



# Knowledge Management

ADITO Software GmbH

From version xRM 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

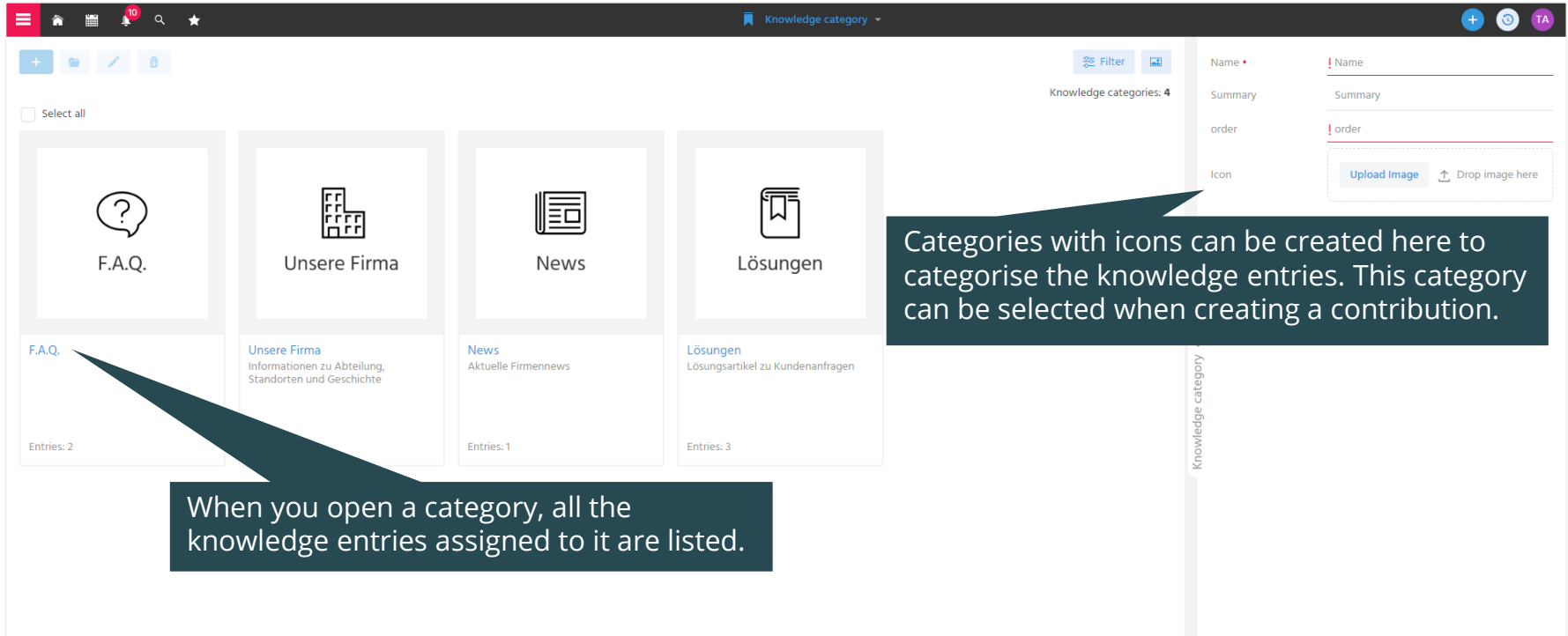
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Create  
Knowledge  
category

# Knowledge category

## Create new data records and overview



The screenshot shows the ADITO Knowledge category management interface. The top navigation bar includes a menu icon, home, calendar, notifications (10), search, and star icons. The main header displays 'Knowledge category' with a dropdown arrow and user avatars. The left sidebar has a 'Select all' checkbox and four category cards: 'F.A.Q.' (question mark icon, 2 entries), 'Unsere Firma' (building icon, 1 entry), 'News' (newspaper icon, 1 entry), and 'Lösungen' (book icon, 3 entries). The right sidebar shows a form for creating or editing a category, with fields for Name, Summary, order, and Icon, along with an 'Upload Image' button and a 'Drop image here' area. A dark blue callout box points to the 'F.A.Q.' category card, stating: 'When you open a category, all the knowledge entries assigned to it are listed.' Another dark blue callout box points to the 'Icon' field in the form, stating: 'Categories with icons can be created here to categorise the knowledge entries. This category can be selected when creating a contribution.'

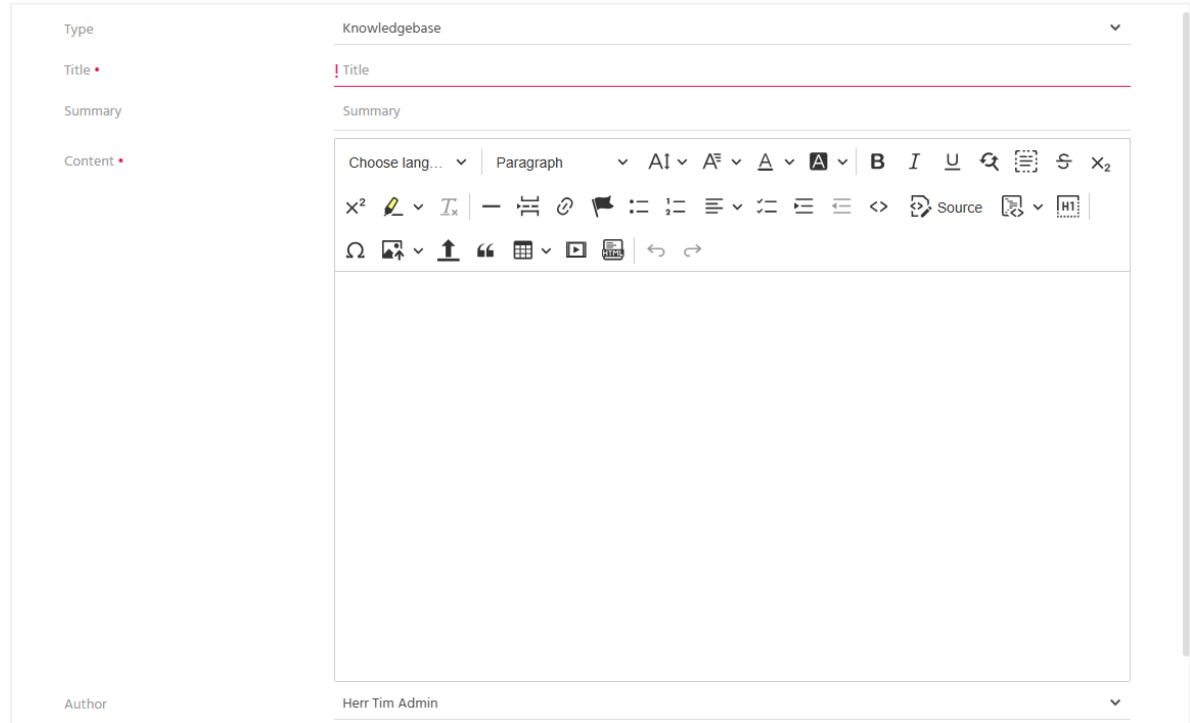


Create  
Knowledge  
entries

# Knowledge entries

## Type

- Knowledge entries of the **"Knowledgebase"** type can be used generally.
- The **"Solution"** type is used for the assignment to service tickets (see separate chapter).



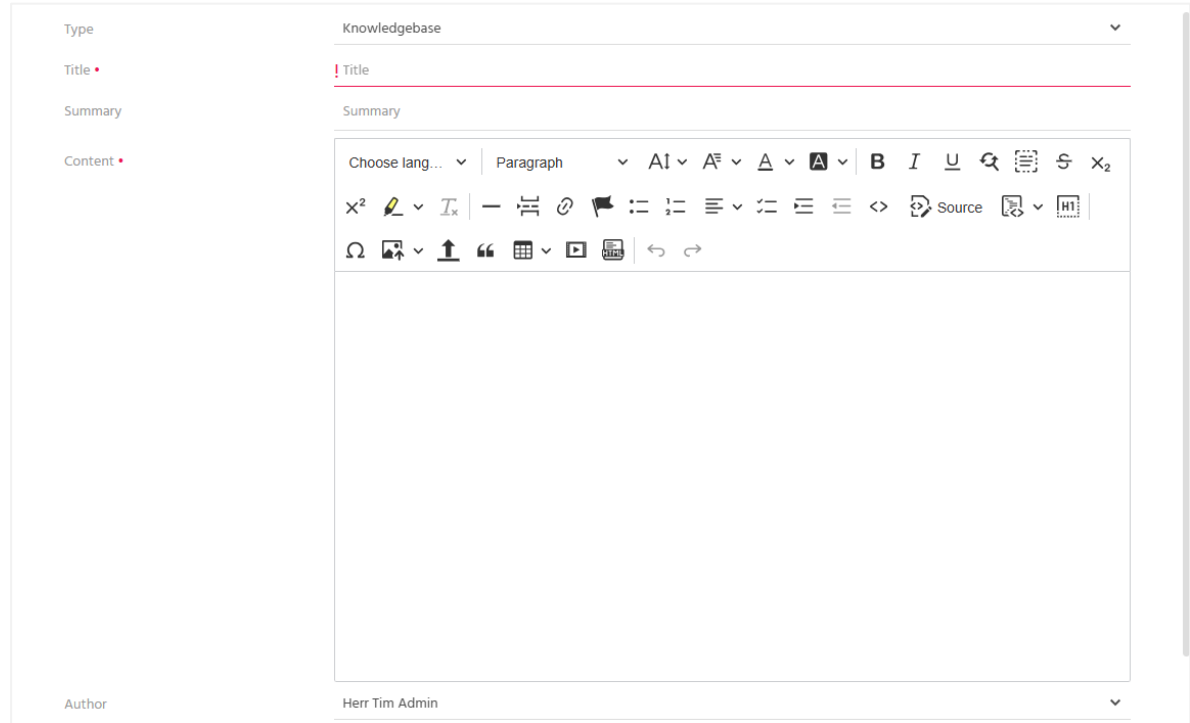
The screenshot displays the ADITO Knowledgebase entry form. On the left, a sidebar lists the form sections: Type, Title, Summary, and Content. The main area is titled 'Knowledgebase' and contains fields for 'Title' (with a red exclamation mark icon) and 'Summary'. Below these is a rich text editor for 'Content' with a comprehensive toolbar including options for language, paragraph style, text color, background color, bold, italic, underline, link, unlink, source, and various alignment and list options. The form is attributed to 'Herr Tim Admin' at the bottom.

# Knowledge entries

## Title and summary

In addition to a **title**, a **summary** that briefly describes the content can be entered.

The summary is displayed as a separate area in the preview.



The screenshot shows the ADITO Knowledgebase entry form. On the left is a sidebar with labels: 'Type', 'Title', 'Summary', and 'Content'. The main area is titled 'Knowledgebase' and contains a 'Title' field with a red exclamation mark icon, a 'Summary' field, and a 'Content' field with a rich text editor. The rich text editor has a toolbar with various icons for text formatting, alignment, and insertion. At the bottom, there is an 'Author' field with the text 'Herr Tim Admin'.

Type Knowledgebase

Title ! Title

Summary

Content

Choose lang... Paragraph A A A B I U Source HT

Author Herr Tim Admin

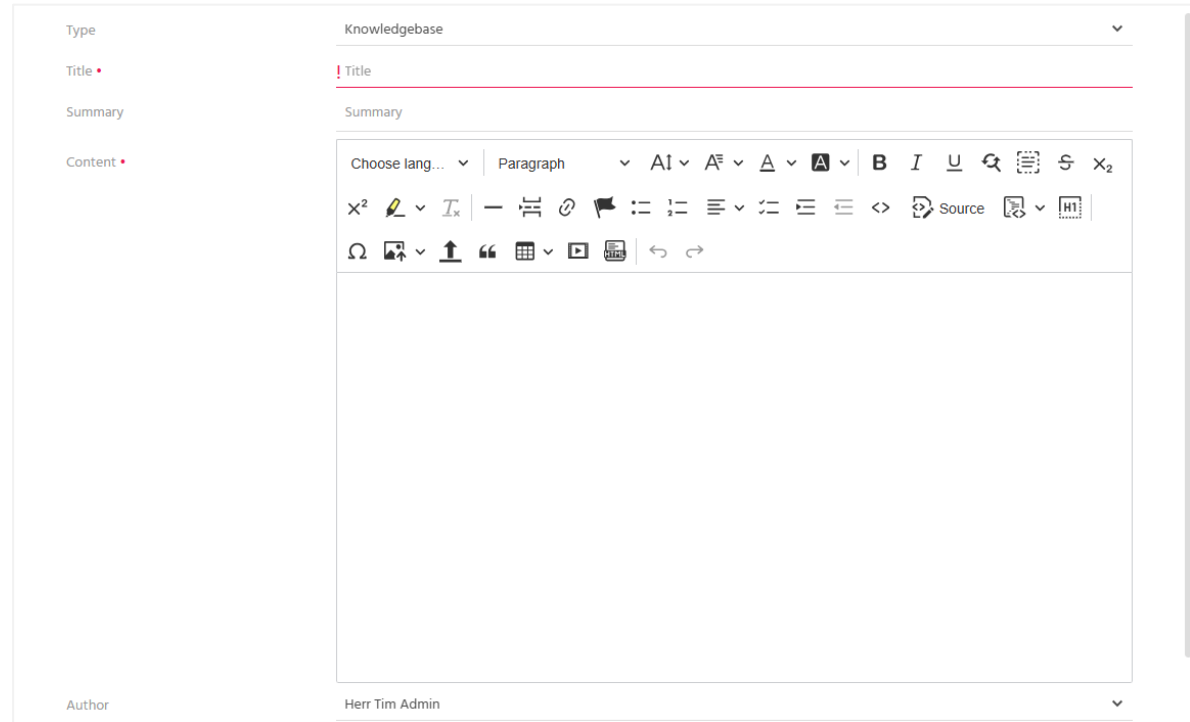


# Knowledge entries

## Create content using HTML editor

The **content** of a entry is formatted using an **HTML editor**.

The individual formatting options for text, images etc. are described in the separate documentation for the HTML editor.



The screenshot displays the ADITO Knowledgebase HTML editor interface. On the left, a sidebar contains a list of fields: 'Type' (set to 'Knowledgebase'), 'Title' (marked with a red dot), 'Summary', and 'Content' (marked with a red dot). The main editing area is divided into sections for 'Title', 'Summary', and 'Content'. The 'Content' section is active, showing a rich text editor toolbar with various formatting options such as bold, italic, underline, link, and image insertion. Below the toolbar is a large text area for entering content. At the bottom, the 'Author' field is populated with 'Herr Tim Admin'.

# Knowledge entries

## Author and Responsible

|             | Title ▾            | Firstname ▾ | Lastname ▾ | Company ▾            |   |
|-------------|--------------------|-------------|------------|----------------------|---|
|             |                    | Steffen     | Abend      | privat               |   |
|             |                    | Tim         | Admin      | meineFirma GmbH      |   |
|             |                    | Tasuku      | Akiyama    | Rixner und Rupp SE   |   |
|             |                    |             |            | nd Rupp SE           |   |
|             |                    |             |            | ruppe Matthias Bogen |   |
|             |                    | Markus      |            | Industrial Steel AG  |   |
| Author      | Frau Isatou Jammeh |             |            |                      | ⬆ |
| Responsible | Frau Isatou Jammeh |             |            |                      | ⬇ |
| Category    | Lösungen           |             |            |                      | ⬇ |

An **author** and **person responsible** are assigned to each contribution.

As these knowledge entries can also be external sources, these fields can also be filled with contacts (who are not employees).

# Knowledge entries



## Publishing level

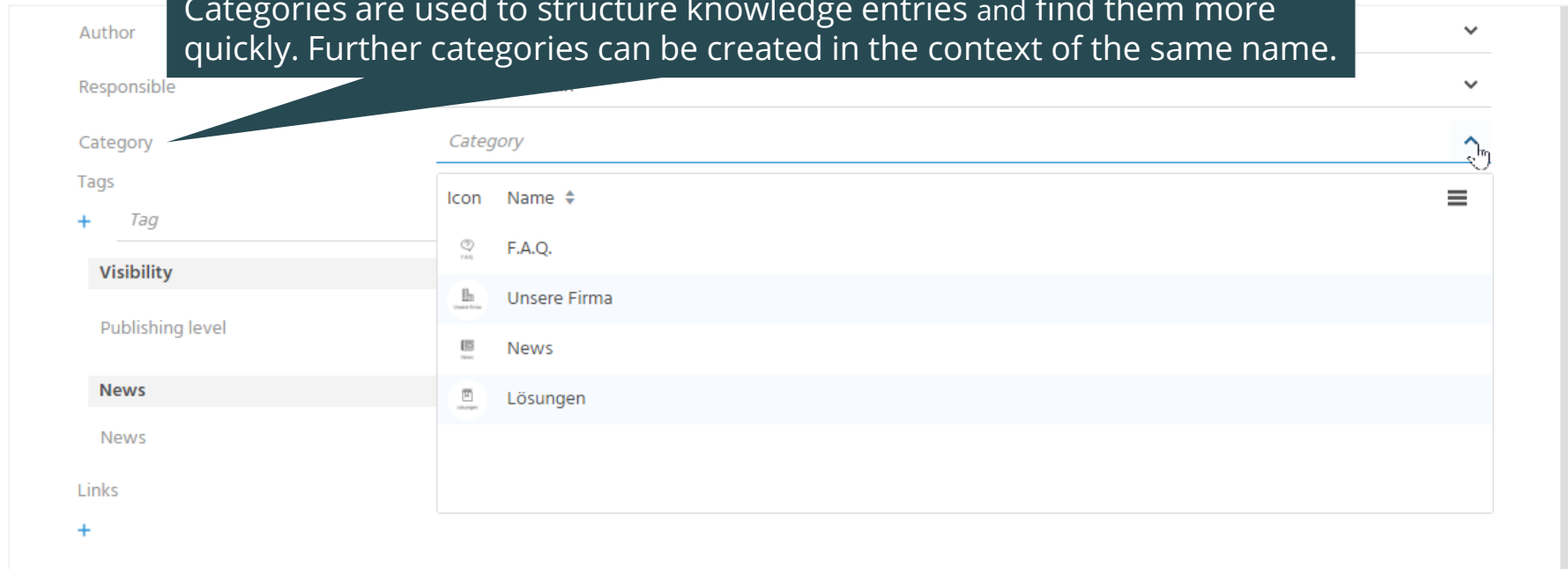
|                  |                |     |
|------------------|----------------|-----|
| Author           | Herr Tim Admin | ▼   |
| Responsible      | Herr Tim Admin | ▼   |
| Category         | Category       | ▼   |
| Tags             |                |     |
| + Tag            |                | ▼ - |
| Visibility       |                |     |
| Publishing level | Internal       | ^   |
| News             | Internal       |     |
| News             | Partner        |     |
| Links            | Public         |     |
| + Document       |                |     |



# Knowledge entries

## Category

Categories are used to structure knowledge entries and find them more quickly. Further categories can be created in the context of the same name.

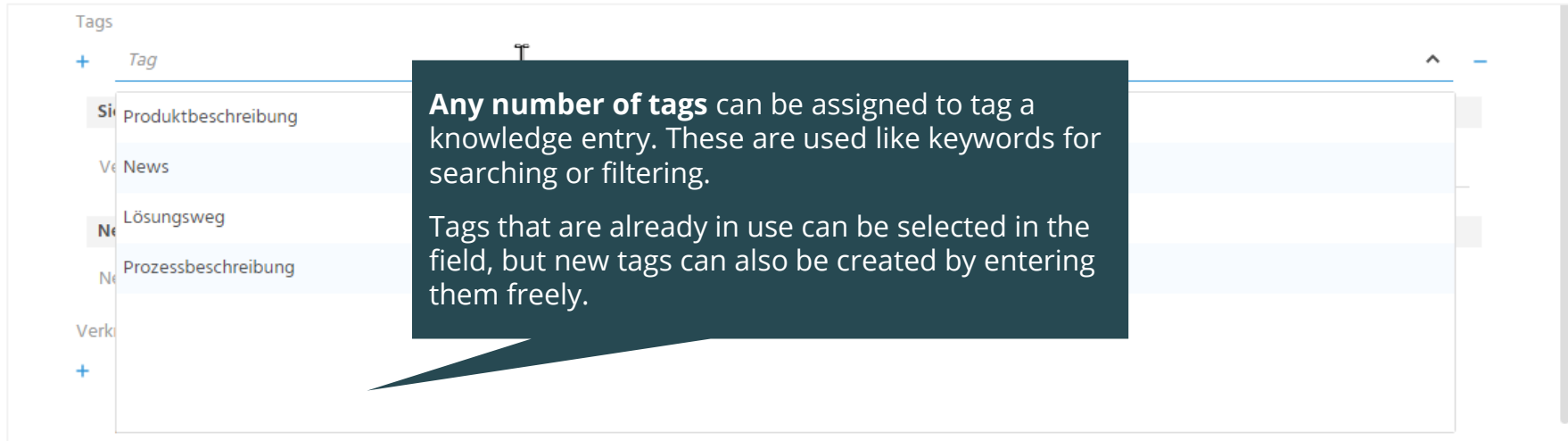


The screenshot shows the ADITO knowledge entry form. On the left is a sidebar with fields: Author, Responsible, Category, Tags, + Tag, Visibility, Publishing level, News, News, Links, and +. The 'Category' field is selected, and a dropdown menu is open. The dropdown menu has a title 'Category' and a list of categories: F.A.Q., Unsere Firma, News, and Lösungen. Each category has a small icon to its left. A hand cursor is pointing at the top right of the dropdown menu.

| Icon                                                                              | Name         |
|-----------------------------------------------------------------------------------|--------------|
|  | F.A.Q.       |
|  | Unsere Firma |
|  | News         |
|  | Lösungen     |

# Knowledge entries

## Tags



Tags

- + Tag
- Six Produktbeschreibung
- Ve News
- Ne Lösungsweg
- Ne Prozessbeschreibung
- Verke
- +

**Any number of tags** can be assigned to tag a knowledge entry. These are used like keywords for searching or filtering.

Tags that are already in use can be selected in the field, but new tags can also be created by entering them freely.



These tags are **not** displayed in the knowledge entry (preview or main view). They can only be viewed and edited in the edit view.

Please also note that the term “tag” is not used here for the function of individual tags or favourites.



# Knowledge entries



## Links

Tags

+ Campaign

Campaign Step

Vi Company

Pl Contact

Ne Contract

Ne Event

Links

Import Template

+ ! Type

Product

! Dataset

Modul D

Knowledge entries that are entered for a specific customer or a specific product, for example, can be linked to the respective data record when they are created. The links can be found in a separate tab in the main view.

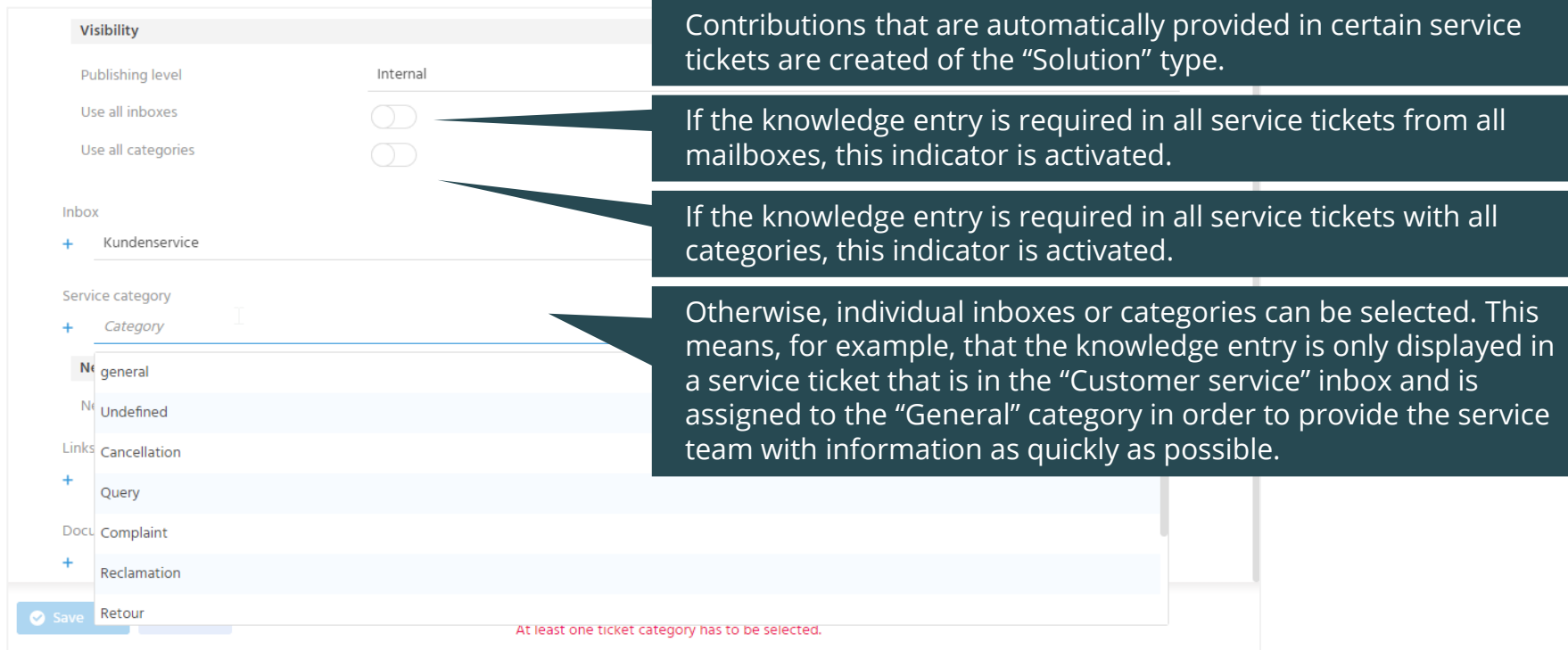




Knowledge  
entry of type  
"Solution"

# Knowledge entries

## Create knowledge entry of type "Solution"



The screenshot shows the 'Visibility' section of the ADITO knowledge entry creation interface. It includes settings for publishing level, use of all inboxes/categories, and selection of inboxes and service categories. Callouts explain that 'Solution' type entries are automatically provided for certain service tickets and that the 'Use all inboxes' and 'Use all categories' indicators activate the entry for all service tickets from all mailboxes and with all categories, respectively. A dropdown menu for 'Service category' is open, showing options like 'general', 'Undefined', 'Cancellation', 'Query', 'Complaint', and 'Reclamation'. A 'Save' button and a 'Retour' button are at the bottom. A red error message states: 'At least one ticket category has to be selected.'

**Visibility**

Publishing level: Internal

Use all inboxes: ☐

Use all categories: ☐

Inbox: + Kundenservice

Service category: + Category

- general
- Undefined
- Cancellation
- Query
- Complaint
- Reclamation

Save Retour

At least one ticket category has to be selected.

Contributions that are automatically provided in certain service tickets are created of the "Solution" type.

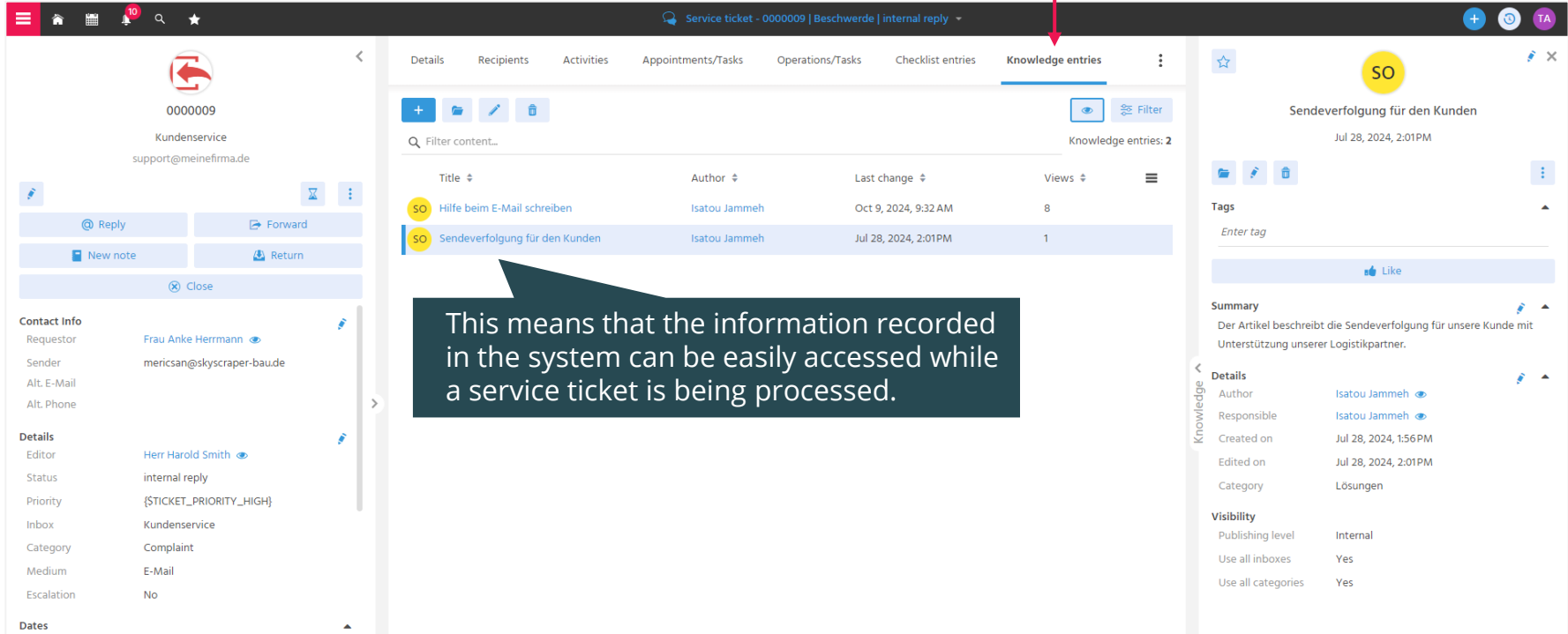
If the knowledge entry is required in all service tickets from all mailboxes, this indicator is activated.

If the knowledge entry is required in all service tickets with all categories, this indicator is activated.

Otherwise, individual inboxes or categories can be selected. This means, for example, that the knowledge entry is only displayed in a service ticket that is in the "Customer service" inbox and is assigned to the "General" category in order to provide the service team with information as quickly as possible.

# Knowledge entries

## Knowledge entry in the service ticket



The screenshot displays the ADITO service ticket interface. The top navigation bar shows the service ticket ID "0000009" and the status "Beschwerde | internal reply". A red arrow points to the "Knowledge entries" tab in the top navigation bar. The left sidebar contains contact information for "Frau Anke Herrmann" and "Herr Harold Smith". The main content area shows a table of knowledge entries. A callout box highlights the entry "Sendeverfolgung für den Kunden". The right sidebar shows the details of the selected knowledge entry, including its title, author, and visibility settings.

| Title                          | Author        | Last change           | Views |
|--------------------------------|---------------|-----------------------|-------|
| Hilfe beim E-Mail schreiben    | Isatou Jammeh | Oct 9, 2024, 9:32 AM  | 8     |
| Sendeverfolgung für den Kunden | Isatou Jammeh | Jul 28, 2024, 2:01 PM | 1     |

This means that the information recorded in the system can be easily accessed while a service ticket is being processed.

**Knowledge entry details:**

- Title: Sendeverfolgung für den Kunden
- Author: Isatou Jammeh
- Responsible: Isatou Jammeh
- Created on: Jul 28, 2024, 1:56 PM
- Edited on: Jul 28, 2024, 2:01 PM
- Category: Lösungen
- Publishing level: Internal
- Use all inboxes: Yes
- Use all categories: Yes



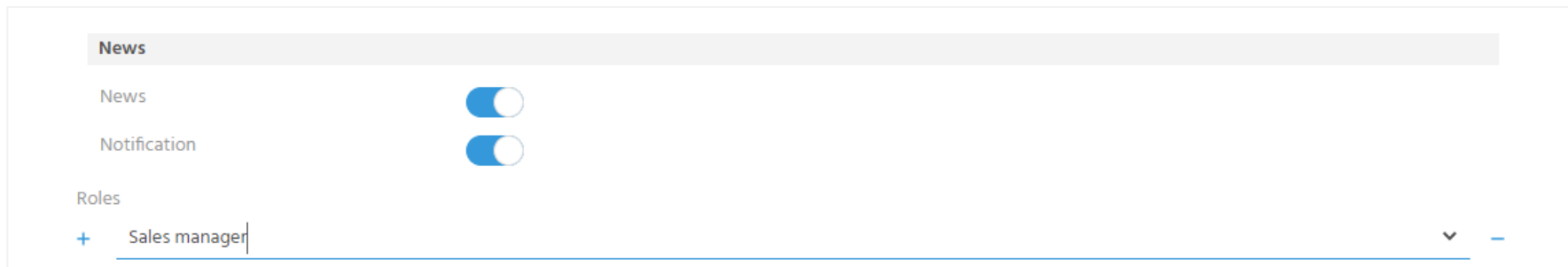
**Knowledge  
entry as news**

# Knowledge entries

## Control knowledge entry as news

The news function can be used to inform employees about a new post.

Here you can specify whether users should receive a **notification** and which **role** a user must have in order to be informed about the news. If you do not specify a role, all users of the selected publication level can see the knowledge entry in their news.



News

News ☒

Notification ☒

Roles

+ Sales manager ▼



Notifications are only **sent when a new knowledge entry is created**, not when you subsequently adjust a knowledge entry.

# Knowledge entries

## News dashlets in the DashletStore

Knowledge entries labelled as “News” are displayed on the user page via **two available dashlets**.

These can be found in the **DashletStore** under the “Knowledge” category.



Newsfeed (Full)

Show complete news articles

Add



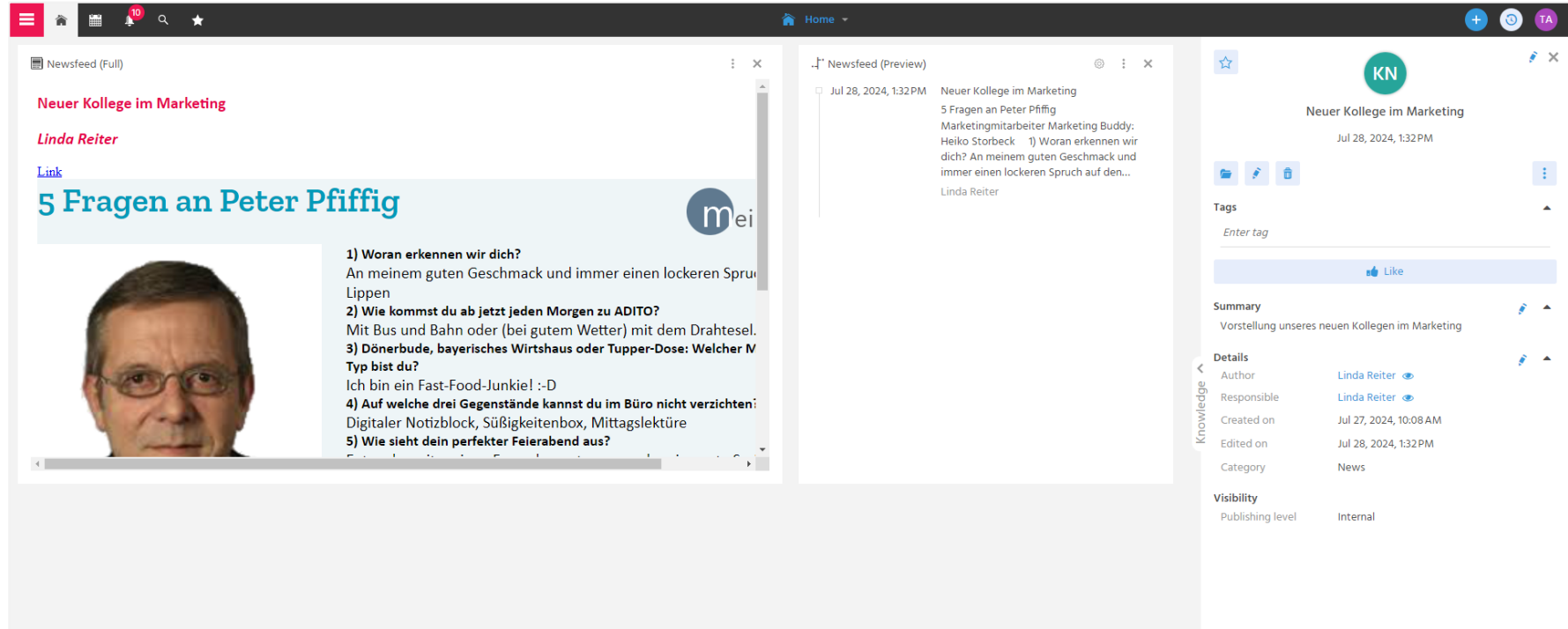
Newsfeed (Preview)

Add



# Knowledge entries

## News dashlets



The screenshot displays the ADITO News dashlet interface, which is divided into three main sections: a full view, a preview view, and a details sidebar.

**Full View (Left):** Shows a news entry titled "Neuer Kollege im Marketing" by Linda Reiter. The entry includes a link to "5 Fragen an Peter Pfiffig" and a photo of Peter Pfiffig. The content of the article is as follows:

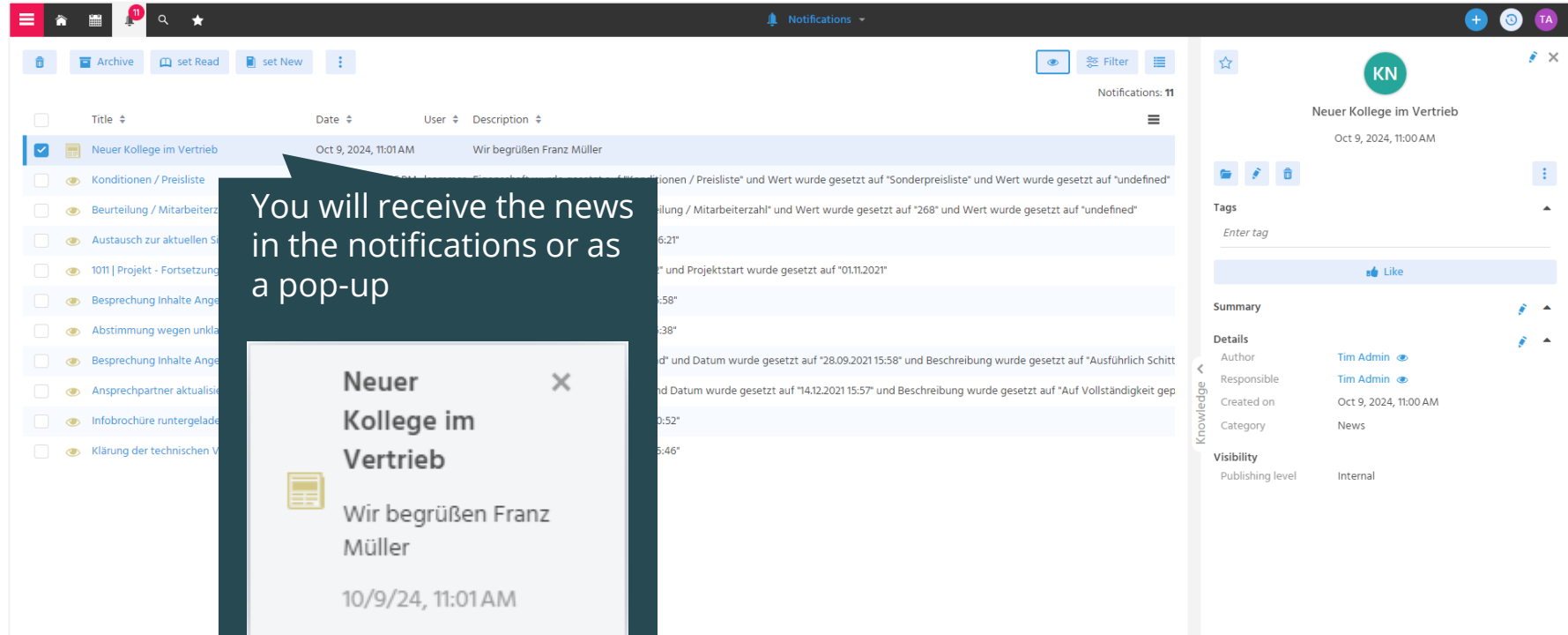
- 1) **Woran erkennen wir dich?**  
An meinem guten Geschmack und immer einen lockeren Spruch auf den Lippen
- 2) **Wie kommst du ab jetzt jeden Morgen zu ADITO?**  
Mit Bus und Bahn oder (bei gutem Wetter) mit dem Drahtesel.
- 3) **Dönerbude, bayerisches Wirtshaus oder Tupper-Dose: Welcher IV Typ bist du?**  
Ich bin ein Fast-Food-Junkie! :-D
- 4) **Auf welche drei Gegenstände kannst du im Büro nicht verzichten?**  
Digitaler Notizblock, Süßigkeitenbox, Mittagslektüre
- 5) **Wie sieht dein perfekter Feierabend aus?**

**Preview View (Middle):** Shows a preview of the same news entry, including the title, author, and a brief description of the content.

**Details Sidebar (Right):** Provides additional information about the news entry, including the author (Linda Reiter), the responsible person (Linda Reiter), the creation date (Jul 27, 2024, 10:08 AM), the edit date (Jul 28, 2024, 1:32 PM), the category (News), and the visibility level (Internal).

# Knowledge entries

## Notifications about news



The screenshot displays the ADITO interface. At the top, a dark navigation bar contains icons for home, calendar, and notifications (with a red badge showing '11'). Below this, a toolbar includes 'Archive', 'set Read', and 'set New' buttons. The main content area shows a list of knowledge entries. The first entry, 'Neuer Kollege im Vertrieb', is highlighted. A dark blue callout box with a white border points to this entry, containing the text: 'You will receive the news in the notifications or as a pop-up'. Below the callout, a detailed view of the notification is shown, featuring a document icon, the title 'Neuer Kollege im Vertrieb', the text 'Wir begrüßen Franz Müller', and the timestamp '10/9/24, 11:01 AM'. To the right of the main list, a sidebar shows the details of the selected entry, including the title 'Neuer Kollege im Vertrieb', the date 'Oct 9, 2024, 11:00 AM', a 'Like' button, and a 'Summary' section with fields for Author, Responsible, Created on, Category, and Visibility.

Notifications: 11

| Title                                                            | Date                  | User | Description               |
|------------------------------------------------------------------|-----------------------|------|---------------------------|
| <input checked="" type="checkbox"/> Neuer Kollege im Vertrieb    | Oct 9, 2024, 11:01 AM |      | Wir begrüßen Franz Müller |
| <input type="checkbox"/> Konditionen / Preisliste                |                       |      |                           |
| <input type="checkbox"/> Beurteilung / Mitarbeiterzahl           |                       |      |                           |
| <input type="checkbox"/> Austausch zur aktuellen Situation       |                       |      |                           |
| <input type="checkbox"/> 1011   Projekt - Fortsetzung            |                       |      |                           |
| <input type="checkbox"/> Besprechung Inhalte Angebots            |                       |      |                           |
| <input type="checkbox"/> Abstimmung wegen unklarer               |                       |      |                           |
| <input type="checkbox"/> Besprechung Inhalte Angebots            |                       |      |                           |
| <input type="checkbox"/> Ansprechpartner aktualisieren           |                       |      |                           |
| <input type="checkbox"/> Infobroschüre runtergeladen             |                       |      |                           |
| <input type="checkbox"/> Klärung der technischen Voraussetzungen |                       |      |                           |

You will receive the news in the notifications or as a pop-up

**Neuer Kollege im Vertrieb**

Wir begrüßen Franz Müller

10/9/24, 11:01 AM

**Neuer Kollege im Vertrieb**

Oct 9, 2024, 11:00 AM

Like

**Summary**

**Details**

Author: Tim Admin

Responsible: Tim Admin

Created on: Oct 9, 2024, 11:00 AM

Category: News

**Visibility**

Publishing level: Internal



**Views & Likes**

# Knowledge entries

## Views and Likes

- A view is each call by a user, i.e. if a user opens this entry twice, this results in two views.
- Unique views, users who have opened the entry several times, are only counted once
- To like an entry, the action in the preview is used.



Hilfe beim E-Mail schreiben

Oct 9, 2024, 9:32 AM



Tags

 Like

Summary

Der Artikel gibt eine Einstiegshilfe zum korrekten Schreiben von Dienst-E-Mails.

Details

|             |                                                                                                   |
|-------------|---------------------------------------------------------------------------------------------------|
| Author      | Isatou Jammeh  |
| Responsible | Isatou Jammeh  |
| Created on  | Jul 28, 2024, 1:37 PM                                                                             |
| Edited on   | Oct 9, 2024, 9:32 AM                                                                              |
| Category    | Lösungen                                                                                          |

Visibility

|                    |          |
|--------------------|----------|
| Publishing level   | Internal |
| Use all inboxes    | Yes      |
| Use all categories | Yes      |

9  
Views

1  
Unique Views

0  
Likes



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