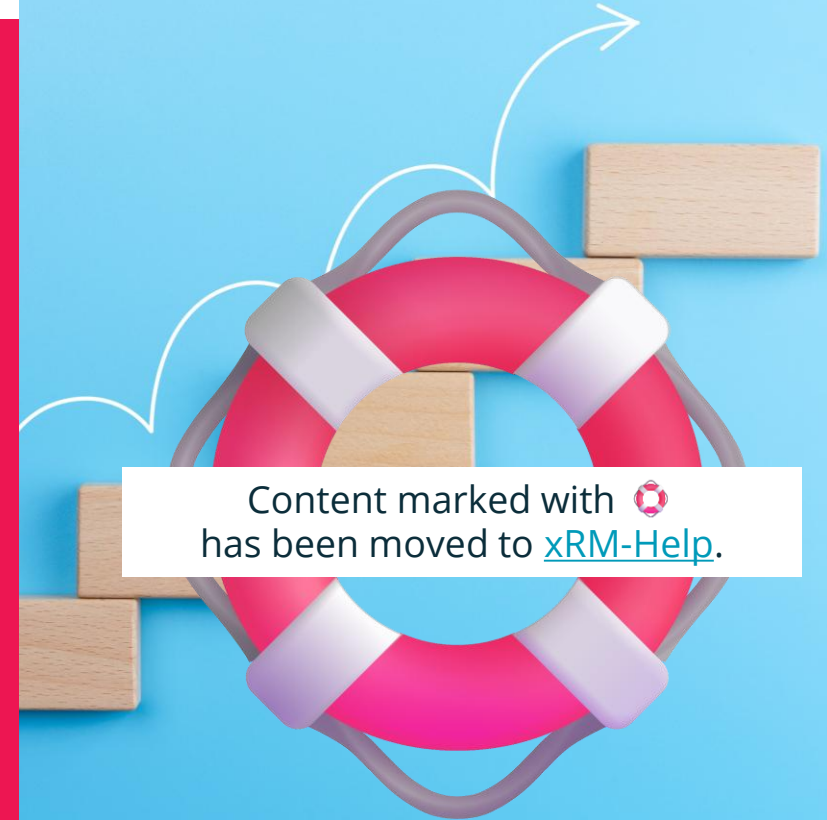


UX & Basics

ADITO Software GmbH

From version 2026.4.2 | July 2026



Content marked with  has been moved to [xRM-Help](#).



Screenshots

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



Agenda

-  Log-in
-  Structure/terms of the Web Client
- Dashboards & Dashlets
 - [Set up My Dashboard \(Home\)](#)
 - [Dashlets from the DashletStore](#)
 - [Creating individual Dashlets](#)
 - [Configuring Dashlets](#)
 - [Share Dashlets](#)
 - [Publish Dashlets](#)
 - [Delete Dashlets](#)
-  Searching for datasets: Index search
-  Filter & grouping datasets
-  Navigating within the Context
 -  FilterView
 -  Preview
 -  MainView
 -  EditView
-  Quickentry
-  Working in the web browser
 -  Working with ADITO links
 -  Copy button for links
 -  Working in several browser tabs
 -  Navigate back using the history button
 -  Contrast
 -  Zoom
- Planning of appointments
 - [Open calendar](#)
 -  Control calendar display
 - [Calendar of colleagues](#)
 - [Create appointments](#)
 - [Appointment Preview](#)
- Mark or categorize datasets as "important"
 - [Overview](#)
 - [Assigning tags](#)
 - [Favorites](#)
 - [#tags](#)
- Documents in the Preview
-  User-specific settings
 -  User menu
 -  Saving individual display settings

Dashboards & Dashlets



Home

My Dashboard (Home) can always be accessed by pressing the Home button.

My Dashboard (Home) is your starting screen that can be customized flexibly.

7
New tasks

2
Imminent appointments for today

My Tasks

Status	Subject	
waiting	Fr. Vogel kont...	
new	Freier Außend...	
new	Event im Hause	Frau Birgit Lei
new	Controlling Termin Vorbereiten	Herr Tim Adm
in progress	Skyscraper VP für nächste Schritte	Frau Birgit Lei
in progress	Vorbereitung Präsentation	Frau Susanne
new	Anrufen: Abfrage aktueller Projektstatus	Frau Lisa Som
new	Produkt Präsentation vorbereiten und mit Li:	Herr Tim Adm
new	Lead nachfassen	Herr Peter Pfi
new	Präsentation vor Ort vorbereiten	Frau Birgit Lei

Newsfeed (Preview)

Marketingmitarbeiter Marketing
Woran erkennen wir dich? An
und immer einen lockeren
e kommst du ab jetzt jeden
Morgen zu ADITO? Mit Bus und Bahn oder (bei gutem...
Linda Reiter

Contact person EN

Picture	Salutation	Title	Firstname	Lastname	Company	E-Mail	Phone	Address
CB	Mr.		Carl	Bush	Lockman LLC	bush@lockman.com		21 London Road - GB SO15 2AD Southampton
CD	Mr.		Cameron	Doyle	Glob Group	doyle@globgroup.com		32-40 Blackfriars Road - GB SE1 8NW London
MF	Mrs.			Freeman	Glob Group	freeman@globgroup.com		32-40 Blackfriars Road - GB SE1 8NW London
JF	Mrs.			Armstrong		jenniferfrost@fsa.org		69 New Street - GB B2 4DU Birmingham
CM	Mr.	PhD				marsh@globgroup.com		32-40 Blackfriars Road - GB SE1 8NW London
MR	Mrs.					read@lockman.com		21 London Road - GB SO15 2AD Southampton
JS	Mr.							-
SW	Mr.		Steven	Wallinger	Parker & Jenkins			26-40 Kensington High Street - GB W8 4PE Royal Borou...

Dashlets are the individually customizable components of a Dashboard.

Appointments/Tasks

10
Overdue tasks

7
New tasks

2
Imminent appointments for today

My Tasks

	Status	Subject	Requestor
☐	waiting	Fr. Vogel kontaktieren	Herr Tim Admin
☐	new	Freier Außendienst im Gebiet alle 4 Wochen	Herr Tim Admin
☐	new	Event im Hause	Frau Birgit Leicht
☐	new	Controlling Termin Vorbereiten	Herr Tim Admin
☐	in progress	Skyscraper VP für nächste Schritte	Frau Birgit Leicht
☐	in progress	Vorbereitung Präsentation	Frau Susanne Lustig
☐	new	Anrufen: Abfrage aktueller Projektstatus	Frau Lisa Sommer
☐	new	Produkt Präsentation vorbereiten und mit Li	Herr Tim Admin
☐	new	Lead nachfassen	Herr Peter Pfiffig
☐	new	Präsentation vor Ort vorbereiten	Frau Birgit Leicht

Newsfeed (Preview)

May 6, 2024, 1:32 PM

Neuer Kollege im Marketing

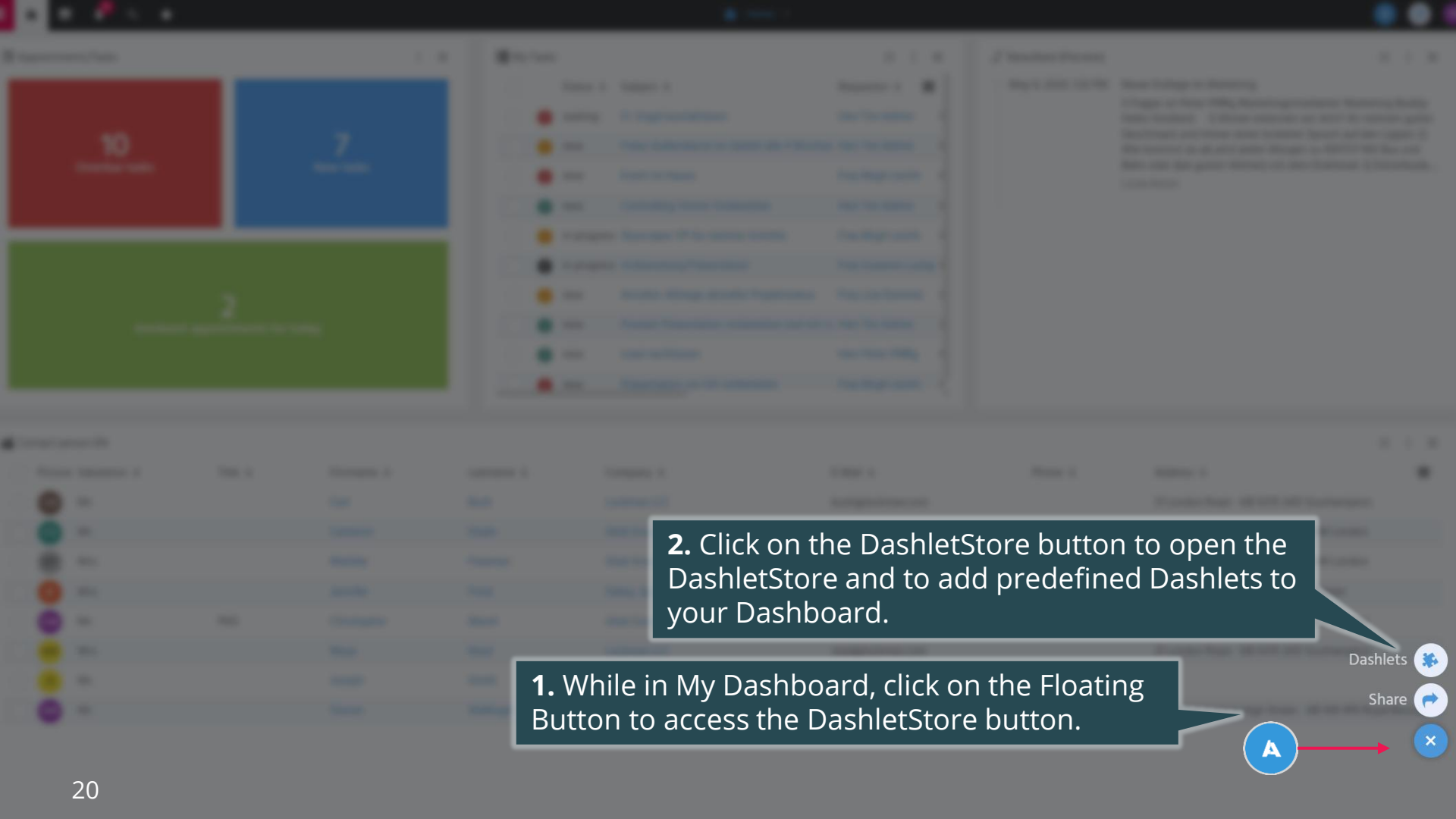
5 Fragen an Peter Pfiffig Marketingmitarbeiter Marketing Buddy: Heiko Storbeck 1) Woran erkennen wir dich? An meinem guten Geschmack und immer einen lockeren Spruch auf den Lippen 2) Wie kommst du ab jetzt jeden Morgen zu ADITO? Mit Bus und Bahn oder (bei gutem Wetter) mit dem Drahtesel. 3) Dönerbude,... Linda Reiter

Contact person EN

	Picture	Salutation	Title	Firstname	Lastname	Company	E-Mail	Phone	Address
☐	CB	Mr.		Carl	Bush				21 London Road - GB SO15 2AD Southampton
☐	CD	Mr.		Cameron	Doyle				Blackfriars Road - GB SE1 8NW London
☐	MF	Mrs.		Matilda	Freeman				Blackfriars Road - GB SE1 8NW London
☐	JF	Mrs.		Jennifer	Frost				W Street - GB B2 4DU Birmingham
☐	CM	Mr.	PhD	Christopher	Marsh	Glob Group	marsh@globgroup.com		32-40 Blackfriars Road - GB SE1 8NW London
☐	MR	Mrs.		Maya	Read	Lockman LLC	read@lockman.com		21 London Road - GB SO15 2AD Southampton
☐	JS	Mr.		Joseph	Smith	Nedick's			-
☐	SW	Mr.		Steven	Wallinger	Parker & Jenkins			26-40 Kensington High Street - GB W8 4PE Royal Borough ...

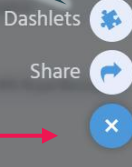
The **position** and **size** of a Dashlet can be adjusted. The **blue dashed frame** shows the next free position or the next possible size.





2. Click on the DashletStore button to open the DashletStore and to add predefined Dashlets to your Dashboard.

1. While in My Dashboard, click on the Floating Button to access the DashletStore button.



The screenshot displays the Dashlets interface. On the left, a sidebar lists categories for dashlets, including 'All (83)', 'Admin (1)', 'Calendar (1)', 'Charts (7)', 'Contact Management (7)', 'Contact synchronisation (5)', 'Covid Information (2)', 'Districts (2)', 'Email (2)', 'Favorites (1)', 'Knowledge (3)', 'Marketing (10)', 'Notifications (1)', 'offline.SlaveAdministrationMyLastSync...', 'Project (3)', and 'Tasks (5)'. The main area shows a grid of dashlets, each with an icon, a title, a description, and an 'Add' button. The dashlets include 'ADITO Facebook Feed', 'Activities', 'All Unlinked Mails', 'All synchronized datasets', 'Appointment CheckUp', 'Bulk Mail Opening Hours', and 'Bulkmail Device Types'. A 'Reset Dashboard' button is located at the top of the dashlet grid. Three callouts provide additional information: one points to the category list, another points to the 'Reset Dashboard' button, and a third points to the dashlet grid.

10
Overdue tasks

Imminent appointments

Contact person EN

Picture Salutation

Mr.

Mr.

Mrs.

Mrs.

Mr.

Mr.

Project (3)

Tasks (5)

Reset Dashboard

ADITO Facebook Feed

Show all Facebook posts of ADITO

Add

Activities

Show all activities

Add

All Unlinked Mails

All mails that could not automatically linked are displayed here

Add

All synchronized datasets

Show all synchronized datasets

Add

Appointment CheckUp

Appointment checklist for the selected day

Add

Bulk Mail Opening Hours

Bulkmail Device Types

Dashlets are displayed depending on the user role.

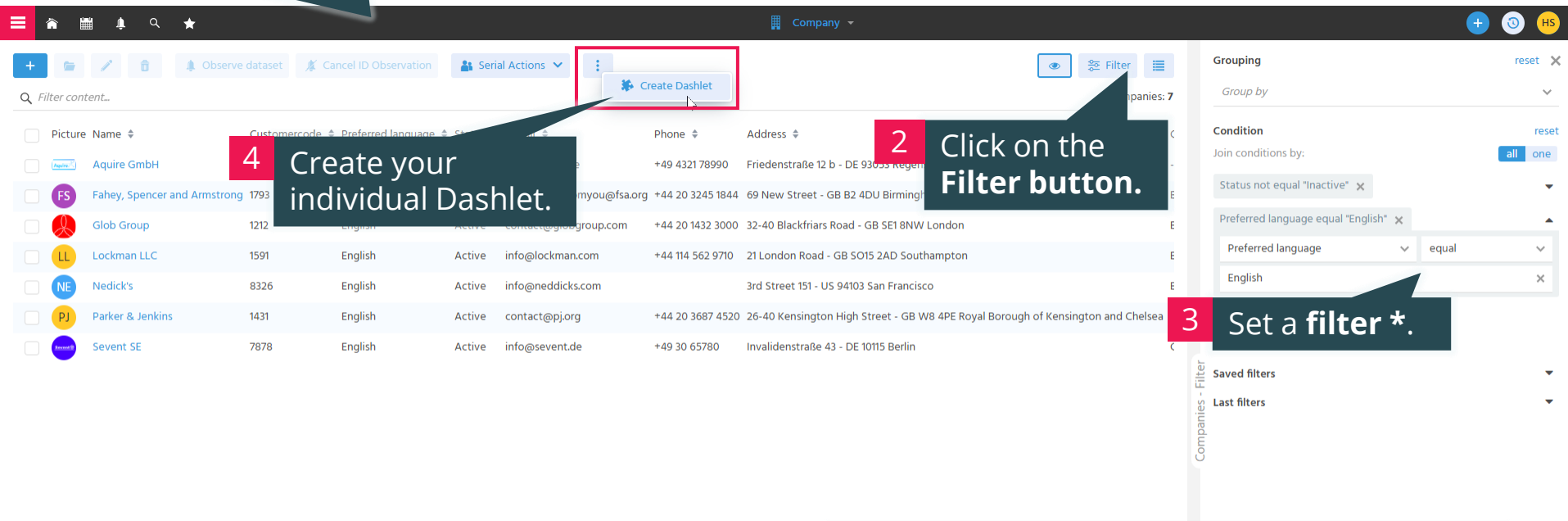
Dashlets that **can only be used once by a user** and that are already placed on the Dashboard will no longer be displayed in the DashletStore.

The available Dashlets are divided into categories.

Reset the Dashboard to its original configuration.

Create individual Dashlets

1 Open the FilterView of the required Context.



The screenshot shows the ADITO interface with a table of company data. A red box highlights the 'Create Dashlet' button in the top toolbar. Another red box highlights the 'Filter' button in the top toolbar. A third red box highlights the 'Filter' button in the right sidebar. A fourth red box highlights the 'Create Dashlet' button in the top toolbar. A fifth red box highlights the 'Filter' button in the right sidebar.

Picture	Name	Customercode	Preferred language	Status	Phone	Address
	Aquire GmbH	1793	English	Active	+49 4321 78990	Friedenstraße 12 b - DE 93055 Regensburg
	Fahey, Spencer and Armstrong	1793	English	Active	+44 20 3245 1844	69 New Street - GB B2 4DU Birmingham
	Glob Group	1212	English	Active	+44 20 1432 3000	32-40 Blackfriars Road - GB SE1 8NW London
	Lockman LLC	1591	English	Active	+44 114 562 9710	21 London Road - GB SO15 2AD Southampton
	Nedick's	8326	English	Active		3rd Street 151 - US 94103 San Francisco
	Parker & Jenkins	1431	English	Active	+44 20 3687 4520	26-40 Kensington High Street - GB W8 4PE Royal Borough of Kensington and Chelsea
	Sevent SE	7878	English	Active	+49 30 65780	Invalidenstraße 43 - DE 10115 Berlin

Grouping

Group by

Condition

Join conditions by:

Status not equal "Inactive" x

Preferred language equal "English" x

Preferred language equal

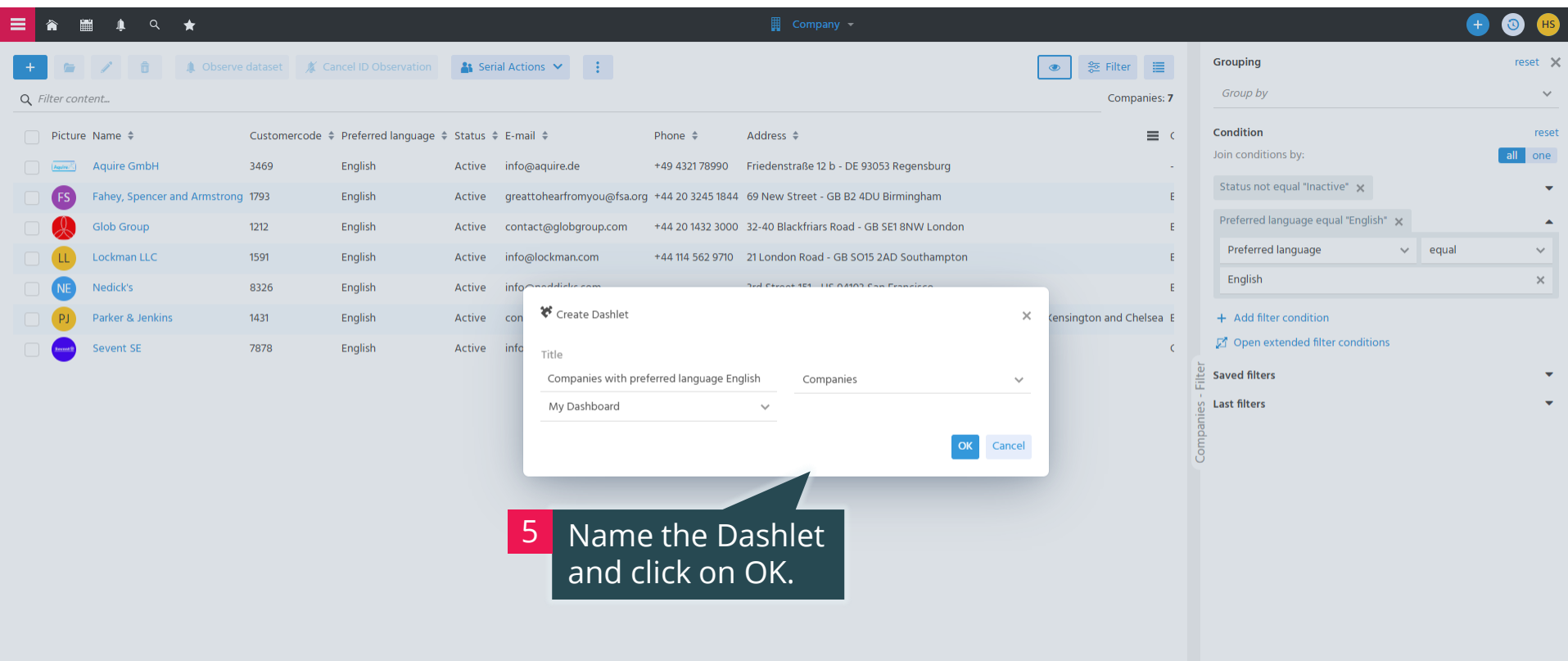
English x

Saved filters

Last filters

* The latest used filter will be transferred into the Dashlet.

Create individual Dashlets



The screenshot shows the ADITO interface with a table of companies. A modal dialog titled 'Create Dashlet' is open, allowing the user to name the dashlet and select the data source.

Table Data:

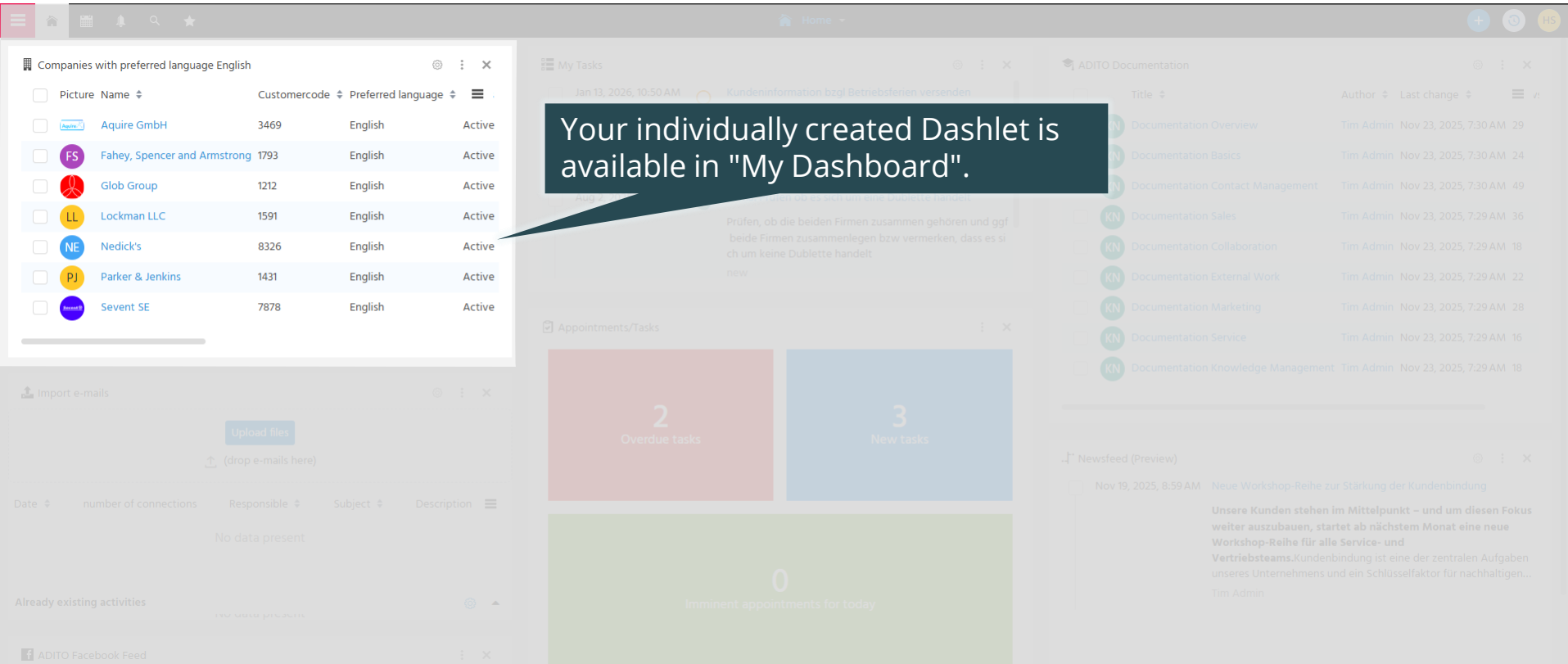
Picture	Name	Customercode	Preferred language	Status	E-mail	Phone	Address
	Aquire GmbH	3469	English	Active	info@acquire.de	+49 4321 78990	Friedenstraße 12 b - DE 93053 Regensburg
	Fahey, Spencer and Armstrong	1793	English	Active	greattohearfromyou@fsa.org	+44 20 3245 1844	69 New Street - GB B2 4DU Birmingham
	Glob Group	1212	English	Active	contact@globgroup.com	+44 20 1432 3000	32-40 Blackfriars Road - GB SE1 8NW London
	Lockman LLC	1591	English	Active	info@lockman.com	+44 114 562 9710	21 London Road - GB SO15 2AD Southampton
	Nedick's	8326	English	Active	info@nedicks.com	+44 114 562 9710	21 London Road - GB SO15 2AD Southampton
	Parker & Jenkins	1431	English	Active	con...		...
	Sevent SE	7878	English	Active	info...		...

Create Dashlet Dialog:

- Title: Companies with preferred language English
- My Dashboard: My Dashboard
- Buttons: OK, Cancel

5 Name the Dashlet and click on OK.

Create individual Dashlets



The screenshot displays the ADITO dashboard interface. A callout box points to the 'My Tasks' section, stating: "Your individually created Dashlet is available in 'My Dashboard'".

Companies with preferred language English

Picture	Name	Customercode	Preferred language	Active
	Aquire GmbH	3469	English	Active
	Fahey, Spencer and Armstrong	1793	English	Active
	Glob Group	1212	English	Active
	Lockman LLC	1591	English	Active
	Nedick's	8326	English	Active
	Parker & Jenkins	1431	English	Active
	Sevent SE	7878	English	Active

My Tasks

Jan 13, 2026, 10:50 AM: Kundeninformation bzgl. Betriebsferien versenden

Prüfen, ob die beiden Firmen zusammen gehören und ggf. beide Firmen zusammenlegen bzw. vermerken, dass es sich um keine Dublette handelt

Appointments/Tasks

- 2 Overdue tasks
- 3 New tasks
- 0 Imminent appointments for today

ADITO Documentation

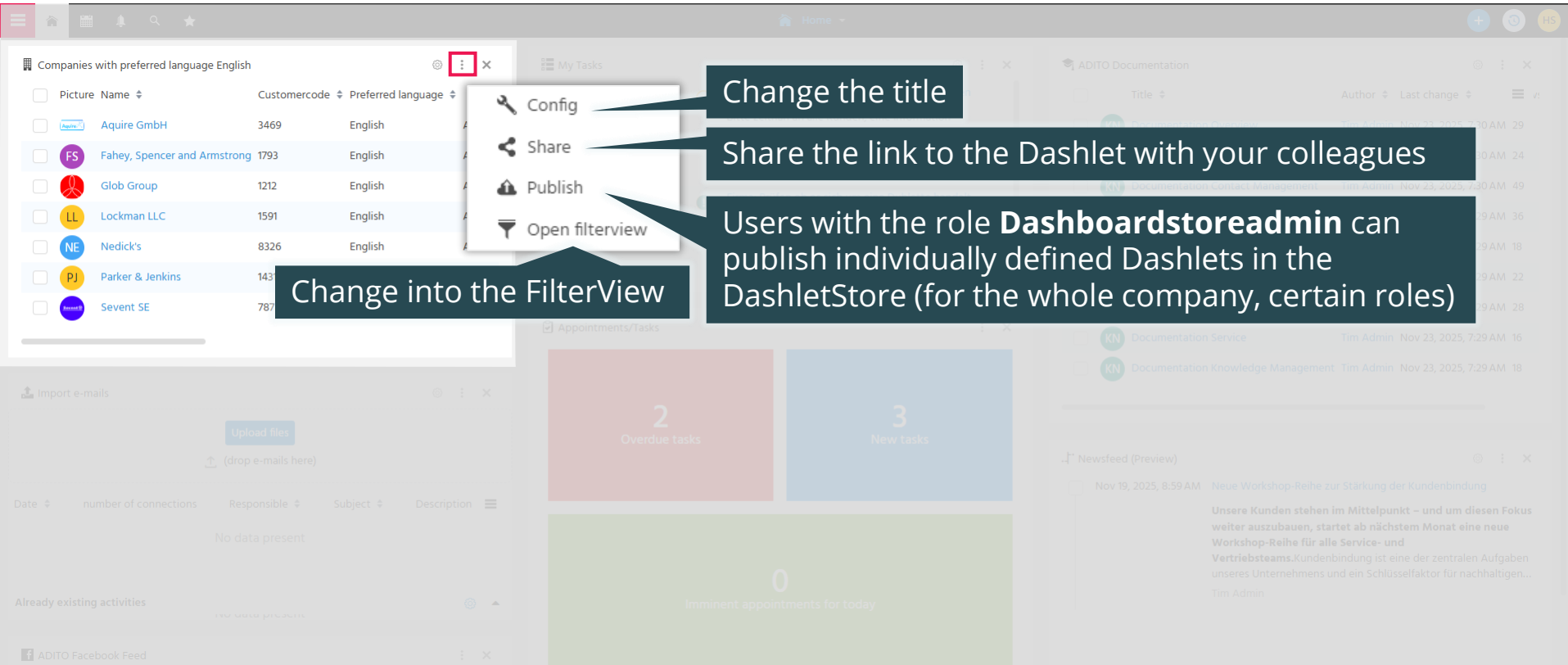
Title	Author	Last change
Documentation Overview	Tim Admin	Nov 23, 2025, 7:30 AM
Documentation Basics	Tim Admin	Nov 23, 2025, 7:30 AM
Documentation Contact Management	Tim Admin	Nov 23, 2025, 7:30 AM
Documentation Sales	Tim Admin	Nov 23, 2025, 7:29 AM
Documentation Collaboration	Tim Admin	Nov 23, 2025, 7:29 AM
Documentation External Work	Tim Admin	Nov 23, 2025, 7:29 AM
Documentation Marketing	Tim Admin	Nov 23, 2025, 7:29 AM
Documentation Service	Tim Admin	Nov 23, 2025, 7:29 AM
Documentation Knowledge Management	Tim Admin	Nov 23, 2025, 7:29 AM

Newsfeed (Preview)

Nov 19, 2025, 8:59 AM: Neue Workshop-Reihe zur Stärkung der Kundenbindung

Unsere Kunden stehen im Mittelpunkt – und um diesen Fokus weiter auszubauen, startet ab nächstem Monat eine neue Workshop-Reihe für alle Service- und Vertriebstteams. Kundenbindung ist eine der zentralen Aufgaben unseres Unternehmens und ein Schlüsselfaktor für nachhaltigen...

"Further Actions" button



The screenshot shows the ADITO dashboard interface. A table titled 'Companies with preferred language English' is visible. A 'Further Actions' menu is open for the first row, showing options: Config, Share, Publish, and Open filterview. Callouts explain the actions: 'Change the title' for Config, 'Share the link to the Dashlet with your colleagues' for Share, and 'Users with the role **Dashboardstoreadmin** can publish individually defined Dashlets in the DashletStore (for the whole company, certain roles)' for Publish. A fourth callout points to the 'Open filterview' option, stating 'Change into the FilterView'.

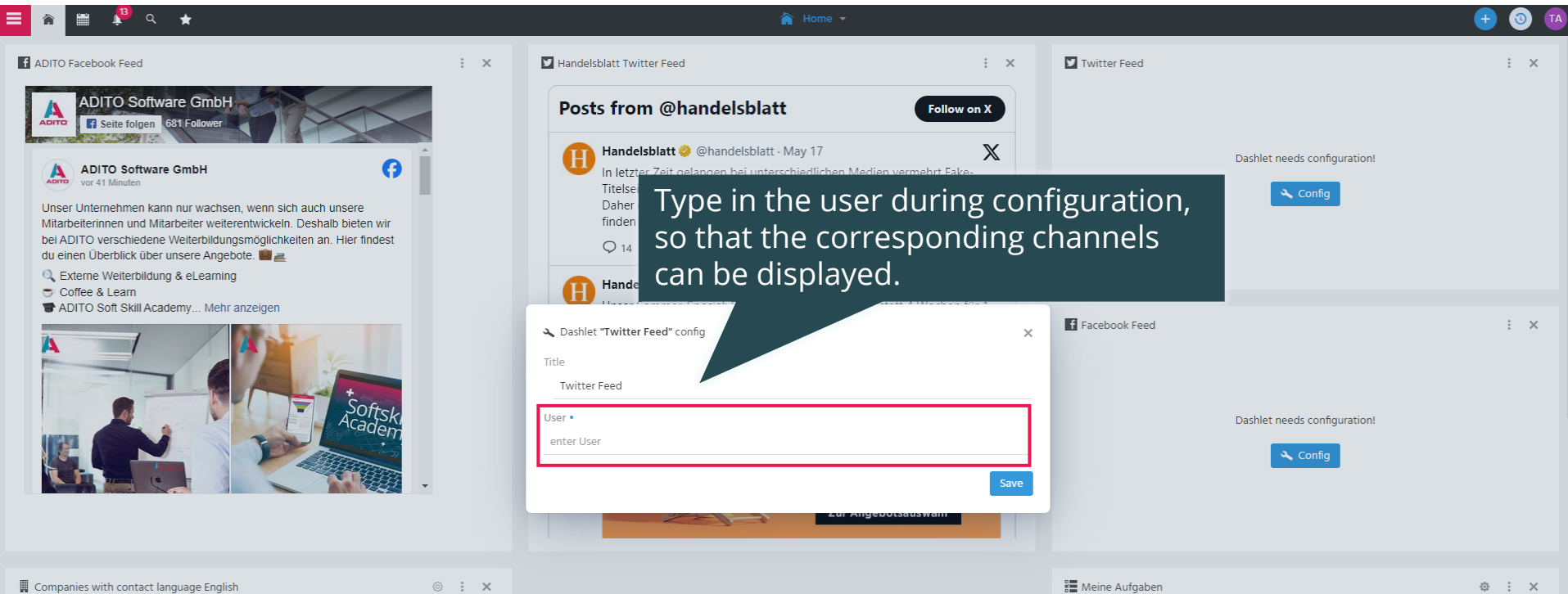
Picture	Name	Customercode	Preferred language
	Aquire GmbH	3469	English
	Fahey, Spencer and Armstrong	1793	English
	Glob Group	1212	English
	Lockman LLC	1591	English
	Nedick's	8326	English
	Parker & Jenkins	143	English
	Sevent SE	787	English

Further Actions Menu:

- Config:** Change the title
- Share:** Share the link to the Dashlet with your colleagues
- Publish:** Users with the role **Dashboardstoreadmin** can publish individually defined Dashlets in the DashletStore (for the whole company, certain roles)
- Open filterview:** Change into the FilterView

Configure Dashlets

Configuration of Social Media Dashlets



The screenshot displays the ADITO dashboard interface. At the top, there is a navigation bar with icons for home, calendar, notifications, search, and a star icon. The main area contains three social media dashlets: 'ADITO Facebook Feed', 'Handelsblatt Twitter Feed', and 'Twitter Feed'. The 'ADITO Facebook Feed' dashlet shows a post from 'ADITO Software GmbH' with text about company growth and employee development. The 'Handelsblatt Twitter Feed' dashlet shows a tweet from '@handelsblatt' dated May 17. The 'Twitter Feed' dashlet is currently in a configuration state, displaying the message 'Dashlet needs configuration!' and a 'Config' button. A configuration dialog box titled 'Dashlet "Twitter Feed" config' is open, showing fields for 'Title' (set to 'Twitter Feed') and 'User' (with a placeholder 'enter User'). A blue 'Save' button is at the bottom right of the dialog. A dark blue speech bubble with white text is overlaid on the dialog, stating: 'Type in the user during configuration, so that the corresponding channels can be displayed.'

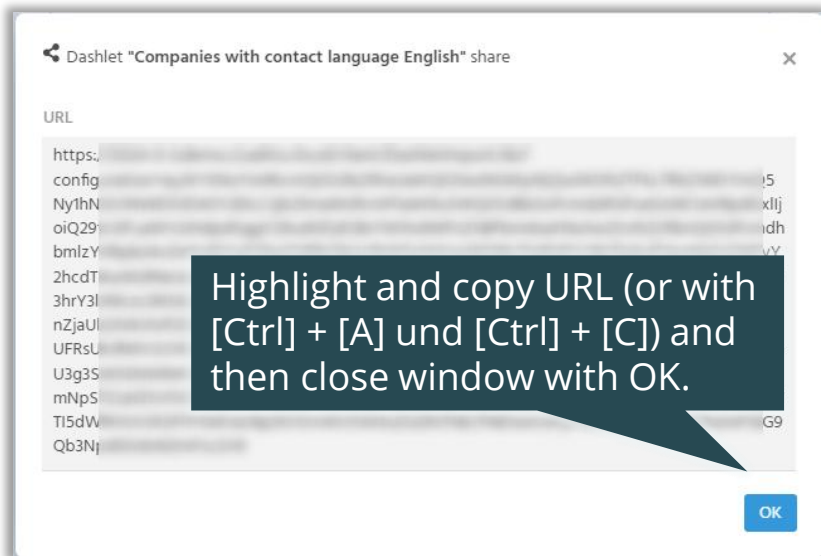
Type in the user during configuration, so that the corresponding channels can be displayed.

Share Dashlets with individual colleagues



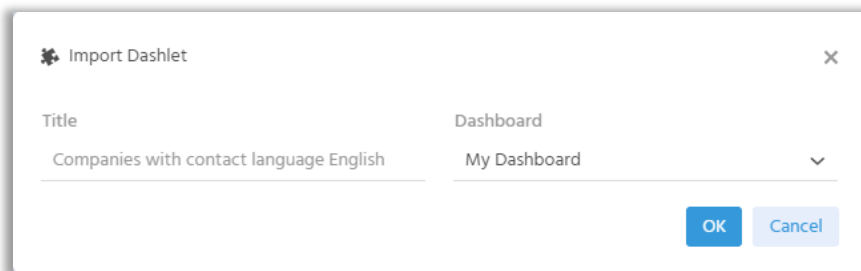
Procedure of sending it:

Highlight and copy link and send it to the recipient.



Procedure of importing it

Open link → Import Dashlet



Publish Dashlets

Company-wide in the DashletStore

Someone with the **role "Dashboardstoreadmin"** can publish Dashlets in the DashletStore.

To do so, the following settings have to be taken care of:

- Assign the Dashlet to a **category** in the DashletStore
- Select **roles** that can use this Dashlet
 - A user with the role of "Dashboardstoreadmin" can only select roles that they possess themselves. For instance, if they do not have a role in Sales, they cannot publish Dashlets for Sales.
- Select **icon** for Dashlet.
- Upload **preview image**, which is used in the DashletStore.
- Button **"Unique per Dashboard"**:
Specify whether the Dashlet can be placed on the Dashboard once or multiple times per user.



The screenshot shows a web form titled "Dashlet 'Companies with contact language English' publish". The form contains several sections: "Title" with the text "Companies with contact language English"; "Categories" with a dropdown menu showing "Contact Management" and a plus icon; "Description" with the text "Show all companies"; "Roles" with a dropdown menu showing "Select role"; "Extended Properties" with a dropdown menu showing "VAADIN:BUILDING"; "Preview" with an "Upload File..." button and a "Drop file here" area; and "Unique per dashboard" with a toggle switch. A "Publish" button is located at the bottom right of the form.

ADITO Software GmbH
Seite folgen 681 Follower

ADITO Software GmbH
vor 41 Minuten

Unser Unternehmen kann nur wachsen, Mitarbeiterinnen und Mitarbeiter weitere bei ADITO verschiedene Weiterbildungs du einen Überblick über unsere Angebot

Externe Weiterbildung & eLearning
Coffee & Learn
ADITO Soft Skill Academy... Mehr an



Companies with contact language English

- ☐ Picture Name ↕
- ☐ Aquire GmbH
- ☐ Fahey, Spencer and Armstrong
- ☐ Glob Group
- ☐ Lockman LLC
- ☐ Nedick's
- ☐ Parker & Jenkins
- ☐ Sevent SE

Dashlets

All (81)

Admin (1)

Calendar (1)

Charts (7)

Contact Management (8)

Contact synchronisation (5)

Covid Information (2)

Districts (2)

Email (1)

Favorites (1)

Knowledge (3)

Marketing (10)

Notifications (1)

offline.SlaveAdministrationMyLastSync...

Project (3)

Sales (15)

Search (1)

Service (15)

Reset Dashboard

Search Dashlets...



Activities

Show all activities

Add



Companies with contact language English

Show all companies

Add



My Tasks



Contacts

Show all contacts

Add



My Activities

Show my activities

Add

Dashletboardstoreadmins can subsequently edit the Dashlets they have published, as indicated by the "Further Actions" button.

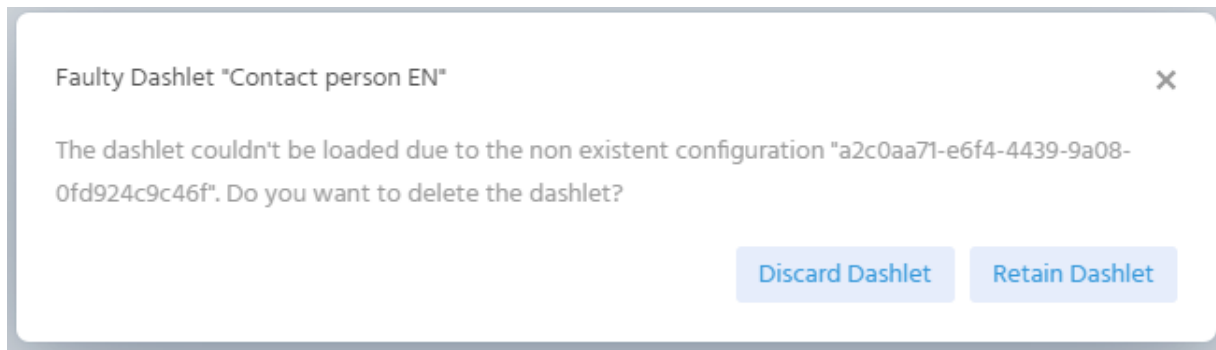
Edit
Delete

Delete Dashlets

Delete Dashlets from Dashboard if they have been removed from the DashletStore

If a Dashlet gets removed from the DashletStore because, for example, a filter had to be adjusted or the logic was revised (either by the Dashletboardstoreadmin or in Customizing), it also shouldn't be used anymore by its users.

→ Users receive this message and can either **discard** or **retain** the Dashlet

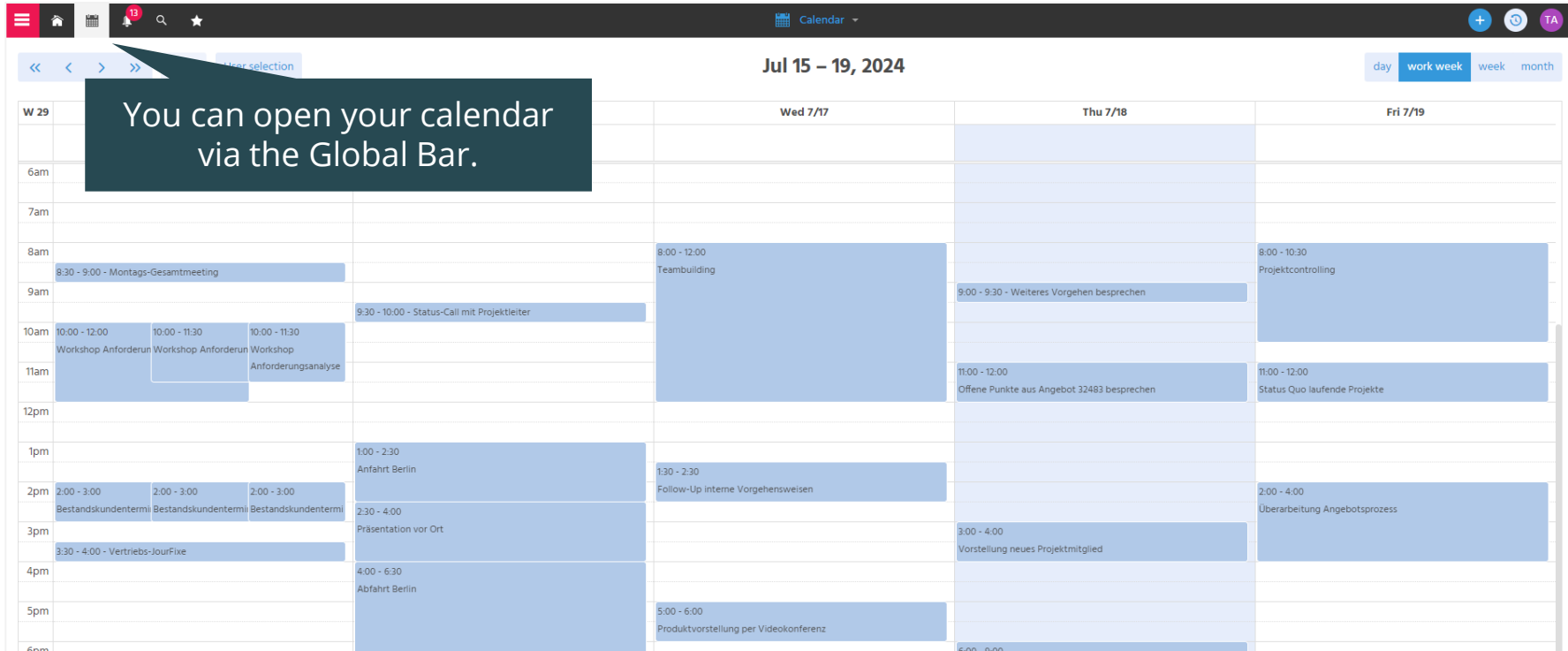


Planning of appointments



Calendar

Using own calendar in ADITO



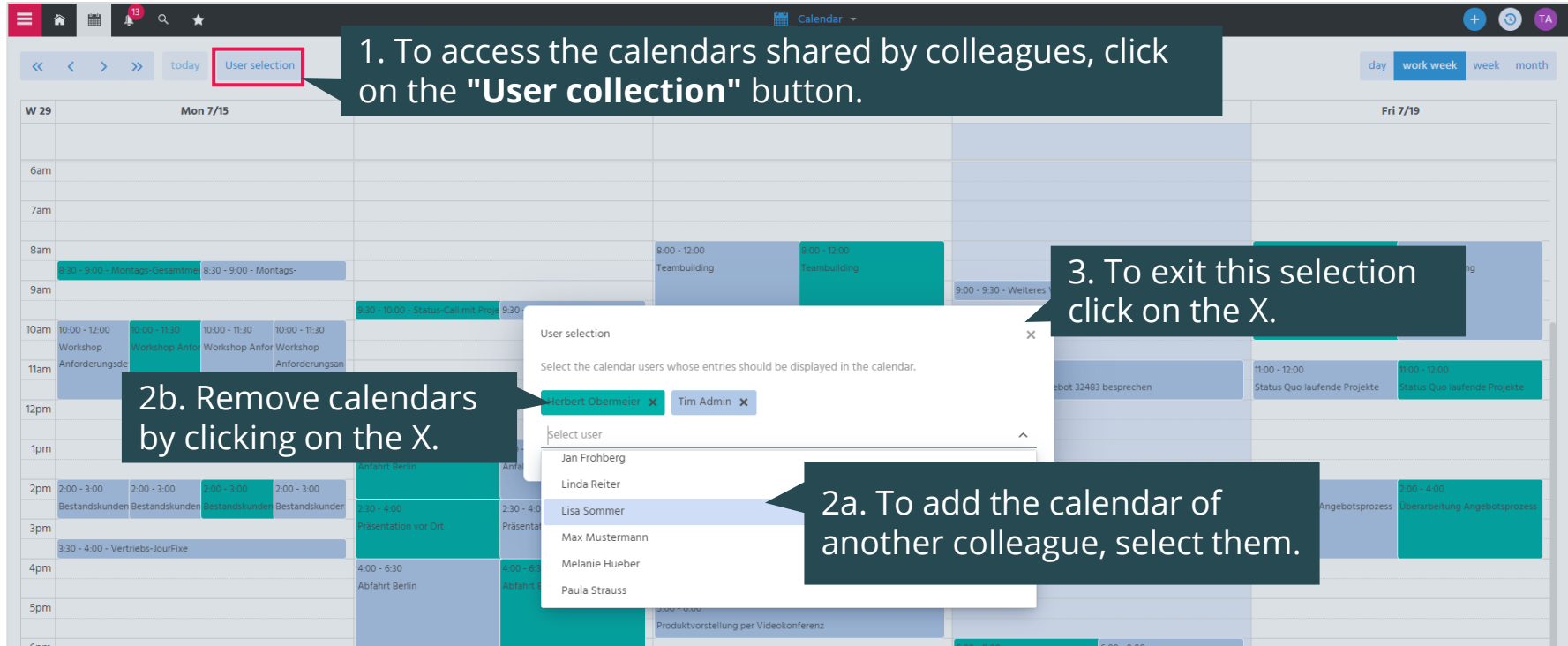
You can open your calendar via the Global Bar.

Calendar Interface:

- Global Bar:** Contains navigation icons (hamburger menu, home, calendar, notifications, search, star) and a 'Calendar' dropdown menu.
- Calendar View:** Displays a weekly view for **Jul 15 – 19, 2024**. The view is set to 'work week'.
- Days:** The calendar shows events for Wednesday (7/17), Thursday (7/18), and Friday (7/19).
- Events:** Various events are scheduled, including meetings, workshops, and presentations, with specific time slots (e.g., 8:30 - 9:00, 10:00 - 11:30).

Calendar

Show calendar of colleagues



The screenshot shows the ADITO calendar application. At the top, there is a navigation bar with a menu icon, home icon, calendar icon, and a 'Calendar' dropdown. Below this is a toolbar with navigation arrows, a 'today' button, and a 'User selection' button highlighted with a red box. The main area displays a calendar grid for Monday, July 15th, and Friday, July 19th. Various events are shown as colored blocks, such as 'Teambuilding' and 'Status Quo laufende Projekte'. A 'User selection' dialog box is open in the center, showing a list of users to be added to the calendar. The dialog has a title 'User selection', a description 'Select the calendar users whose entries should be displayed in the calendar.', and a list of users: Jan Froberg, Linda Reiter, Lisa Sommer, Max Mustermann, Melanie Hueber, and Paula Strauss. The 'Herbert Obermeier' and 'Tim Admin' users are already selected and shown at the top of the dialog with an 'X' icon. Callout boxes provide instructions: 1. To access the calendars shared by colleagues, click on the "User collection" button. 2b. Remove calendars by clicking on the X. 2a. To add the calendar of another colleague, select them. 3. To exit this selection click on the X.

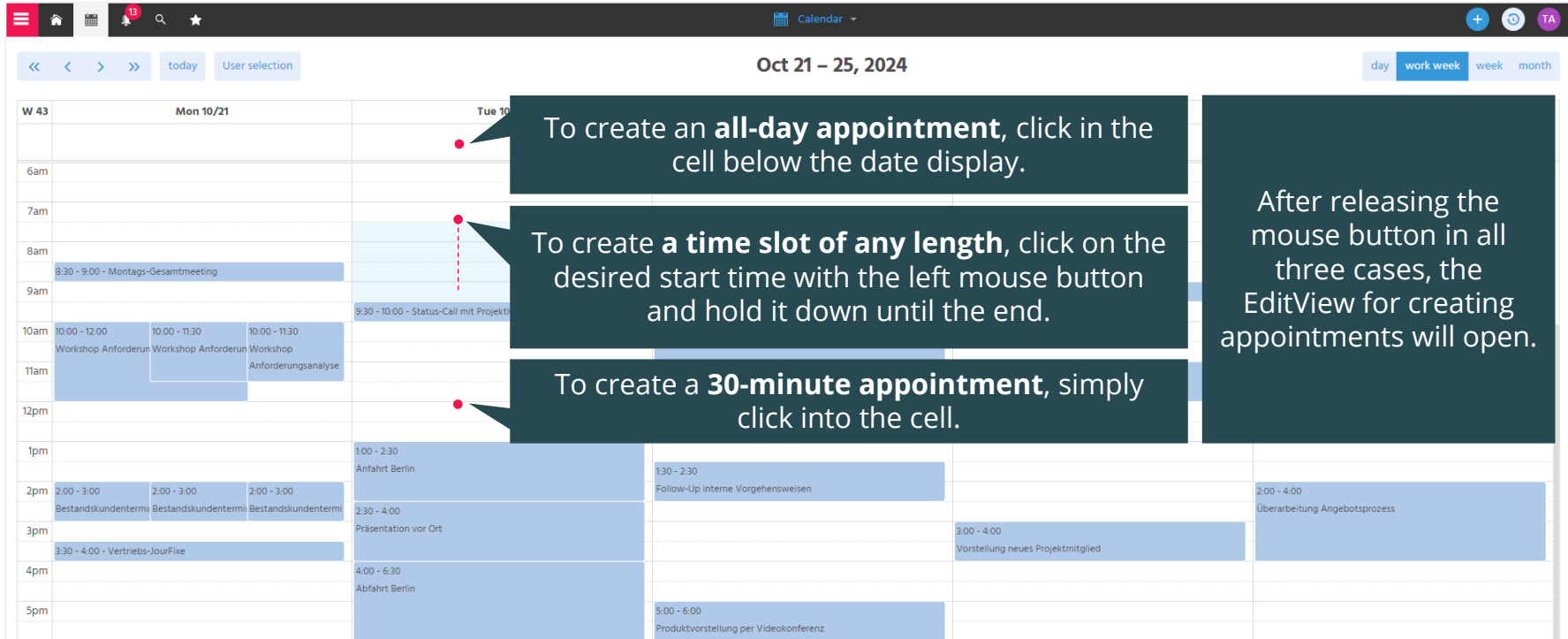
1. To access the calendars shared by colleagues, click on the "User collection" button.

2b. Remove calendars by clicking on the X.

2a. To add the calendar of another colleague, select them.

3. To exit this selection click on the X.

Creating appointments in the calendar



Calendar

Oct 21 – 25, 2024

day work week week month

W 43 Mon 10/21 Tue 10/22

6am

7am

8am

9am

10am

11am

12pm

1pm

2pm

3pm

4pm

5pm

8:30 - 9:00 - Montags-Gesamtmeeting

9:30 - 10:00 - Status-Call mit Projekti

10:00 - 12:00 Workshop Anfordeun

10:00 - 11:30 Workshop Anfordeun

10:00 - 11:30 Workshop Anfordeun

11:00 - 11:30 Workshop Anfordeun

1:00 - 2:30 Anfahrt Berlin

2:00 - 3:00 Bestandskundentermi

2:00 - 3:00 Bestandskundentermi

2:00 - 3:00 Bestandskundentermi

2:30 - 4:00 Präsentation vor Ort

3:00 - 4:00 Vertriebs-JourFixe

4:00 - 6:30 Abfahrt Berlin

1:30 - 2:30 Follow-Up interne Vorgehensweisen

3:00 - 4:00 Vorstellung neues Projektmitglied

5:00 - 6:00 Produktvorstellung per Videokonferenz

2:00 - 4:00 Überarbeitung Angebotsprozess

To create an **all-day appointment**, click in the cell below the date display.

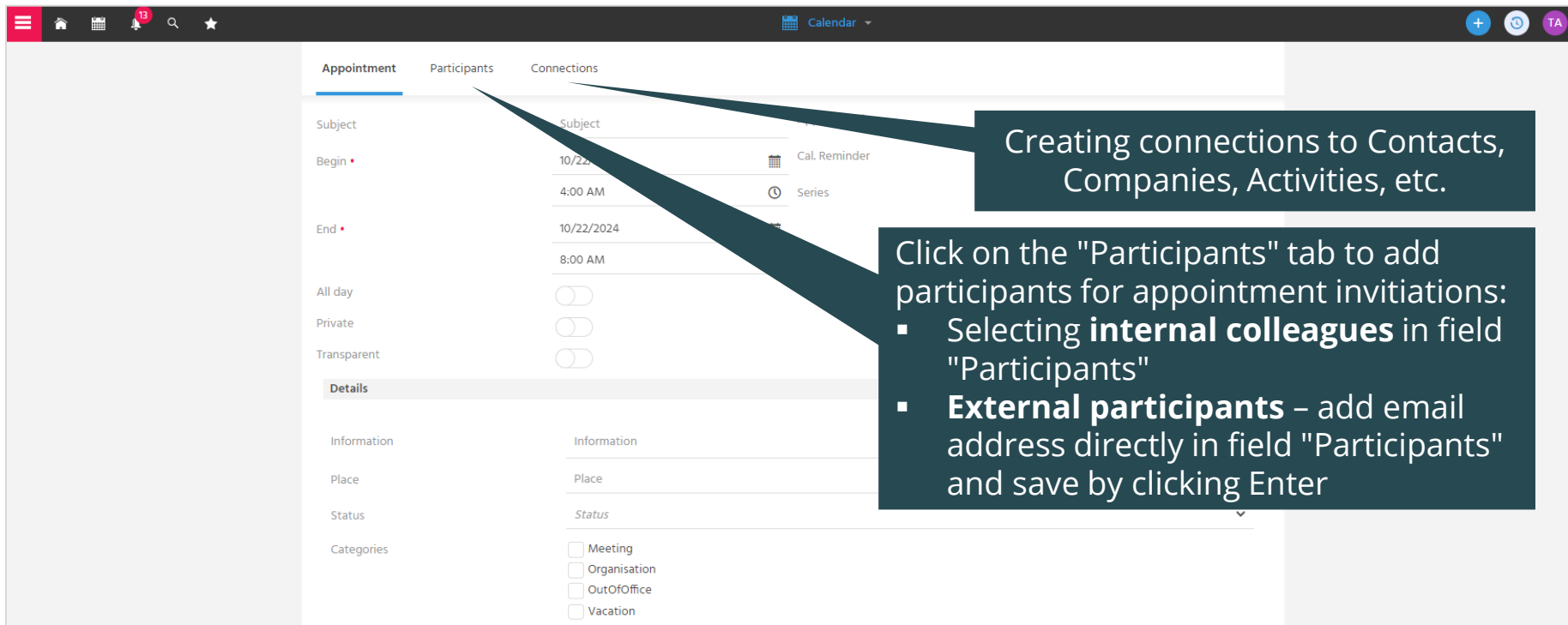
To create a **time slot of any length**, click on the desired start time with the left mouse button and hold it down until the end.

To create a **30-minute appointment**, simply click into the cell.

After releasing the mouse button in all three cases, the EditView for creating appointments will open.

Calendar

Creating appointments



The screenshot displays the ADITO Calendar application interface. The top navigation bar includes a menu icon, home, calendar, notifications (13), search, and star icons. The main content area is divided into three tabs: 'Appointment', 'Participants', and 'Connections'. The 'Appointment' tab is active, showing fields for Subject, Begin (10/22/2024 4:00 AM), End (10/22/2024 8:00 AM), All day, Private, and Transparent. Below these are sections for Details, Information, Place, Status, and Categories. A callout box points to the 'Participants' tab, explaining how to add participants.

Creating connections to Contacts, Companies, Activities, etc.

Click on the "Participants" tab to add participants for appointment invitations:

- Selecting **internal colleagues** in field "Participants"
- **External participants** – add email address directly in field "Participants" and save by clicking Enter

Calendar

Creating appointments in Company/Contact

If you create the appointment within the company, the link to it will be automatically generated.

The screenshot displays the user interface of the Bucher Unternehmensgruppe system. At the top, the company name 'Bucher Unternehmensgruppe' and customer number 'Cust.-No.: 3698' are visible. A sidebar on the left contains navigation links: Tags, Communication, Addresses, Further information, Relevant Documents, and Turnover. A dropdown menu is open, listing various actions. The 'New appointment' option is highlighted with a red rectangular border. At the bottom of the interface, there are three status indicators: '26 Days inactive', '100% Turnover change', and 'BC Classification'. A red 'A' logo is located in the bottom right corner.

- Observe dataset
- New task
- Write e-mail
- New letter
- Add to Campaign
- New offer
- New opportunity
- New operation recommendation
- Show Classification
- New operation
- Create operation task
- New appointment**
- Add to serial letter
- Add to bulk mail
- Open Location
- Radius Search
- Customer Base Sheet
- Start workflow
- Edit defaults
- Open admin view

26 Days inactive | 100% Turnover change | BC Classification

Calendar



Appointment preview

Calendar

Jul 15 – 19, 2024

day work week week month

W 29 Mon 7/15 Tue 7/16 Wed 7/17 Thu 7/18 Fri 7/19

6am

7am

8am 8:30 - 9:00 - Montags-Gesamtmeeing

9am

10am 10:00 - 12:00 Workshop Anford Workshop Anford Workshop Anford

11am 10:00 - 11:30 Workshop Anford 10:00 - 11:30 Workshop Anford 10:00 - 11:30 Workshop Anford

12pm

1pm

2pm 2:00 - 3:00 Bestandskunde Bestandskunde Bestandskunde 2:00 - 3:00 Bestandskunde Bestandskunde Bestandskunde

3pm 3:30 - 4:00 - Vertriebs-JouFive

4pm

5pm

6pm

7pm

8pm

8:00 - 12:00 Teambuilding

9:00 - 10:30 Status-Call mit Projektleiter

10:00 - 11:30 Status-Call mit Projektleiter

11:00 - 12:00 Offene Punkte aus Angebot 32483 besprechen

1:00 - 2:30 Anfahrt Berlin

2:30 - 4:00 Präsentation vor Ort

4:00 - 6:30 Abfahrt Berlin

5:00 - 6:00 Produktvorstellung per Videokonferenz

6:00 - 9:00 Privater Termin

8:00 - 10:30 Projektcontrolling

9:00 - 9:30 - Weiteres Vorgehen besprechen

10:00 - 12:00 Status Quo laufende Projekte

2:00 - 4:00 Überarbeitung Angebotsprozess

3:00 - 4:00 Vorstellung neues Projektmitglied

Appointment

Status-Call mit Projektleiter

07/16/2024 | 09:30 - 10:30 o'clock

Information

Details

Place Online

Status Confirmed

Participants

AD Admin

HO hobermeier

LS Isommer

MM mmustermann

Connections

Company Industrial Steel AG

Open the appointment preview by clicking on the appointment.

Further Actions

- Delete recurring appointment
- New operation
- New activity

Overview of all invited participants.

Overview of all linked data.



Calendar



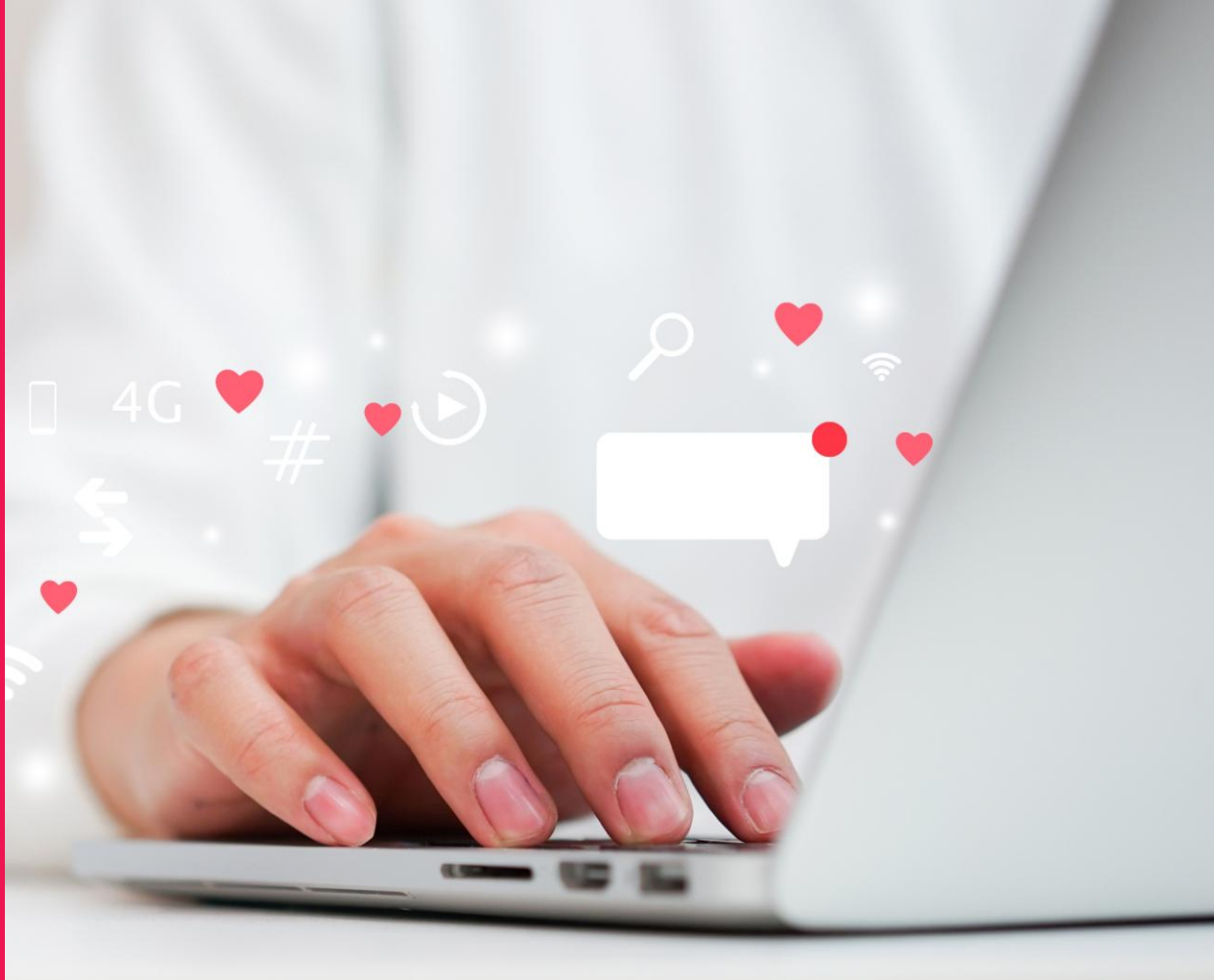
Linked appointments e.g. within Company

The screenshot displays the ADITO interface for 'Industrial Steel AG'. The left sidebar contains company information: 'Industrial Steel AG', 'Cust.-No.: 1234', 'E-Mail: info@industrial-steel.de', 'Phone: +49 40 63520', 'Website: https://www.industrial-steel.de', 'Office address: Rathausmarkt 1, 20095 Hamburg, Germany', 'Turnover Current: 683,860.00 EUR', 'Turnover Last Year: 0.00 EUR', and 'Relevant documents: Information.pdf'. The main area shows a calendar view with a list of appointments. The right sidebar displays details for a selected appointment: 'Status-Call mit Projektleiter', '07/16/2024 | 09:30 - 10:30 o'clock', 'Information', 'Details', 'Participants' (Admin, hobermeier, Isommer, mmustermann), and 'Connections' (Company: Industrial Steel AG). A dark blue speech bubble overlay is positioned over the appointment list, containing the text: 'Overview of all appointments, which are linked to this dataset.'

Overview of all appointments, which are linked to this dataset.



**Marking
datasets as
"important" or
categorizing**



Tags: overview

There are 2 possibilities to use tags:

1. **Public tags**

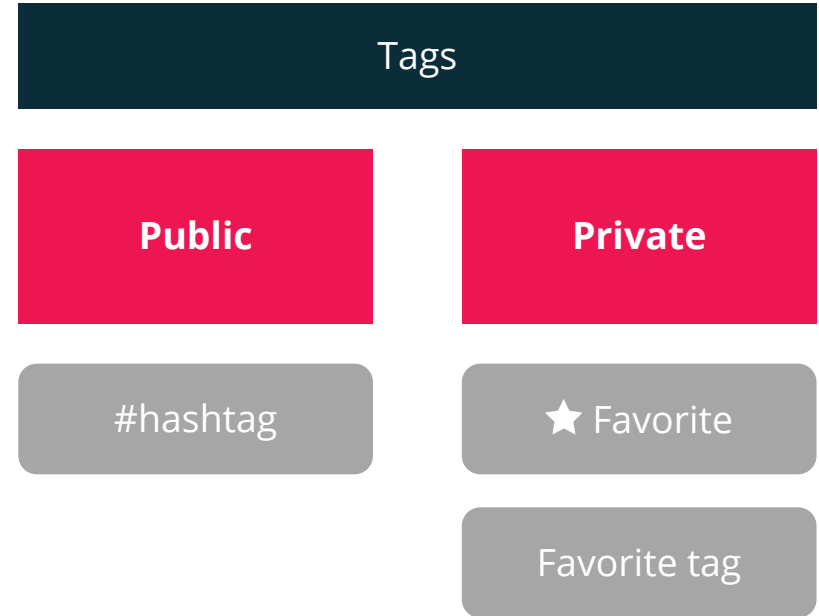
for a system-wide categorization and use in the index search.*

2. **Private tags**

for marking important data

→ Quick access in the Context "Favorites"

→ Filter in the respective FilterView using the "Favorite groups" filter.



*Can be compared to social networks. This function can be deactivated in the system if it is not required.

Assigning tags (1)

In the preview of a dataset

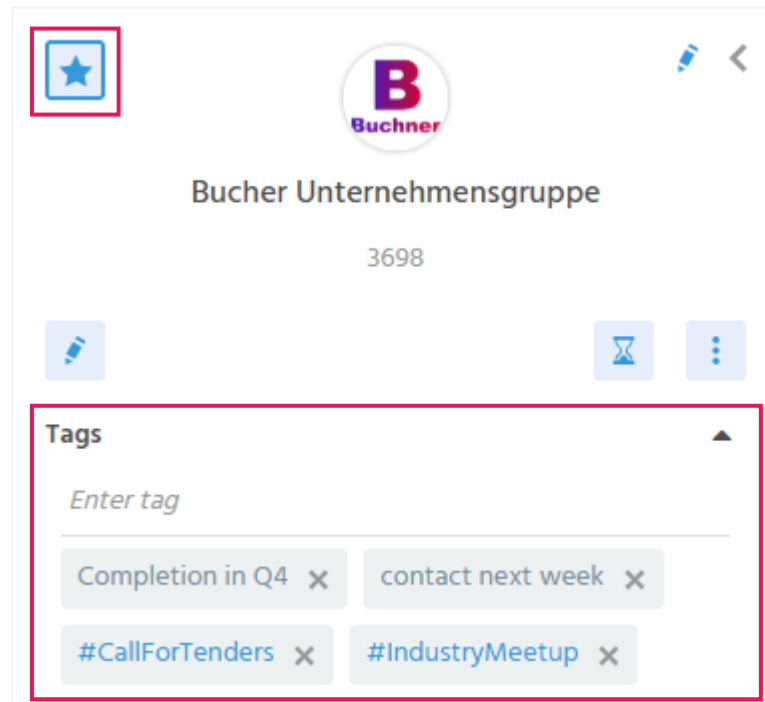
All tags can be assigned within the **"Tags"** section:

★ button

- **Favorite** is activated ★ or inactive ☆

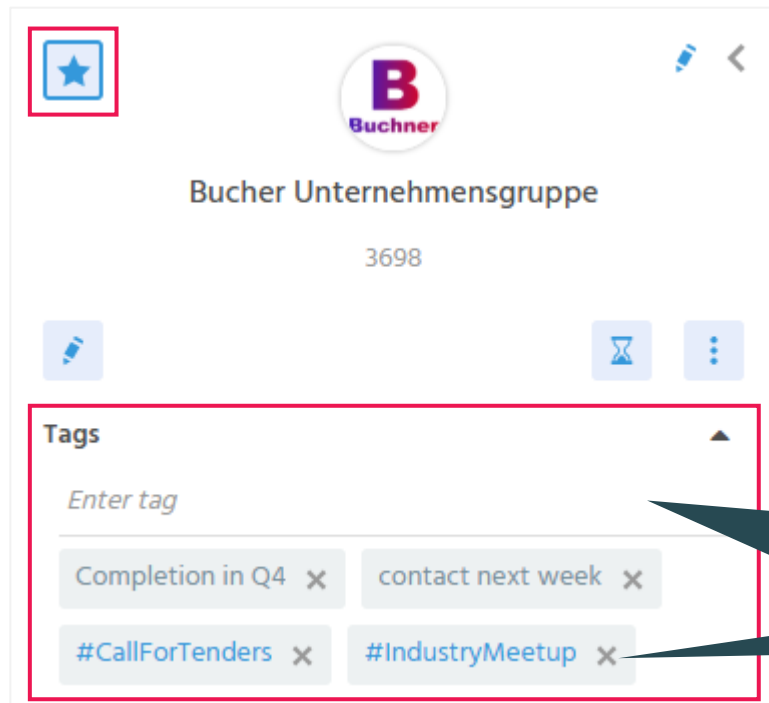
Field "Enter tag" + ENTER

- **Private tags** cannot begin with #, can contain blank spaces
- **Public tags** must begin with #, cannot contain blank spaces



Assigning tags (2)

In the preview of a dataset



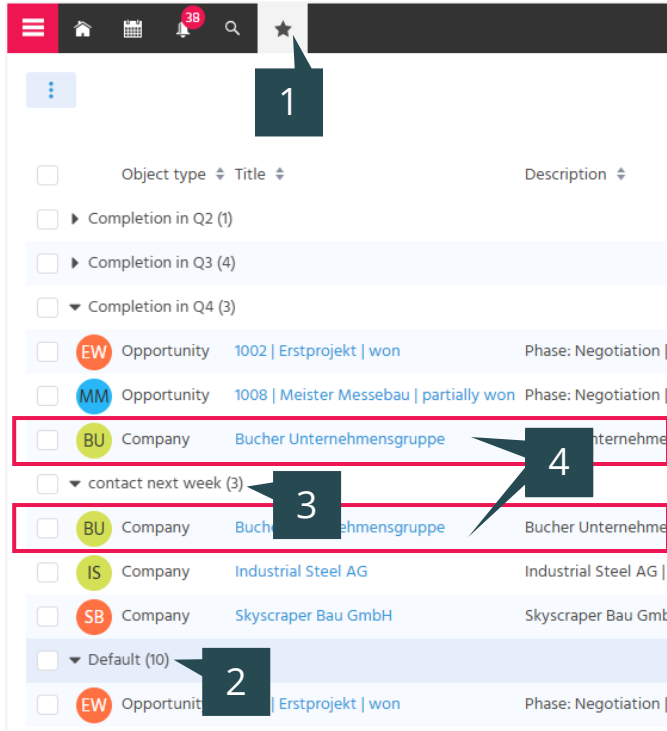
A maximum of 100 tags can be entered per dataset (sum of all private tags and public tags of all users)

If you enter any tag in the preview, **existing** tags will be displayed (via autocomplete or suggestion list). If a tag does not exist yet, it can be created by pressing **Enter**.

Click on the **X** to delete the tag.

Favorite tags

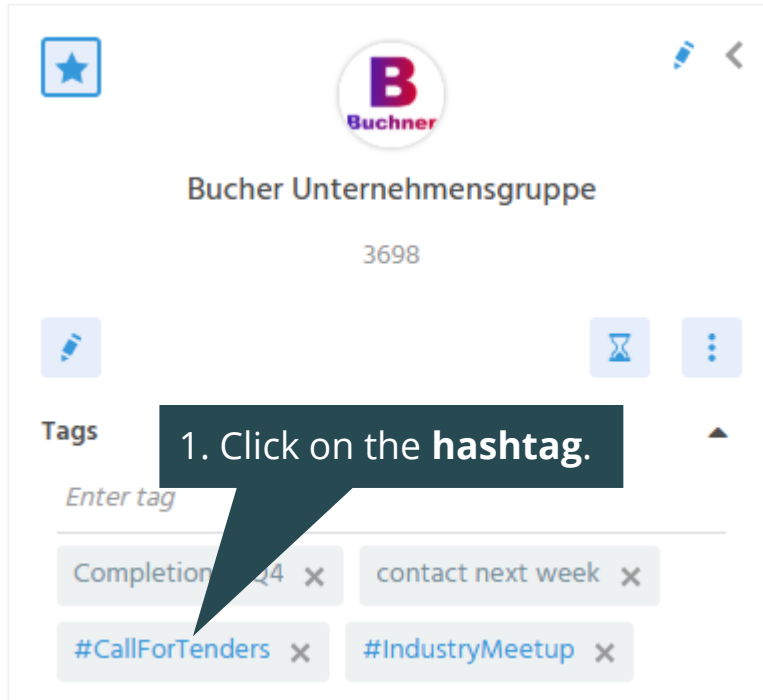
Overview in the Context "Favorite"



1. In the Context "Favorite", the datasets are grouped by tag.
2. If you activated the ★ **button**, the datasets will be displayed in the private tag "**Default**".
3. When assigning an private tag, it will be displayed in the corresponding favorite tag (e.g. "**contact next week**").
4. If you assign more tags to a dataset, they will be displayed in the corresponding private tags section (★ button and/or one or more tags).

#tags

Search system-wide for datasets that are linked with hashtags (1)



Bucher Unternehmensgruppe

3698

Tags

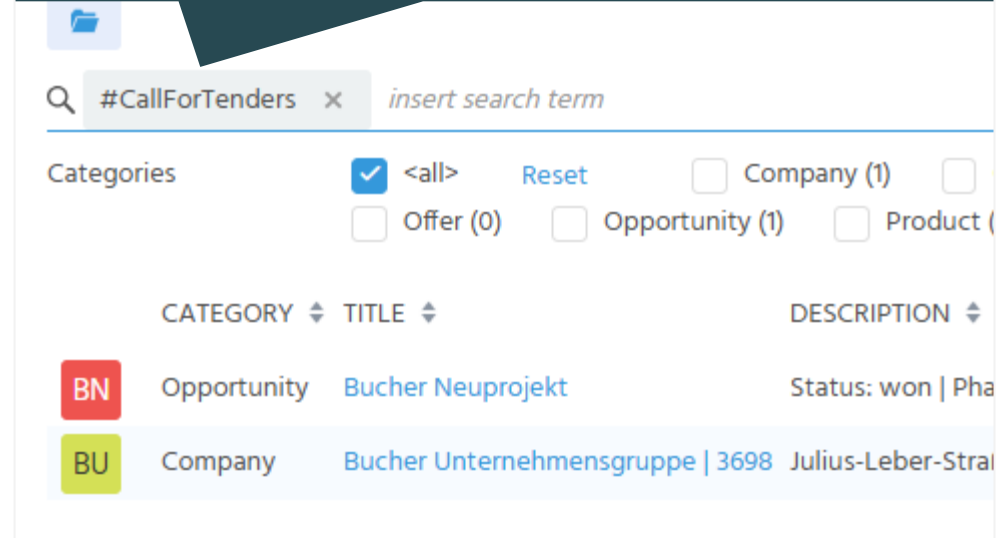
Enter tag

Completion 4 x contact next week x

#CallForTenders x #IndustryMeetup x

1. Click on the **hashtag**.

2. The **index search** is opened in an extended view, with further datasets listed for which this hashtag is assigned.



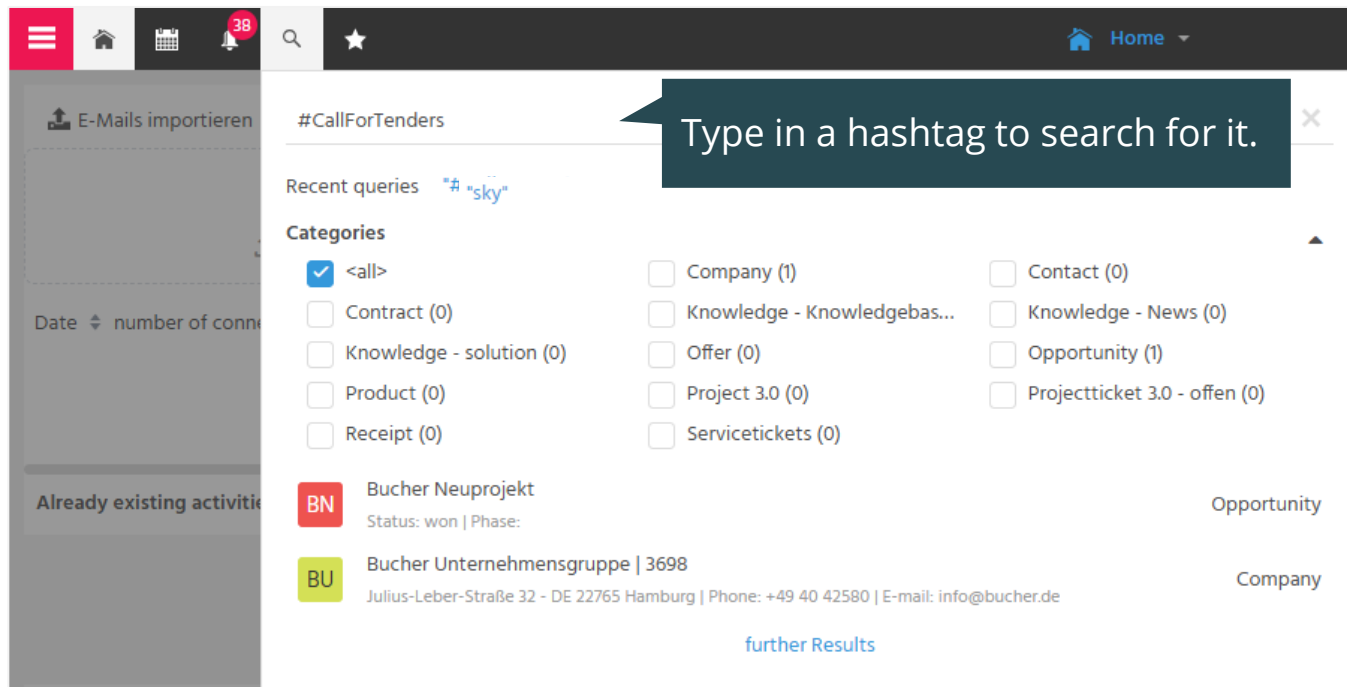
#CallForTenders x insert search term

Categories ☒ <all> Reset ☐ Company (1) ☐ Offer (0) ☐ Opportunity (1) ☐ Product (1)

CATEGORY	TITLE	DESCRIPTION
BN	Opportunity	Bucher Neuprojekt Status: won Pha
BU	Company	Bucher Unternehmensgruppe 3698 Julius-Leber-Stral

#tags

Search system-wide for datasets that are linked with hashtags (2)

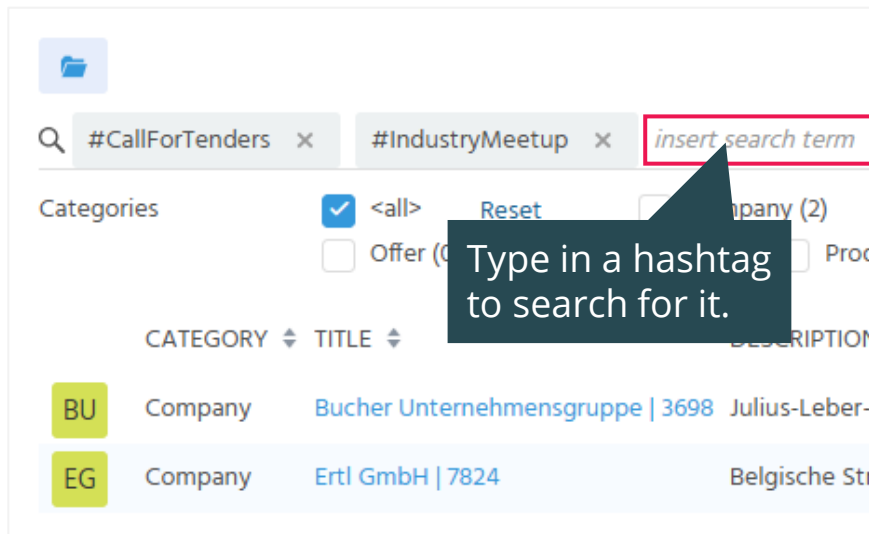


The screenshot shows the ADITO search interface. The top navigation bar includes a menu icon, home icon, calendar icon, a notification bell with '38', a search icon, and a star icon. The main search bar contains the hashtag '#CallForTenders'. A dark blue callout box with a white border and a close button (X) contains the text 'Type in a hashtag to search for it.' Below the search bar, the 'Recent queries' section shows '"# "sky"'. The 'Categories' section lists various filters with checkboxes and counts: '<all>' (checked), 'Contract (0)', 'Knowledge - solution (0)', 'Product (0)', 'Receipt (0)', 'Company (1)', 'Knowledge - Knowledgebas...' (0), 'Offer (0)', 'Project 3.0 (0)', 'Servicetickets (0)', 'Contact (0)', 'Knowledge - News (0)', 'Opportunity (1)', and 'Projectticket 3.0 - offen (0)'. Below the categories, two results are shown: 'BN Bucher Neuprojekt' with status 'won' and phase 'Phase:', categorized as 'Opportunity'; and 'BU Bucher Unternehmensgruppe | 3698' with address 'Julius-Leber-Straße 32 - DE 22765 Hamburg', phone '+49 40 42580', and email 'info@bucher.de', categorized as 'Company'. A blue link 'further Results' is at the bottom.

- Autocompletion is **not** available here.
- In the "**further results**" view, you can search for more tags.

#tags

Search system-wide for datasets that are linked with hashtags (3)



Search bar: #CallForTenders x #IndustryMeetup x insert search term

Categories: ☒ <all> Reset ☐ Offer (0) ☐ Company (2) ☐ Proc

Type in a hashtag to search for it.

CATEGORY	TITLE	DESCRIPTION
BU	Company	Bucher Unternehmensgruppe 3698 Julius-Leber-
EG	Company	Ertl GmbH 7824 Belgische Str

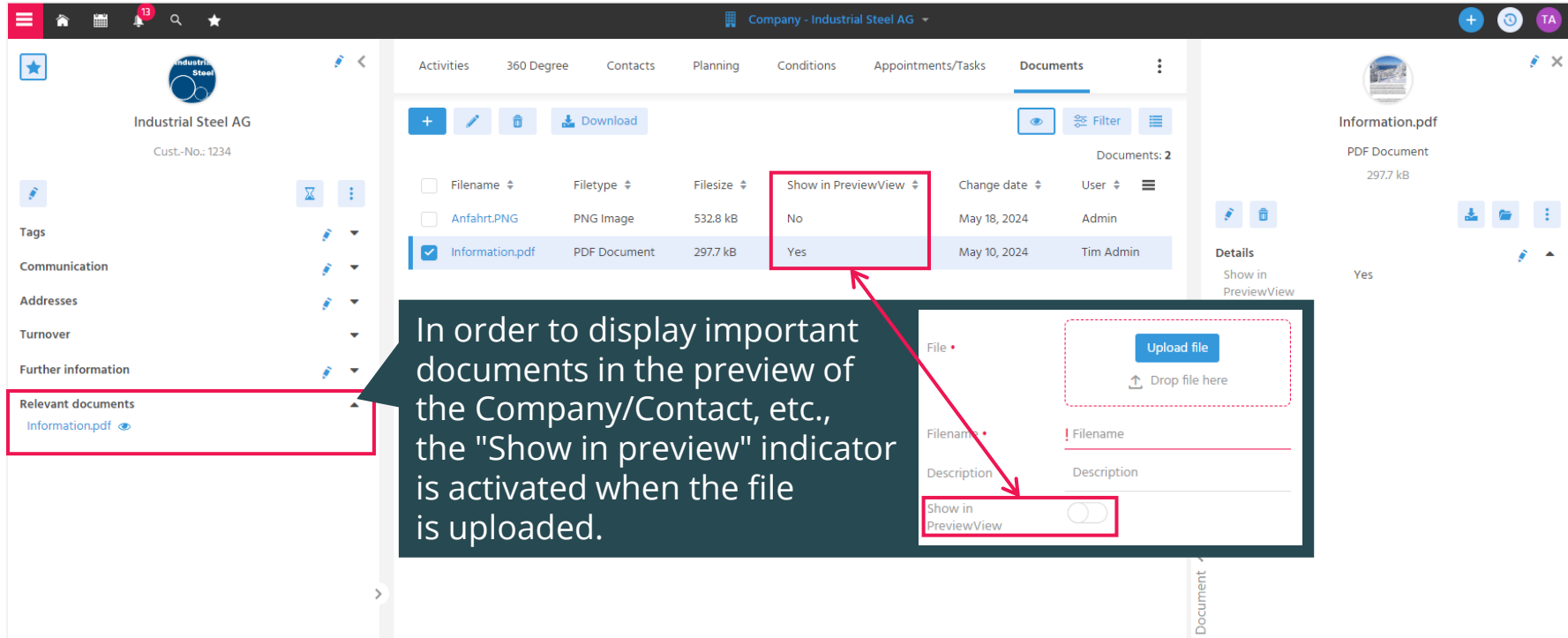
- As soon as # is typed in, the autocomplete or suggestion list becomes available.
- The datasets that are being searched for are displayed beneath the search bar.
- You can search for multiple hashtags simultaneously. In this scenario, the hashtags are connected with the operator **AND**, meaning that the results must be associated with **all** of the hashtags that have been searched for.

Documents



Documents

Display of important documents in the preview



The screenshot shows the ADITO interface for 'Industrial Steel AG'. The 'Documents' tab is active, displaying a table of documents. The 'Information.pdf' document is highlighted, and its 'Show in PreviewView' dropdown menu is open, showing 'Yes' selected. A callout box explains that this indicator is activated when the file is uploaded. An inset shows the upload form with the 'Show in PreviewView' toggle switch.

Filename	Filetype	Filesize	Show in PreviewView	Change date	User
Anfahrt.PNG	PNG Image	532.8 kB	No	May 18, 2024	Admin
Information.pdf	PDF Document	297.7 kB	Yes	May 10, 2024	Tim Admin

Information.pdf
PDF Document
297.7 kB

Details
Show in PreviewView
Yes

Upload file
Drop file here

Filename
Description

Show in PreviewView

In order to display important documents in the preview of the Company/Contact, etc., the "Show in preview" indicator is activated when the file is uploaded.

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Einzigartige Beziehungen