



Knowledge Management

ADITO Software GmbH

From version xRM 2026.4.2 | July 2026





Screenshots

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





Agenda

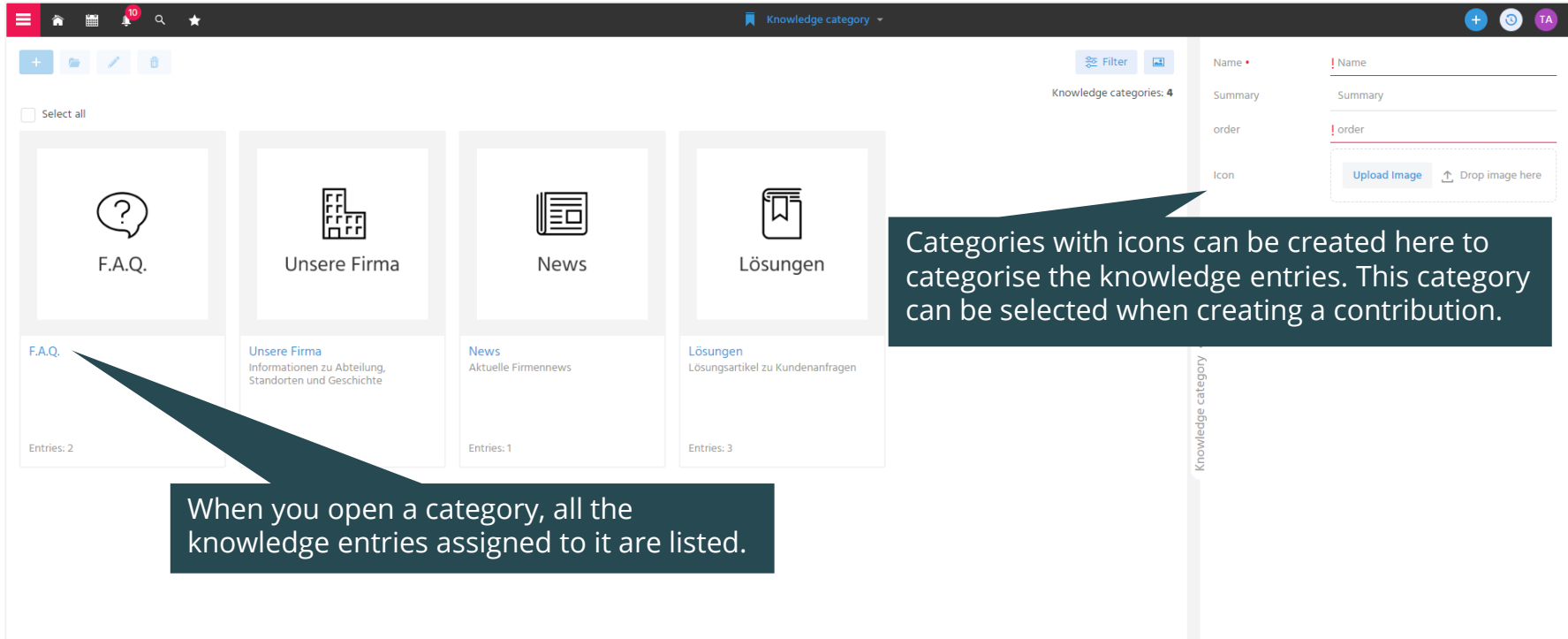
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- [Create Knowledge entries](#)
 - [Type](#)
 - [Title and summary](#)
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Create
Knowledge
category

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. The main content area shows four knowledge categories as cards:

- F.A.Q.**: Icon of a question mark, description 'F.A.Q.', Entries: 2.
- Unsere Firma**: Icon of a building, description 'Informationen zu Abteilung, Standorten und Geschichte', Entries: 1.
- News**: Icon of a newspaper, description 'Aktuelle Firmennews', Entries: 1.
- Lösungen**: Icon of a book, description 'Lösungsartikel zu Kundenanfragen', Entries: 3.

On the right, a form for creating or editing a category is visible, with fields for Name, Summary, order, and Icon. The 'Icon' field includes an 'Upload Image' button and a 'Drop image here' instruction.

Annotations:

- A 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."
- A 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."

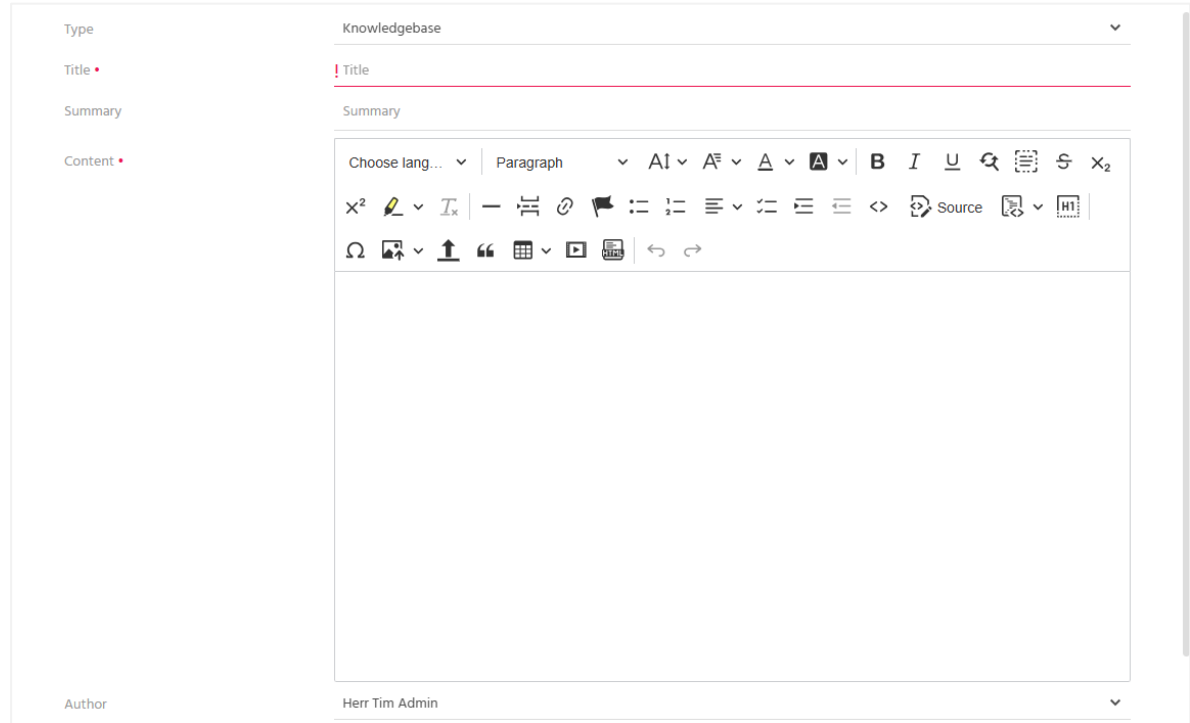


Create
Knowledge
entries

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 editor. On the left, a sidebar lists the fields: Type, Title, Summary, and Content. The main area shows the 'Knowledgebase' type selected. The 'Title' field is empty and marked with a red exclamation mark. The 'Summary' field is also empty. The 'Content' field is the largest, featuring a rich text editor with a toolbar containing various formatting and editing tools. The author field at the bottom is 'Herr Tim Admin'.

Type Knowledgebase

Title ! Title

Summary

Content

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

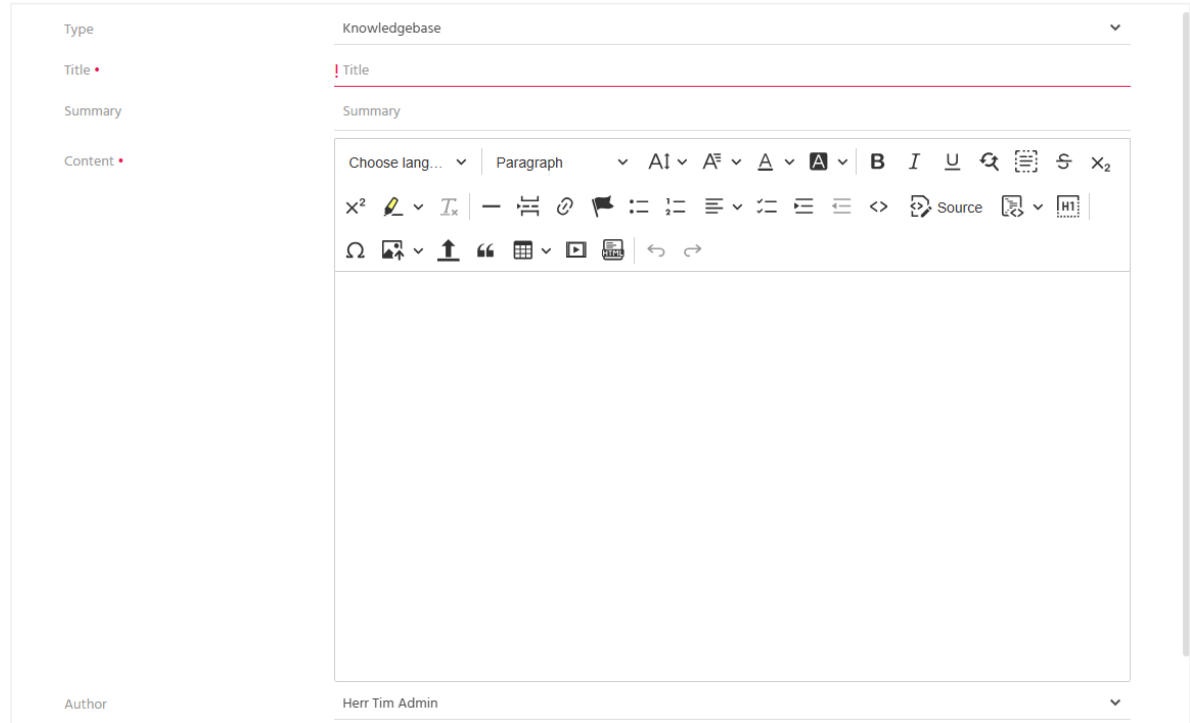
Author Herr Tim Admin

Knowledge entries

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

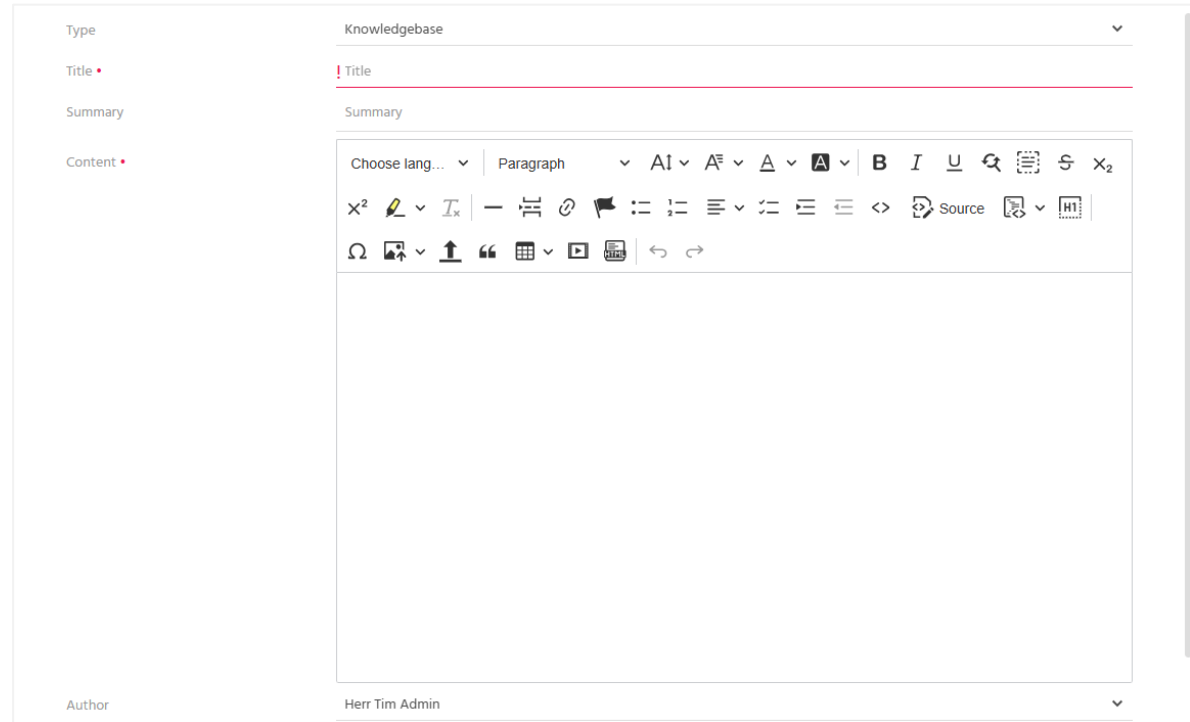
Author Herr Tim Admin

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 with a comprehensive toolbar. The toolbar includes options for language selection, paragraph formatting, text alignment, font color and background color, bold, italic, underline, link, unlink, source code, and various insertion tools like tables, images, and videos. Below the toolbar is a large text area for content entry. 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	Tim Admin	x
Responsible	Tim Admin	x
Category	Category	v
Visibility		
Publishing level	Internal	x
News	Q Search	
News	Internal	
Connections	Partner	
+	Public	



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.

Author ✕

Responsibility ✕

Category ⬆

Visibility

Publishing level

News

News

Connections

+

Document

+

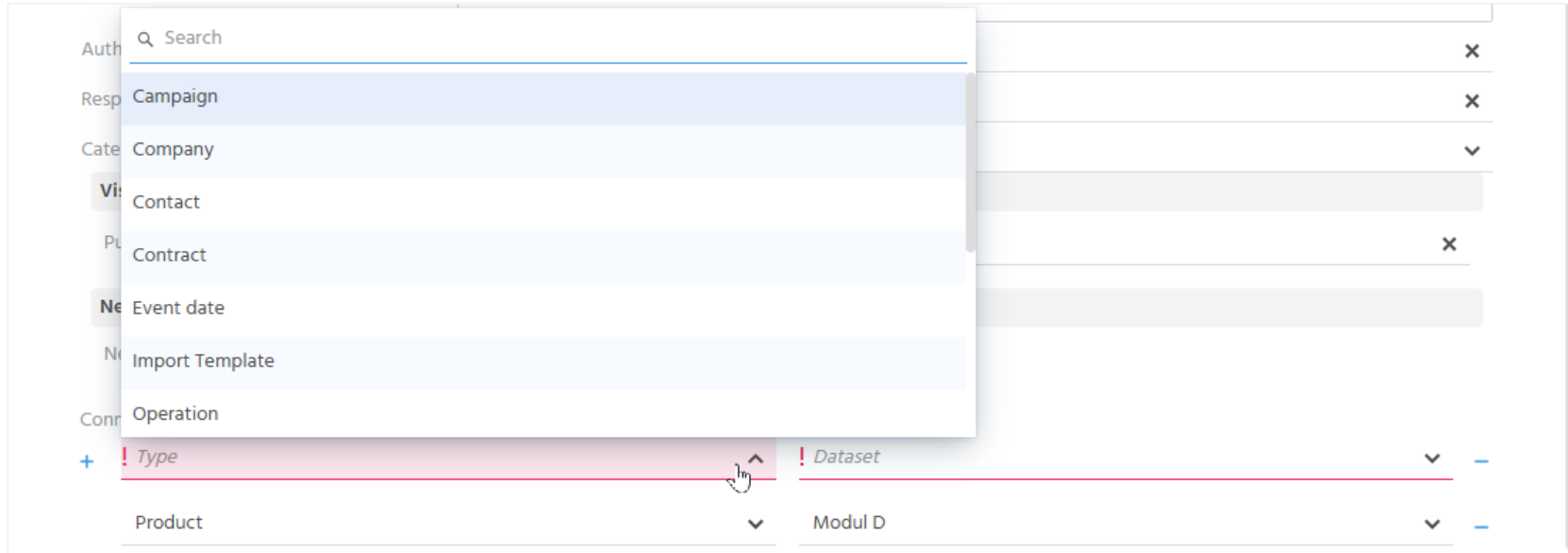
Save and open entry ▼ ✕ Cancel

Required value is missing

Icon	Name
	F.A.Q.
	Unsere Firma
	News
	Lösungen
	Dokumentation
	Documentation

Knowledge entries

Links



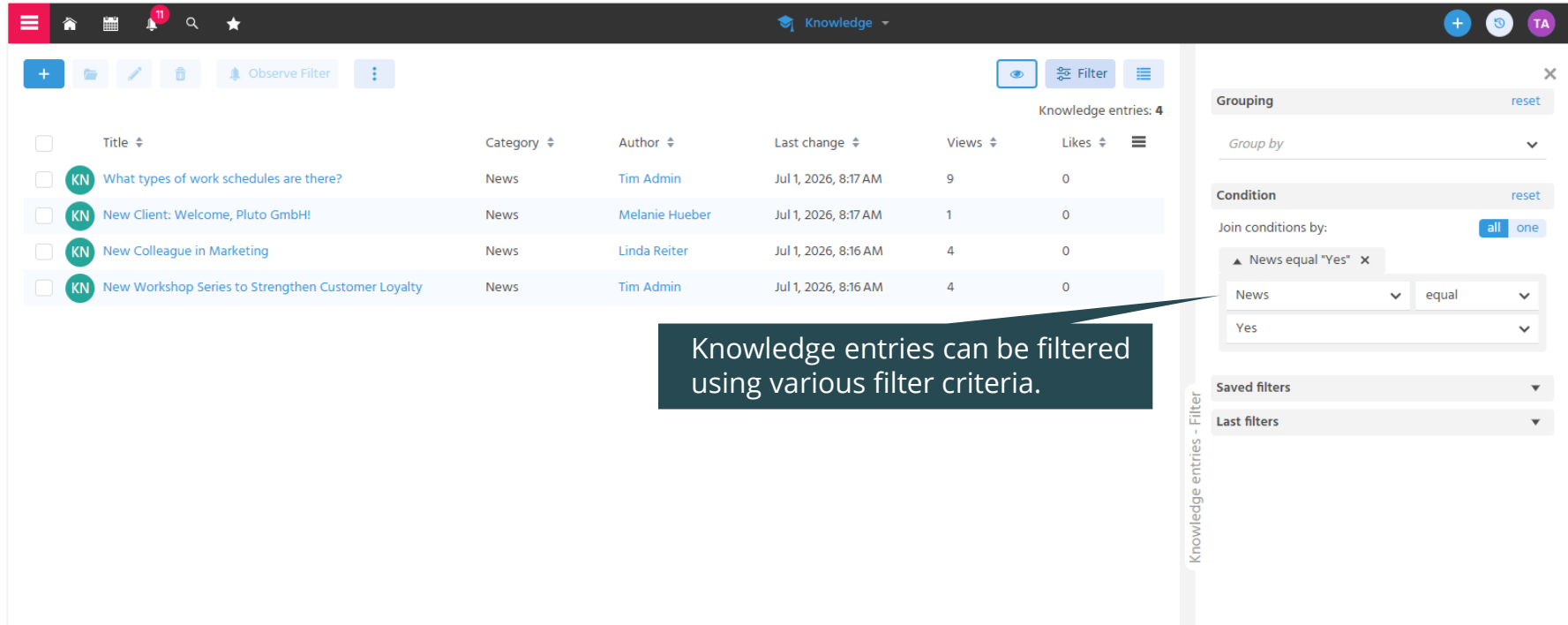
Knowledge entries that are entered for a specific customer or a specific product, for example, can be linked to the respective data record when they are created. The links can be found in a separate tab in the main view.



**Find an
Knowledge
entry**

Knowledge entries

Filter: News, Category, etc.



The screenshot displays the ADITO Knowledge entries interface. At the top, a navigation bar includes icons for home, calendar, notifications (11), search, and a star. The main header shows 'Knowledge' with a dropdown arrow and user avatars. Below the header, a toolbar contains icons for adding, editing, deleting, and observing filters. The main content area is a table of knowledge entries with columns for Title, Category, Author, Last change, Views, and Likes. A 'Filter' button is visible above the table. On the right, a sidebar titled 'Knowledge entries - Filter' contains sections for 'Grouping' (with a 'reset' button), 'Condition' (with a 'reset' button), and 'Join conditions by' (with 'all' and 'one' options). The 'Condition' section shows a filter rule: 'News equal "Yes"', with 'News' selected from a dropdown and 'equal' selected from a second dropdown. The 'Join conditions by' section shows 'all' selected. The 'Saved filters' and 'Last filters' sections are also visible.

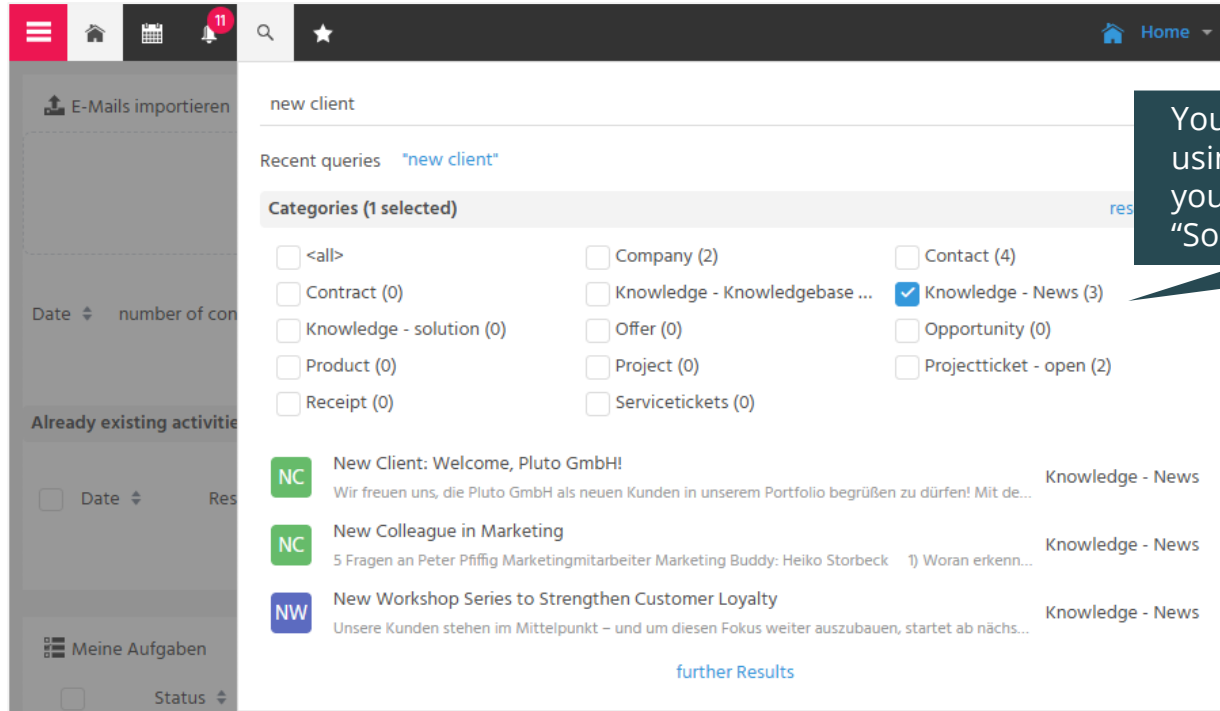
Title	Category	Author	Last change	Views	Likes
☐ What types of work schedules are there?	News	Tim Admin	Jul 1, 2026, 8:17 AM	9	0
☐ New Client: Welcome, Pluto GmbH!	News	Melanie Hueber	Jul 1, 2026, 8:17 AM	1	0
☐ New Colleague in Marketing	News	Linda Reiter	Jul 1, 2026, 8:16 AM	4	0
☐ New Workshop Series to Strengthen Customer Loyalty	News	Tim Admin	Jul 1, 2026, 8:16 AM	4	0

Knowledge entries: 4

Knowledge entries can be filtered using various filter criteria.

Knowledge entries

Search



The screenshot shows the ADITO search interface. At the top, there is a navigation bar with icons for home, calendar, notifications (11), search, and a star. Below the navigation bar, the search bar contains the text "new client". To the left of the search results, there is a sidebar with various filters and options, including "E-Mails importieren", "Date", "number of con", "Already existing activitie", "Date", "Res", "Meine Aufgaben", and "Status". The main search results area displays a list of categories and their counts, with "Knowledge - News (3)" selected. Below the categories, there are three search results, each with a green "NC" icon and a blue "NW" icon. The results are:

- NC** New Client: Welcome, Pluto GmbH! Knowledge - News
- NC** New Colleague in Marketing Knowledge - News
- NW** New Workshop Series to Strengthen Customer Loyalty Knowledge - News

At the bottom of the results, there is a link for "further Results".

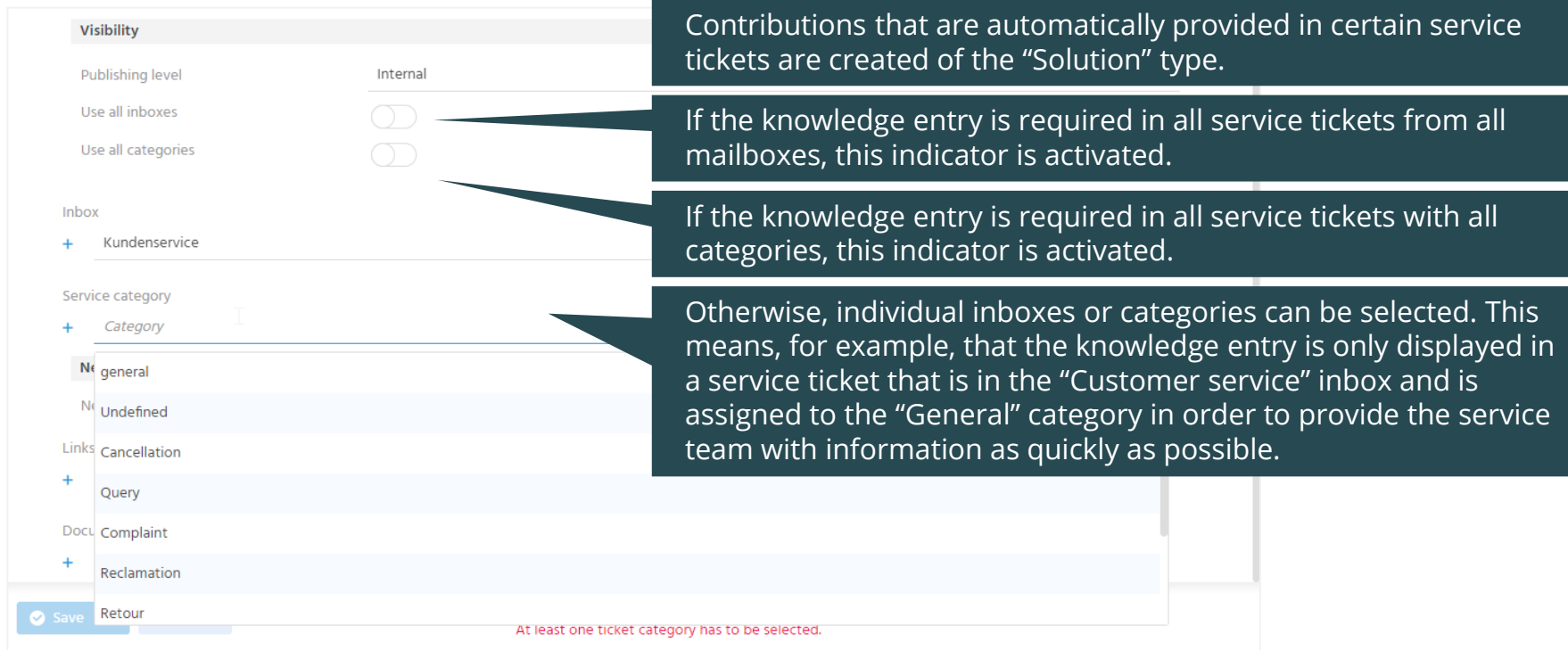
You can search for knowledge articles using the index search. You can narrow your search to the categories "News," "Solution," and "Knowledge Base."



Knowledge
entry of type
"Solution"

Knowledge entries

Create knowledge entry of type “Solution”



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.

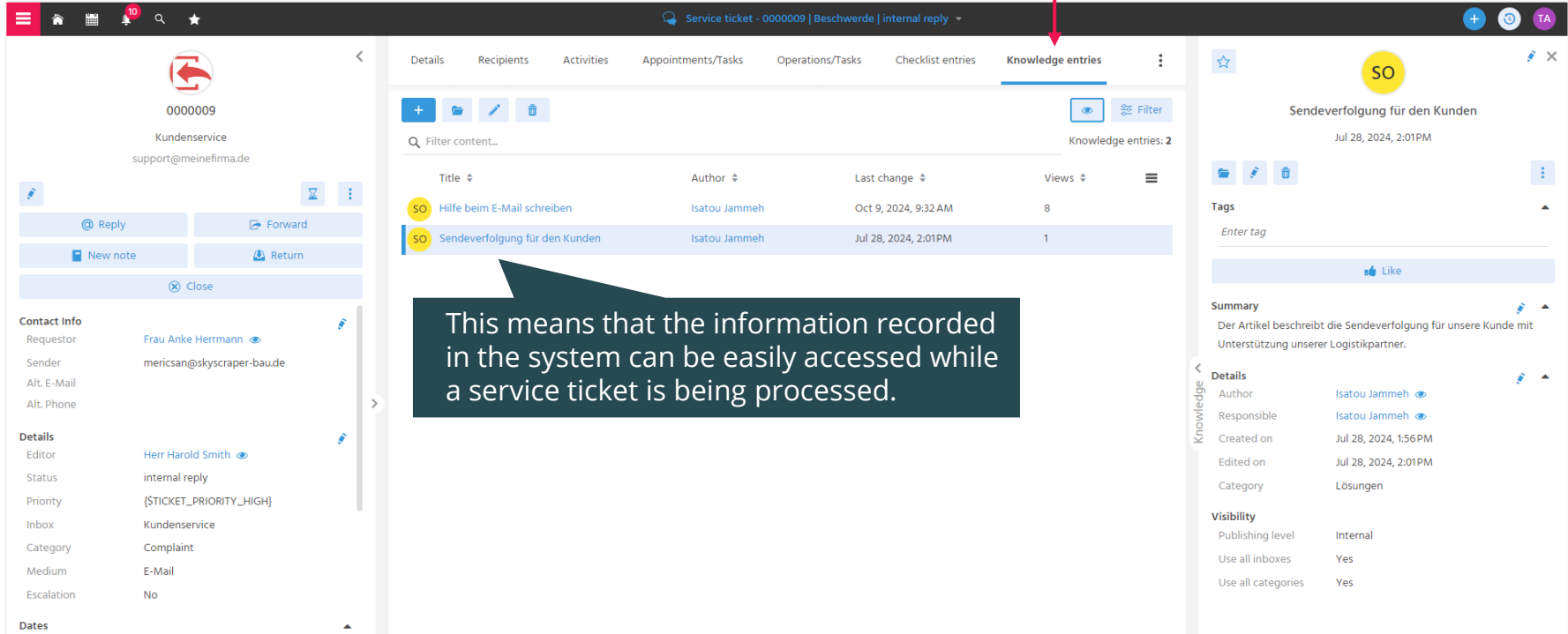
If the knowledge entry is required in all service tickets from all mailboxes, this indicator is activated.

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 details for the ticket, including the editor "Herr Harold Smith" and the status "internal reply". The main content area shows a table of knowledge entries. The table has columns for Title, Author, Last change, and Views. Two entries are listed: "Hilfe beim E-Mail schreiben" and "Sendeverfolgung für den Kunden". A callout box points to the second entry, stating: "This means that the information recorded in the system can be easily accessed while a service ticket is being processed." The right sidebar shows the details of the selected knowledge entry, "Sendeverfolgung für den Kunden", including its tags, summary, and details.

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.



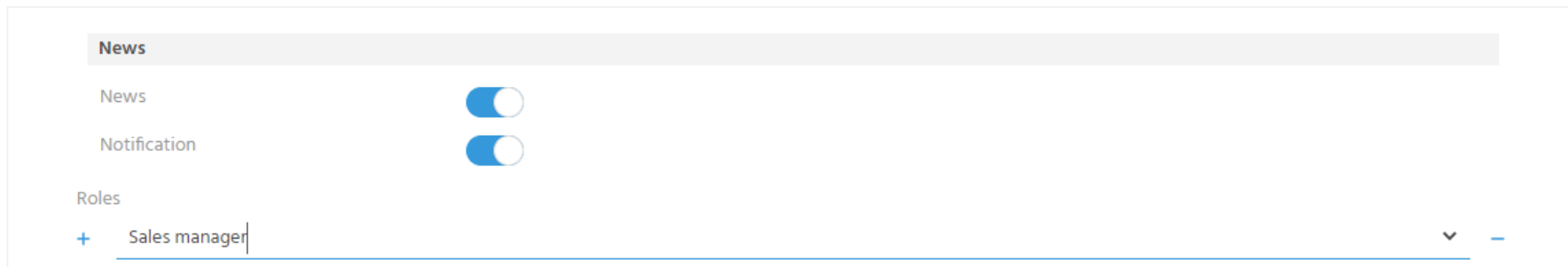
**Knowledge
entry as news**

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

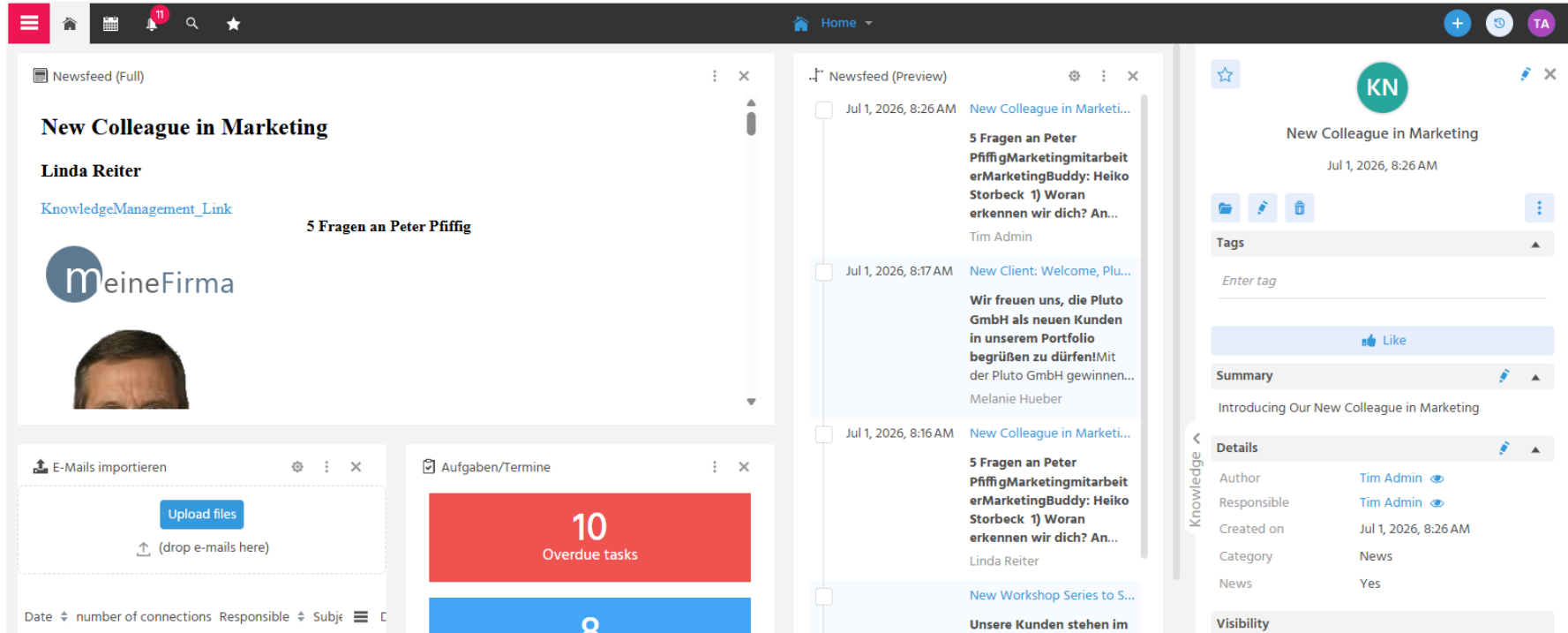


Newsfeed (Preview)

Add

Knowledge entries

News dashlets

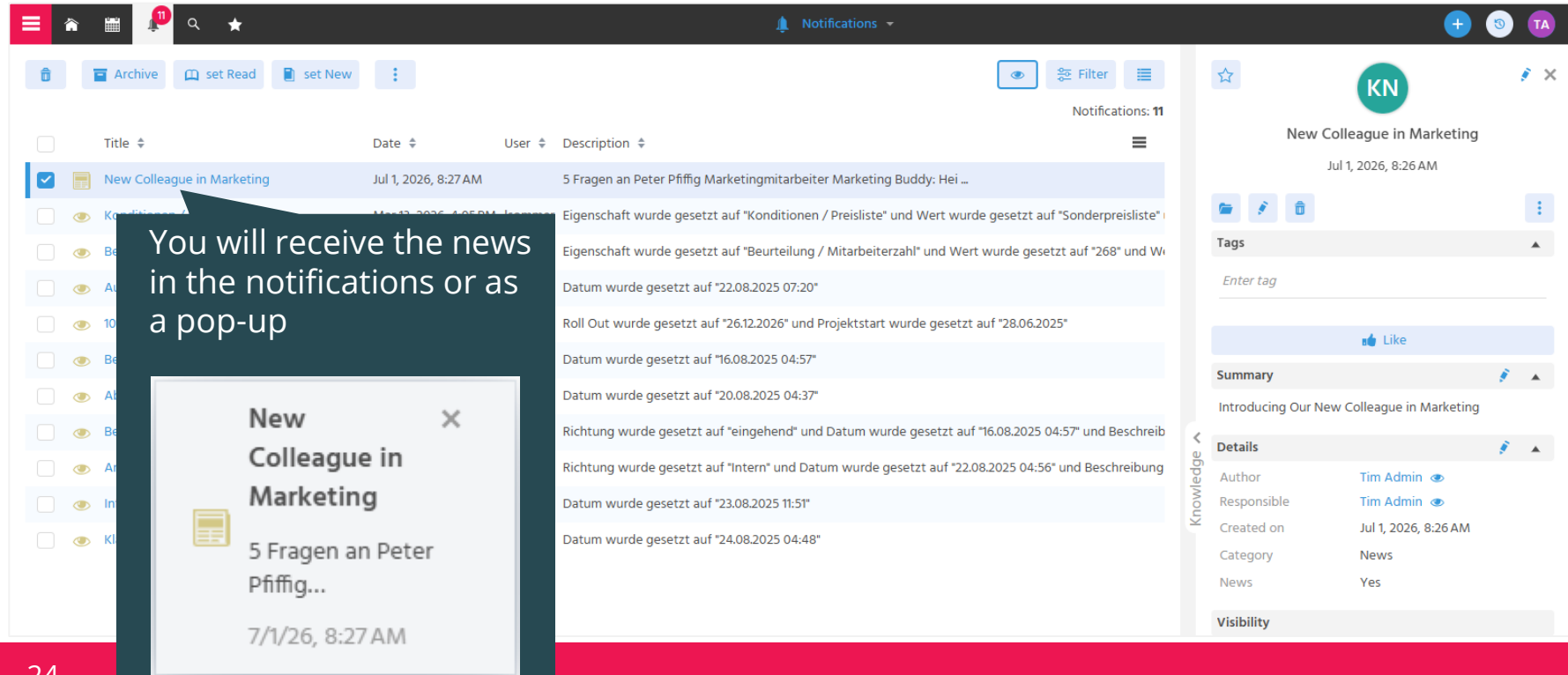


The screenshot displays the ADITO News dashlets interface, which is organized into several panels:

- Top Navigation Bar:** Includes a hamburger menu, home icon, calendar, notifications (11), search, and a star icon. The right side shows a "Home" dropdown and user avatars for a new user (+), a user with a refresh icon, and a user labeled "TA".
- Newsfeed (Full) Panel:**
 - Title:** New Colleague in Marketing
 - Author:** Linda Reiter
 - Link:** [KnowledgeManagement_Link](#)
 - Image:** A circular logo with the text "meineFirma" and a portrait photo of a man.
 - Text:** 5 Fragen an Peter Pfiffig
- E-Mails importieren Panel:**
 - Button:** Upload files
 - Text:** (drop e-mails here)
- Aufgaben/Termine Panel:**
 - Count:** 10 Overdue tasks
 - Count:** 8
- Newsfeed (Preview) Panel:**
 - Item 1:** Jul 1, 2026, 8:26 AM. Title: New Colleague in Marketi... Content: 5 Fragen an Peter PfiffigMarketingmitarbeit erMarketingBuddy: Heiko Storbeck 1) Woran erkennen wir dich? An... Author: Tim Admin
 - Item 2:** Jul 1, 2026, 8:17 AM. Title: New Client: Welcome, Plu... Content: Wir freuen uns, die Pluto GmbH als neuen Kunden in unserem Portfolio begrüßen zu dürfen!Mit der Pluto GmbH gewinnen... Author: Melanie Hueber
 - Item 3:** Jul 1, 2026, 8:16 AM. Title: New Colleague in Marketi... Content: 5 Fragen an Peter PfiffigMarketingmitarbeit erMarketingBuddy: Heiko Storbeck 1) Woran erkennen wir dich? An... Author: Linda Reiter
 - Item 4:** New Workshop Series to S... Content: Unsere Kunden stehen im
- Knowledge Panel:**
 - Star icon:** A star icon in a blue box.
 - Avatar:** A circular avatar with the letters "KN".
 - Title:** New Colleague in Marketing
 - Date:** Jul 1, 2026, 8:26 AM
 - Tags:** A section with a "Enter tag" input field and a "Like" button.
 - Summary:** A section with a "Summary" title and a "Like" button.
 - Details:** A section with a "Details" title and a "Like" button. It includes fields for Author (Tim Admin), Responsible (Tim Admin), Created on (Jul 1, 2026, 8:26 AM), Category (News), and News (Yes).
 - Visibility:** A section with a "Visibility" title.

Knowledge entries

Notifications about news



The screenshot displays the ADITO interface with a notification about a new colleague in marketing. A dark blue callout box highlights the notification, stating: "You will receive the news in the notifications or as a pop-up".

Notification Details:

- Title:** New Colleague in Marketing
- Date:** Jul 1, 2026, 8:27 AM
- User:** Peter Pfiffig
- Description:** 5 Fragen an Peter Pfiffig Marketingmitarbeiter Marketing Buddy: Hei ...

Knowledge Entry Details:

- Title:** New Colleague in Marketing
- Author:** Tim Admin
- Responsible:** Tim Admin
- Created on:** Jul 1, 2026, 8:26 AM
- Category:** News
- News:** Yes
- Visibility:** (Not specified)



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.

The screenshot displays a knowledge entry interface. At the top, there is a star icon, a yellow circle with 'SO', and a close icon. The title is 'Hilfe beim E-Mail schreiben' with a timestamp 'Mar 15, 2026, 1:01PM'. Below the title are icons for folder, edit, and delete, and a three-dot menu. The 'Tags' section is empty. A 'Like' button is present. The 'Summary' section contains the text 'Der Artikel gibt eine Einstiegshilfe zum korrekten Schreiben von Dienst-E-Mails.' The 'Details' section lists metadata: Author (Isatou Jammeh), Responsible (Isatou Jammeh), Created on (Mar 15, 2026, 12:37PM), Edited on (Mar 15, 2026, 1:01PM), Category (Lösungen), and News (No). The 'Visibility' section shows 'Publishing level' as 'Internal'. At the bottom, statistics are shown: 1 Views, 1 Unique Views, and 0 Likes.

Knowledge

Hilfe beim E-Mail schreiben
Mar 15, 2026, 1:01PM

Tags

Like

Summary

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

Details

Author Isatou Jammeh
Responsible Isatou Jammeh
Created on Mar 15, 2026, 12:37PM
Edited on Mar 15, 2026, 1:01PM
Category Lösungen
News No

Visibility

Publishing level Internal

1 Views	1 Unique Views	0 Likes
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