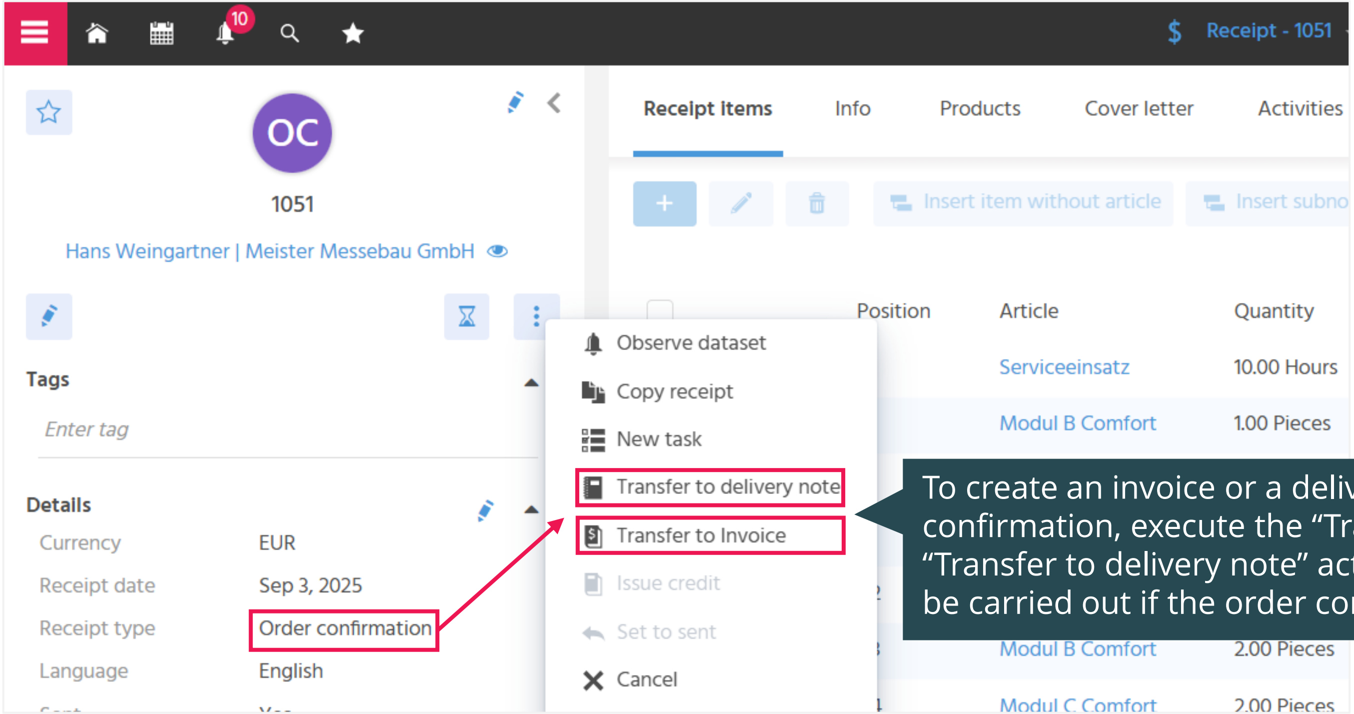
Order item



The receipt items are taken over with all information from the offer or from the receipt from which you started.

Receipt

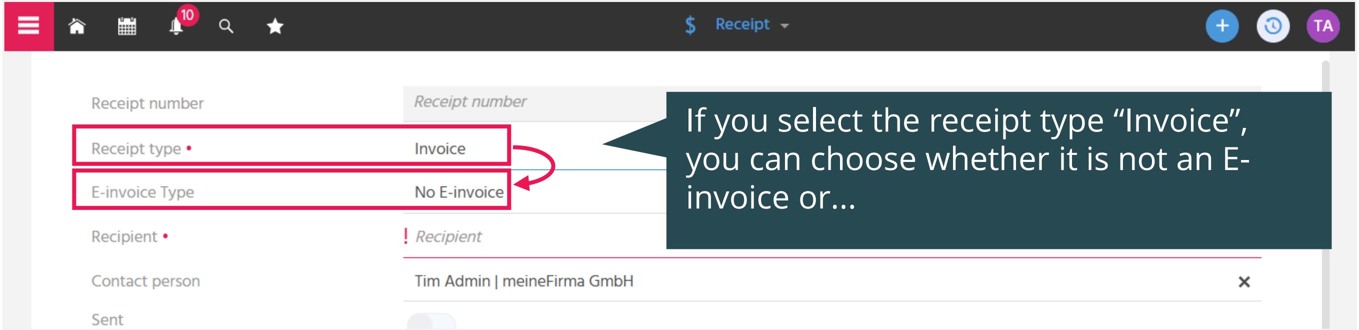
Transfer to delivery note/invoice



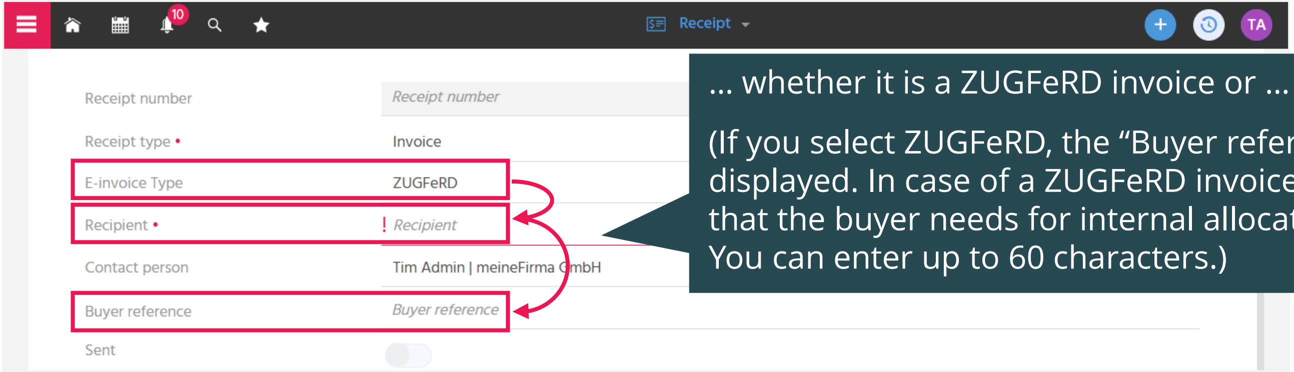
To create an invoice or a delivery note from the order confirmation, execute the “Transfer to invoice” or “Transfer to delivery note” action. The actions can only be carried out if the order confirmation has been sent.

Receipt

Create receipt - document types “Invoice”, “Credit”, “Cancellation”



If you select the receipt type “Invoice”, you can choose whether it is not an E-invoice or…

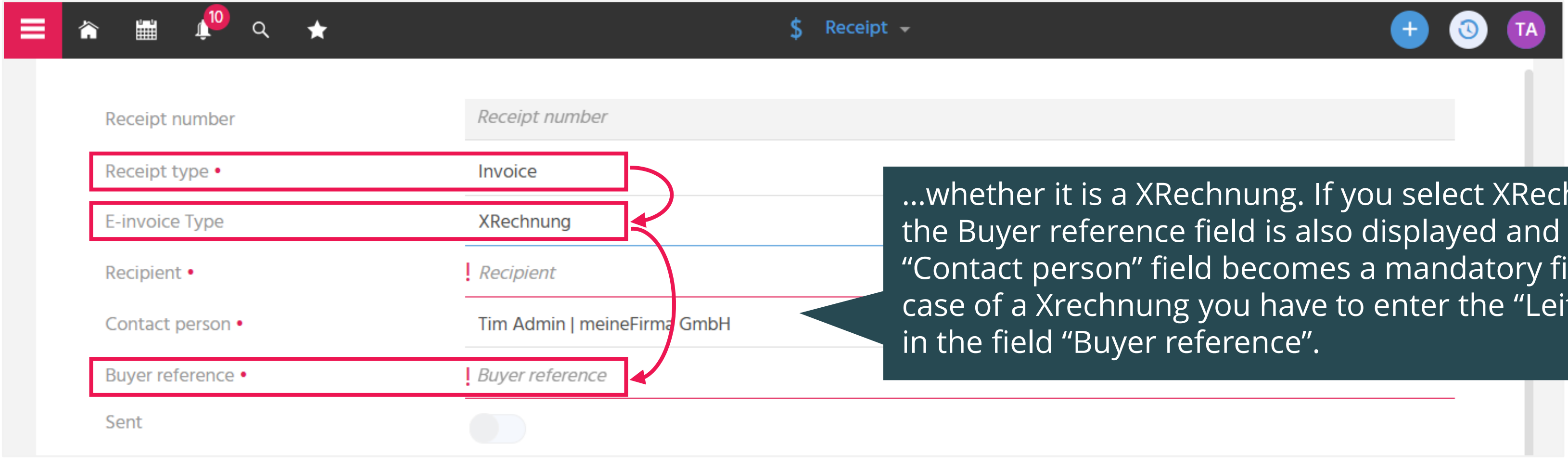


… whether it is a ZUGFeRD invoice or …

(If you select ZUGFeRD, the “Buyer reference” field will also be displayed. In case of a ZUGFeRD invoice, enter the information that the buyer needs for internal allocation of the invoice there. You can enter up to 60 characters.)

Receipt

Create receipt - document types “Invoice”, “Credit”, “Cancellation”



…whether it is a XRechnung. If you select XRechnung, the Buyer reference field is also displayed and the “Contact person” field becomes a mandatory field. In case of a Xrechnung you have to enter the “Leitweg-ID” in the field “Buyer reference”.

Excursus on laws and standards

Directive 2014/55/EU requires the use of E-invoices in the public sector. This was implemented in Germany by

- 2017: the E-invoicing Law
- 2018: the E-invoicing Ordinance (ERechV)

The E-invoicing Ordinance specifies that **suppliers to the federal government** are obliged to submit invoices electronically and in compliance with E-invoice (EN 16931) **from 27.11.2020**.

The Growth Opportunities Act specifies that

- **from 01.01. 25 domestic entrepreneurs** must be able to issue and receive **E-invoices for B2B sales**
- the format must comply with directive 2014/55/EU ergo EN 16931
- everything that does not comply with EN 16931 is an “other invoice” (postal, PDF, ...)
- there are the following transitional arrangements
  - 2025 – 2026: Paper invoices or other electronic invoices* permitted (the latter only with the consent of the recipient)
  - 2027: analogous to the previous year, if sales in the previous year < 800K€**
  - 2028 Only E-invoices (EN 16931-compliant)

EN 16931

- defines the semantic data model for the E-invoice
- Thus implements the directive technically

*EDI-Format inclusive
**EDI-Format 2027 still independent of turnover

Excursus on terms

Generic term

E-	invoice
electronically transmittable, receivable & processable	Invoices, cancellations, credit notes and other “document types”

Must contain structured data à la EN 16931, e.g.

```
<rsm:ExchangedDocument>
    <ram:ID>NUMFACT</ram:ID>
    <ram:TypeCode>380</ram:TypeCode>
```

Other invoice

All invoices that do not meet the requirements for E-invoices (paper, PDF, etc.)

Standardized formats

Format	XRechnung	ZUGFeRD* (FACTUR-X)
Structure	Pure XML file More mandatory fields in the XML (e.g. Buyer Reference = Leitweg-ID)	Hybrid: PDF/A-3 file with embedded XML file Different profiles: Minimum, Basic WL, Basic, EN16931, Extended and X-Invoice (can also be made as a hybrid in consultation with the recipient)
XML-Standard	UBL oder CII Universal Business Language und Cross Industrie Invoice are XML-based syntaxes	CII
Law/Applica-tion	Standard and mandatory for B2G in Germany since 2020	For B2B: mandatory in the “EN16931” profile since 2025

Implementation in the ADITO xRM

Professional

As an ADITO user, I can create invoices, cancelations and credit notes in XRechnung (version 3.0.1) or ZUGFeRD (version 2.3.2) format and send them to the recipient by e-mail.

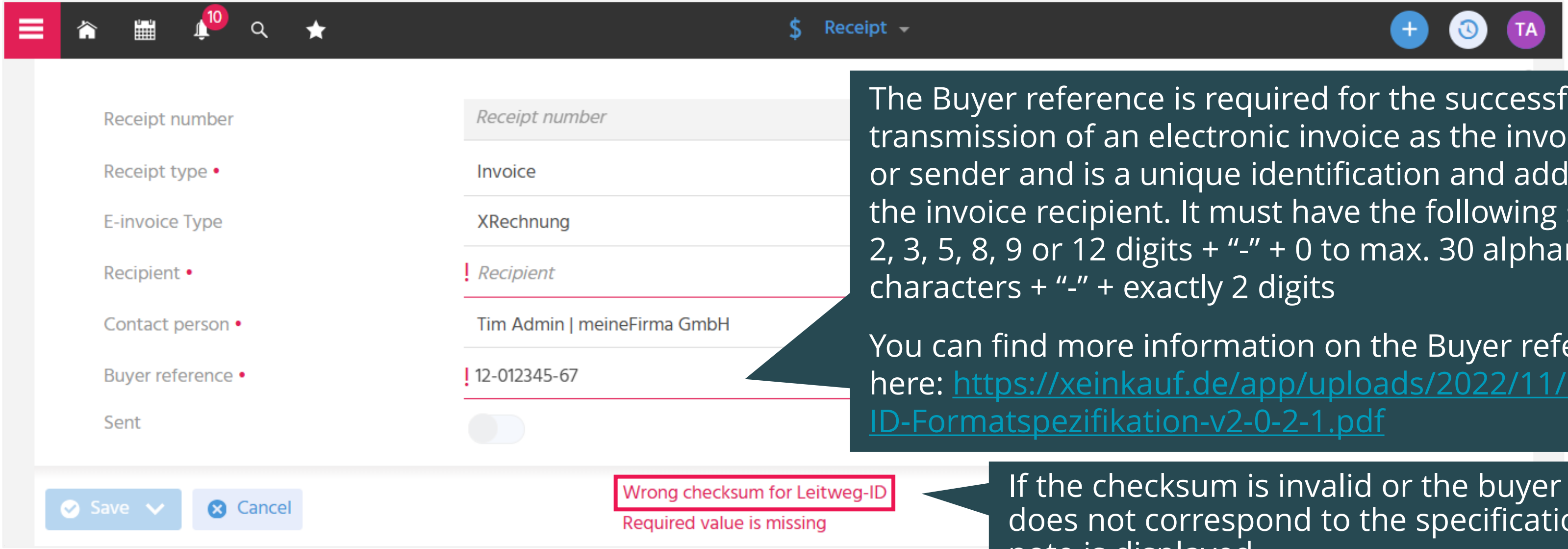
Technical

- new Java plugin with the open source library “mustangproject” (version 2.15.0)
- An XML file is generated and returned in xRM from the receipt data
- if you also transfer a PDF file to the plugin, this is converted to PDF/A-3 and provided with the previously created XML

Plugins/E-invoice - GitLab

Receipt

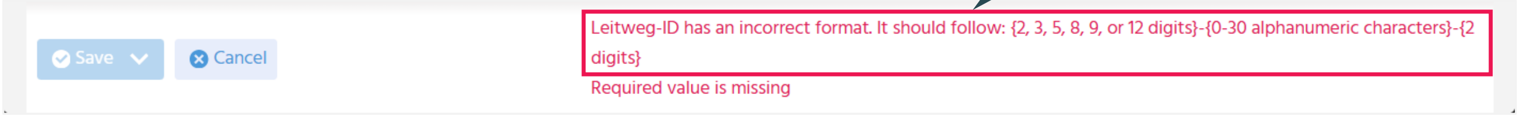
Create receipt - document types “Invoice”, “Credit”, “Cancellation”



The Buyer reference is required for the successful transmission of an electronic invoice as the invoice issuer or sender and is a unique identification and addressing of the invoice recipient. It must have the following structure: 2, 3, 5, 8, 9 or 12 digits + “-” + 0 to max. 30 alphanumeric characters + “-” + exactly 2 digits

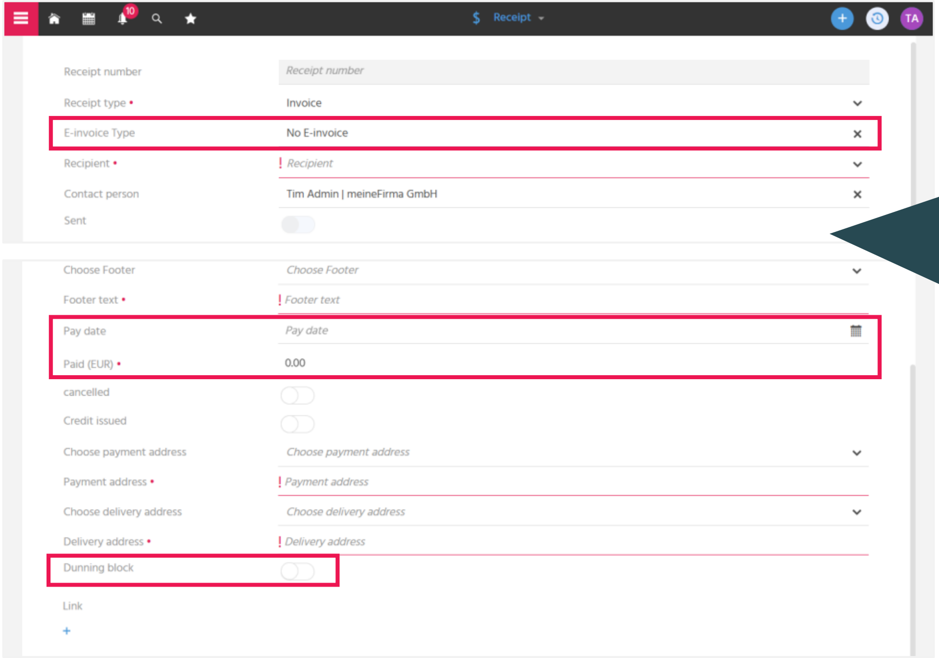
You can find more information on the Buyer reference here: https://xeinkauf.de/app/uploads/2022/11/Leitweg-ID-Formatspezifikation-v2-0-2-1.pdf

If the checksum is invalid or the buyer reference does not correspond to the specifications, a note is displayed.



Receipt

Create receipt - receipt type „Invoice“

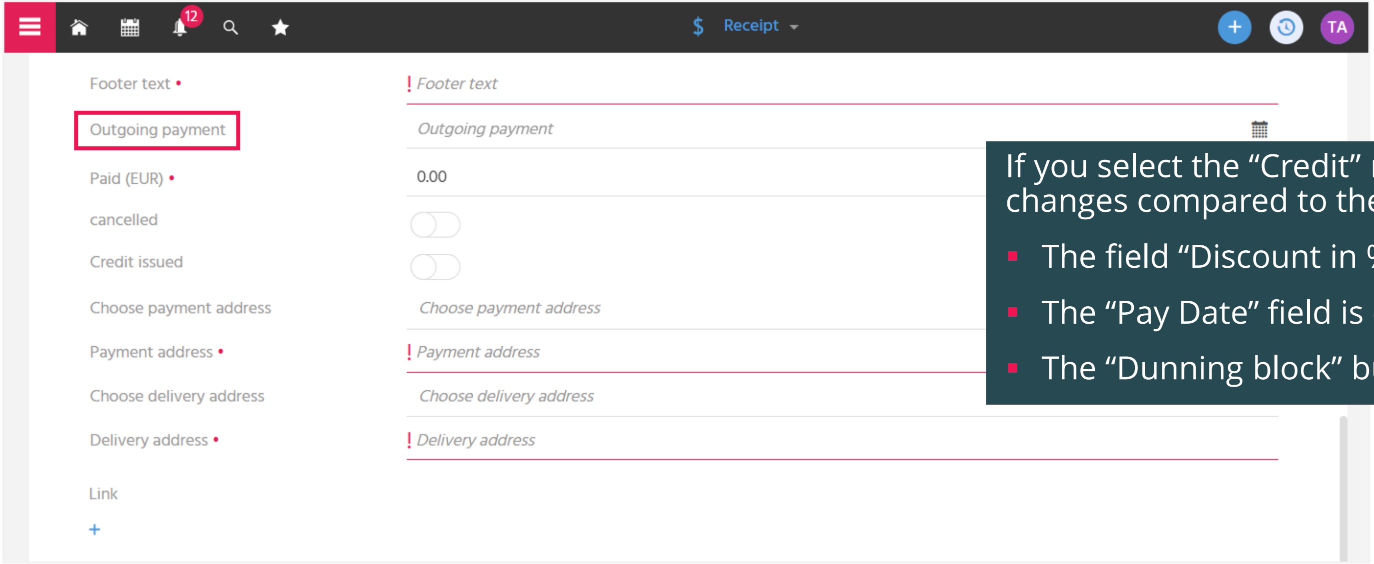


If you select the receipt type “Invoice“, the following fields are also displayed in addition:

- E-invoice Type
- Pay date
- Paid (EUR)
- Dunning block

Receipt

Create receipt – receipt type „Credit“

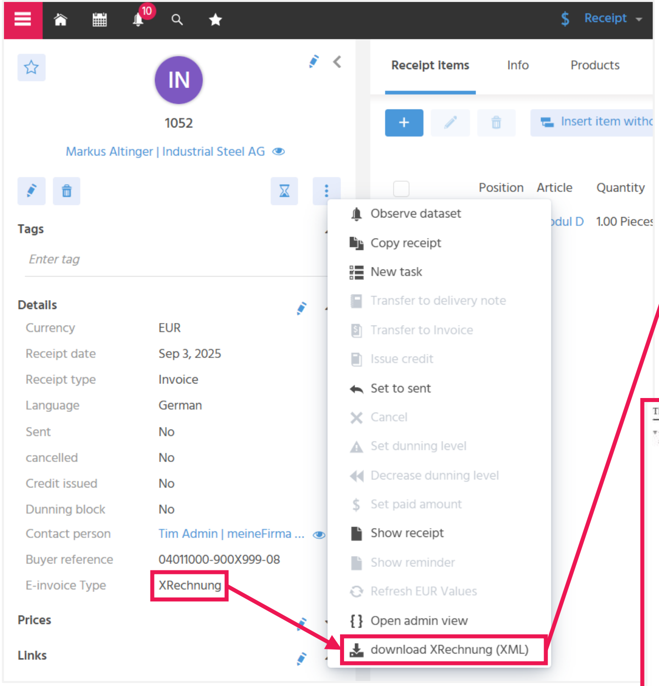


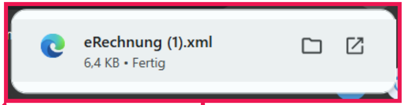
If you select the “Credit” receipt type, the following changes compared to the invoice:

- The field “Discount in %” is not displayed
- The “Pay Date” field is called “Outgoing payment”
- The “Dunning block” button is not displayed

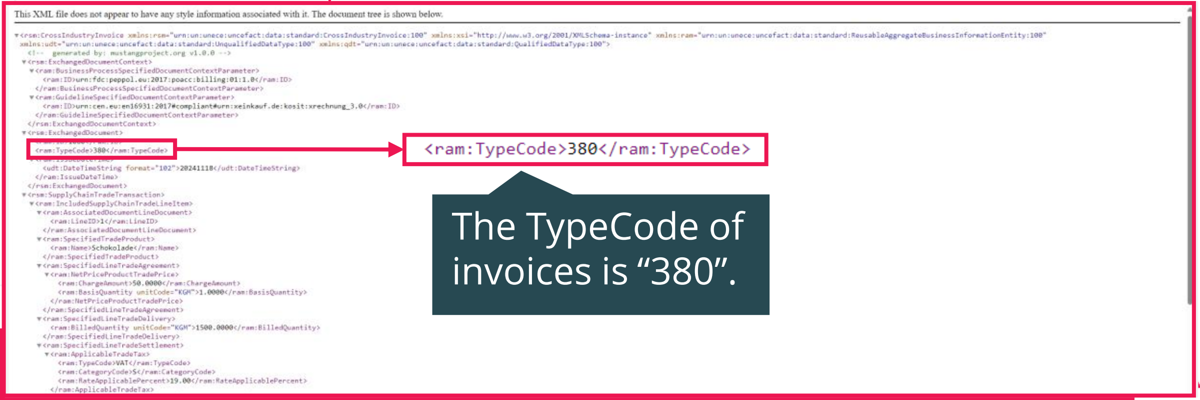
Receipt

Download XRechnung (XML)





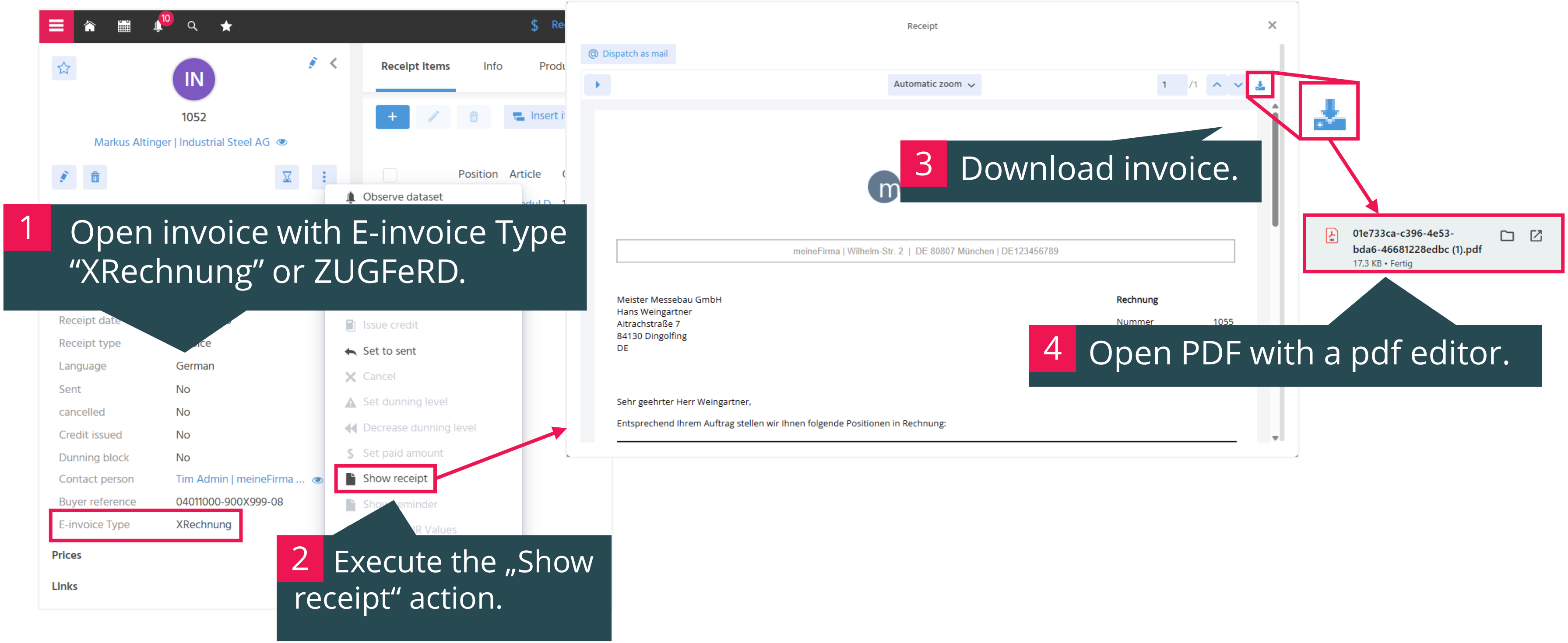
For the E-invoice Type “XRechnung”, you will find the action “download XRechnung (XML)”.



The TypeCode of invoices is “380”.

Receipt

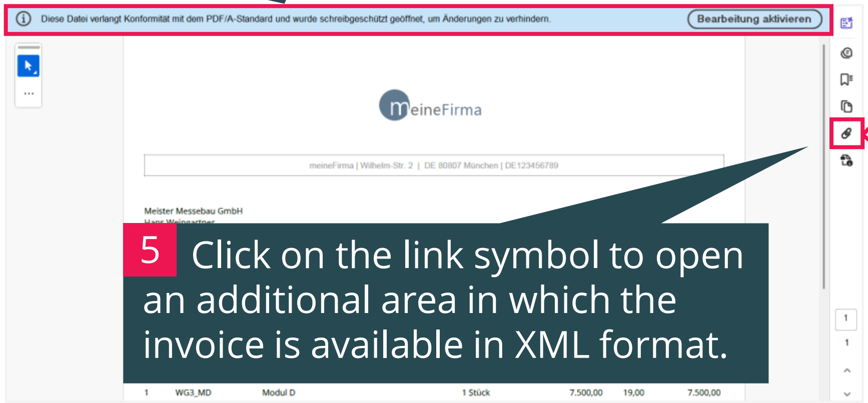
Open invoice as PDF including XML file



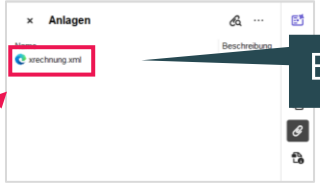
Receipt

Open invoice as PDF including XML file

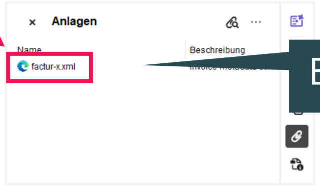
The PDF is opened read-only.



5 Click on the link symbol to open an additional area in which the invoice is available in XML format.



E-invoice Type „XRechnung“

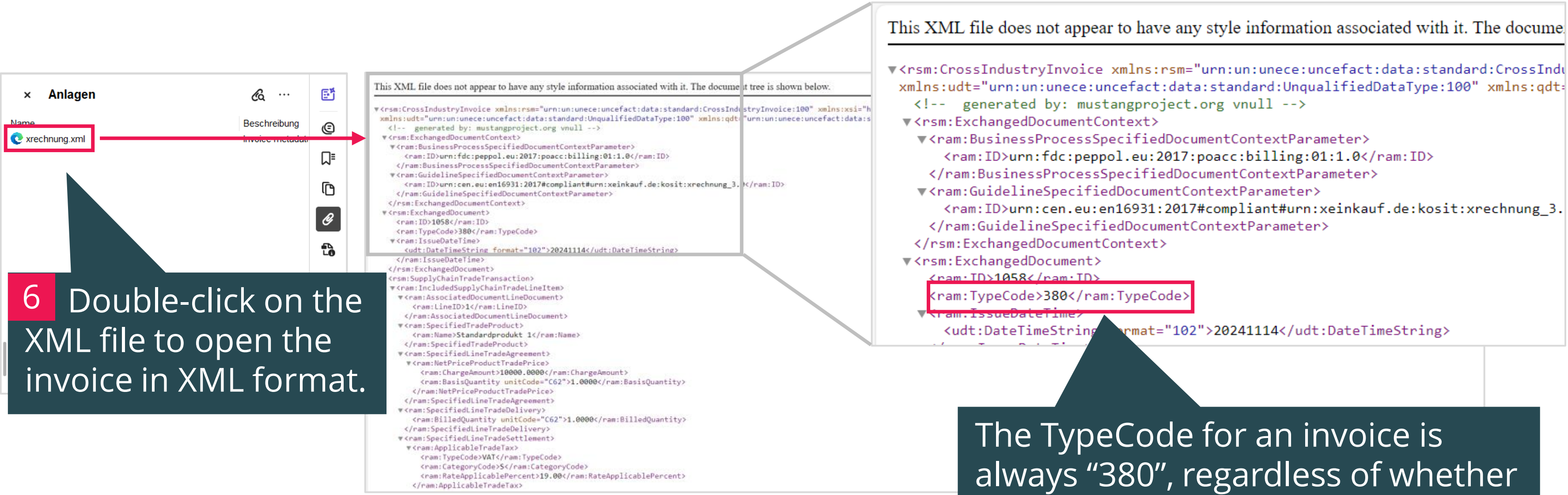


E-invoice Type „ZUGFeRD“

If no e-mail address is stored for the recipient, the PDF will open without an attachment.

Receipt

Open invoice as PDF including XML file

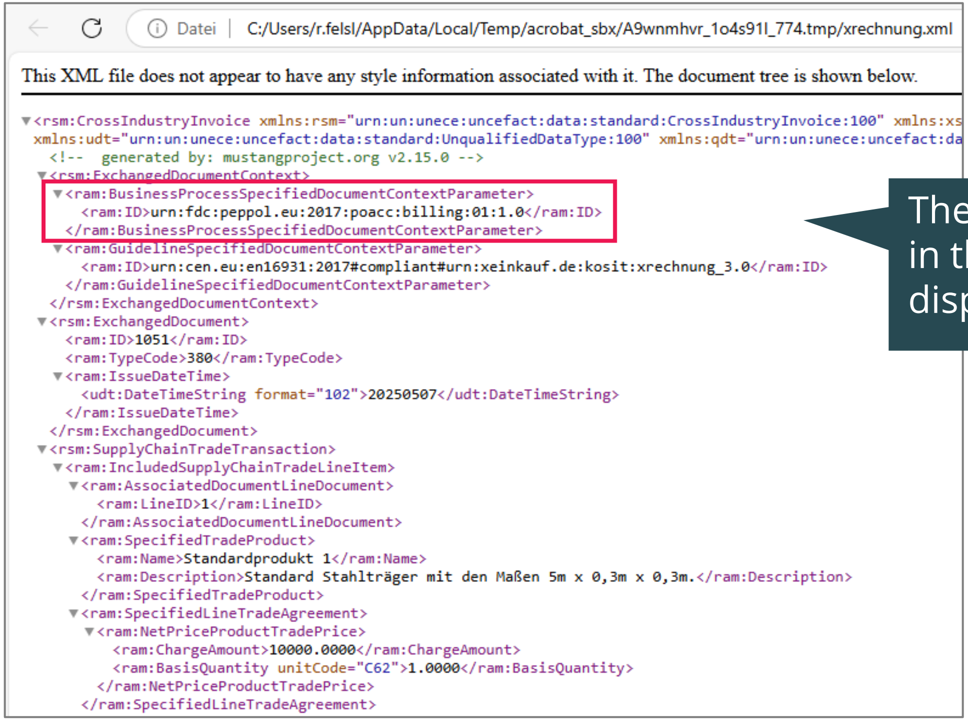


6 Double-click on the XML file to open the invoice in XML format.

The TypeCode for an invoice is always “380”, regardless of whether it is XRechnung or ZUGFeRD.

Receipt

Difference xml „XRechnung“ and xml „ZUGFeRD“


Datei | C:/Users/r.felsl/AppData/Local/Temp/acrobat_sbx/A9wnmhvr_1o4s91l_774.tmp/xrechnung.xml

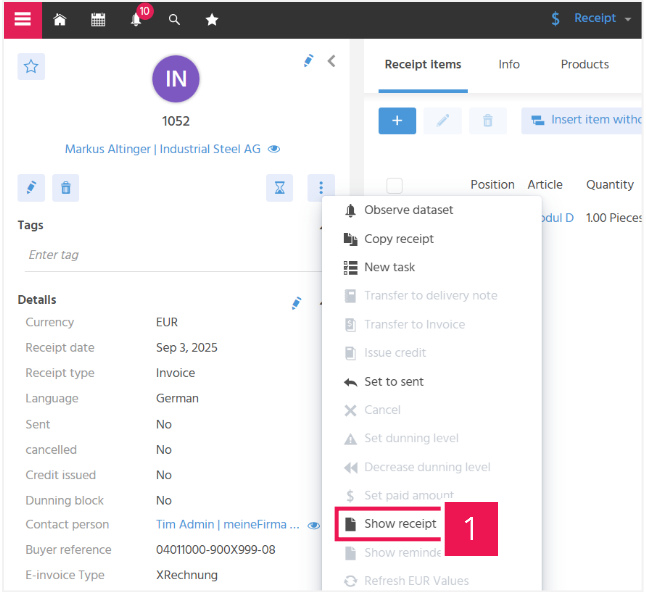
This XML file does not appear to have any style information associated with it. The document tree is shown below.

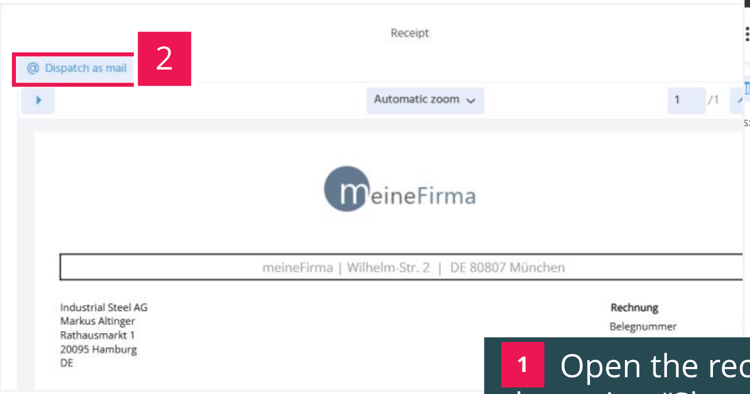

```
▼<rsm:CrossIndustryInvoice xmlns:rsm="urn:un:unece:uncefact:data:standard:CrossIndustryInvoice:100" xmlns:xs
 xmlns:udt="urn:un:unece:uncefact:data:standard:UnqualifiedDataType:100" xmlns:qdt="urn:un:unece:uncefact:da
  <!-- generated by: mustangproject.org v2.15.0 -->
 ▼<rsm:ExchangedDocumentContext>
  ▼<ram:BusinessProcessSpecifiedDocumentContextParameter>
     <ram:ID>urn:fdc:peppol.eu:2017:poacc:billing:01:1.0</ram:ID>
   </ram:BusinessProcessSpecifiedDocumentContextParameter>
  ▼<ram:GuidelineSpecifiedDocumentContextParameter>
     <ram:ID>urn:cen.eu:en16931:2017#compliant#urn:xeinkauf.de:kosit:xrechnung_3.0</ram:ID>
   </ram:GuidelineSpecifiedDocumentContextParameter>
  </rsm:ExchangedDocumentContext>
 ▼<rsm:ExchangedDocument>
   <ram:ID>1051</ram:ID>
   <ram:TypeCode>380</ram:TypeCode>
  ▼<ram:IssueDateTime>
     <udt:DateTimeString format="102">20250507</udt:DateTimeString>
   </ram:IssueDateTime>
  </rsm:ExchangedDocument>
 ▼<rsm:SupplyChainTradeTransaction>
  ▼<ram:IncludedSupplyChainTradeLineItem>
   ▼<ram:AssociatedDocumentLineDocument>
      <ram:LineID>1</ram:LineID>
    </ram:AssociatedDocumentLineDocument>
   ▼<ram:SpecifiedTradeProduct>
      <ram:Name>Standardprodukt 1</ram:Name>
      <ram:Description>Standard Stahlträger mit den Maßen 5m x 0,3m x 0,3m.</ram:Description>
    </ram:SpecifiedTradeProduct>
   ▼<ram:SpecifiedLineTradeAgreement>
    ▼<ram:NetPriceProductTradePrice>
       <ram:ChargeAmount>10000.0000</ram:ChargeAmount>
       <ram:BasisQuantity unitCode="C62">1.0000</ram:BasisQuantity>
     </ram:NetPriceProductTradePrice>
    </ram:SpecifiedLineTradeAgreement>
```

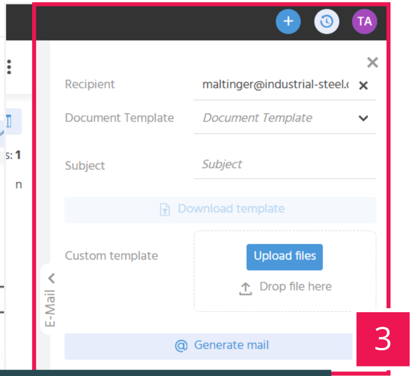

The marked lines can only be found in the XRechnung. They are not displayed in ZUGFeRD xml files.

Receipt

Send receipt by e-mail







1 Open the receipt as a PDF using the action “Show receipt“.

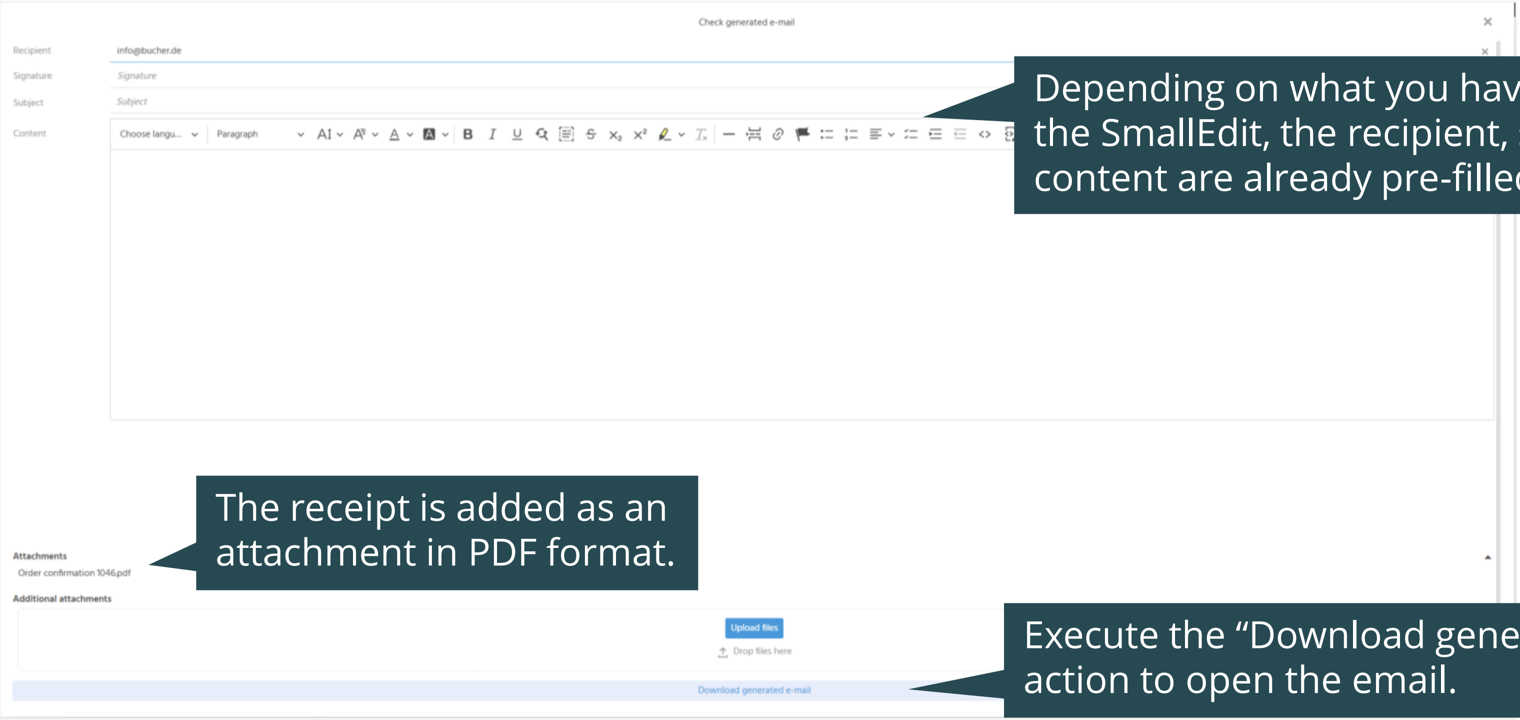
2 Click on “Dispatch as mail“. This opens a SmallEdit.

3 Select a recipient and a document template, enter the subject for the e-mail to be sent and click the “Generate mail“ button.

You can **use AI features when creating emails** if you are authorized to do so. For more information, see the documentation “Document templates, writing letters & emails.”

Receipt

Send receipt by e-mail



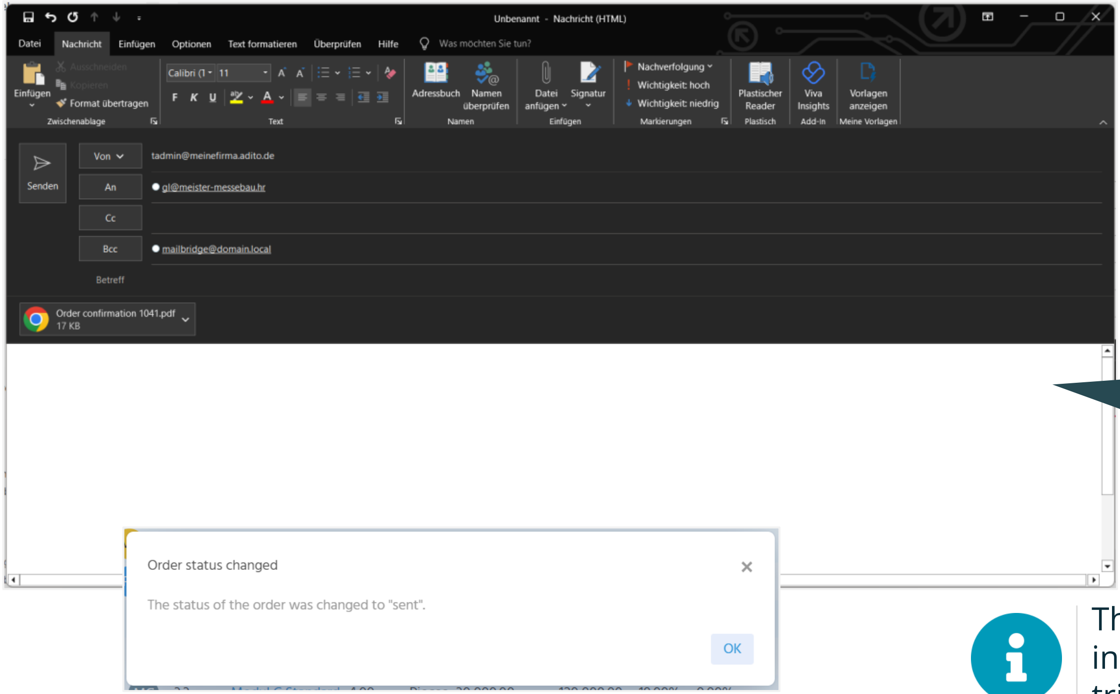
Depending on what you have defined in the SmallEdit, the recipient, subject, and content are already pre-filled here.

The receipt is added as an attachment in PDF format.

Execute the “Download generated e-mail” action to open the email.

Receipt

Send receipt by e-mail

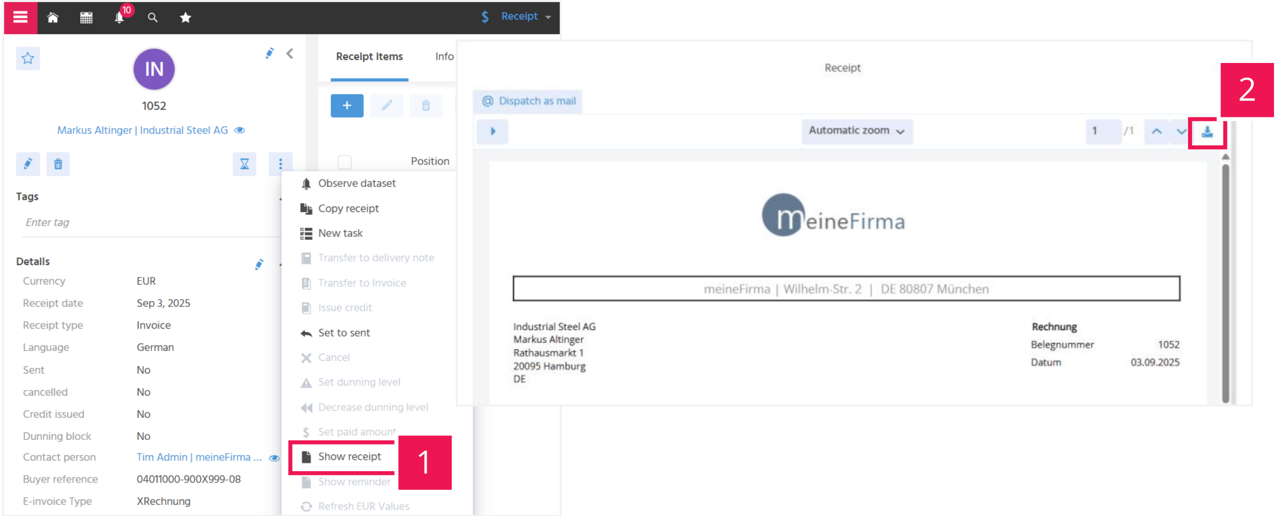


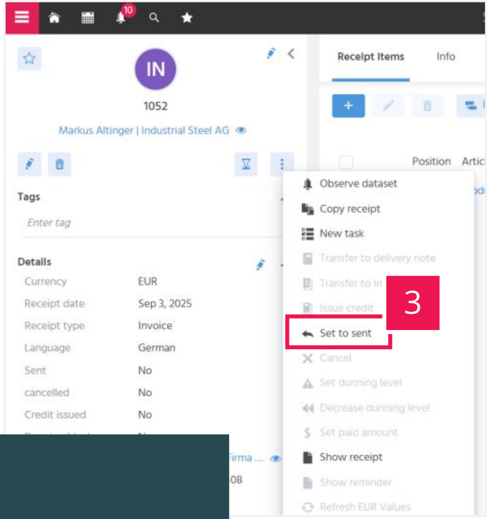
The email opens and you get the info that the status of the receipt has been set to “sent“.

The PDF is automatically read-only and includes an attached XML file when you trigger the e-mail dispatch for a XRechnung.

Receipt

Send receipt by post

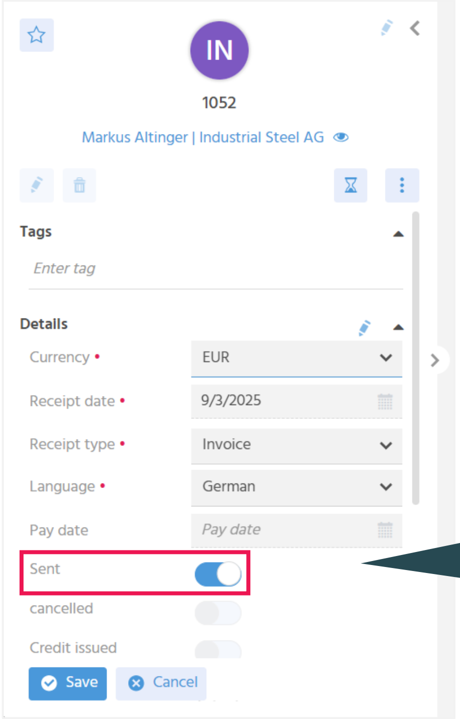




1. Open the receipt as a PDF using the action “Show receipt“.
2. Download the receipt and print it out.
3. Set the status of the receipt to “sent“ using the “Set to sent“ action.

Receipt

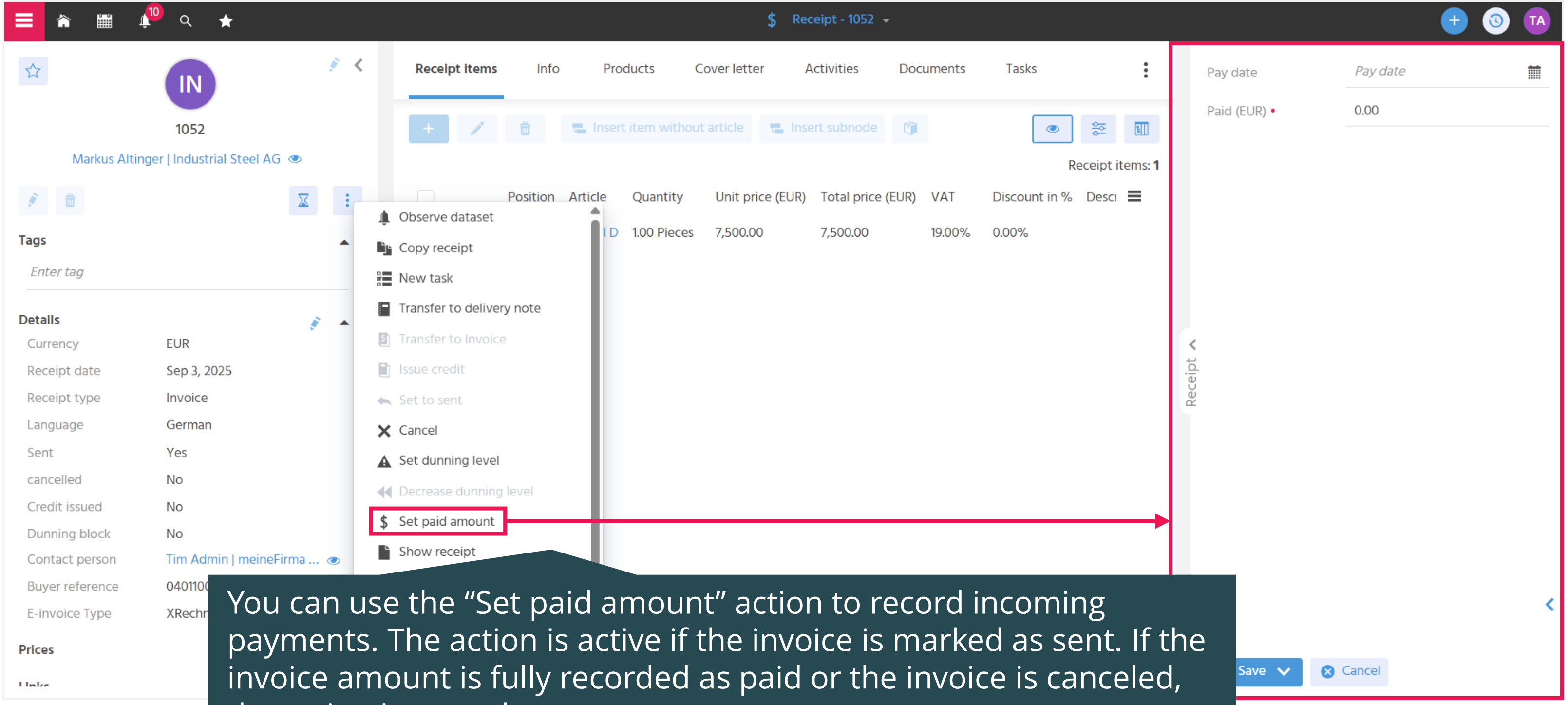
Sent receipts



As soon as a receipt has been marked as “Sent”, the data in the “Receipt items”, “Info” and “Cover letter” tabs can no longer be changed. Users with the “Administrator” role can deactivate the “Sent” button so that changes are possible again.

Receipt

Set paid amount



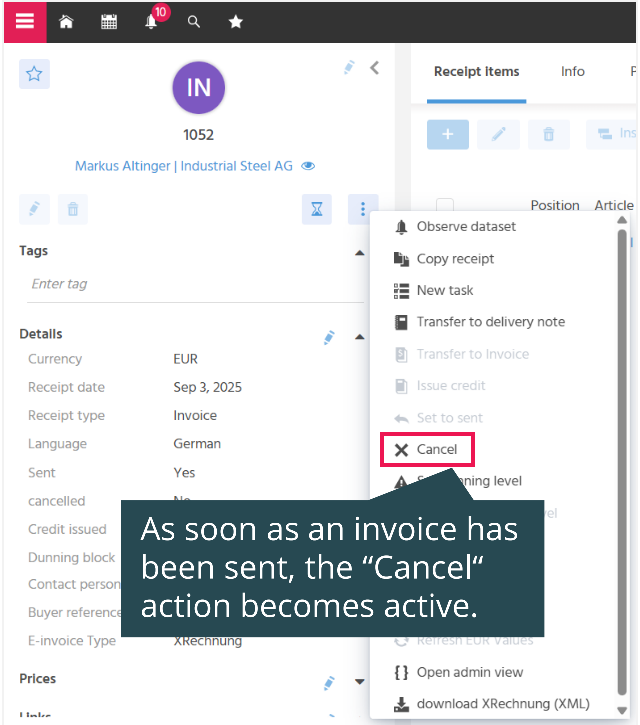
You can use the “Set paid amount” action to record incoming payments. The action is active if the invoice is marked as sent. If the invoice amount is fully recorded as paid or the invoice is canceled, the action is greyed out.

Receipt

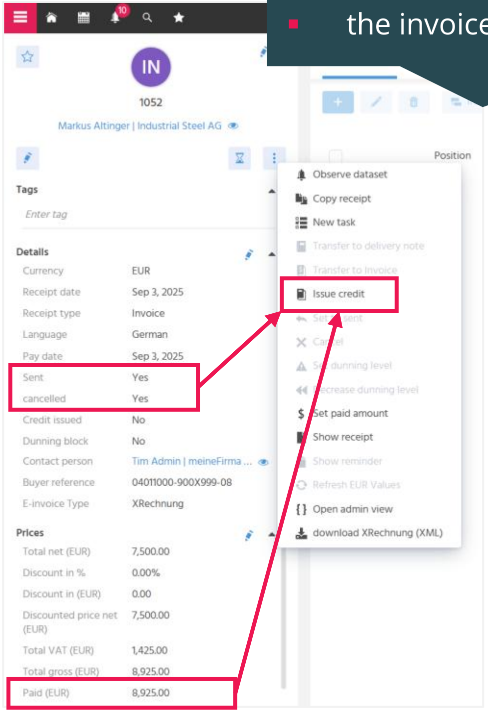
Cancellation and credit note

Creating a credit note from an invoice is possible when

- the invoice has the status “Sent“,
- a paid amount is deposited with the invoice and
- the invoice is cancelled.

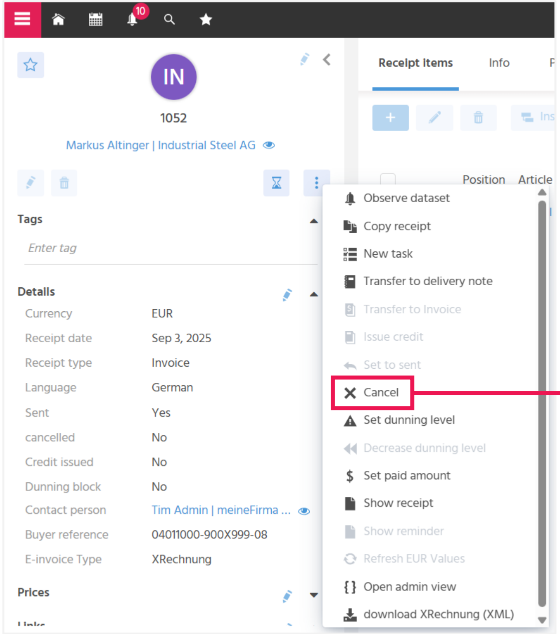


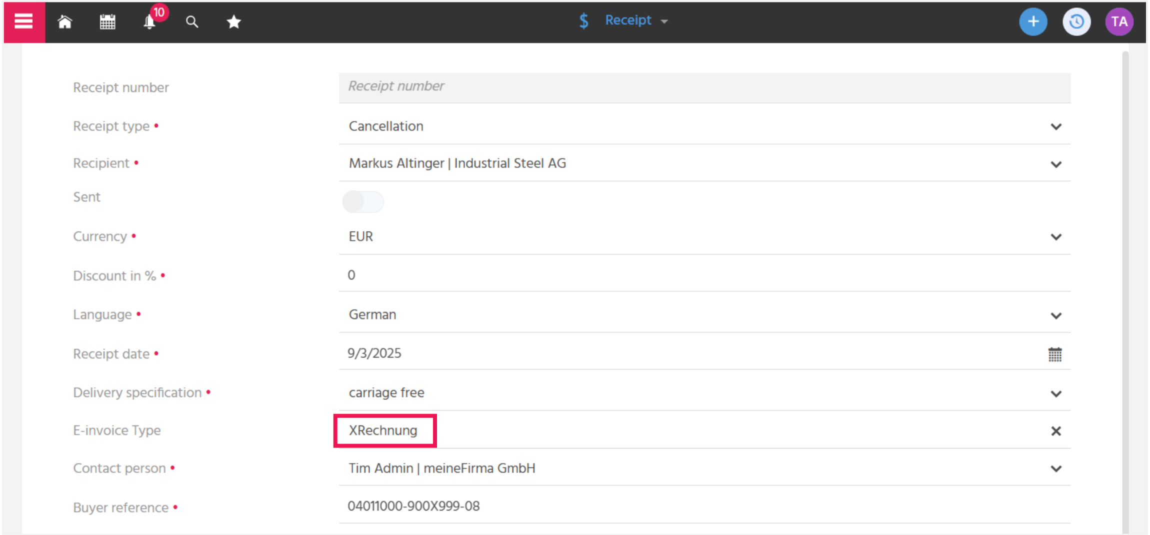
As soon as an invoice has been sent, the “Cancel“ action becomes active.



Receipt

Cancel XRechnung





If you want to send a cancellation receipt in XML format, select the E-invoice Type “XRechnung” here too. The buyer reference is automatically taken from the invoice.

Receipt

Cancel XRechnung

Diese Datei verlangt Konformität mit dem PDF/A-Standard und wurde schreibgeschützt geöffnet, um Änderungen zu verhindern. **Bearbeitung aktivieren**

1	WG3_MD	Modul D	-1 Stück	73.100,00	19,00	-73.100,00
1.1	WG3003-SL	Produkt SL3	-1 Stück	73.000,00	19,00	-73.000,00
1.1.1	WG3_MC-C	Modul C Comfort	-1 Stück	33.000,00	19,00	-33.000,00
1.1.2	WG3_MA-S	Modul A Standard	-1 Stück	10.000,00	19,00	-10.000,00
1.1.3	WG3_MB-S	Modul B Standard	-2 Stück	15.000,00	19,00	-30.000,00
1.2	S001	Serviceeinsatz	-1 Stunden	100,00	19,00	-100,00
2	WG1003	Standardprodukt 3	-1 Stück	171.547,50	19,00	-171.547,50
2.1	ET1002	Ersatzteil 1.002	-1 Stück	47,50	19,00	-47,50
2.2	WG3001-SL	Produkt SL1	-1 Stück	171.500,00	19,00	-171.500,00
2.2.1	WG3_MD	Modul D	-1 Stück	7.500,00	19,00	-7.500,00
2.2.2	WG3_MA-C	Modul A Comfort	-1 Stück	13.000,00	19,00	-13.000,00
2.2.3	WG3_MB-C	Modul B Comfort	-1 Stück	18.000,00	19,00	-18.000,00
2.2.4	WG3_MC-C	Modul C Comfort	-1 Stück	33.000,00	19,00	-33.000,00
2.2.5	WG3_MC-S	Modul C Standard	-2 Stück	30.000,00	19,00	-60.000,00
2.2.6	WG3_MA-S	Modul A Standard	-1 Stück	10.000,00	19,00	-10.000,00
2.2.7	WG3_MB-S	Modul B Standard	-2 Stück	15.000,00	19,00	-30.000,00

Summe netto	-244.647,50
Rabatt 10%	-24.464,75
zzgl.Summe USt	-41.834,72
Summe brutto	**-262.017,47**

In the cancellation receipt all amounts are displayed with a negative sign.

Anlagen

Name	Beschreibung
xrechnung.xml	Invoice metadat

The TypeCode for the cancellation receipt is always “384”.


```
</rsm:ExchangedDocu
<rsm:ExchangedDocu
  <ram:ID>1056</ram:ID>
  <ram:TypeCode>384</ram:TypeCode>
  <ram:IssueDateTime>
    <udt:DateTimeString format="102">20241128</udt:DateTimeString>
  </ram:IssueDateTime>
</rsm:ExchangedDocument>
```

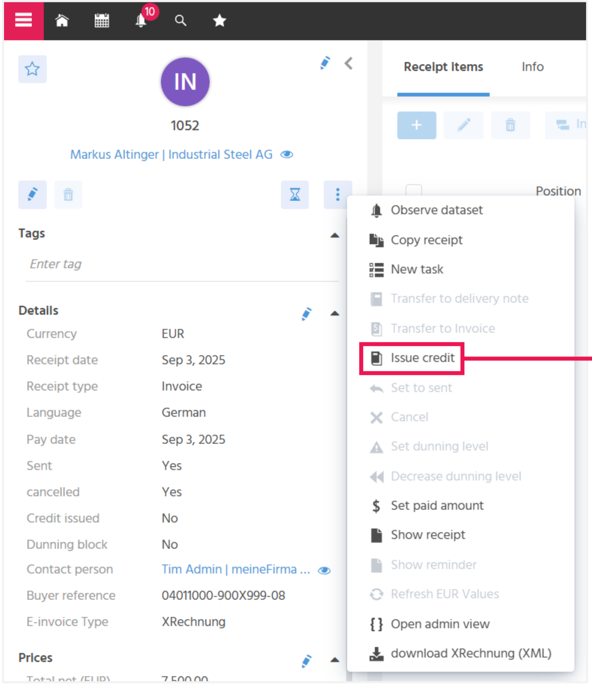


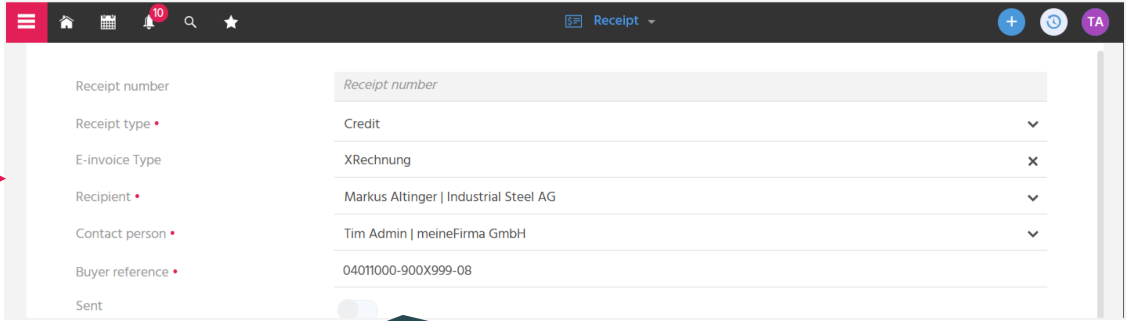
```
<ram:SpecifiedTradeSettlementHeaderMonetarySummation>
  <ram:LineTotalAmount>-244647.50</ram:LineTotalAmount>
  <ram:ChargeTotalAmount>0.00</ram:ChargeTotalAmount>
  <ram:AllowanceTotalAmount>-24464.75</ram:AllowanceTotalAmount>
  <ram:TaxBasisTotalAmount>-220182.75</ram:TaxBasisTotalAmount>
  <ram:TaxTotalAmount currencyID="EUR">-41834.72</ram:TaxTotalAmount>
  <ram:GrandTotalAmount>-262017.47</ram:GrandTotalAmount>
  <ram:TotalPrepaidAmount>0.00</ram:TotalPrepaidAmount>
  <ram:DuePayableAmount>-262017.47</ram:DuePayableAmount>
</ram:SpecifiedTradeSettlementHeaderMonetarySummation>
```


In the XML file the amounts are also transmitted with a negative sign.

Receipt

Create credit note with E-invoice Type “XRechnung”

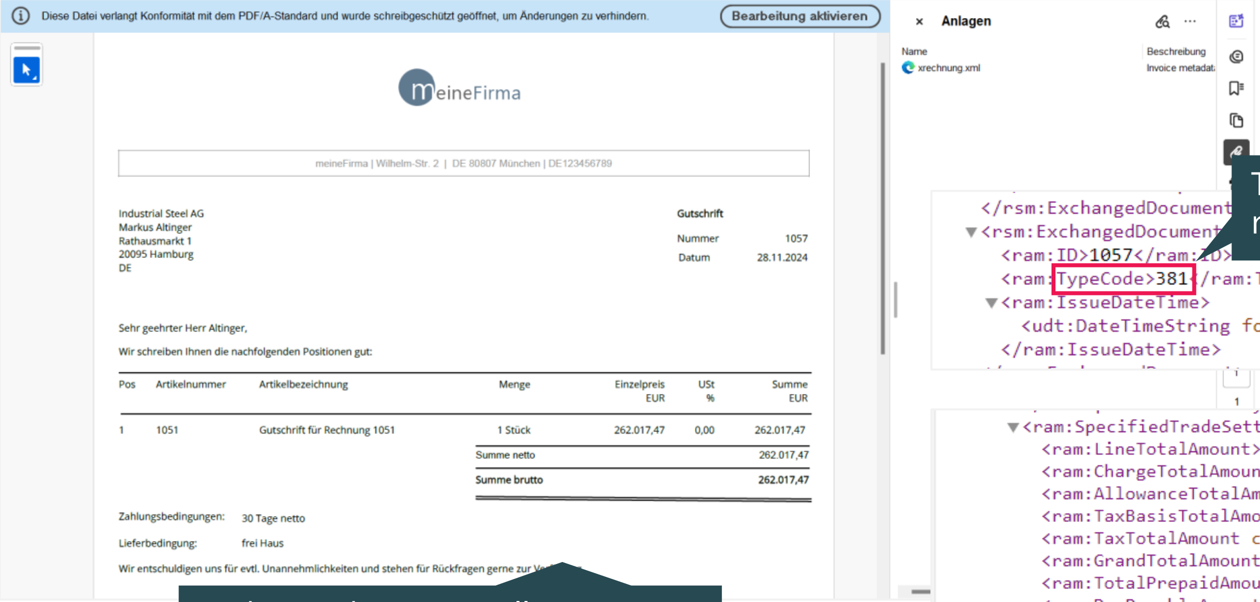




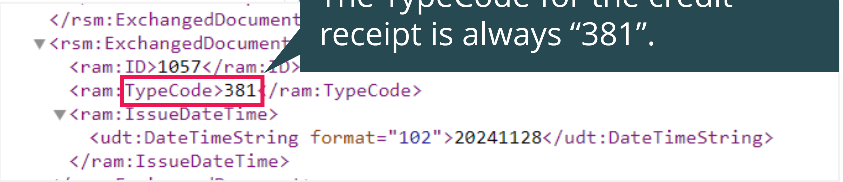
If you want to send a credit note in XML format, select the E-invoice Type “XRechnung” here too. If you create the credit note from a XRechnung, the buyer reference is automatically taken from the invoice.

Receipt

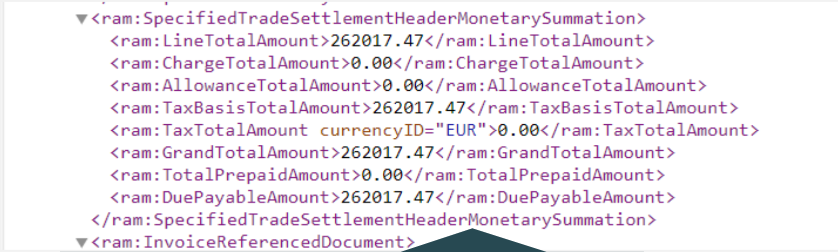
Create credit note with E-invoice Type “XRechnung”



In the credit receipt all amounts are displayed with a positive sign.



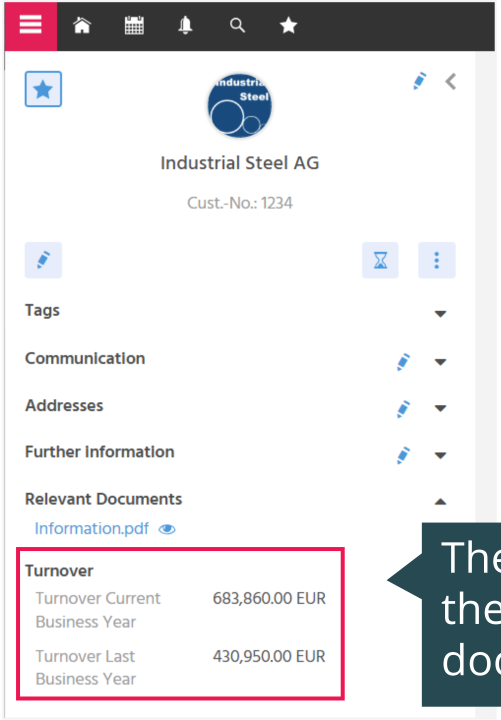
The TypeCode for the credit receipt is always “381”.



In the XML file the amounts are also transmitted with a positive sign.

Excursus into the company

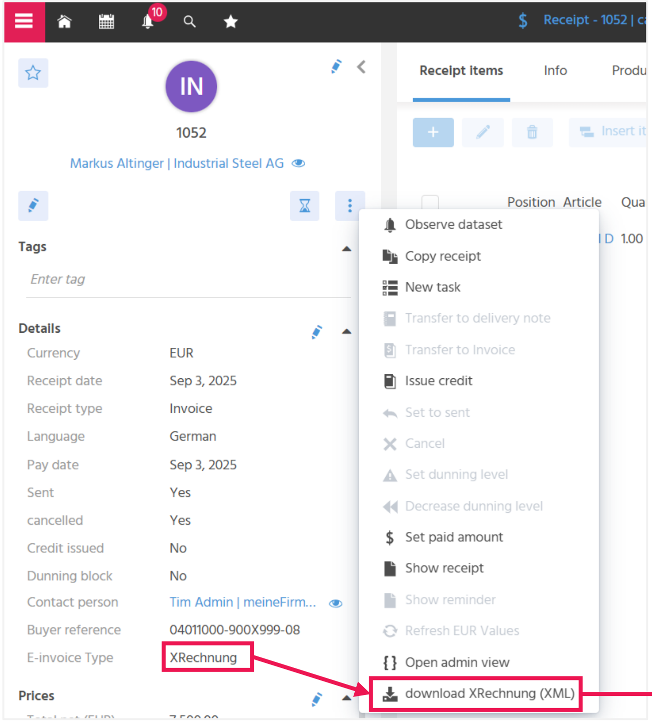
"Turnover" area



The turnover is calculated from the sent, not cancelled invoice documents of the respective year.

Receipt

VAT-ID

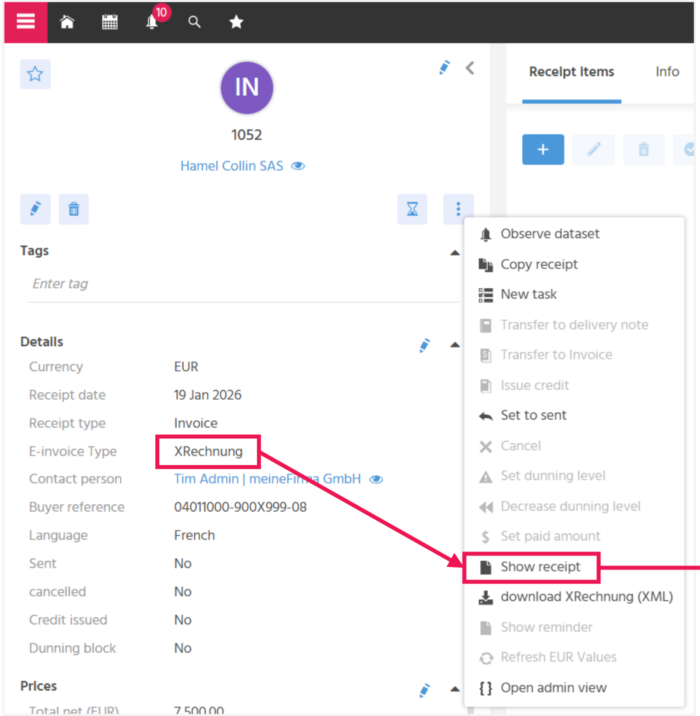


The VAT ID of the invoice recipient is displayed in the XML in the “BuyerTradeParty” data if the VAT ID is stored as a attribute for the corresponding company.

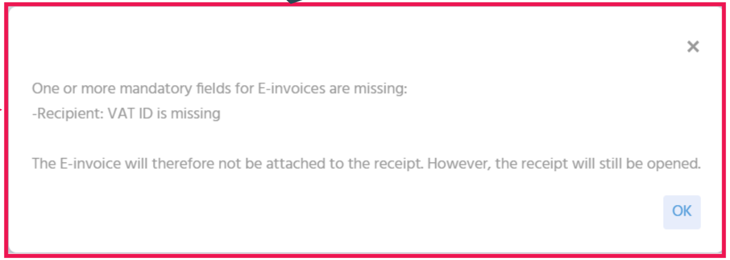

```xml
<ram:BuyerTradeParty>
  <ram:Name>Hamel Collin SAS</ram:Name>
  <ram:PostalTradeAddress>
    <ram:PostcodeCode>68100</ram:PostcodeCode>
    <ram:LineOne>Passage de l'Hôtel de Ville 6</ram:LineOne>
    <ram:CityName>Mulhouse</ram:CityName>
    <ram:CountryID>FR</ram:CountryID>
  </ram:PostalTradeAddress>
  <ram:URIUniversalCommunication>
    <ram:URIID schemeID="EM">bertin@hamel.fr</ram:URIID>
  </ram:URIUniversalCommunication>
  <ram:SpecifiedTaxRegistration>
    <ram:ID schemeID="VA">FR87654321123</ram:ID>
  </ram:SpecifiedTaxRegistration>
</ram:BuyerTradeParty>
```

Receipt

VAT-ID

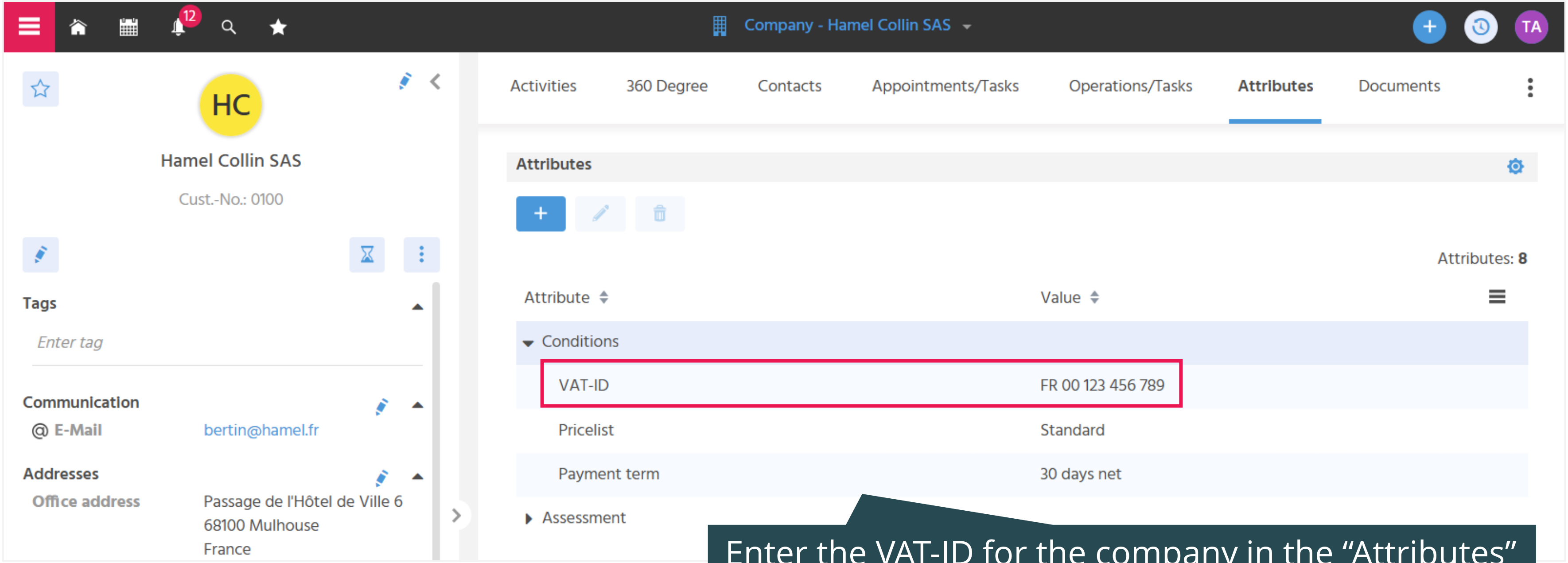


If the recipient does not have a VAT ID, the message below will be displayed.



Excursus into the company

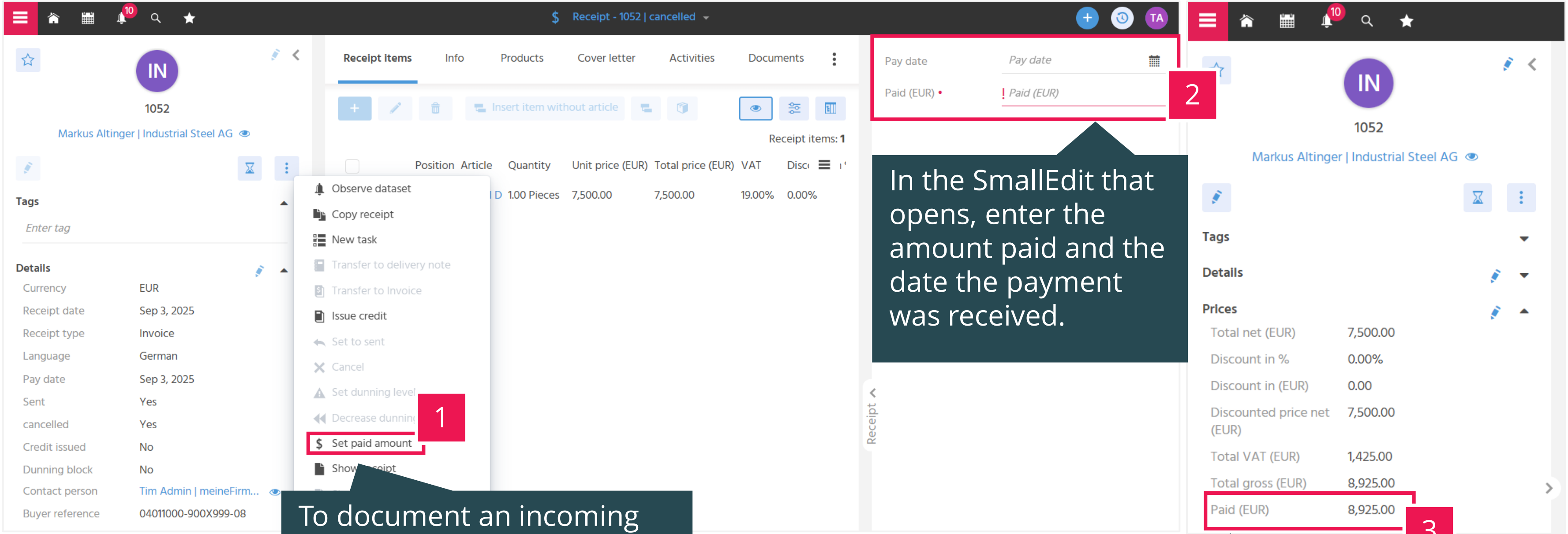
VAT-ID



Enter the VAT-ID for the company in the “Attributes” tab under the parent property “Conditions”.

Incoming payments/dunning

Incoming payments



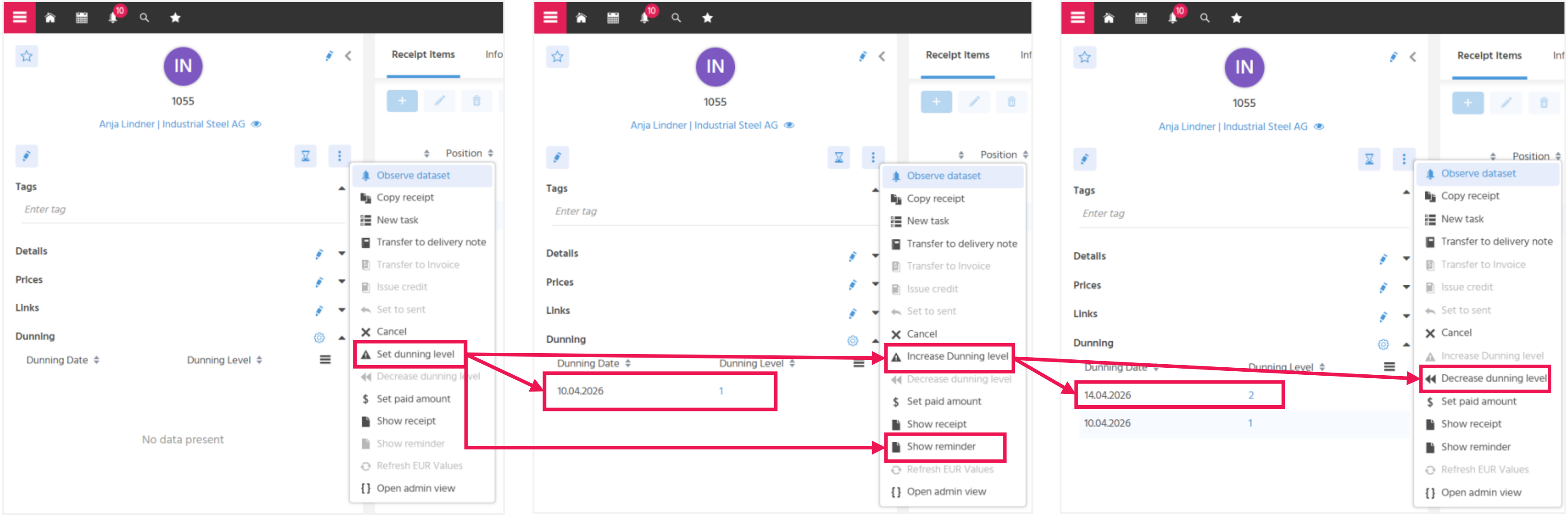
In the SmallEdit that opens, enter the amount paid and the date the payment was received.

To document an incoming payment, execute the action “Set paid amount“.

The amount paid is then displayed in the preview in the “Prices“ area.

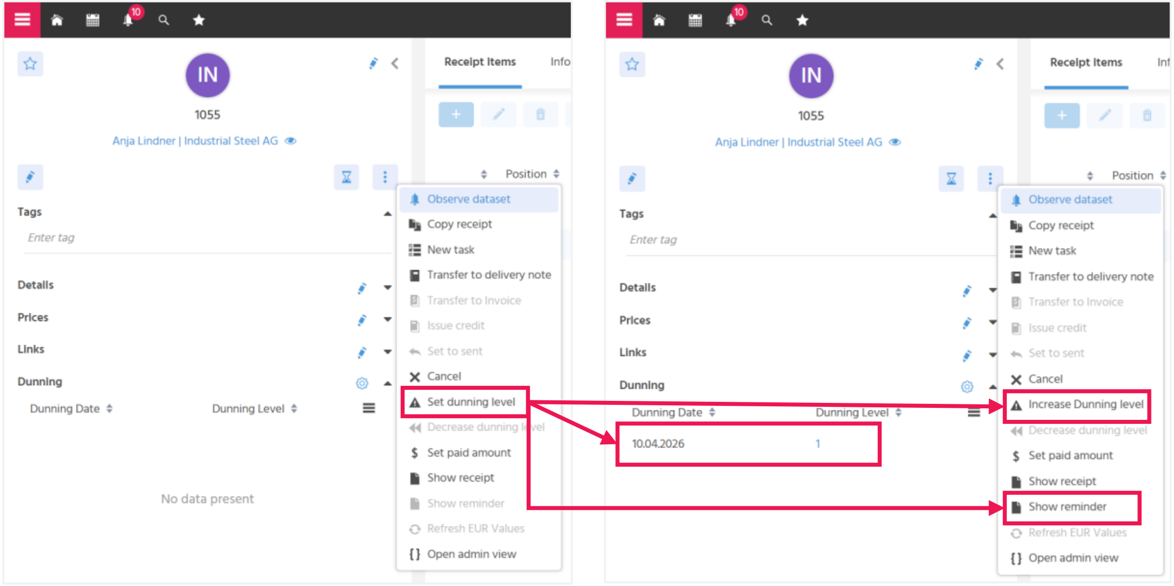
Dunning

Set, increase, decrease dunning levels manually - overview



Dunning

Set dunning



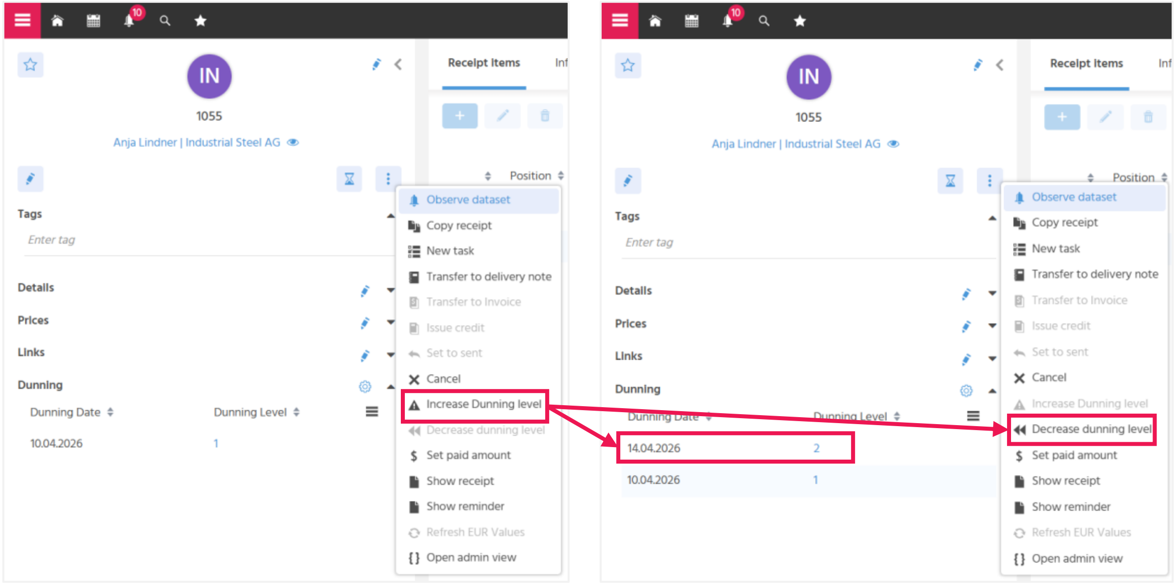
The **"Set dunning level"** action becomes **active** as soon as the **receipt is marked as "Sent"**. The action is **no longer active** if a **paid amount** is set that **matches the Total gross of the invoice**.

As soon as you execute the "Set dunning level" action,

- dunning level 1 is set on the receipt
- the "Show reminder" action becomes active
- you get the action "Increase Dunning level".

Dunning

Increase, decrease dunning levels



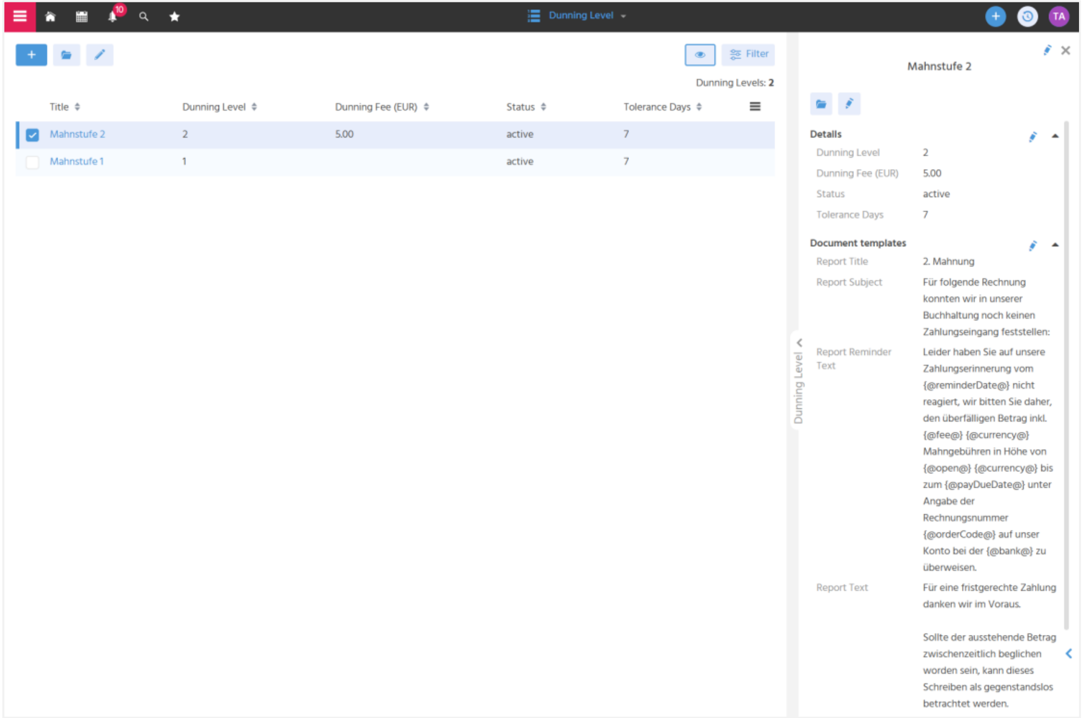
You can define **how many dunning levels** there should be in the Context **"Dunning level"** in the menu group "Administration".

The **"Increase dunning level"** action is active as long as there is at least one dunning level that is higher than the dunning level entered in the receipt.

As soon as there is at least one dunning level that is lower than the dunning level entered in the receipt, the **"Decrease dunning level"** action becomes active.

Excursus Administration

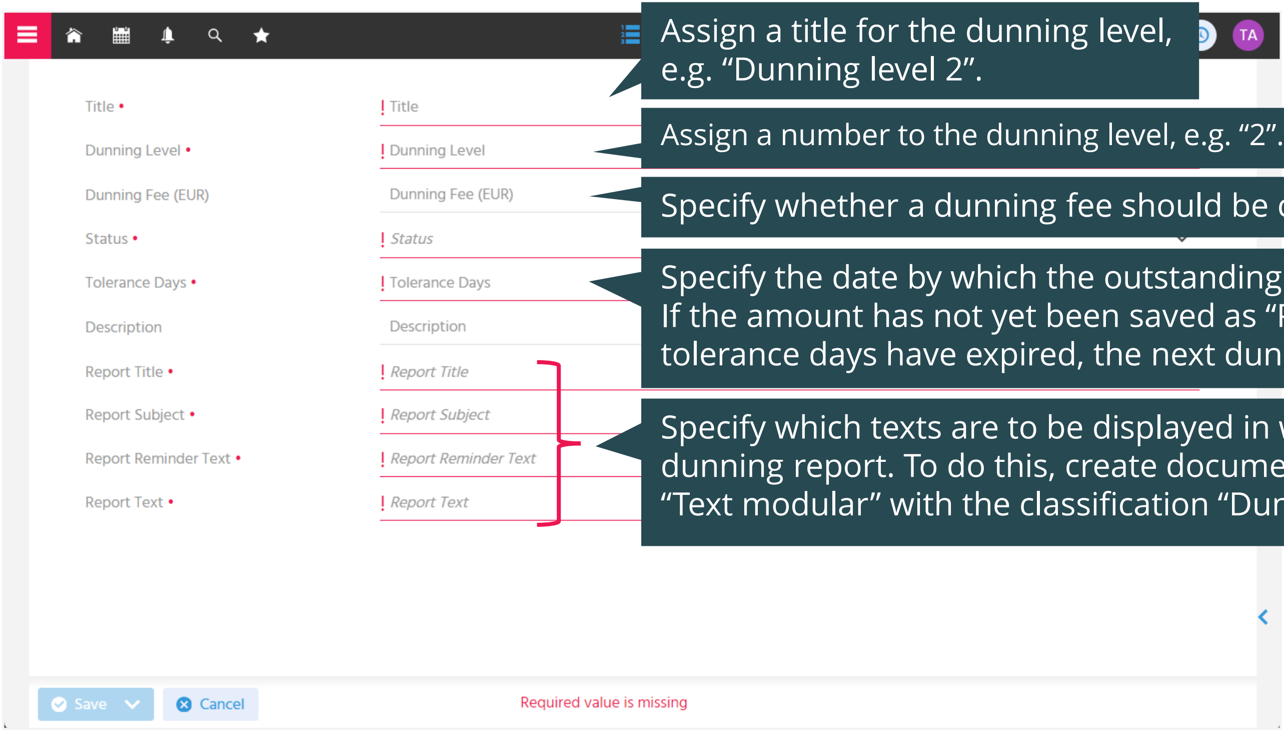
Context “Dunning level“



The dunning levels are recorded in the “Dunning level” context. If you select a dunning level, you can see which texts are displayed where in the dunning report.

Excursus Administration

Context “Dunning level“



Assign a title for the dunning level, e.g. “Dunning level 2”.

Assign a number to the dunning level, e.g. “2”.

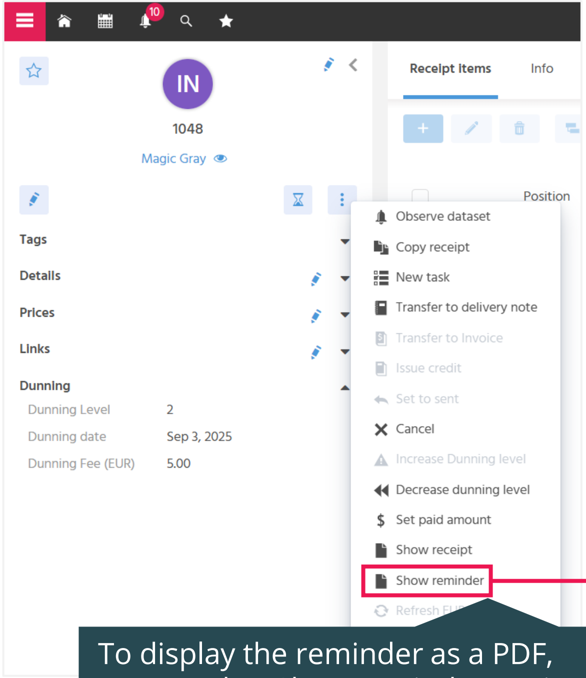
Specify whether a dunning fee should be charged.

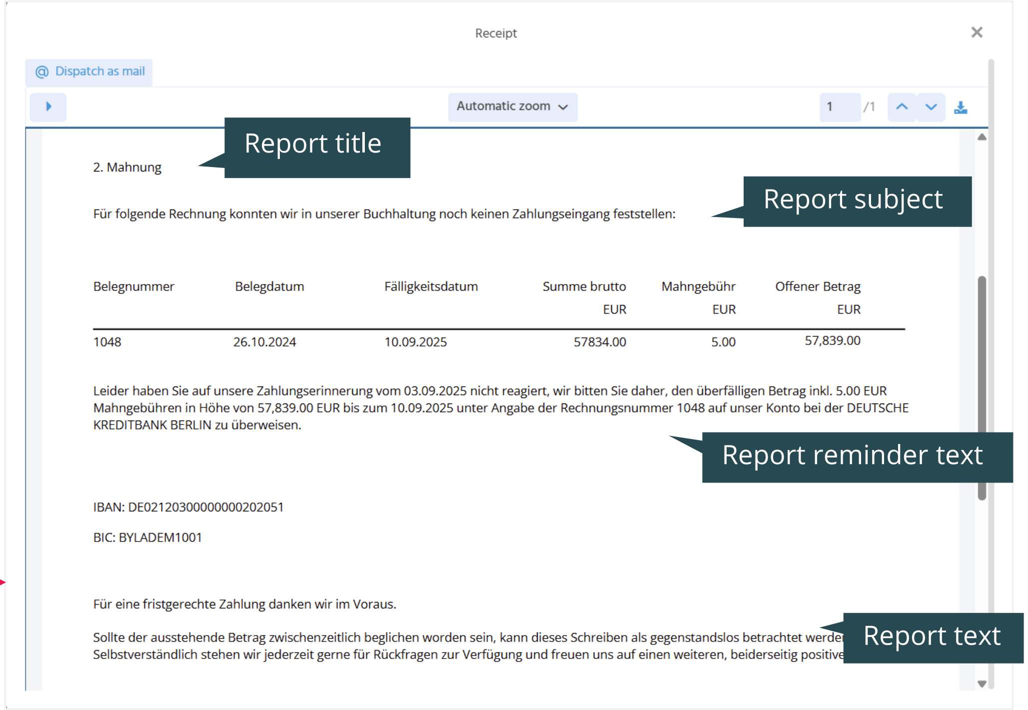
Specify the date by which the outstanding amount should be transferred. If the amount has not yet been saved as “Paid” in the receipt after the tolerance days have expired, the next dunning is due.

Specify which texts are to be displayed in which position in the dunning report. To do this, create document templates of the type “Text modular” with the classification “Dunning text” in advance.

Dunning

Show reminder

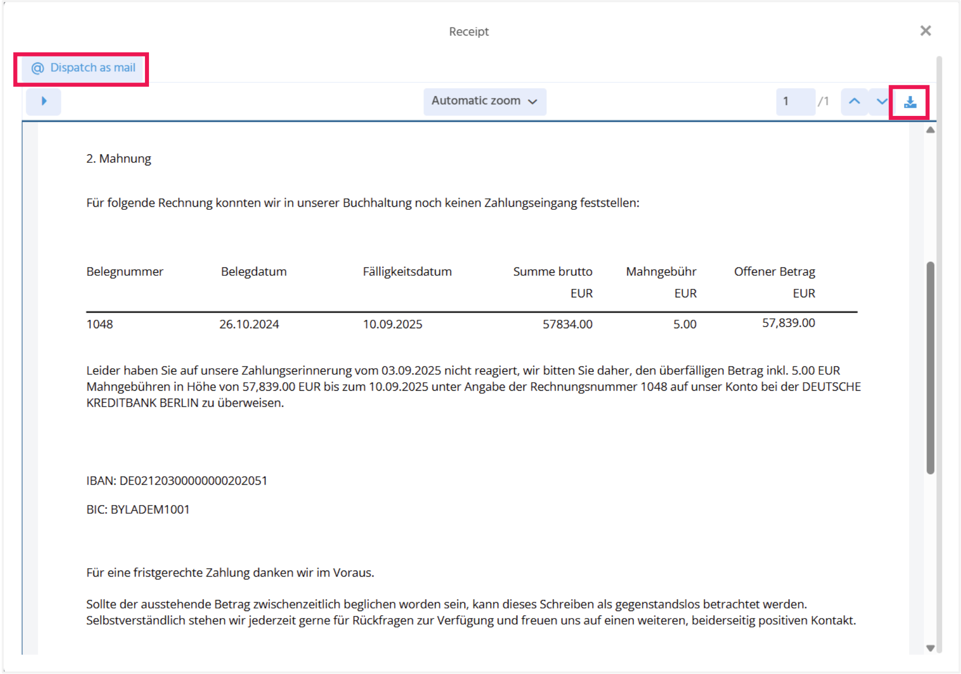




To display the reminder as a PDF, execute the “Show reminder” action.

Dunning

Send dunning


Receipt

Dispatch as mail

Automatic zoom

1 /1

2. Mahnung

Für folgende Rechnung konnten wir in unserer Buchhaltung noch keinen Zahlungseingang feststellen:

Belegnummer	Belegdatum	Fälligkeitsdatum	Summe brutto EUR	Mahngebühr EUR	Offener Betrag EUR
1048	26.10.2024	10.09.2025	57834.00	5.00	57,839.00

Leider haben Sie auf unsere Zahlungserinnerung vom 03.09.2025 nicht reagiert, wir bitten Sie daher, den überfälligen Betrag inkl. 5.00 EUR Mahngebühren in Höhe von 57,839.00 EUR bis zum 10.09.2025 unter Angabe der Rechnungsnummer 1048 auf unser Konto bei der DEUTSCHE KREDITBANK BERLIN zu überweisen.

IBAN: DE02120300000000202051

BIC: BYLADEM1001

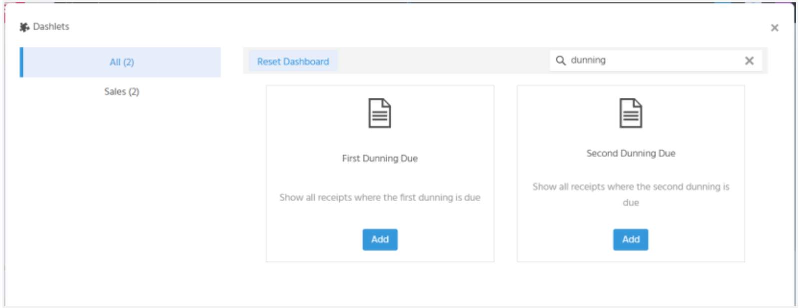
Für eine fristgerechte Zahlung danken wir im Voraus.

Sollte der ausstehende Betrag zwischenzeitlich beglichen worden sein, kann dieses Schreiben als gegenstandslos betrachtet werden. Selbstverständlich stehen wir jederzeit gerne für Rückfragen zur Verfügung und freuen uns auf einen weiteren, beiderseitig positiven Kontakt.

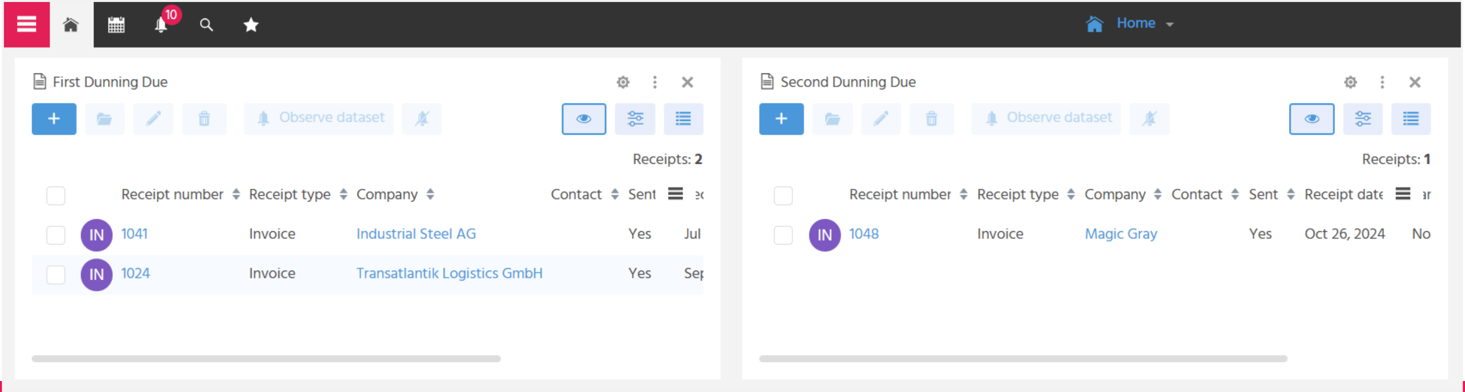
You can send the PDF as an e-mail or by post. The functionality is identical to sending receipts (slides “Send receipt by e-mail“ and “Send receipt by post“).

Dunning

Dashlets



In the dashlet store, you will find the dashlets “First dunning due” and “Second dunning due”. There you will find receipts for which a dunning level must be set. The 1st dunning is due after “Receipt date + Tolerance days”. The 2nd dunning is due after “Receipt date + Tolerance days”.

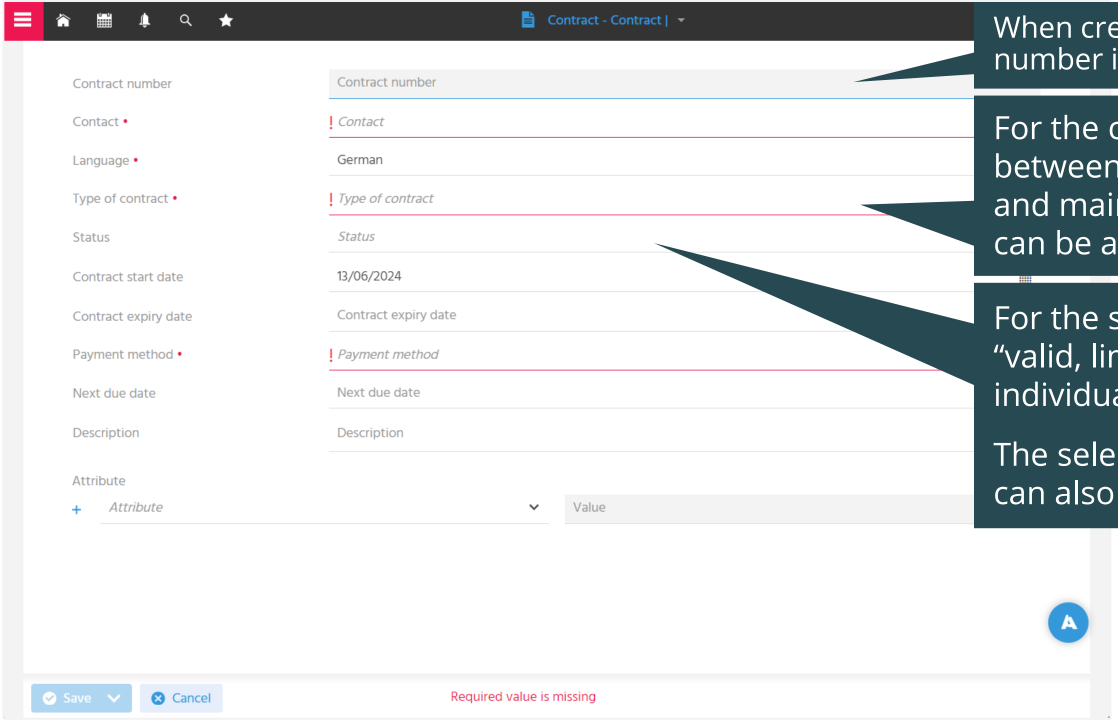


Contract


Check-lists
Classification
Dunning level
Opportunity
Contact
Qualification
Prospect
Offer
Negotiation
Deal
Planning
Offer
Contract
$ Receipt
Product
During the "Negotiation" phase, you can document the contract negotiations and file contract versions in the "Contract" context.
Sales process
Target acquisition
Sales Dashboard
Conversion Rate
Sales forecast
Sales analysis
To be created in advance by the administrator
In use "daily" by end users

Contract

Documentation of the agreements



When creating a new contract, the contract number is assigned systematically.

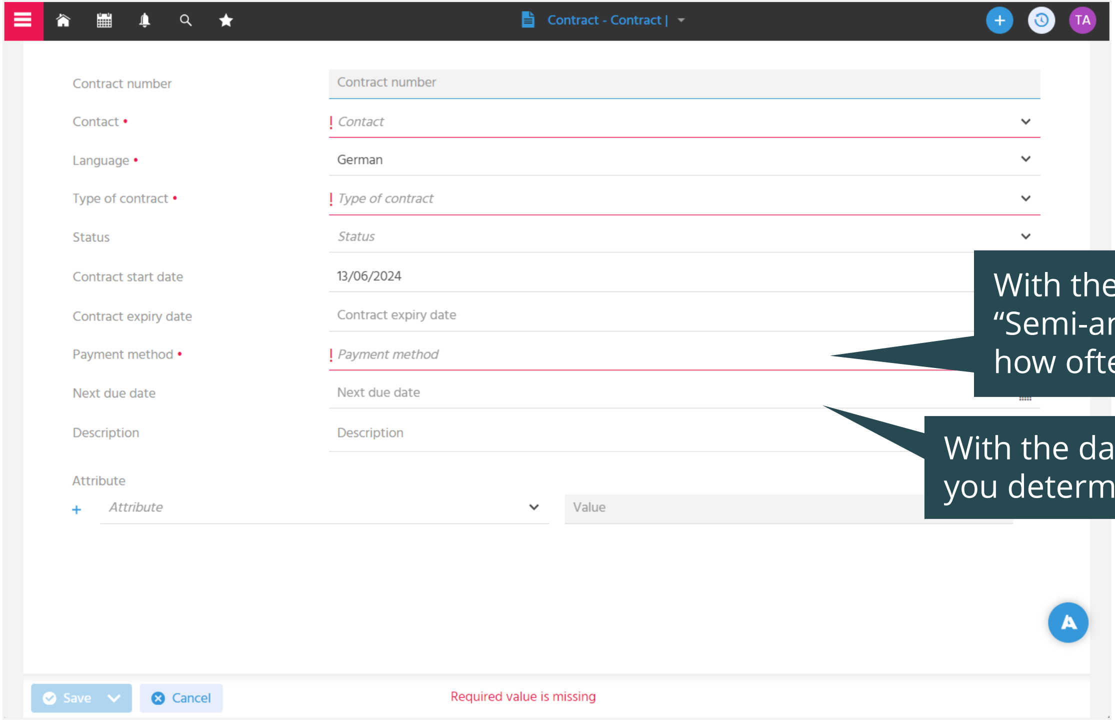
For the contract type, you have the choice between framework contract, service contract and maintenance contract. The contract types can be adapted by the administrator.

For the status you can select “valid, unlimited“, “valid, limited“, “not yet signed“, “none, individual count“, “resigned“ or “refused“.

The selection options for the contract status can also be adjusted by the administrator.

Contract

Documentation of the agreements

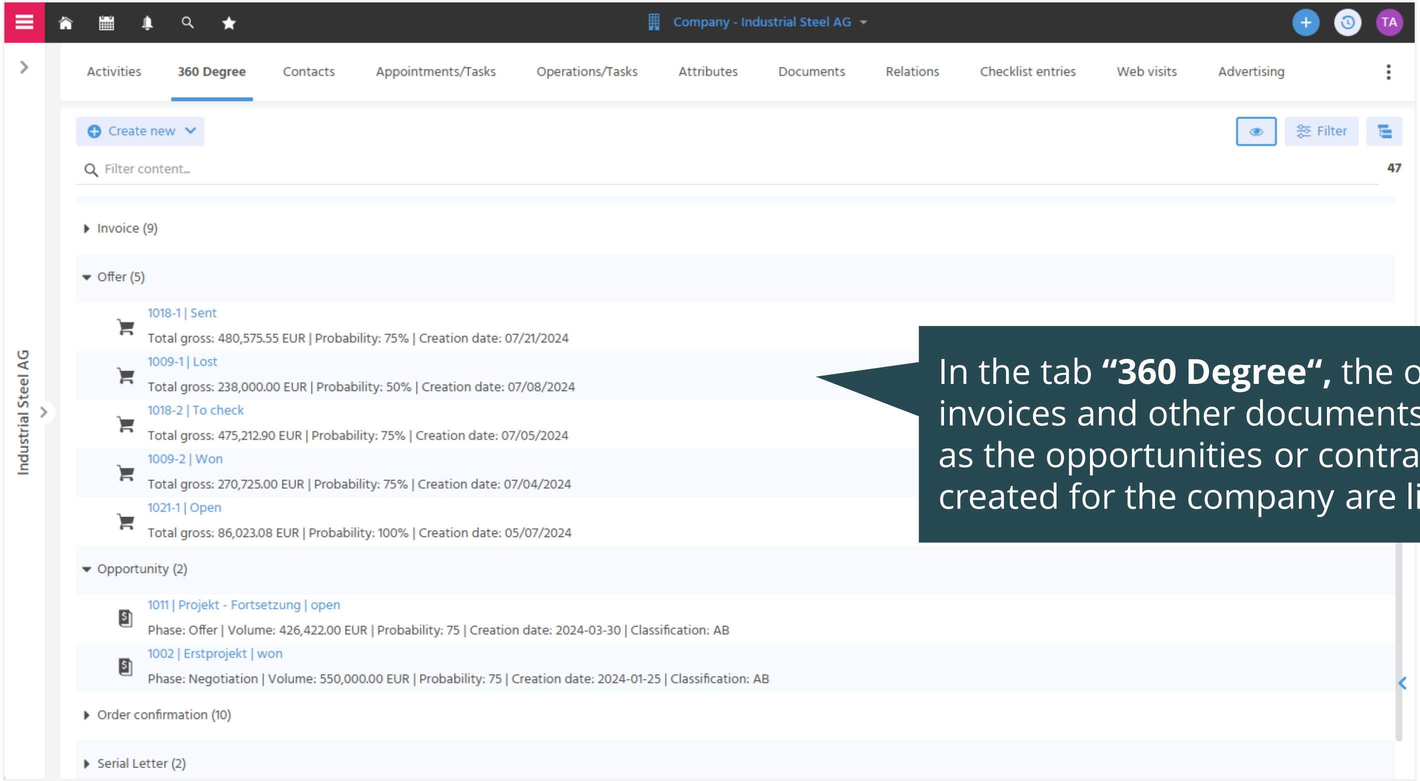


With the payment method “Annually“, “Semi-annually“ or “Quarterly“ you choose how often the agreed amount is due.

With the date you enter in the “next due date“ field, you determine from when the payment routine starts.

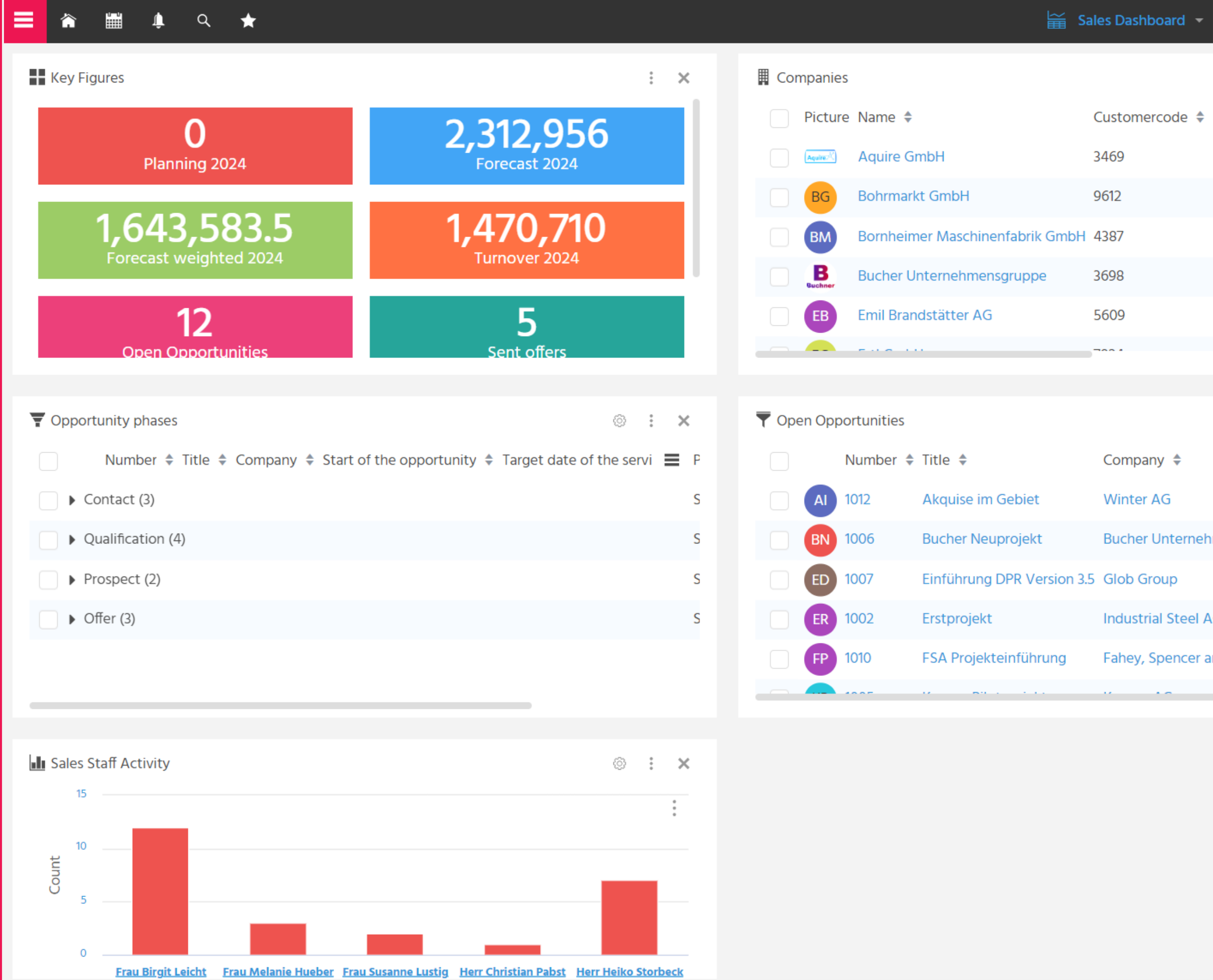
Visibility of the sales process at the company

Tab "360 degrees"



In the tab **"360 Degree"**, the offers, invoices and other documents, as well as the opportunities or contracts created for the company are linked.

Sales analysis



Check-lists

Classification

Dunning level

Opportunity

Contact → Qualification → Prospect → Offer → Negotiation → Deal

Planning

Offer

Product

Product-package

Price

Contract

$ Receipt

Sales process

Target acquisition

Sales Dashboard

Conversion Rate

Sales forecast

Sales analysis

To be created in advance by the administrator

In use “daily“ by end users

Sales Dashboard

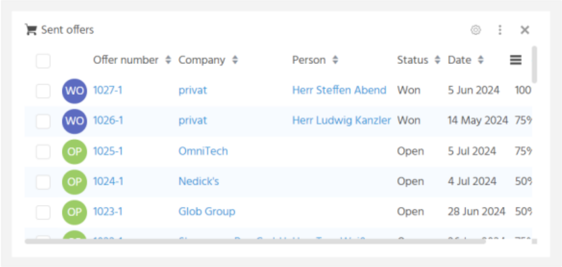
Sales Dashboard

Dashlets

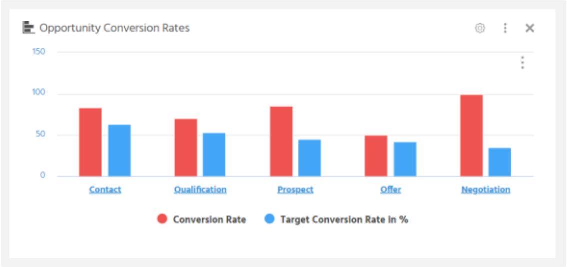
- Dashlets offer various functionalities to map the various professional requirements, to monitor sales key figures and their developments.
- You can specify that the dashlets of the Sales Dashboard can only be configured by the sales manager. “Normal“ users will then not be able to add any further dashlets or delete dashlets.

Key Figures

Filter views

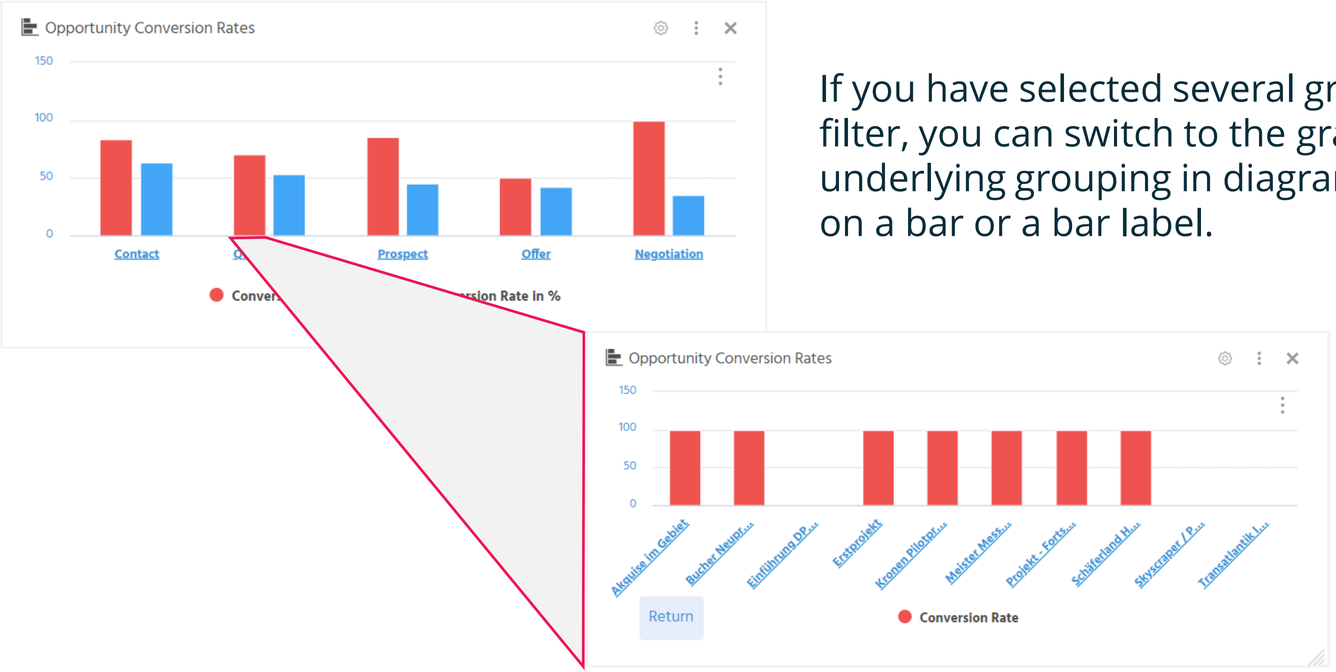


Charts



Sales Dashboard

Interactive dashlet

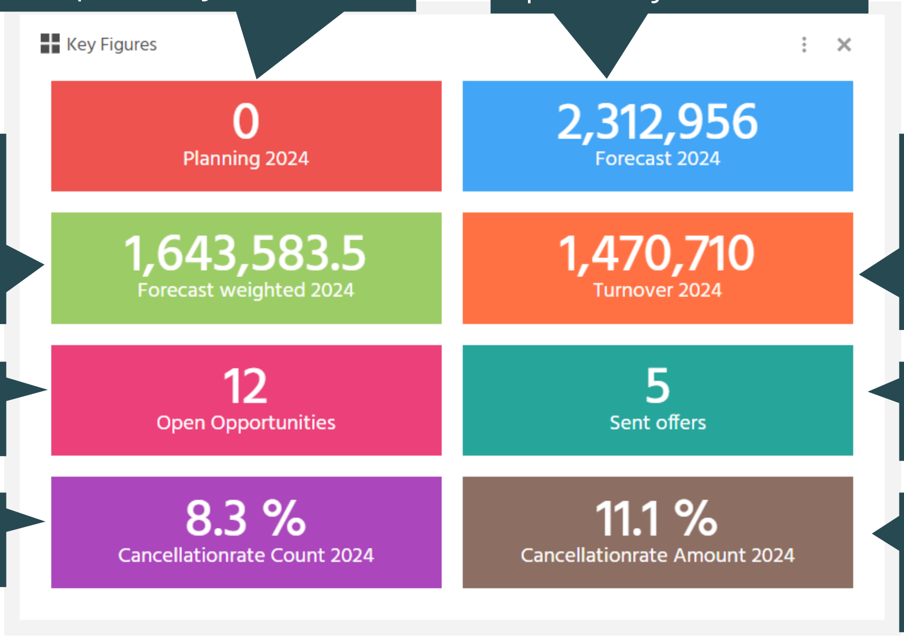


If you have selected several groupings in the filter, you can switch to the graphic of the underlying grouping in diagrams by clicking on a bar or a bar label.

Key figures dashlet

The plannings entered in the context “Planning“ for the specified year.

Forecasts from the opportunities for the specified year.



“Forecast of an opportunity“ x “Probability of the opportunity“.

Total of all invoice amounts (discounted) from sent invoices (without cancellations).

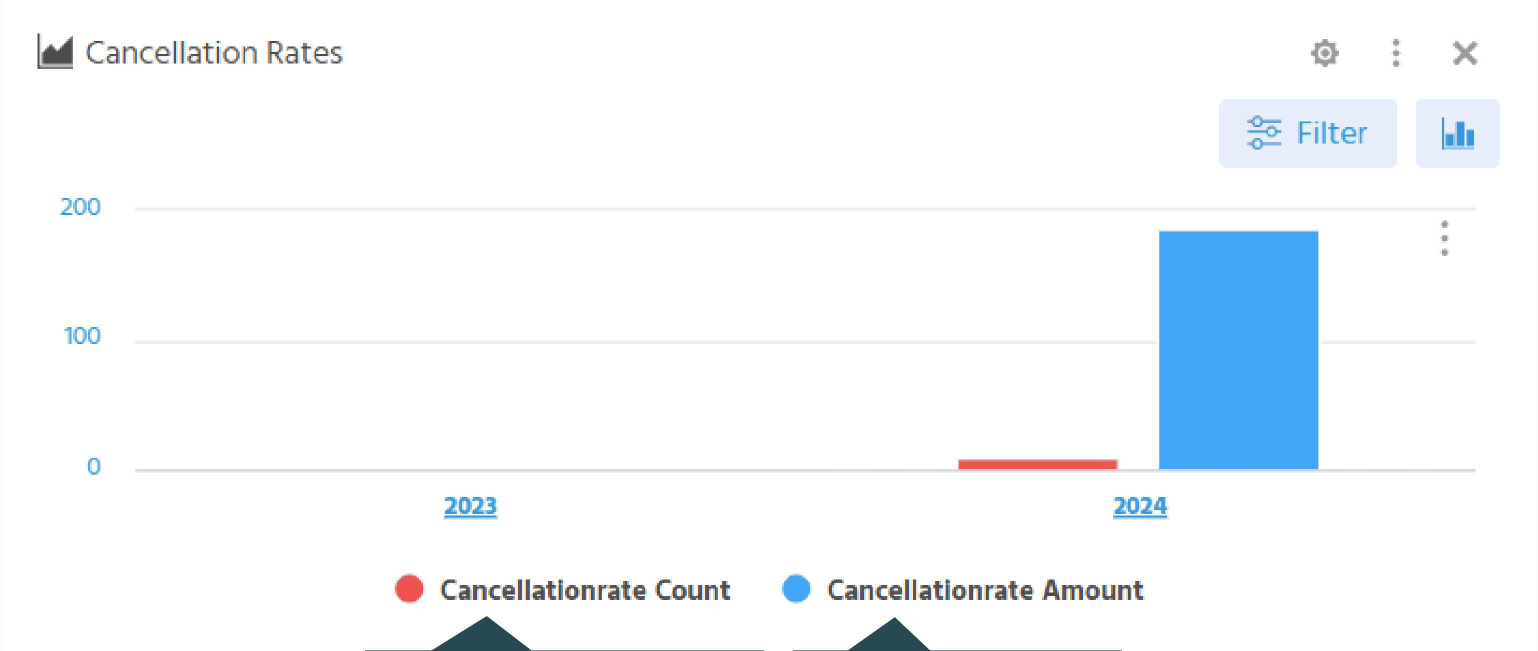
All opportunities with status “open“.

Sum of all offers sent.

Number of cancelled invoices in percent.

Canceled invoice amount in relation to the total invoice amount.

Dashlet cancellation rates



Number of cancelled invoices in percent.

Total cancelled invoice amounts.

Conversion Rate

Conversion Rates

The conversion rate is available as a separate context in the Sales menu group or can be used as a dashlet. The dashlet is located in the DashletStore.

Upper area

The **red bars show what** percentage of the opportunities have developed out of the phase into one of the subsequent phases or have received the status “order“ or “partial order“. The **blue bars** show what percentage of the opportunities should develop out of the phase into a next phase or reach the status “order“ or “partial order“.

If an opportunity is set directly, e.g. in the “Prospect“ phase to the “Deal“ phase or “Order“ status, then it is considered as if it had also passed through the intermediate phases and is counted in these.

Conversion Rate

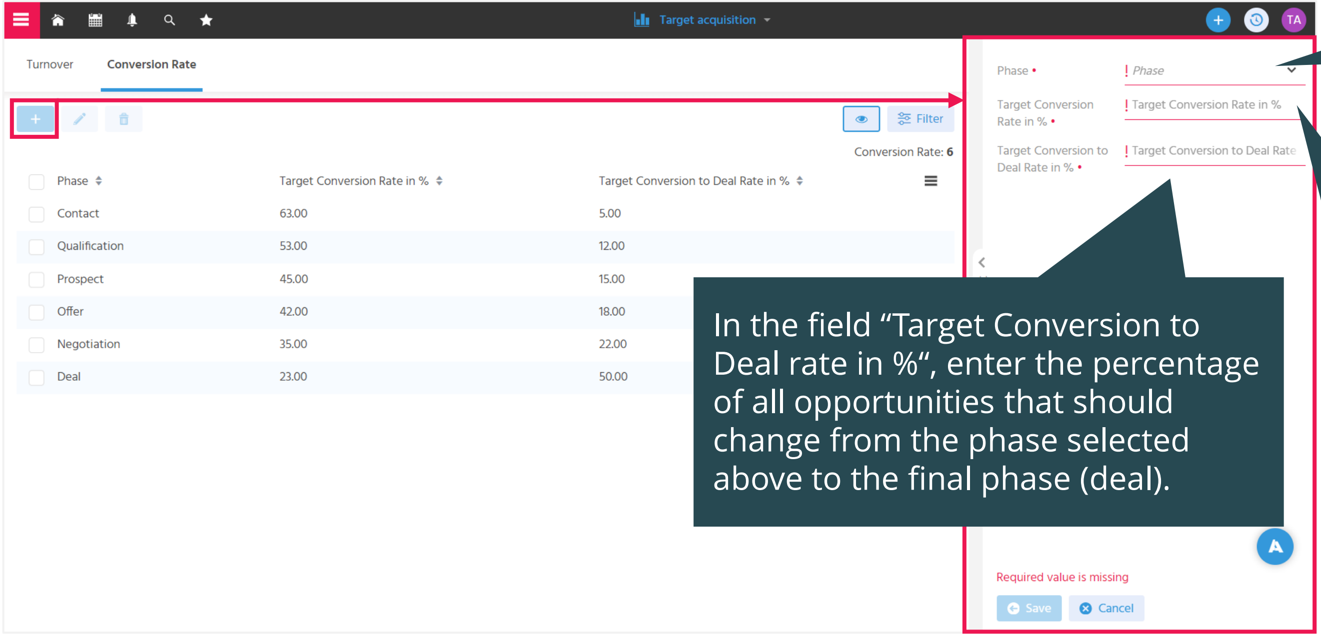
Lower area

The **red bars** show how many projects from this phase have reached the Deal phase. The **blue bars show how** many projects from this phase are to reach the Deal phase.

The conversion rate is available as a separate context in the Sales menu group or can be used as a dashlet. The dashlet is located in the DashletStore.

Excursus into administration

Targeting Conversion Rate



Choose a phase of the opportunity.

In the field “Target Conversion rate in %”, enter the percentage of all opportunities that should change from the phase selected above to the next phase.

In the field “Target Conversion to Deal rate in %“, enter the percentage of all opportunities that should change from the phase selected above to the final phase (deal).

Turnover planning & forecast

Overview Turnover Planning and Forecast

Target turnover

You can enter a sales target for your business year and break this down into quarterly and monthly sales targets.

Planning

You can create plannings for companies, i.e. enter an amount that you expect as turnover with this company in a business year. You can also create a planning at product group level.

Forecast

In an opportunity, you can enter a forecast for the current project. You can also enter the forecasts at product group level. The forecast is also displayed weighted according to the probability stored in the opportunity.

Confirmation Volume

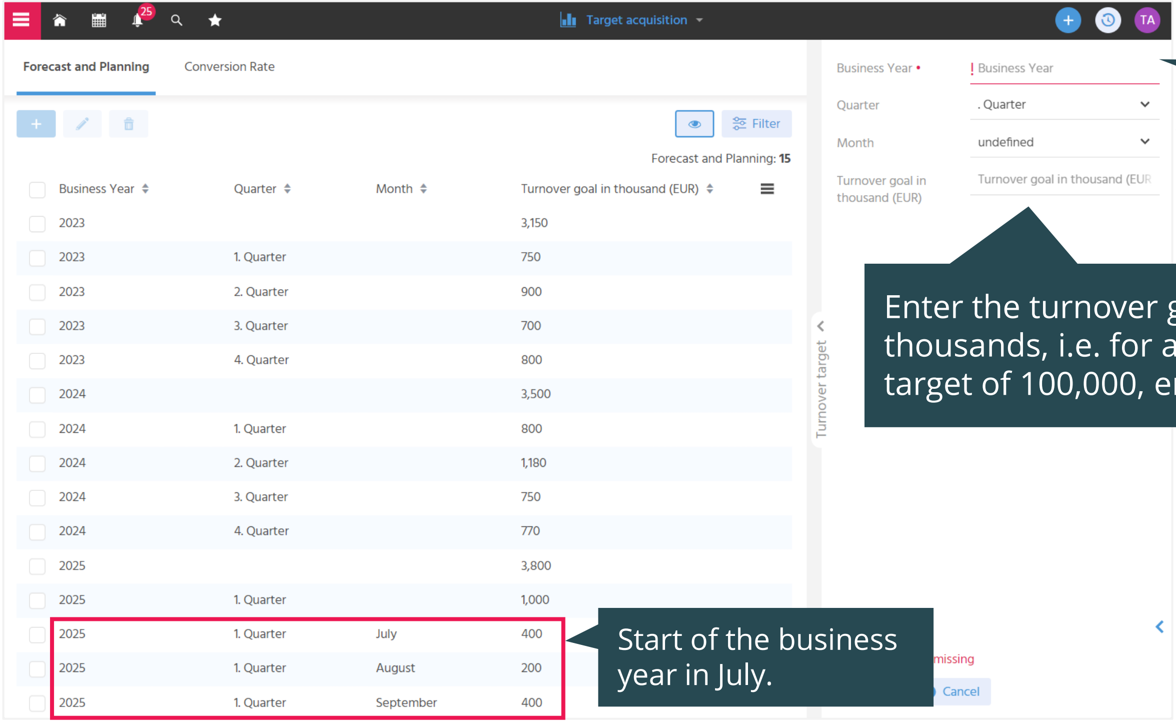
The confirmation volume is calculated from the net totals of order confirmations that have been sent and not canceled.

Turnover

The Turnover is calculated from the net totals of invoices that have been sent and not canceled. If you do not want to enter invoices in ADITO but would rather import them from a third-party system, you will find further information in the readme file for the receipt module.

Excursus into administration

Target turnover



Enter the year in which your business year begins for which you want to enter a sales target.

You can also set the quarter and month of the turnover goal.

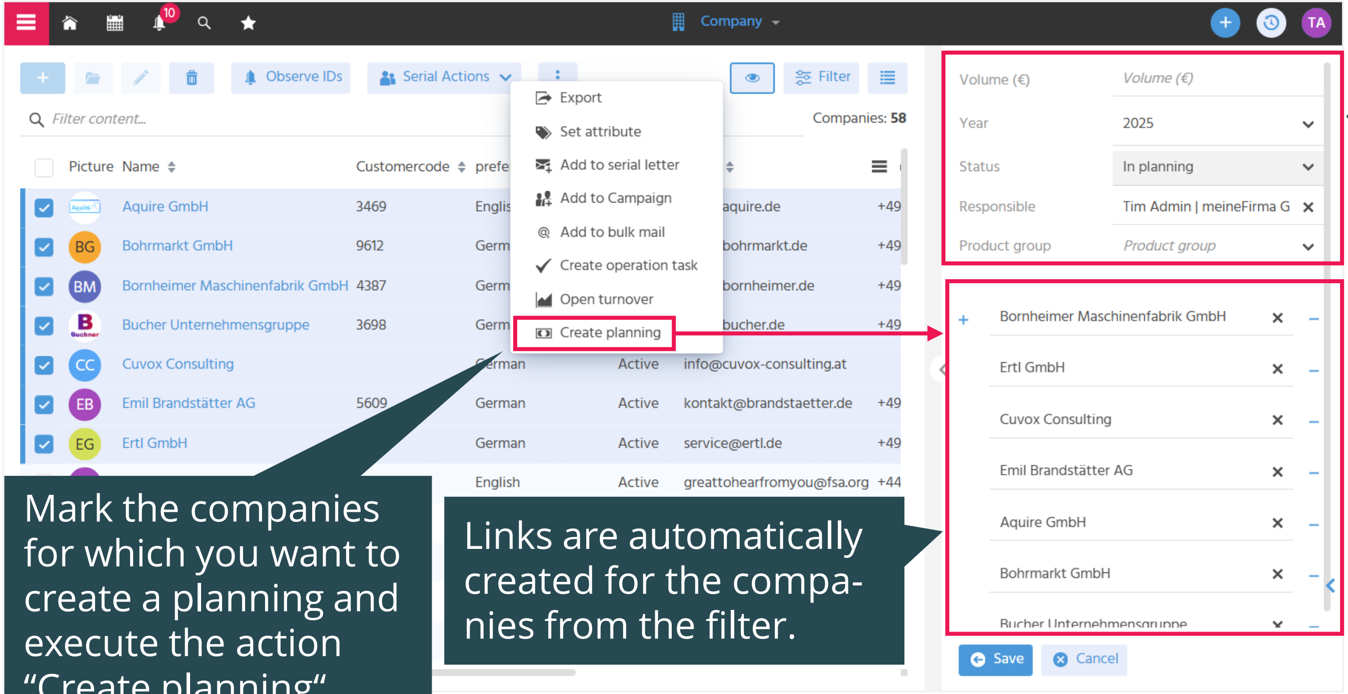
Enter the turnover goal here in thousands, i.e. for a turnover target of 100,000, enter 100.

Start of the business year in July.

Turnover planning

ADITO

Create planning



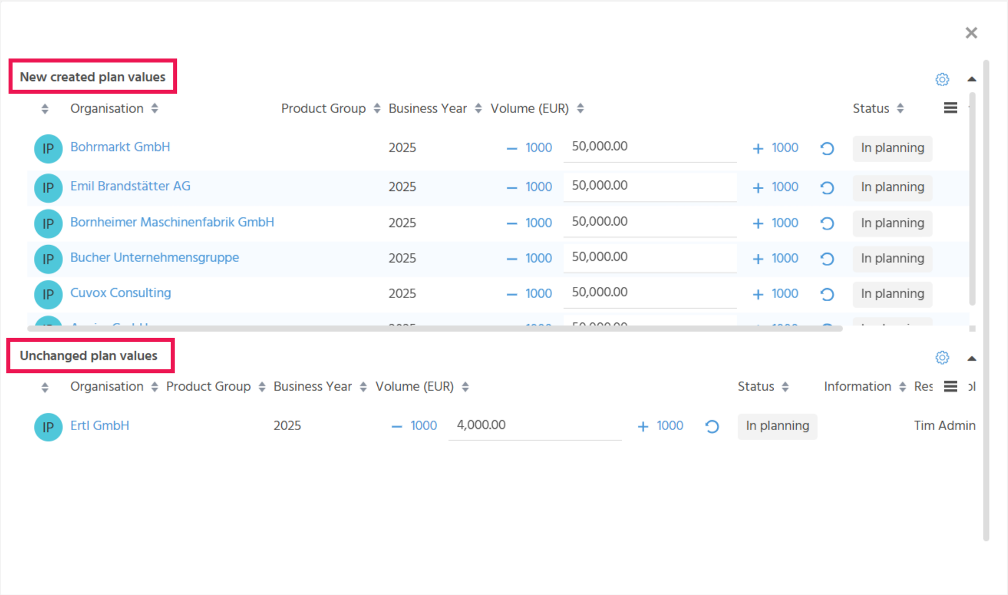
Enter the values as desired. The status is indicated with “In planning“ and cannot be changed at this point.

Mark the companies for which you want to create a planning and execute the action “Create planning“.

Links are automatically created for the companies from the filter.

Turnover planning

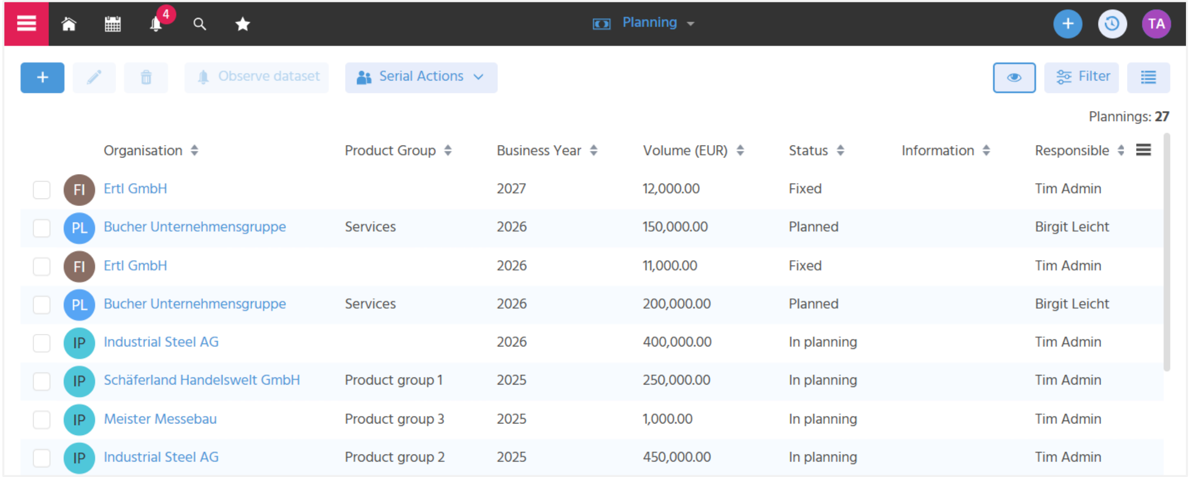
Create planning



After saving, an overlay appears. If a company already has a plan for the selected product group, it is not overwritten but displayed in the lower area. The volumes for the companies can be edited and saved separately in the upper as well as in the lower area.

Turnover planning

Context Planning



	Organisation	Product Group	Business Year	Volume (EUR)	Status	Information	Responsible
FI	Ertl GmbH		2027	12,000.00	Fixed		Tim Admin
PL	Bucher Unternehmensgruppe	Services	2026	150,000.00	Planned		Birgit Leicht
FI	Ertl GmbH		2026	11,000.00	Fixed		Tim Admin
PL	Bucher Unternehmensgruppe	Services	2026	200,000.00	Planned		Birgit Leicht
IP	Industrial Steel AG		2026	400,000.00	In planning		Tim Admin
IP	Schäferland Handelswelt GmbH	Product group 1	2025	250,000.00	In planning		Tim Admin
IP	Meister Messebau	Product group 3	2025	1,000.00	In planning		Tim Admin
IP	Industrial Steel AG	Product group 2	2025	450,000.00	In planning		Tim Admin

In the context “Planning“ you can see all the plannings that have ever been created.

With the help of the icons at the beginning of a data set, you can see at a glance what status a planning has.

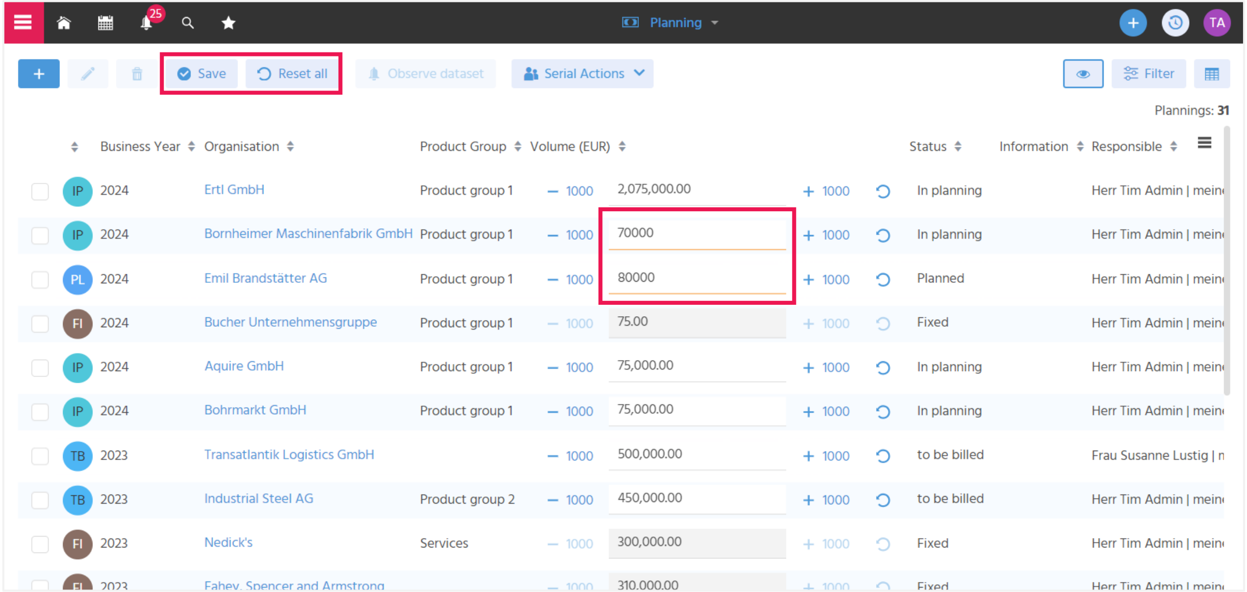
IP = In planning

PL = Planned

FI = Fixed

Turnover planning

Context Planning

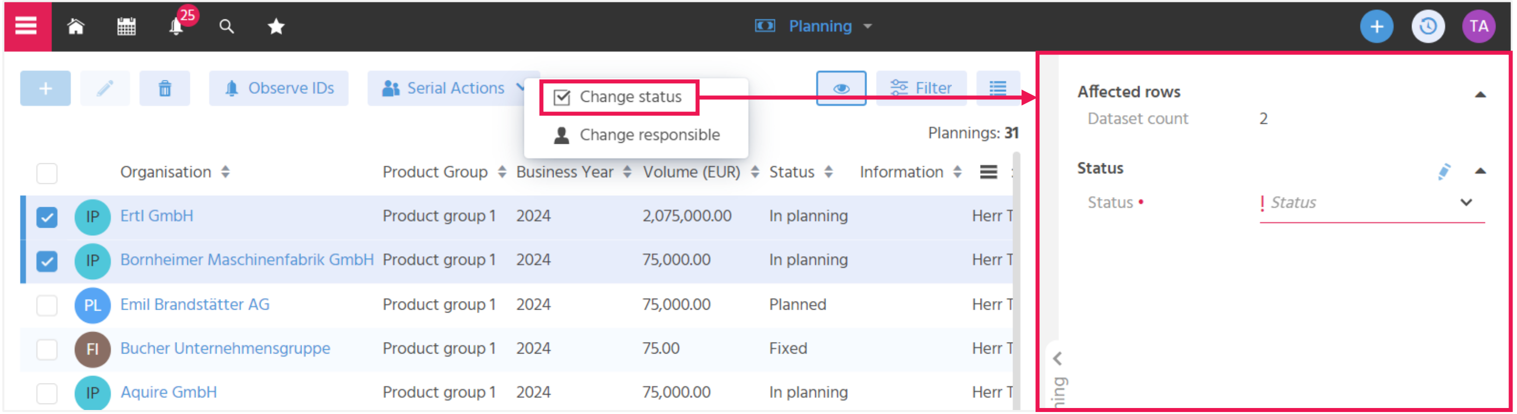


In the multiedit view, you can adjust the volumes and confirm them via the “Save“ button. As long as a change is not yet saved, you can reset it to get back the original value.

You can no longer adjust the volume for plans with the status “Fixed“.

Turnover planning

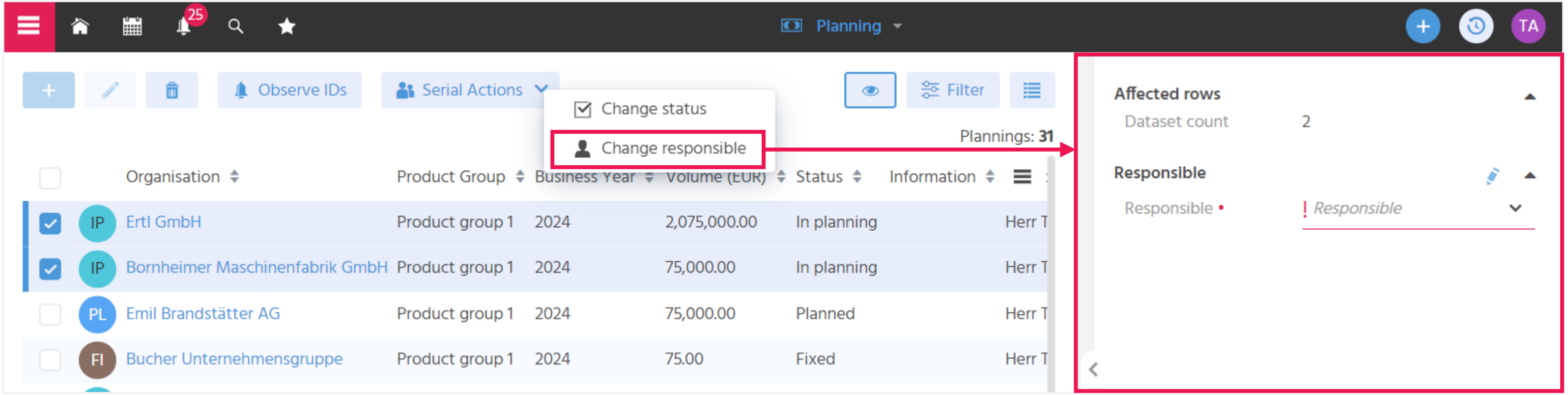
Series Action - Change Status



Example:
The employee for Berlin would like to change all plannings from “In Planning“ to “Planned“ after adjusting and finalising all planning.

Turnover planning

Series action - change responsible person

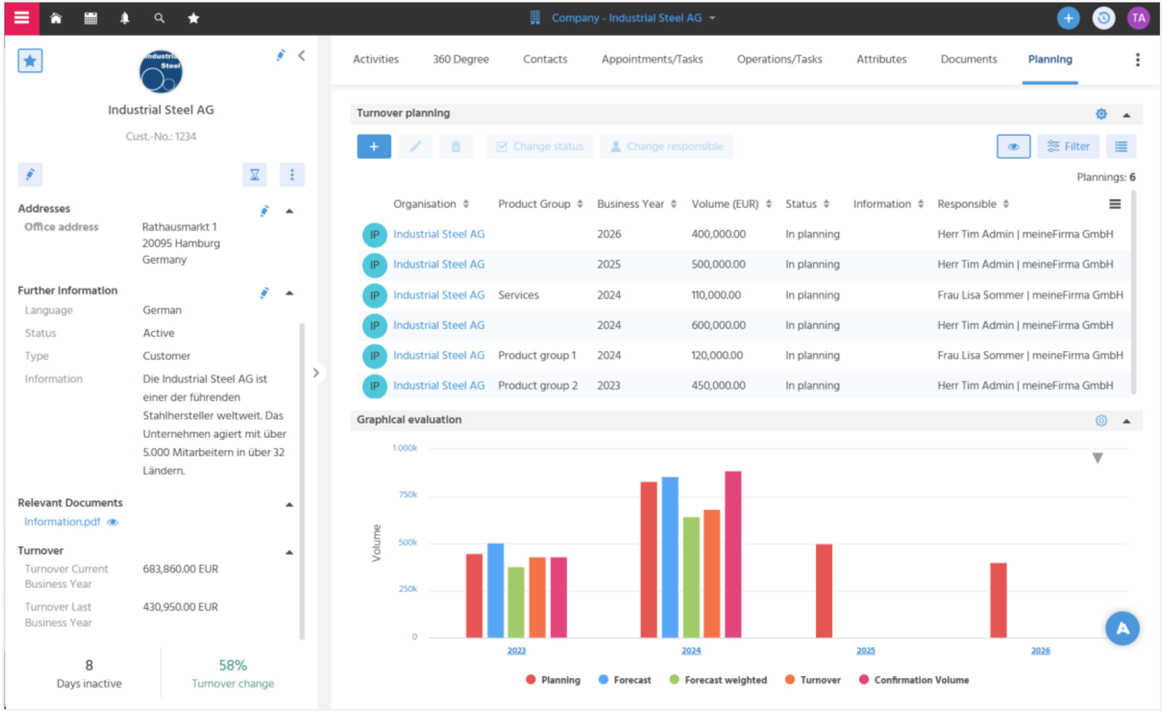


Example 1:
A position is newly filled and the new colleague is assigned all turnover plannings of his predecessor.

Example 2:
The area of Bavaria is divided into southern and northern Bavaria. Originally, one employee looked after all the companies in Bavaria, now there is another colleague to whom the corresponding planning is assigned.

Planning in the company

You can also see the plannings belonging to a company in the company in the “Planning“ tab.

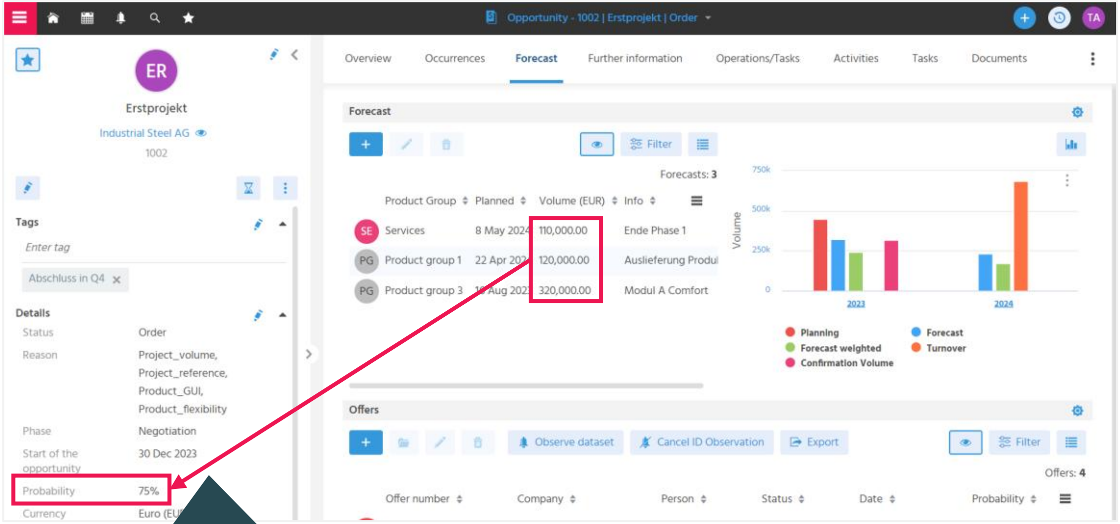


The following figures are used for the graph at company level:

- **planning**.
- the **forecast** recorded in the opportunities linked to the company.
- the **forecast weighted.** Here, the forecast is multiplied by the probability specified in the opportunity.
- **turnover** from invoices sent but not canceled (net total).
- **confirmation volume** from order confirmations sent but not canceled (net total).

Forecast

Excursus into the Opportunity

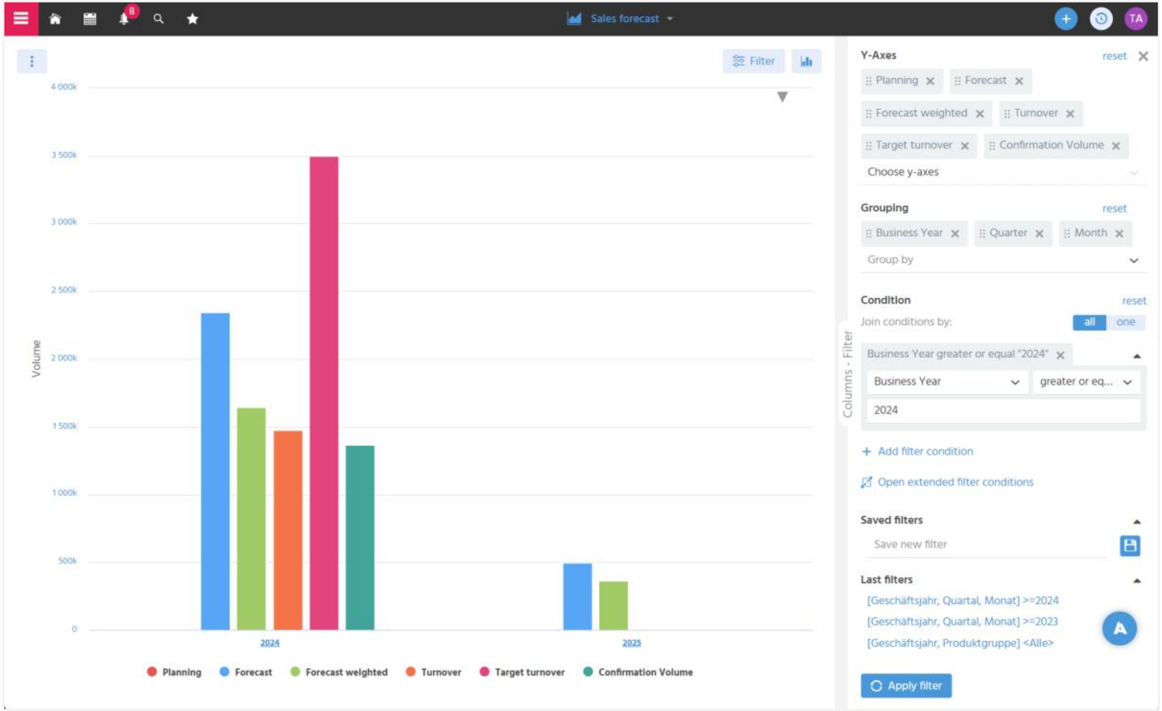


Forecast weighted =

the sum of the individual forecast values multiplied by the probability.

Forecasts are recorded in the opportunity. In this section as well, planning, forecast, weighted forecast, turnover, turnover target and confirmation volume are compared graphically.

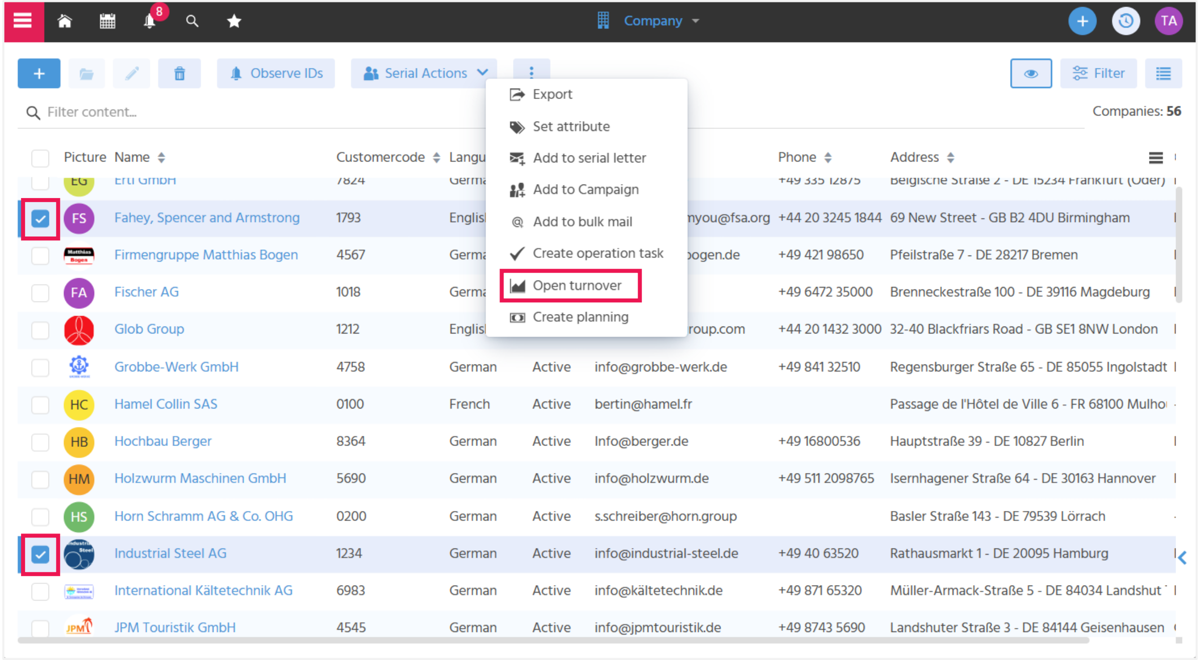
Sales forecast



When opening the context “Sales forecast”, the **values** stored in the system are **displayed cumulatively.**

With the help of the filter you can hide or show values, define groupings and create conditions.

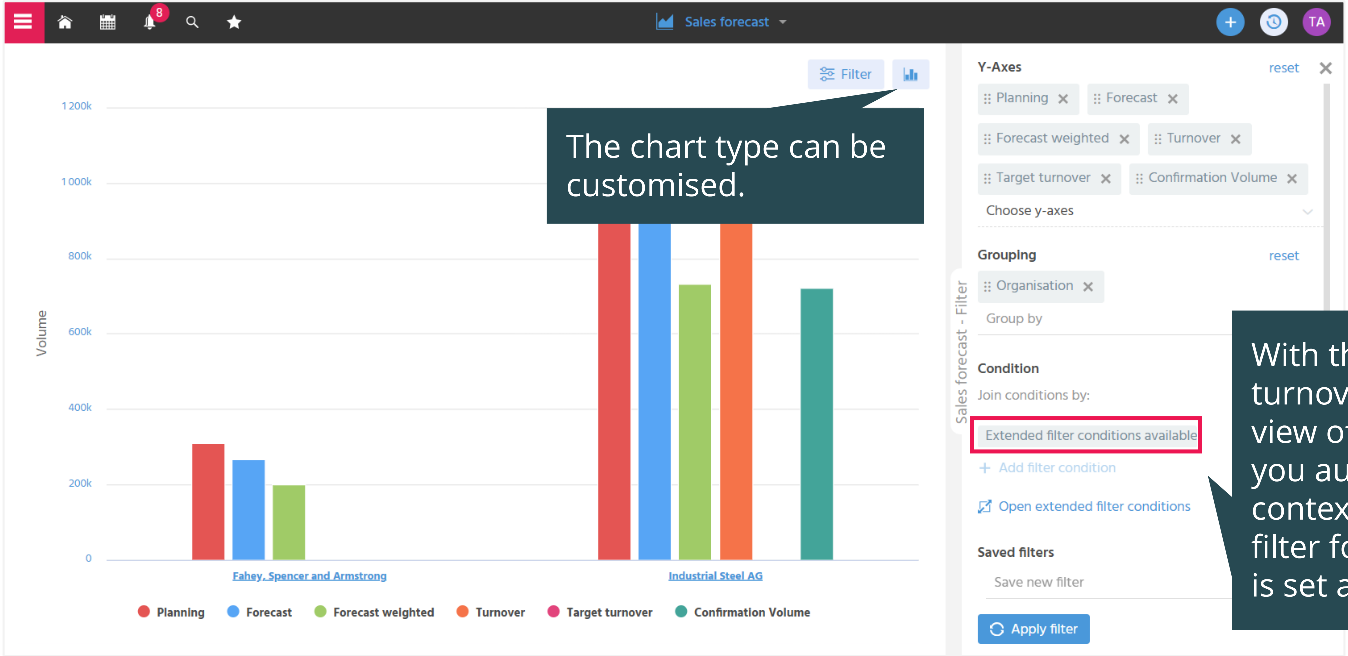
Sales forecast from company filter



When you execute the series action “Open turnover“, the context “Sales forecast“ opens automatically. The selected companies are then already preset in the filter.

You can open the sales forecast for a maximum of 50 companies.

Turnover forecast



The chart type can be customised.

With the series action “Open turnover forecast“ (in the filter view of the context “Company“) you automatically reach the context “Turnover forecast“. The filter for the selected companies is set automatically.

With the action “Open turnover forecast“ no year filters are set. This means that all planning, forecast and turnover values maintained in the company are displayed cumulatively for all years in the diagram.

Order confirmation

Receipt

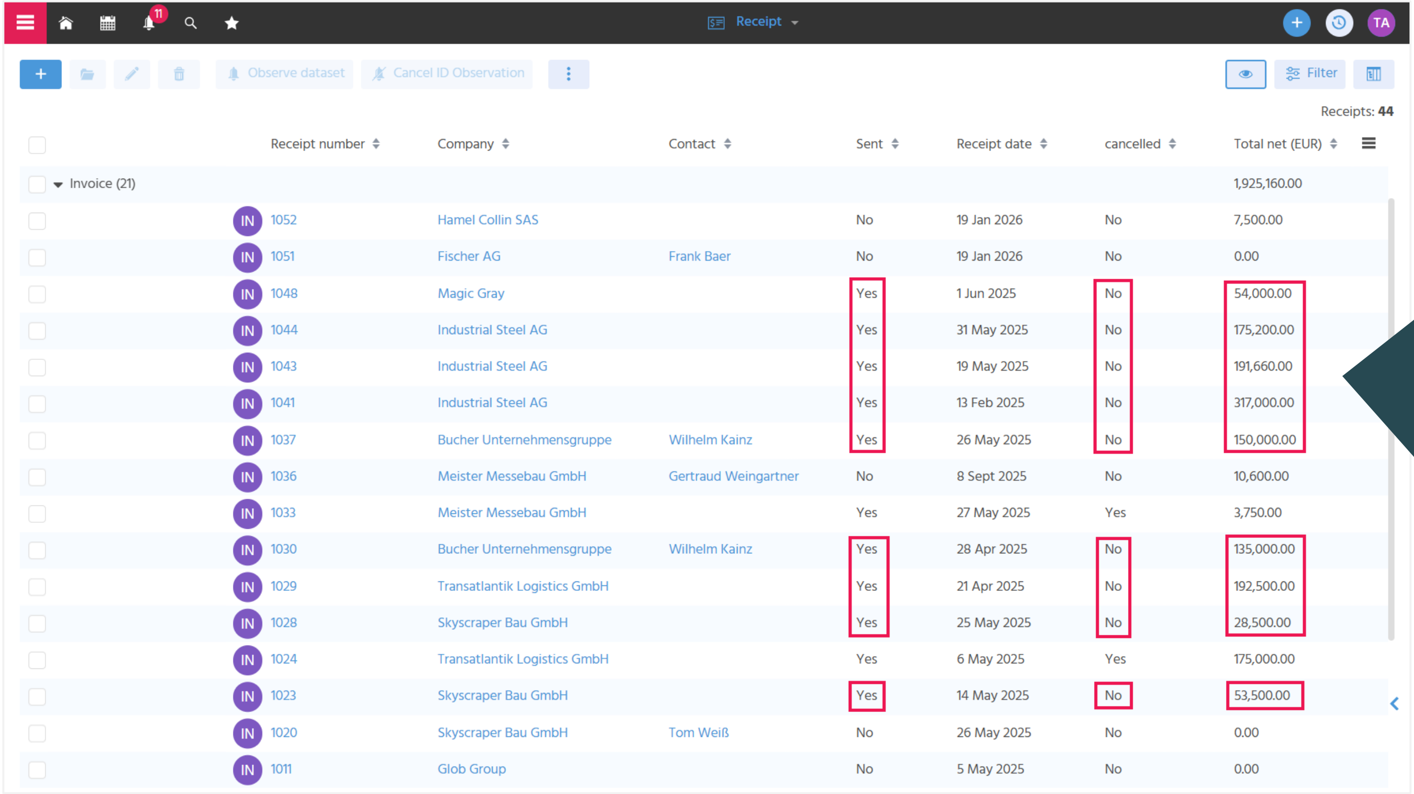
Observe dataset | Cancel ID Observation | Filter

Receipts: **44**

	Receipt number	Company	Contact	Sent	Receipt date	cancelled	Total net (EUR)
Invoice (21)							1,925,160.00
Order confirmation (15)							2,167,957.50
OC	1050	Meister Messebau		No	19 Jan 2026	No	0.00
OC	1049	privat	Ludwig Kanzler	Yes	18 Jun 2025	No	12,547.50
OC	1047	Bucher Unternehmensgruppe		Yes	29 May 2025	No	640,000.00
OC	1046	Bucher Unternehmensgruppe		No	1 Nov 2025	No	0.00
OC	1045	Glob Group	Cameron Doyle	No	8 Jul 2025	No	90,250.00
OC	1042	Industrial Steel AG		Yes	17 Apr 2025	No	366,860.00
OC	1040	Industrial Steel AG		Yes	10 Jan 2025	No	317,000.00
OC	1039	Industrial Steel AG		No	6 Oct 2024	No	73,000.00
OC	1038	Industrial Steel AG		Yes	7 Jul 2025	No	223,000.00
OC	1034	Meister Messebau GmbH	Gertraud Weingartner	No	5 Sept 2025	No	10,600.00
OC	1031	Meister Messebau GmbH		Yes	24 May 2025	No	3,750.00
OC	1006	Industrial Steel AG		Yes	10 May 2024	No	107,737.50
OC	1004	Industrial Steel AG		Yes	6 Feb 2024	No	107,737.50
OC	1002	Industrial Steel AG		Yes	8 Nov 2023	No	107,737.50
OC	1000	Industrial Steel AG		Yes	25 Aug 2023	No	107,737.50

The confirmation volume is calculated from the net totals of order confirmations that have been sent and not canceled.

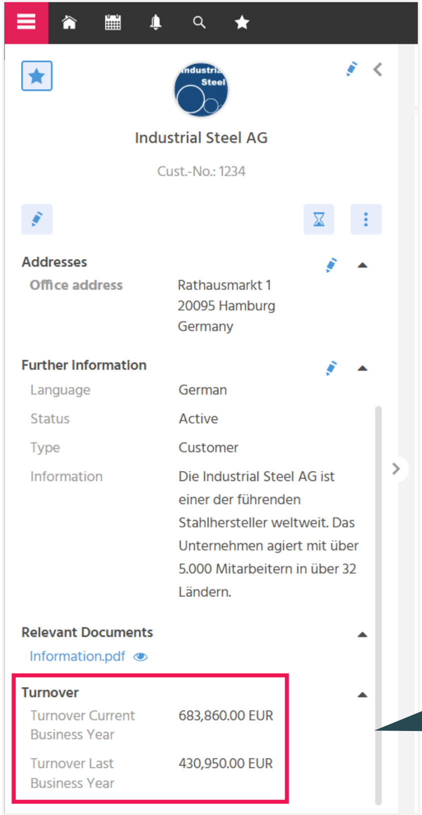
Turnover



	Receipt number	Company	Contact	Sent	Receipt date	cancelled	Total net (EUR)
Invoice (21)							1,925,160.00
IN	1052	Hamel Collin SAS		No	19 Jan 2026	No	7,500.00
IN	1051	Fischer AG	Frank Baer	No	19 Jan 2026	No	0.00
IN	1048	Magic Gray		Yes	1 Jun 2025	No	54,000.00
IN	1044	Industrial Steel AG		Yes	31 May 2025	No	175,200.00
IN	1043	Industrial Steel AG		Yes	19 May 2025	No	191,660.00
IN	1041	Industrial Steel AG		Yes	13 Feb 2025	No	317,000.00
IN	1037	Bucher Unternehmensgruppe	Wilhelm Kainz	Yes	26 May 2025	No	150,000.00
IN	1036	Meister Messebau GmbH	Gertraud Weingartner	No	8 Sept 2025	No	10,600.00
IN	1033	Meister Messebau GmbH		Yes	27 May 2025	Yes	3,750.00
IN	1030	Bucher Unternehmensgruppe	Wilhelm Kainz	Yes	28 Apr 2025	No	135,000.00
IN	1029	Transatlantik Logistics GmbH		Yes	21 Apr 2025	No	192,500.00
IN	1028	Skyscraper Bau GmbH		Yes	25 May 2025	No	28,500.00
IN	1024	Transatlantik Logistics GmbH		Yes	6 May 2025	Yes	175,000.00
IN	1023	Skyscraper Bau GmbH		Yes	14 May 2025	No	53,500.00
IN	1020	Skyscraper Bau GmbH	Tom Weiß	No	26 May 2025	No	0.00
IN	1011	Glob Group		No	5 May 2025	No	0.00

The Turnover is calculated from the net totals of invoices that have been sent and not canceled. If you do not want to enter invoices in ADITO but would rather import them from a third-party system, you will find further information in the readme file for the receipt module.

Turnover



In the company preview you will find the actual turnover for the current and previous business year.

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Einzigartige Beziehungen