



District definition

ADITO Software GmbH

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Screenshots

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





Agenda

- District definition
 - Create new district
 - Preview
 - Filter view
 - Serial action „Set parent district“
 - Serial action „Set auto assignment“
 - Assign companies
 - Tab „Companies“
 - Tab „Responsibles“
 - Assign „Supervisors“
 - Tab „Supervisors“
 - Status of companies and supervisors
- Dashlets
- Exkursus to the company



District definition

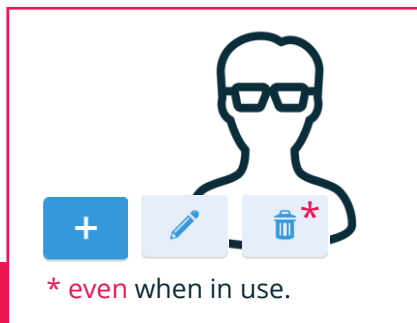
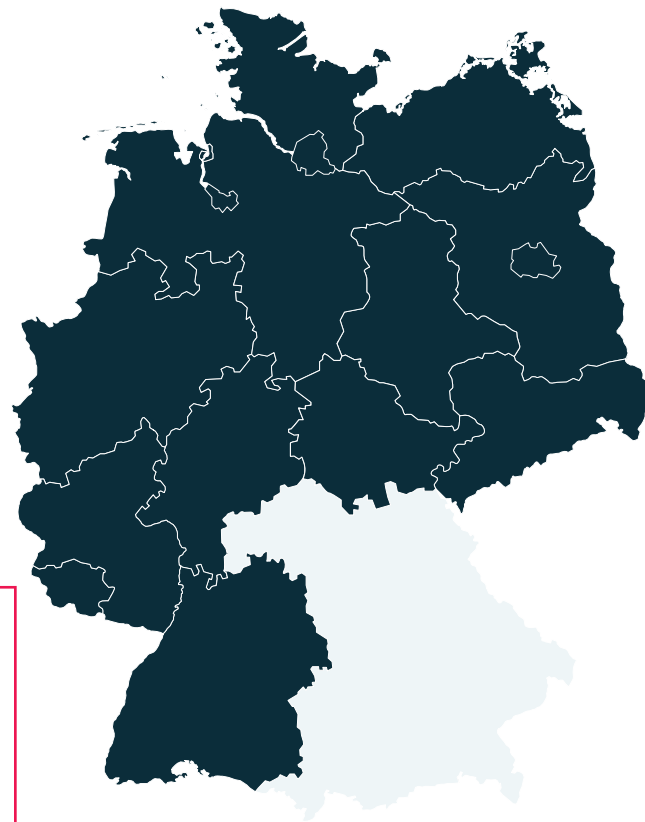
District definition

Districts can

- map **geographical areas** and regional structures (filter by: zip codes, countries, ...) or
- **structures that specify companies in more detail.**

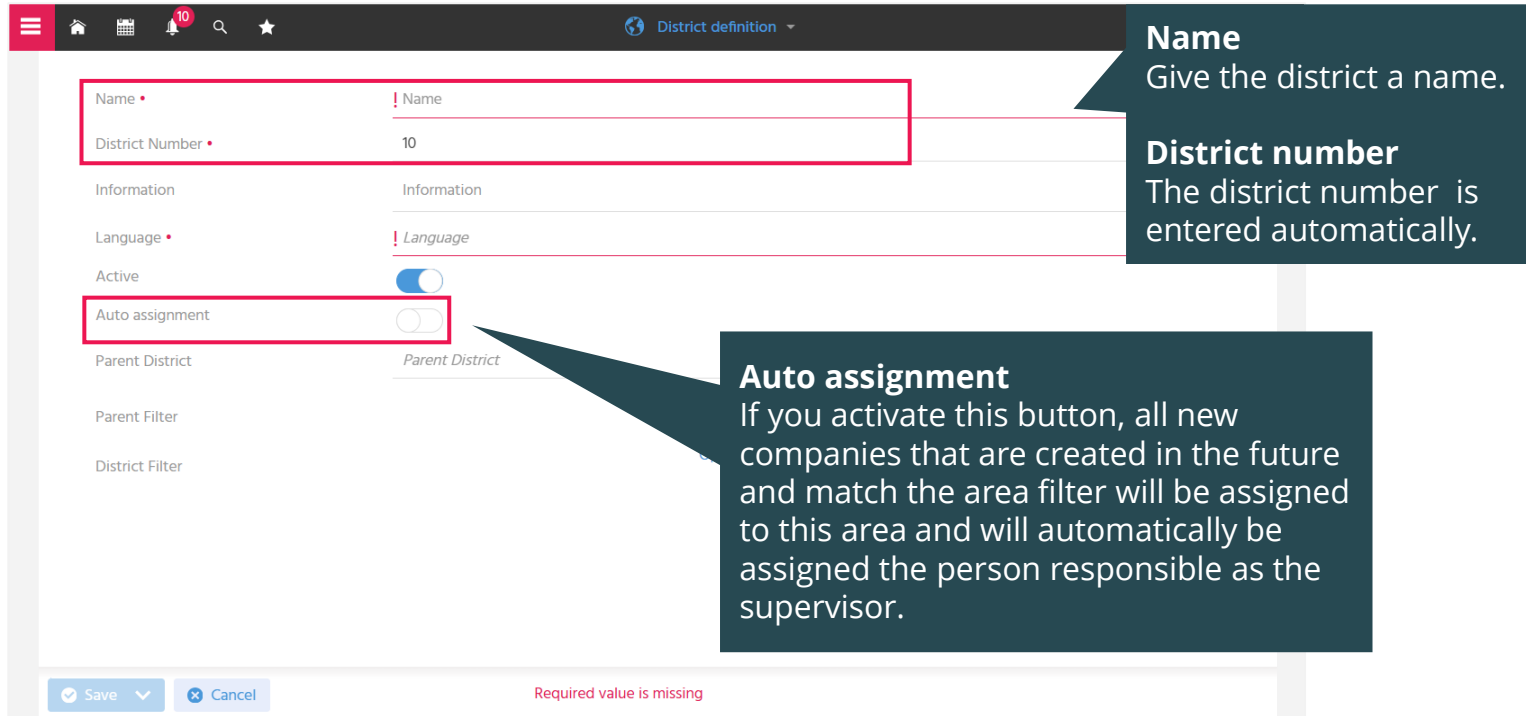
Filter by:

- Industries,
- Types,
- Classifications,
- ...



District definition

Create new district



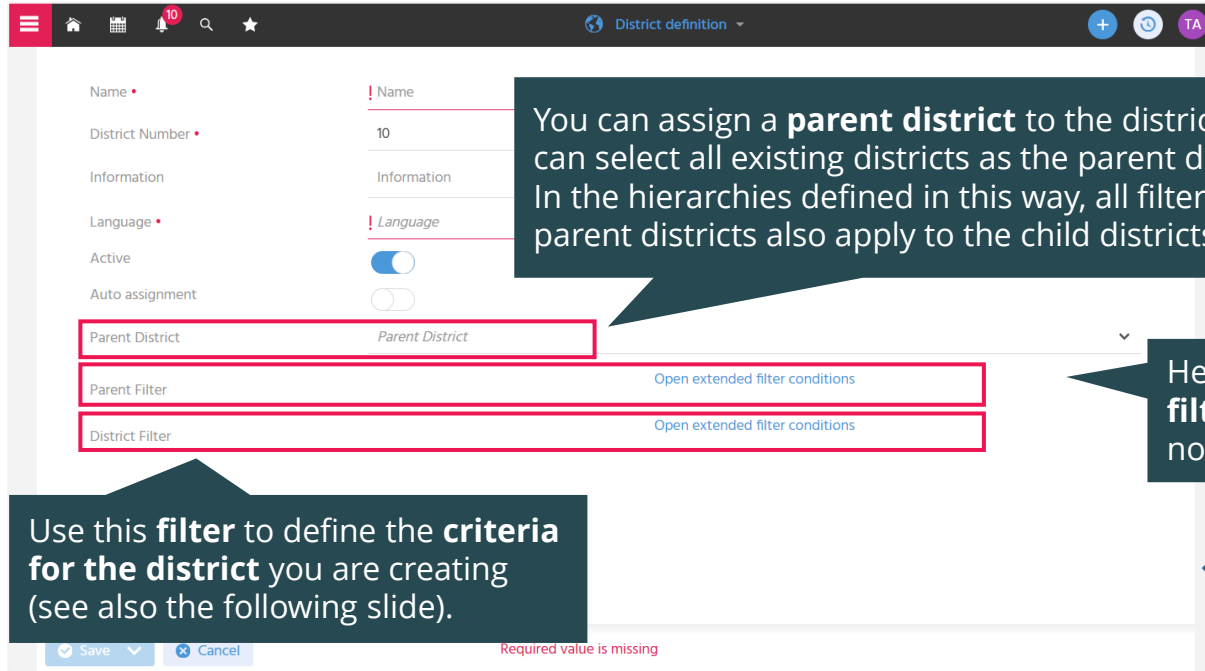
The screenshot shows the 'District definition' form in the ADITO system. The form has a dark header bar with navigation icons and a 'District definition' dropdown. The form fields are as follows:

- Name:** A text input field with a red border and a red exclamation mark icon. A callout box explains: **Name** Give the district a name.
- District Number:** A text input field with the value '10' and a red border. A callout box explains: **District number** The district number is entered automatically.
- Information:** A text input field.
- Language:** A text input field with a red exclamation mark icon and the text 'Language'.
- Active:** A toggle switch that is currently turned on.
- Auto assignment:** A toggle switch that is currently turned off and has a red border. A callout box explains: **Auto assignment** If you activate this button, all new companies that are created in the future and match the area filter will be assigned to this area and will automatically be assigned the person responsible as the supervisor.
- Parent District:** A text input field with the text 'Parent District'.
- Parent Filter:** A text input field.
- District Filter:** A text input field.

At the bottom of the form, there are 'Save' and 'Cancel' buttons. A red error message 'Required value is missing' is displayed below the buttons.

District definition

Create new district



The screenshot shows the 'District definition' form in the ADITO system. The form includes fields for Name, District Number (set to 10), Information, Language, Active status (toggle), and Auto assignment (toggle). Below these are three sections: 'Parent District' (with a dropdown menu), 'Parent Filter' (with a link to 'Open extended filter conditions'), and 'District Filter' (with a link to 'Open extended filter conditions'). The 'Parent District' field is highlighted with a red box. At the bottom, there are 'Save' and 'Cancel' buttons, and a red error message 'Required value is missing' is displayed.

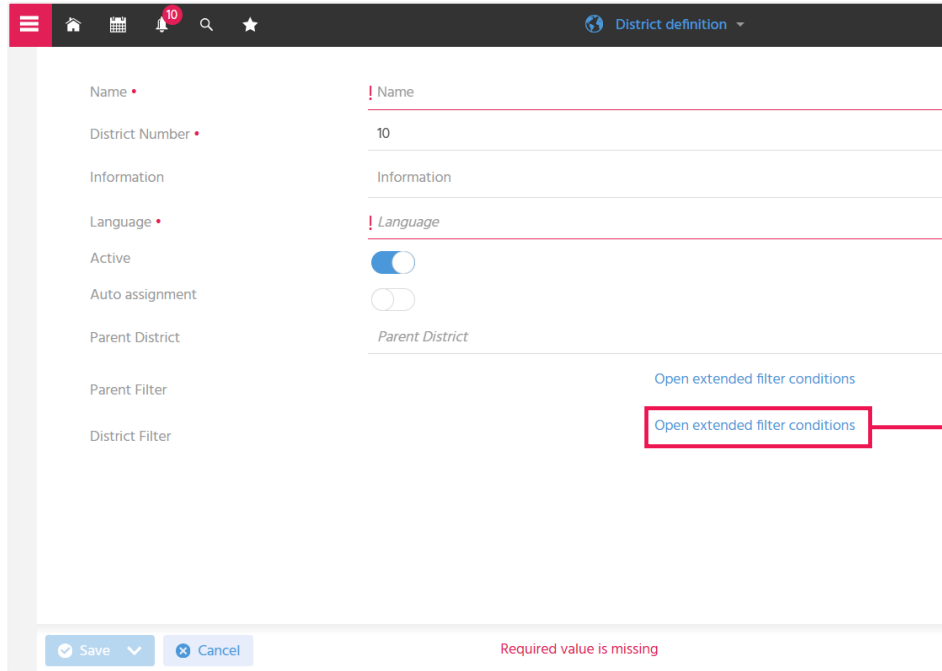
You can assign a **parent district** to the district. You can select all existing districts as the parent district. In the hierarchies defined in this way, all filters of the parent districts also apply to the child districts.

Here you can open and view the **filter of the parent district**, but not change it.

Use this **filter** to define the **criteria for the district** you are creating (see also the following slide).

District definition

Define district filter



! Name

District Number • 10

Information

! Language

Active ☒

Auto assignment ☐

Parent District *Parent District*

Parent Filter [Open extended filter conditions](#)

District Filter

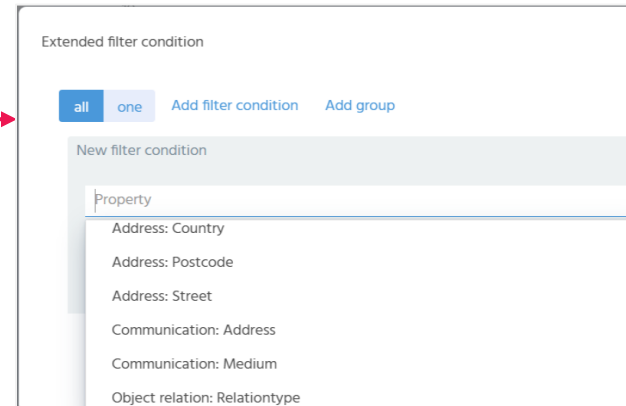
[Open extended filter conditions](#)

Save Cancel

Required value is missing

The filter criteria from the context company are available for the district filter.

For example, "Address: Postcode begins with 8" or "Planning: Volume greater than 50,000"



Extended filter condition

all one Add filter condition Add group

New filter condition

Property

- Address: Country
- Address: Postcode
- Address: Street
- Communication: Address
- Communication: Medium
- Object relation: Relationtype

District definition

Define district filter

Extended filter condition

all one Add filter condition Add group

New filter condition

Property

- Contact_Address: ZIP end
- Contact_Address: ZIP start
- Customercode
- Default address groomed
- Default mail groomed
- Default phone groomed

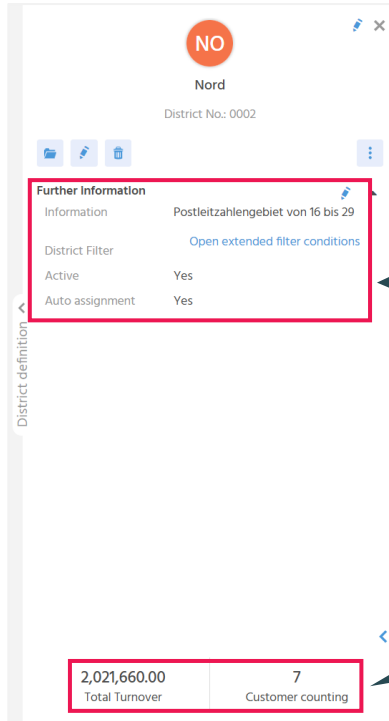
To create a district for a specific zip code range, use the properties "Contact_Address: ZIP start" and "Contact_Address: ZIP end".



Only the "contains" operator has a function for the properties "Contact_Address: ZIP start" and "Contact_Address: ZIP end". You can select and save other operators, but no companies are assigned to the district during company assignment.

District definition

Preview of the district definition



NO
Nord
District No.: 0002

Further Information

Information	Postleitzahlengebiet von 16 bis 29
District Filter	Open extended filter conditions
Active	Yes
Auto assignment	Yes

Footer

2,021,660.00 Total Turnover	7 Customer counting
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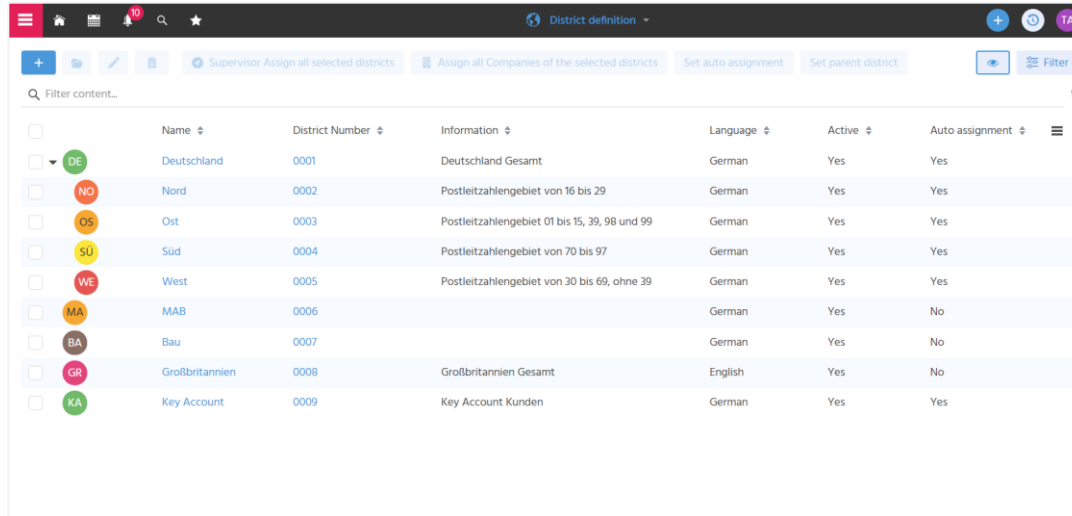
You can view the filter criteria for this district in the “Further Information” area over the **district filter**, but you cannot change them.

If the **auto-assignment** is set to “Yes”, all companies are automatically assigned to the district from the point at which they match the filter criteria.

In the **footer** you can see the cumulative turnover of all companies belonging to the district and the number of companies that fall into this district.

District definition

Filter view



The screenshot shows the ADITO District definition interface. At the top, there is a navigation bar with a hamburger menu, home, calendar, notifications (10), search, and star icons. Below this is a toolbar with buttons for adding (+), deleting (-), editing (pencil), and a trash icon. There are also buttons for 'Supervisor Assign all selected districts', 'Assign all Companies of the selected districts', 'Set auto assignment', and 'Set parent district'. A 'Filter' button is on the right. Below the toolbar is a search bar labeled 'Filter content...'. The main area displays a table with 9 rows and 7 columns. The columns are: Name, District Number, Information, Language, Active, and Auto assignment. The first row is expanded, showing a tree structure where 'Deutschland' is the parent and 'Nord', 'Ost', 'Süd', and 'West' are its children. The other rows are 'MAB', 'Bau', 'Großbritannien', and 'Key Account'.

	Name	District Number	Information	Language	Active	Auto assignment
☐	Deutschland	0001	Deutschland Gesamt	German	Yes	Yes
☐	Nord	0002	Postleitzahlengebiet von 16 bis 29	German	Yes	Yes
☐	Ost	0003	Postleitzahlengebiet 01 bis 15, 39, 98 und 99	German	Yes	Yes
☐	Süd	0004	Postleitzahlengebiet von 70 bis 97	German	Yes	Yes
☐	West	0005	Postleitzahlengebiet von 30 bis 69, ohne 39	German	Yes	Yes
☐	MAB	0006		German	Yes	No
☐	Bau	0007		German	Yes	No
☐	Großbritannien	0008	Großbritannien Gesamt	English	Yes	No
☐	Key Account	0009	Key Account Kunden	German	Yes	Yes

The **hierarchies** that you create by assigning a parent district to a district **are displayed as a tree table in the filter view.**

In the figure, for example, the district “Nord”, “Ost”, “Süd” and “West” are subordinated to the district “Deutschland”.

2 Execute the “Set parent district” serial action.

3 Choose a parent district.

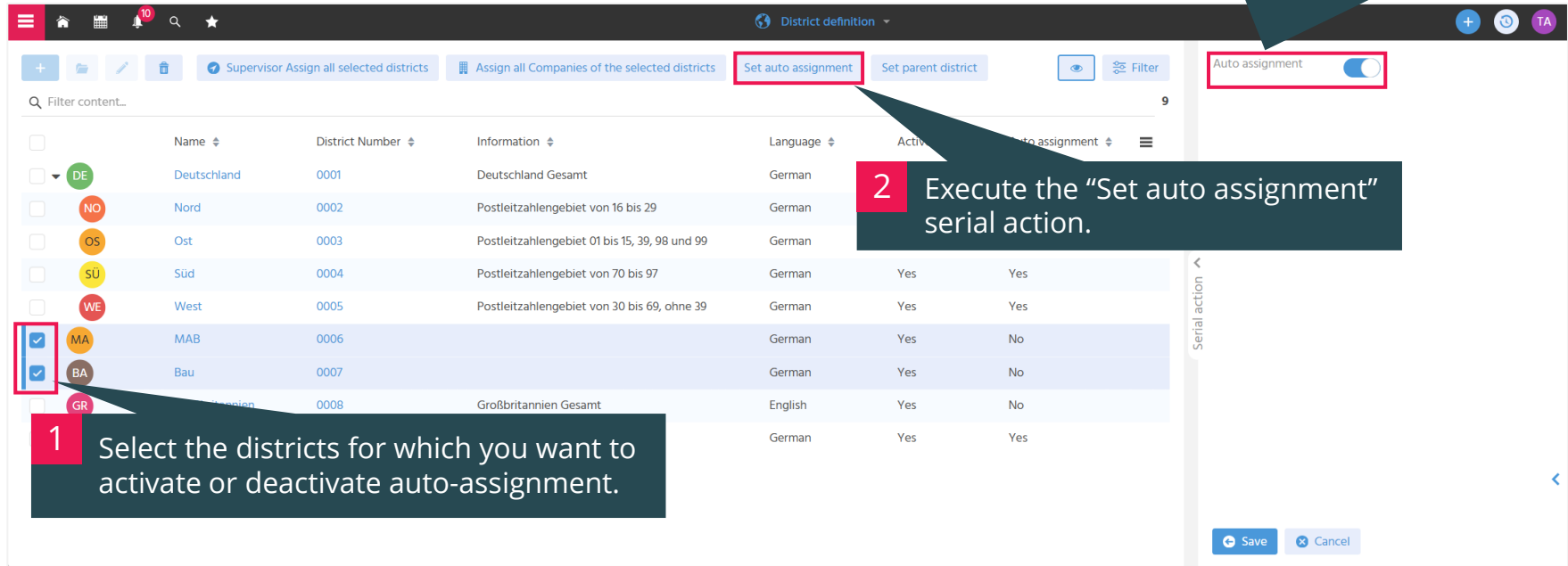
District definition

Serial action „Set auto assignment“

3 Set the button active for auto-assignment = Yes or inactive for auto-assignment = No.

2 Execute the “Set auto assignment” serial action.

1 Select the districts for which you want to activate or deactivate auto-assignment.



The screenshot shows the ADITO District definition interface. At the top, there is a navigation bar with a hamburger menu, home, calendar, notifications (10), search, and star icons. Below the navigation bar, there is a toolbar with buttons for adding, deleting, editing, and a dropdown menu. The main content area displays a table of districts with columns for Name, District Number, Information, Language, and Active. The table lists districts for Germany (DE), Norway (NO), Sweden (OS), Switzerland (SU), Austria (WE), and others. The 'Active' column has a dropdown menu. A serial action panel on the right shows the 'Set auto assignment' action, which is currently active (indicated by a blue toggle switch). The 'Auto assignment' toggle switch is also shown in the top right corner of the interface.

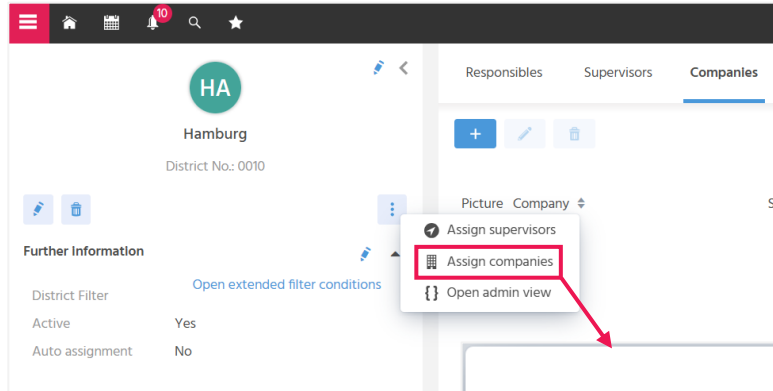
	Name	District Number	Information	Language	Active	Auto assignment
☐	Deutschland	0001	Deutschland Gesamt	German		
☐	Nord	0002	Postleitzahlengebiet von 16 bis 29	German		
☐	Ost	0003	Postleitzahlengebiet 01 bis 15, 39, 98 und 99	German		
☐	Süd	0004	Postleitzahlengebiet von 70 bis 97	German	Yes	Yes
☐	West	0005	Postleitzahlengebiet von 30 bis 69, ohne 39	German	Yes	Yes
☒	MAB	0006		German	Yes	No
☒	Bau	0007		German	Yes	No
☐	GR	0008	Großbritannien Gesamt	English	Yes	No
☐				German	Yes	Yes

Serial action

Save Cancel

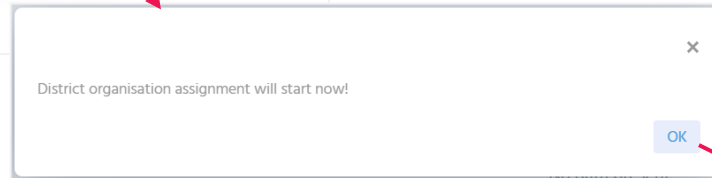
District definition

District – Tab „Companies“



Execute the “Assign companies” action:

- **Initial**, if you have created a new district.
- If you have **changed** the **district filter**.
- When a **company relocates** and therefore belongs to another district.
- If you have **imported** large quantities of **company data records**.



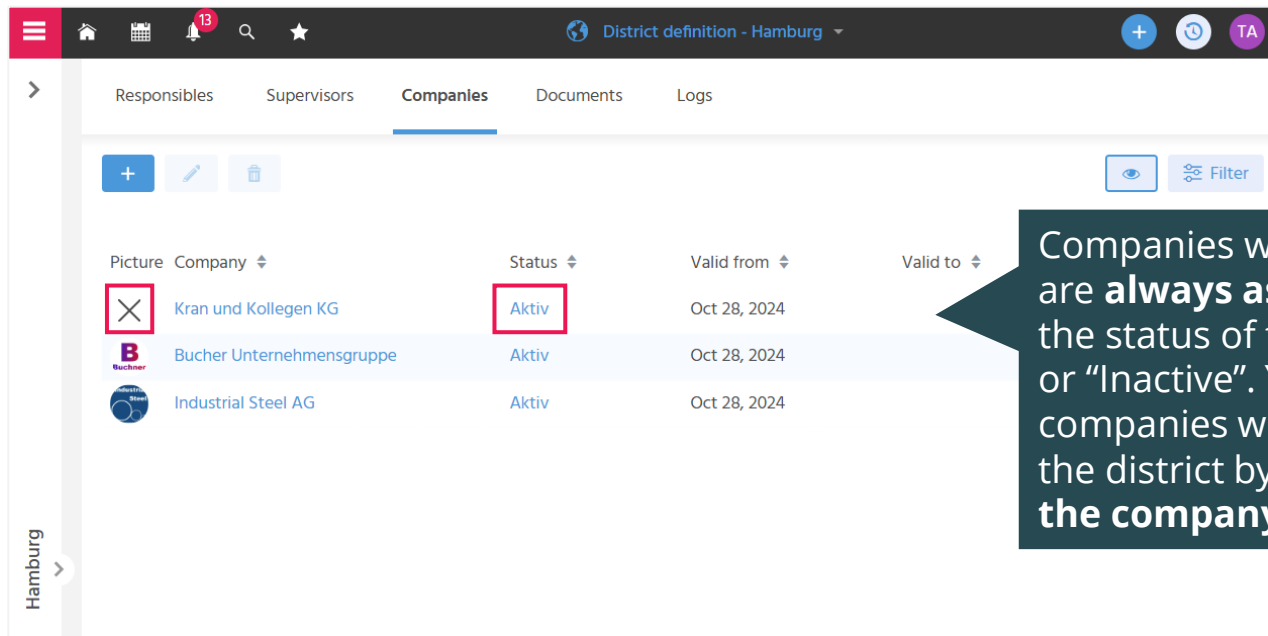
As soon as the assignment is complete, you will receive a notification.



If you have activated auto-assignment in a district, it is not necessary to carry out the “Assign companies” action manually.

District definition – Company assignment

Assignment depending on the status of the company



Picture	Company	Status	Valid from	Valid to
	Kran und Kollegen KG	Aktiv	Oct 28, 2024	
	Buchner Unternehmensgruppe	Aktiv	Oct 28, 2024	
	Industrial Steel AG	Aktiv	Oct 28, 2024	

Companies with matching filter criteria are **always assigned to** a district, even if the status of the company is "In review" or "Inactive". You can recognize companies with the status "Inactive" in the district by the icon . **The status of the company assignment is still active.**

District definition – Company assignment



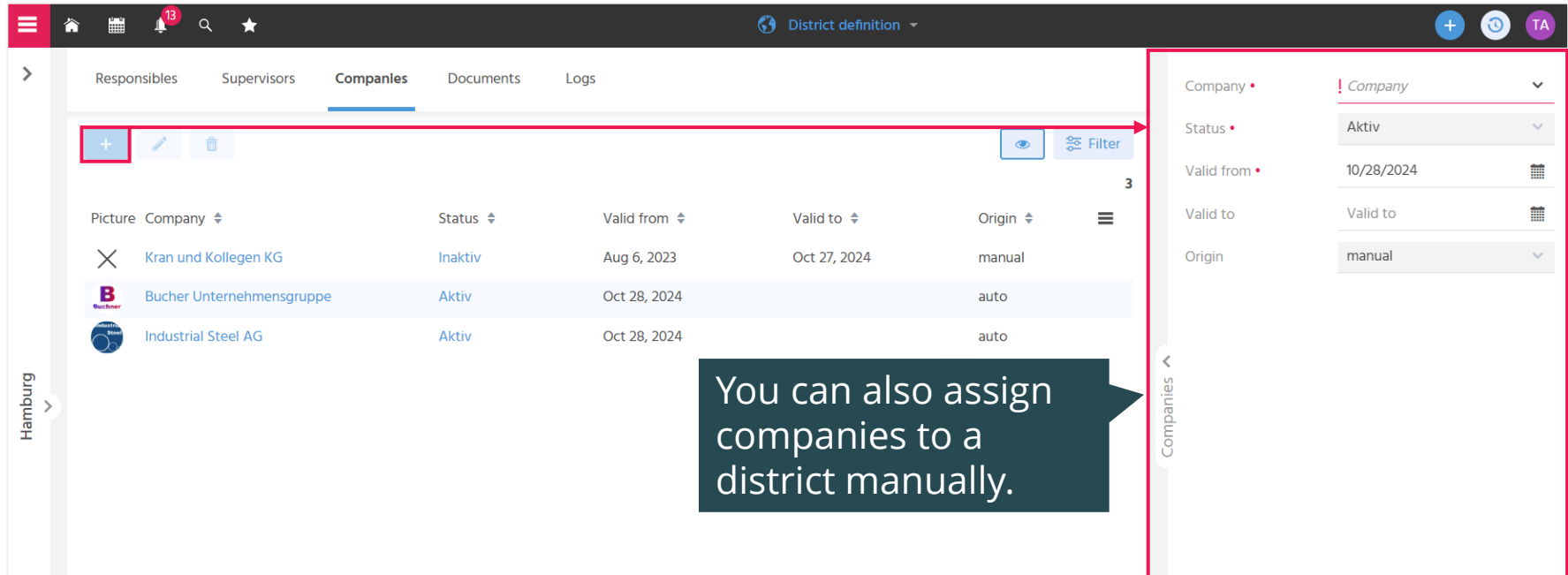
Status of the company assignment

Picture	Company	Status	Valid from	Valid to
	Kran und Kollegen KG	Inaktiv	Aug 6, 2023	Oct 27, 2024
	Bucher Unternehmensgruppe	Aktiv	Oct 28, 2024	
	Industrial Steel AG	Aktiv	Oct 28, 2024	

If you set a "Valid to" date in the district at the company assignment that has been exceeded, the status of the company assignment is set to "Inactive". You can use a filter to hide the inactive data records.

District definition

District – Tab „Companies“



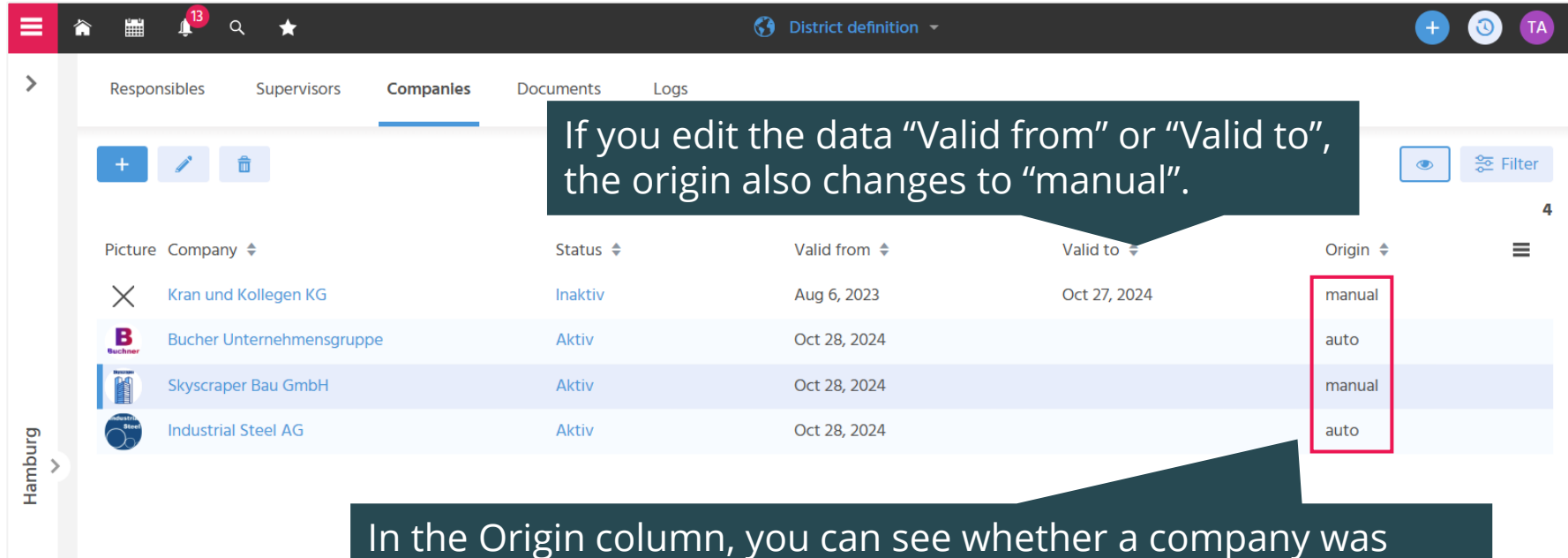
The screenshot displays the ADITO District definition interface, specifically the 'Companies' tab. The interface includes a top navigation bar with a hamburger menu, home, calendar, notifications (13), search, and star icons. The main header shows 'District definition' with a dropdown arrow. Below this, there are tabs for 'Responsibles', 'Supervisors', 'Companies' (selected), 'Documents', and 'Logs'. A red box highlights the '+', '-', and trash icons in the top left of the table area. The table lists three companies: 'Kran und Kollegen KG' (Inaktiv, Aug 6, 2023 to Oct 27, 2024, manual), 'Bucher Unternehmensgruppe' (Aktiv, Oct 28, 2024, auto), and 'Industrial Steel AG' (Aktiv, Oct 28, 2024, auto). A red arrow points from the table to the right-hand sidebar, which shows the details for a selected company. The sidebar includes fields for 'Company', 'Status' (Aktiv), 'Valid from' (10/28/2024), 'Valid to', and 'Origin' (manual). A dark blue callout box with white text states: 'You can also assign companies to a district manually.'

Picture	Company	Status	Valid from	Valid to	Origin
	Kran und Kollegen KG	Inaktiv	Aug 6, 2023	Oct 27, 2024	manual
	Bucher Unternehmensgruppe	Aktiv	Oct 28, 2024		auto
	Industrial Steel AG	Aktiv	Oct 28, 2024		auto

You can also assign companies to a district manually.

District definition

District – Tab „Companies“



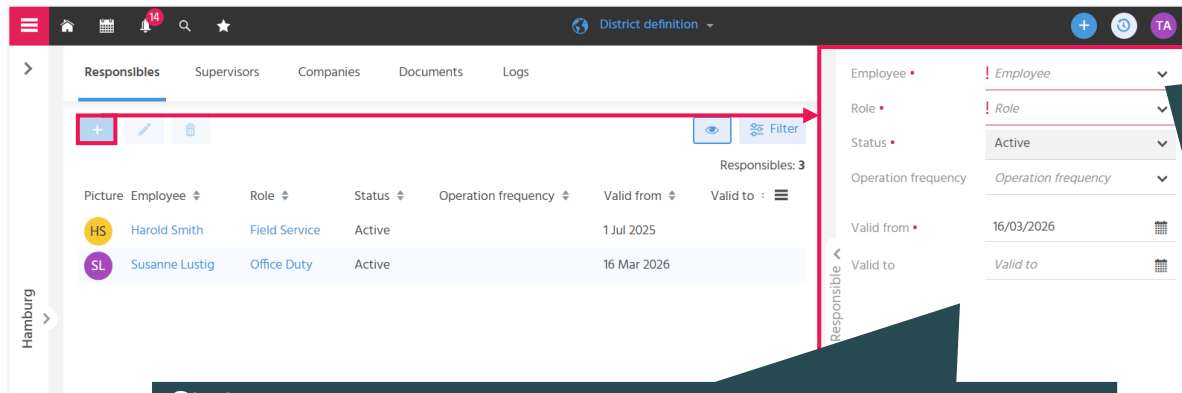
If you edit the data “Valid from” or “Valid to”, the origin also changes to “manual”.

Picture	Company	Status	Valid from	Valid to	Origin
	Kran und Kollegen KG	Inaktiv	Aug 6, 2023	Oct 27, 2024	manual
	Buchner Unternehmensgruppe	Aktiv	Oct 28, 2024		auto
	Skyscraper Bau GmbH	Aktiv	Oct 28, 2024		manual
	Industrial Steel AG	Aktiv	Oct 28, 2024		auto

In the Origin column, you can see whether a company was assigned to the area using the “Assign companies” action or based on the auto-assignment (auto) or whether the company was added using the Create button (manual).

District definition

Add responsible persons to the area



Picture	Employee	Role	Status	Operation frequency	Valid from	Valid to
HS	Harold Smith	Field Service	Active		1 Jul 2025	
SL	Susanne Lustig	Office Duty	Active		16 Mar 2026	

Status

The status is automatically preset to "Active".

Operation frequency

Select here how often the person responsible should visit the companies in this district, e.g. quarterly, semi-annually, etc.

„Valid from“ and „Valid to“

Indicate here from when or until when the contact is responsible for this district.

Employee

Here you can select all internal employees entered in the system.

Role

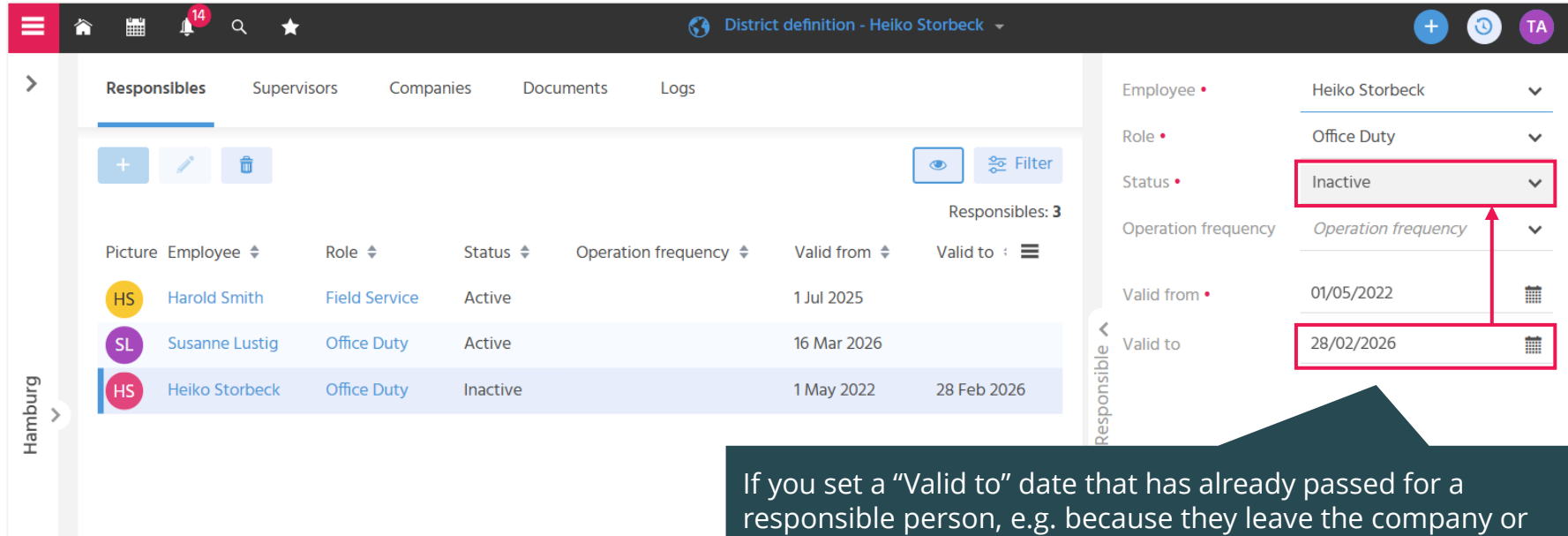
Select the role that the person responsible should have in this district, e.g. area manager.



These roles are independent of the roles used within the permission. The selection can be customized in the keyword ADVISER_ROLE.

District definition

Add responsible persons to the area



The screenshot shows the ADITO District definition interface. The main table lists responsible persons with columns for Picture, Employee, Role, Status, Operation frequency, Valid from, and Valid to. Heiko Storbeck is listed as 'Inactive' with a 'Valid to' date of 28 Feb 2026. A detailed view on the right shows the 'Status' dropdown set to 'Inactive' and the 'Valid to' date set to 28/02/2026. A red arrow points from the 'Valid to' date to the 'Inactive' status, indicating the cause of the status change.

Picture	Employee	Role	Status	Operation frequency	Valid from	Valid to
HS	Harold Smith	Field Service	Active		1 Jul 2025	
SL	Susanne Lustig	Office Duty	Active		16 Mar 2026	
HS	Heiko Storbeck	Office Duty	Inactive		1 May 2022	28 Feb 2026

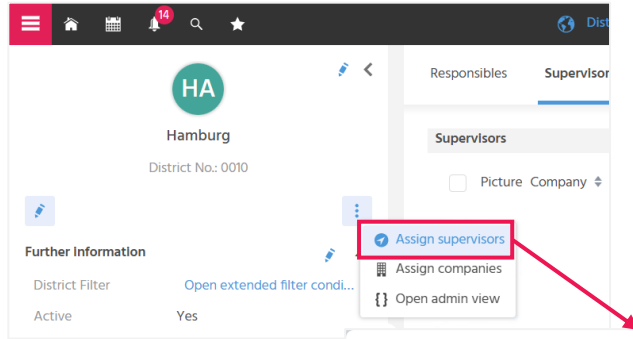
Responsible: 3

Employee: Heiko Storbeck
Role: Office Duty
Status: Inactive
Operation frequency: Operation frequency
Valid from: 01/05/2022
Valid to: 28/02/2026

If you set a "Valid to" date that has already passed for a responsible person, e.g. because they leave the company or change district, the status is automatically set to "Inactive".

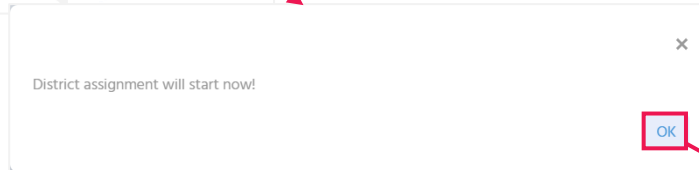
District definition

Assign supervisors



Carry out the “Assign supervisors” action:

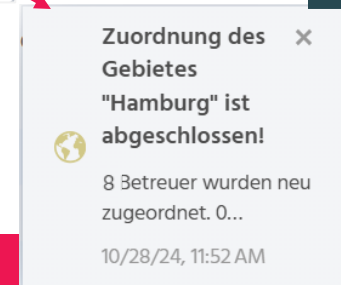
- **Initial**, if you have created a new district.
- If you have **changed** the **district filter**.
- When a **company relocates** and therefore changes to another district.
- If you have **changed** something in the **“Responsibles” tab** (status, validity, etc.).



As soon as the assignment is complete, you will receive a notification.

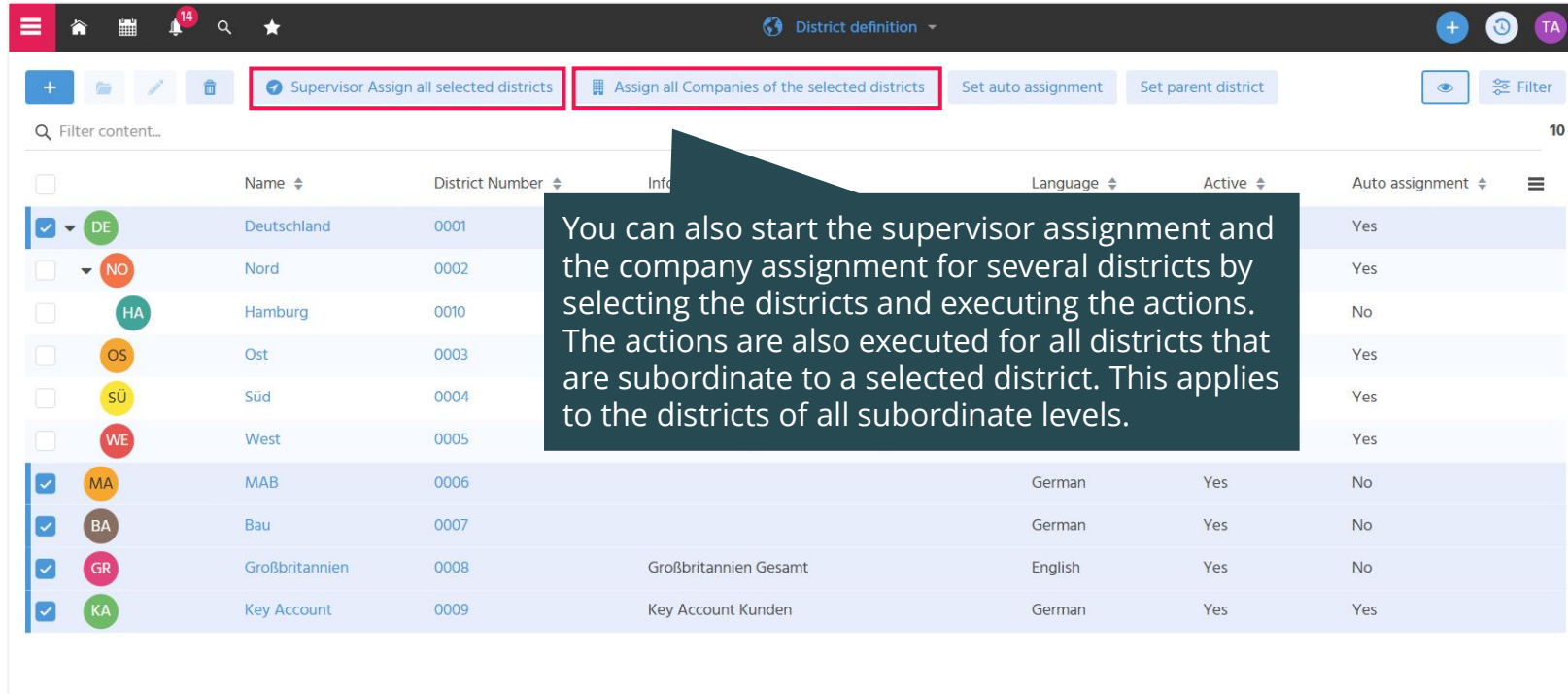


It generally makes sense to carry out the “Assign supervisors” action regularly in order to keep the status of the supervisor data records up to date at all times.



District definition

Assignment by serial action



Supervisor Assign all selected districts

Assign all Companies of the selected districts

Set auto assignment

Set parent district

Filter

10

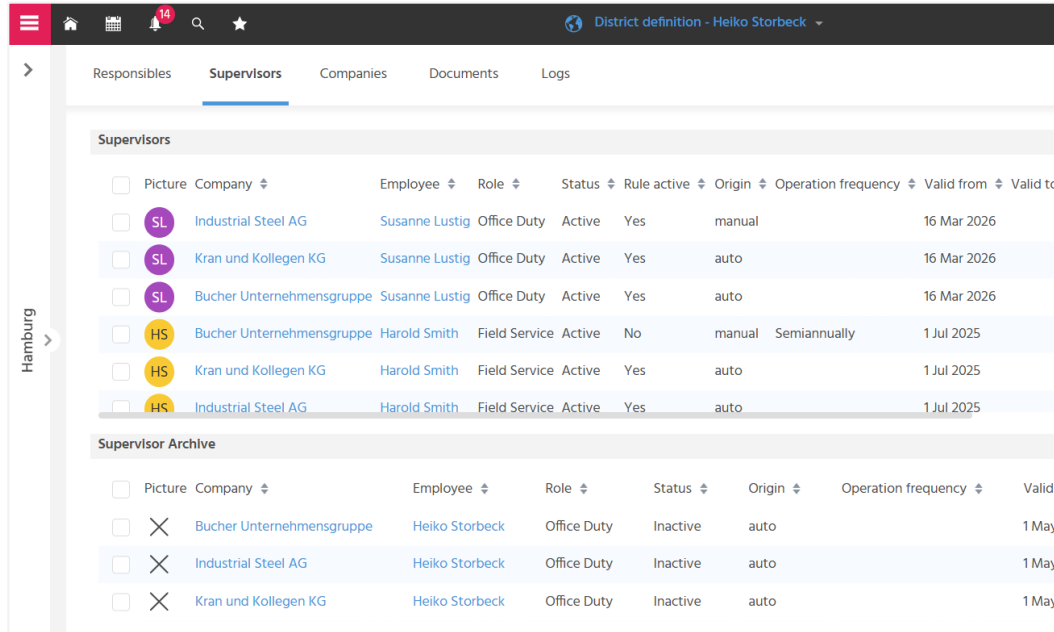
Filter content...

	Name	District Number	Info	Language	Active	Auto assignment
☒	DE Deutschland	0001				Yes
☐	NO Nord	0002				Yes
☐	HA Hamburg	0010				No
☐	OS Ost	0003				Yes
☐	SÜ Süd	0004				Yes
☐	WE West	0005				Yes
☒	MA MAB	0006		German	Yes	No
☒	BA Bau	0007		German	Yes	No
☒	GR Großbritannien	0008	Großbritannien Gesamt	English	Yes	No
☒	KA Key Account	0009	Key Account Kunden	German	Yes	Yes

You can also start the supervisor assignment and the company assignment for several districts by selecting the districts and executing the actions. The actions are also executed for all districts that are subordinate to a selected district. This applies to the districts of all subordinate levels.

District definition

Tab „Supervisors“



Picture	Company	Employee	Role	Status	Rule active	Origin	Operation frequency	Valid from	Valid to
☐	SL Industrial Steel AG	Susanne Lustig	Office Duty	Active	Yes	manual		16 Mar 2026	
☐	SL Kran und Kollegen KG	Susanne Lustig	Office Duty	Active	Yes	auto		16 Mar 2026	
☐	SL Bucher Unternehmensgruppe	Susanne Lustig	Office Duty	Active	Yes	auto		16 Mar 2026	
☐	HS Bucher Unternehmensgruppe	Harold Smith	Field Service	Active	No	manual	Semiannually	1 Jul 2025	
☐	HS Kran und Kollegen KG	Harold Smith	Field Service	Active	Yes	auto		1 Jul 2025	
☐	HS Industrial Steel AG	Harold Smith	Field Service	Active	Yes	auto		1 Jul 2025	

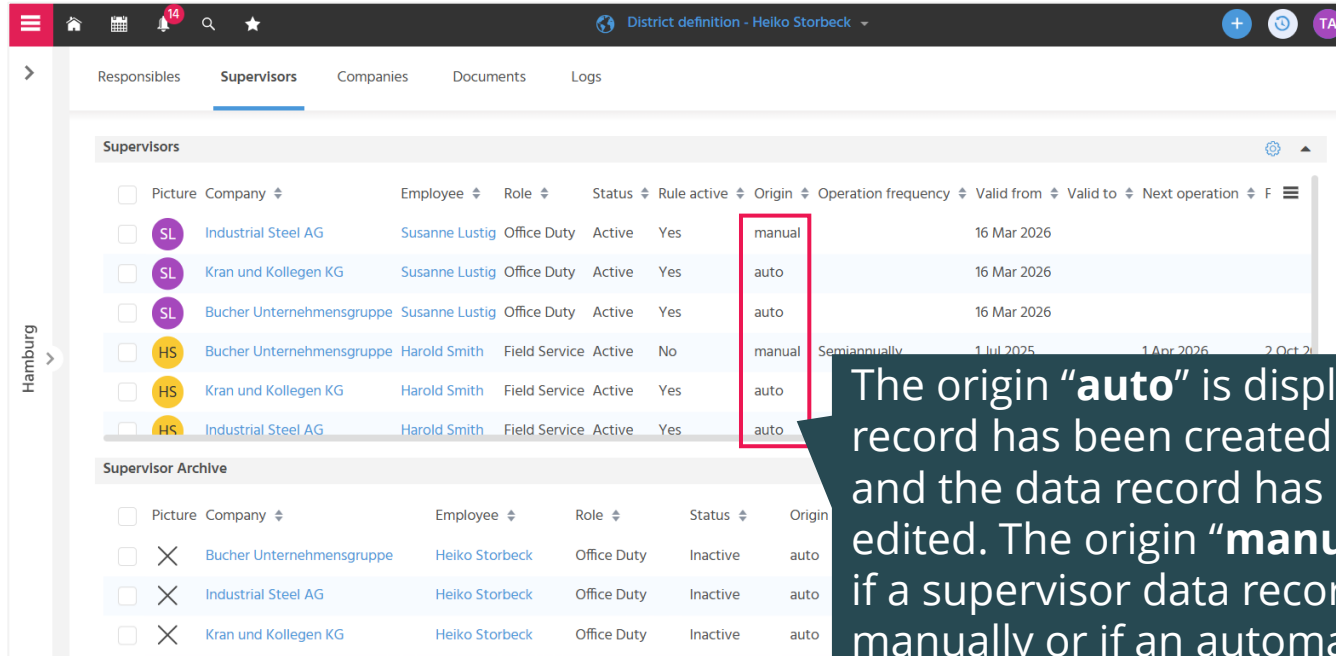
Picture	Company	Employee	Role	Status	Origin	Operation frequency	Valid from	Valid to
☐	X Bucher Unternehmensgruppe	Heiko Storbeck	Office Duty	Inactive	auto		1 May 2	
☐	X Industrial Steel AG	Heiko Storbeck	Office Duty	Inactive	auto		1 May 2	
☐	X Kran und Kollegen KG	Heiko Storbeck	Office Duty	Inactive	auto		1 May 2022	20 Feb 2020

As soon as the supervisor assignment has been completed, you will find a **supervisor data record for each possible combination of responsible person and company** in the “Supervisor” tab, which the system has created automatically. You can also create a supervisor data record manually.

As soon as a supervisor data record exists for a supervisor, the supervisor can no longer be deleted.

District definition

Tab „Supervisors“



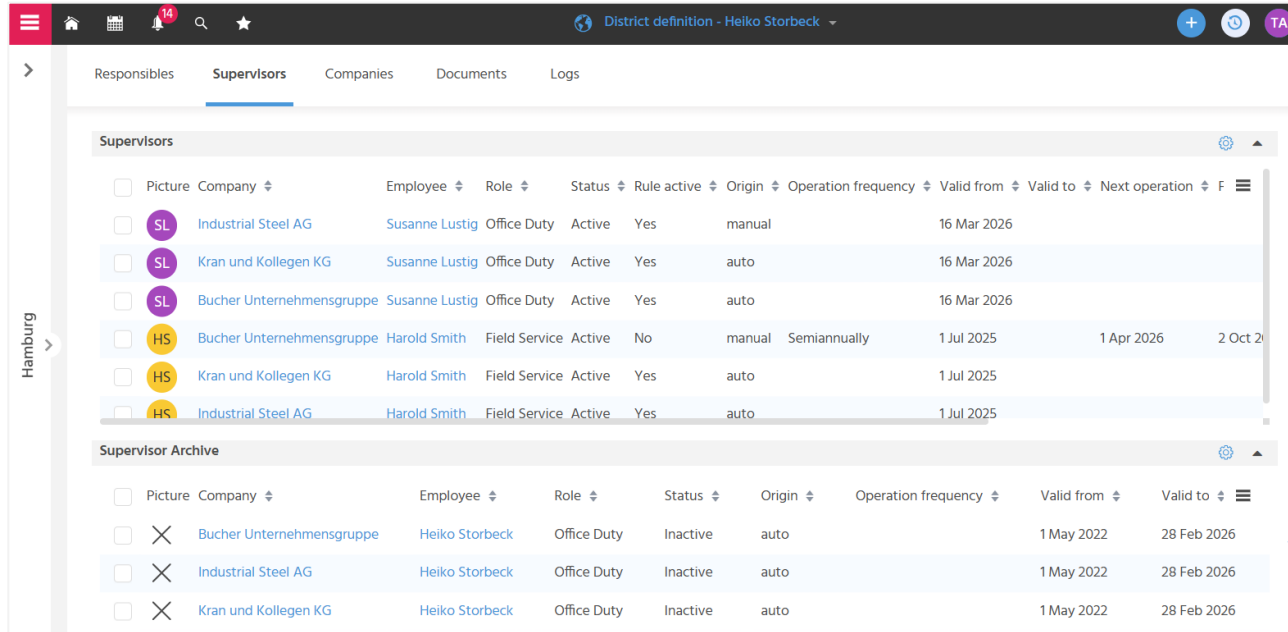
Picture	Company	Employee	Role	Status	Rule active	Origin	Operation frequency	Valid from	Valid to	Next operation
☐	SL Industrial Steel AG	Susanne Lustig	Office Duty	Active	Yes	manual		16 Mar 2026		
☐	SL Kran und Kollegen KG	Susanne Lustig	Office Duty	Active	Yes	auto		16 Mar 2026		
☐	SL Bucher Unternehmensgruppe	Susanne Lustig	Office Duty	Active	Yes	auto		16 Mar 2026		
☐	HS Bucher Unternehmensgruppe	Harold Smith	Field Service	Active	No	manual	Semiannually	1 Jul 2025	1 Apr 2026	2 Oct 2026
☐	HS Kran und Kollegen KG	Harold Smith	Field Service	Active	Yes	auto				
☐	HS Industrial Steel AG	Harold Smith	Field Service	Active	Yes	auto				

Picture	Company	Employee	Role	Status	Origin
☐	X Bucher Unternehmensgruppe	Heiko Storbeck	Office Duty	Inactive	auto
☐	X Industrial Steel AG	Heiko Storbeck	Office Duty	Inactive	auto
☐	X Kran und Kollegen KG	Heiko Storbeck	Office Duty	Inactive	auto

The origin **“auto”** is displayed if a data record has been created by the system and the data record has not yet been edited. The origin **“manual”** is displayed if a supervisor data record was created manually or if an automatically created data record was subsequently edited.

District definition

Tab „Supervisors“



The screenshot displays the ADITO District definition interface. The top navigation bar shows 'District definition - Heiko Storbeck'. The main content area is divided into two sections: 'Supervisors' and 'Supervisor Archive'.

Supervisors Table:

Picture	Company	Employee	Role	Status	Rule active	Origin	Operation frequency	Valid from	Valid to	Next operation
☐	SL	Industrial Steel AG	Susanne Lustig	Office Duty	Active	Yes	manual	16 Mar 2026		
☐	SL	Kran und Kollegen KG	Susanne Lustig	Office Duty	Active	Yes	auto	16 Mar 2026		
☐	SL	Bucher Unternehmensgruppe	Susanne Lustig	Office Duty	Active	Yes	auto	16 Mar 2026		
☐	HS	Bucher Unternehmensgruppe	Harold Smith	Field Service	Active	No	manual Semiannually	1 Jul 2025	1 Apr 2026	2 Oct 2026
☐	HS	Kran und Kollegen KG	Harold Smith	Field Service	Active	Yes	auto	1 Jul 2025		
☐	HS	Industrial Steel AG	Harold Smith	Field Service	Active	Yes	auto	1 Jul 2025		

Supervisor Archive Table:

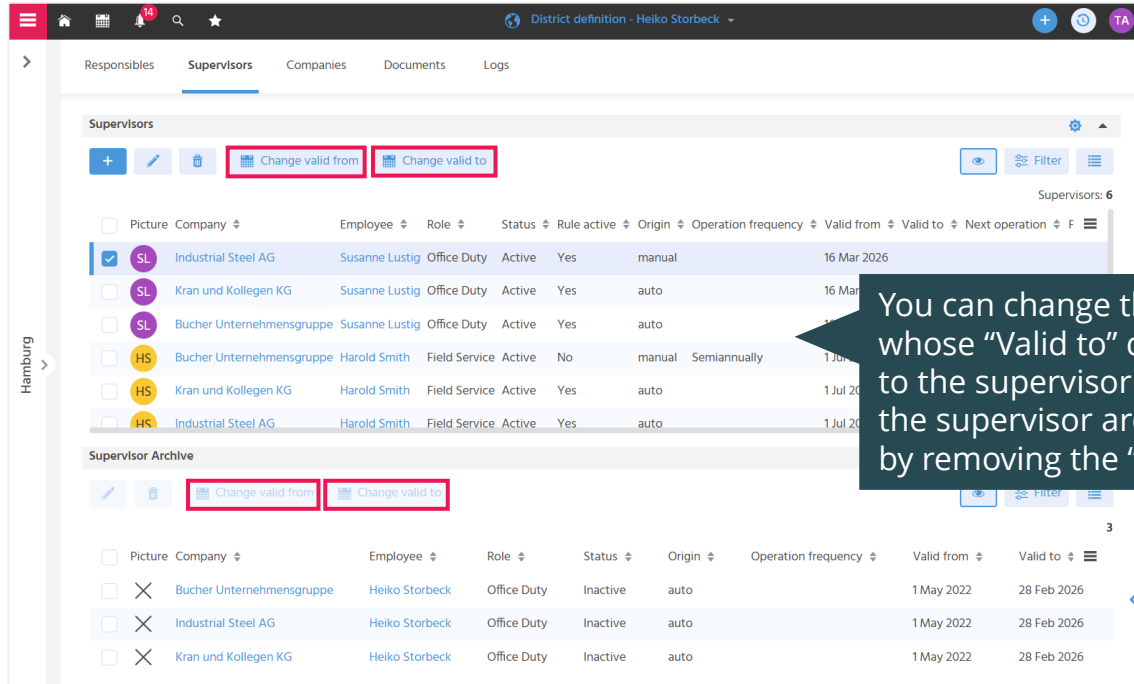
Picture	Company	Employee	Role	Status	Origin	Operation frequency	Valid from	Valid to
☐	X	Bucher Unternehmensgruppe	Heiko Storbeck	Office Duty	Inactive	auto	1 May 2022	28 Feb 2026
☐	X	Industrial Steel AG	Heiko Storbeck	Office Duty	Inactive	auto	1 May 2022	28 Feb 2026
☐	X	Kran und Kollegen KG	Heiko Storbeck	Office Duty	Inactive	auto	1 May 2022	28 Feb 2026

In the “Supervisors” area, you can see the active supervisors for whom no “Valid to” date has been set or one that is in the future.

In the “Supervisor archive” area, you can see the inactive supervisors for whom a “Valid to” date has been set that has already been reached or exceeded.

District definition

Tab „Supervisors“



Supervisors

Supervisors: 6

Picture	Company	Employee	Role	Status	Rule active	Origin	Operation frequency	Valid from	Valid to	Next operation
☒	SL	Industrial Steel AG	Susanne Lustig	Office Duty	Active	Yes	manual	16 Mar 2026		
☐	SL	Kran und Kollegen KG	Susanne Lustig	Office Duty	Active	Yes	auto	16 Mar 2026		
☐	SL	Bucher Unternehmensgruppe	Susanne Lustig	Office Duty	Active	Yes	auto			
☐	HS	Bucher Unternehmensgruppe	Harold Smith	Field Service	Active	No	manual	Semiannually	1 Jul 2026	
☐	HS	Kran und Kollegen KG	Harold Smith	Field Service	Active	Yes	auto	1 Jul 2026		
☐	HS	Industrial Steel AG	Harold Smith	Field Service	Active	Yes	auto	1 Jul 2026		

Supervisor Archive

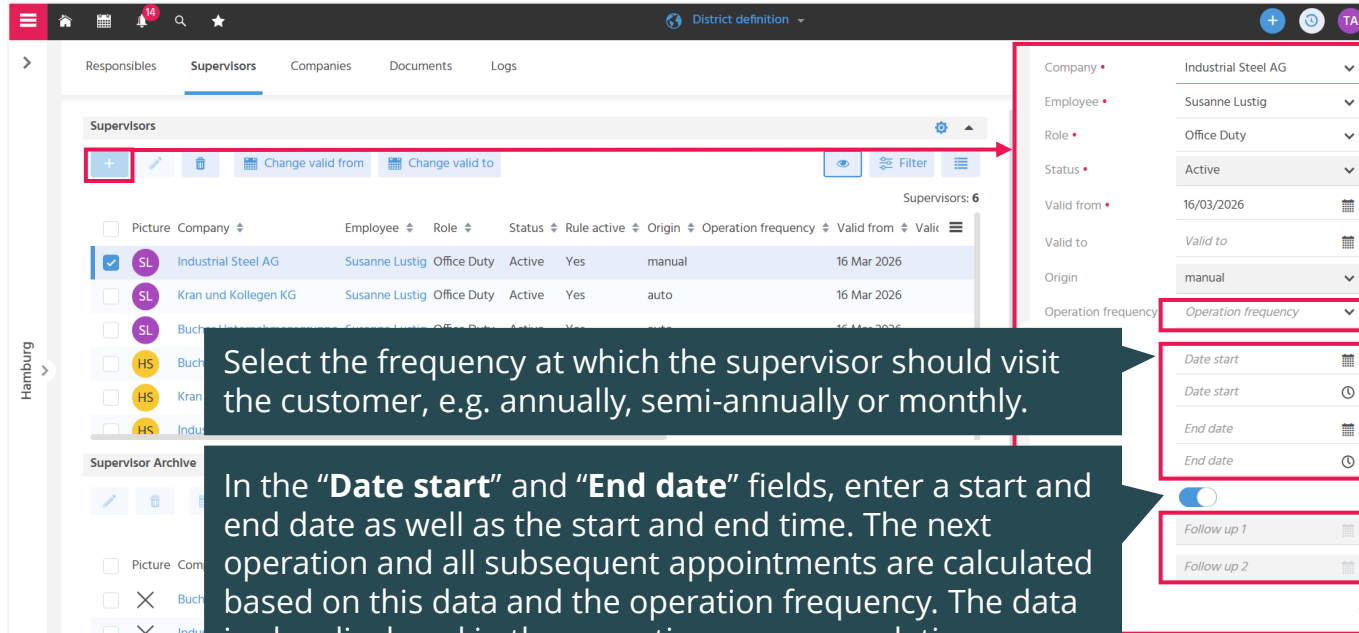
3

Picture	Company	Employee	Role	Status	Origin	Operation frequency	Valid from	Valid to
☐	X	Bucher Unternehmensgruppe	Heiko Storbeck	Office Duty	Inactive	auto	1 May 2022	28 Feb 2026
☐	X	Industrial Steel AG	Heiko Storbeck	Office Duty	Inactive	auto	1 May 2022	28 Feb 2026
☐	X	Kran und Kollegen KG	Heiko Storbeck	Office Duty	Inactive	auto	1 May 2022	28 Feb 2026

You can change the validity of the supervisors. Supervisors whose "Valid to" date has expired are automatically moved to the supervisor archive. You can move supervisors from the supervisor archive back to the active supervisor area by removing the "Valid to" date.

District definition

Tab „Supervisors“



Select the frequency at which the supervisor should visit the customer, e.g. annually, semi-annually or monthly.

In the **“Date start”** and **“End date”** fields, enter a start and end date as well as the start and end time. The next operation and all subsequent appointments are calculated based on this data and the operation frequency. The data is also displayed in the operation recommendation.

Picture	Company	Employee	Role	Status	Rule active	Origin	Operation frequency	Valid from	Valid to
☒	Industrial Steel AG	Susanne Lustig	Office Duty	Active	Yes	manual		16 Mar 2026	
☐	Kran und Kollegen KG	Susanne Lustig	Office Duty	Active	Yes	auto		16 Mar 2026	
☐	Buchholz Maschinenbau GmbH	Susanne Lustig	Office Duty	Active	Yes	auto		16 Mar 2026	
☐	Buchholz Maschinenbau GmbH	Susanne Lustig	Office Duty	Active	Yes	auto		16 Mar 2026	
☐	Kran und Kollegen KG	Susanne Lustig	Office Duty	Active	Yes	auto		16 Mar 2026	
☐	Industrial Steel AG	Susanne Lustig	Office Duty	Active	Yes	auto		16 Mar 2026	

Supervisors: 6

Company: Industrial Steel AG

Employee: Susanne Lustig

Role: Office Duty

Status: Active

Valid from: 16/03/2026

Valid to: Valid to

Origin: manual

Operation frequency: Operation frequency

Date start: Date start

Date end: Date end

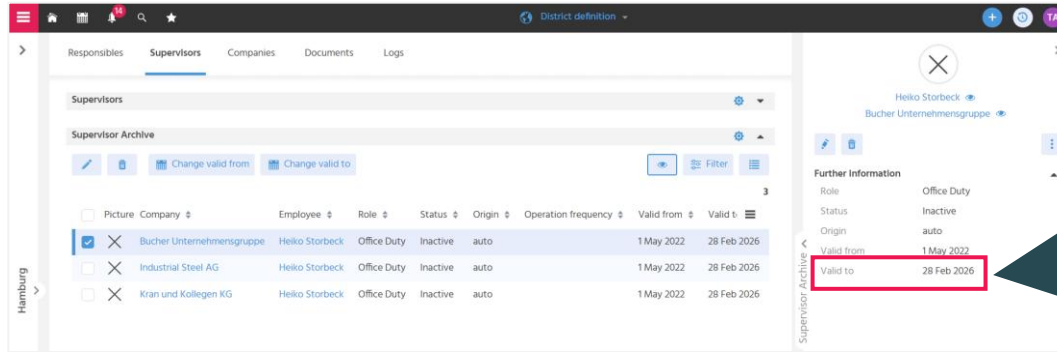
End date: End date

Follow up 1: Follow up 1

Follow up 2: Follow up 2

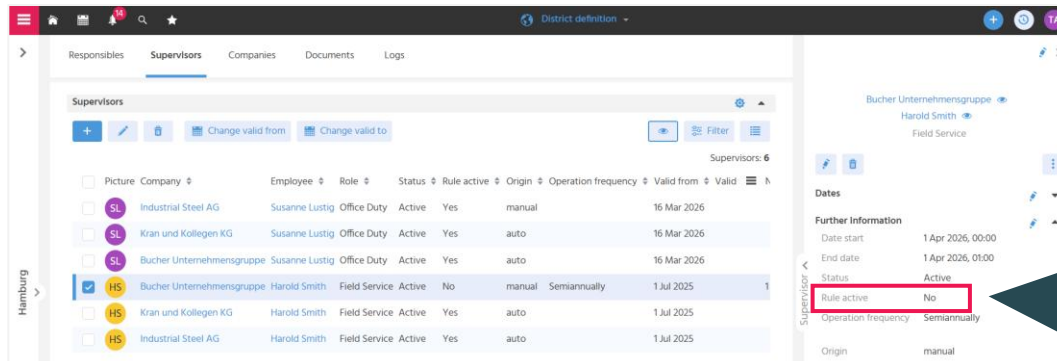
District definition

Tab „Supervisors“ – Review Supervisor data record



Picture	Company	Employee	Role	Status	Origin	Operation frequency	Valid from	Valid to
☒	Bucher Unternehmensgruppe	Heiko Storbeck	Office Duty	Inactive	auto		1 May 2022	28 Feb 2026
☐	Industrial Steel AG	Heiko Storbeck	Office Duty	Inactive	auto		1 May 2022	28 Feb 2026
☐	Kran und Kollegen KG	Heiko Storbeck	Office Duty	Inactive	auto		1 May 2022	28 Feb 2026

If a “Valid to” date has been set for a supervisor data record and this is before the “Next operation”, the associated operation recommendations are deleted. You set the “Valid to” date if an employee is no longer permanently responsible for a company in a district.

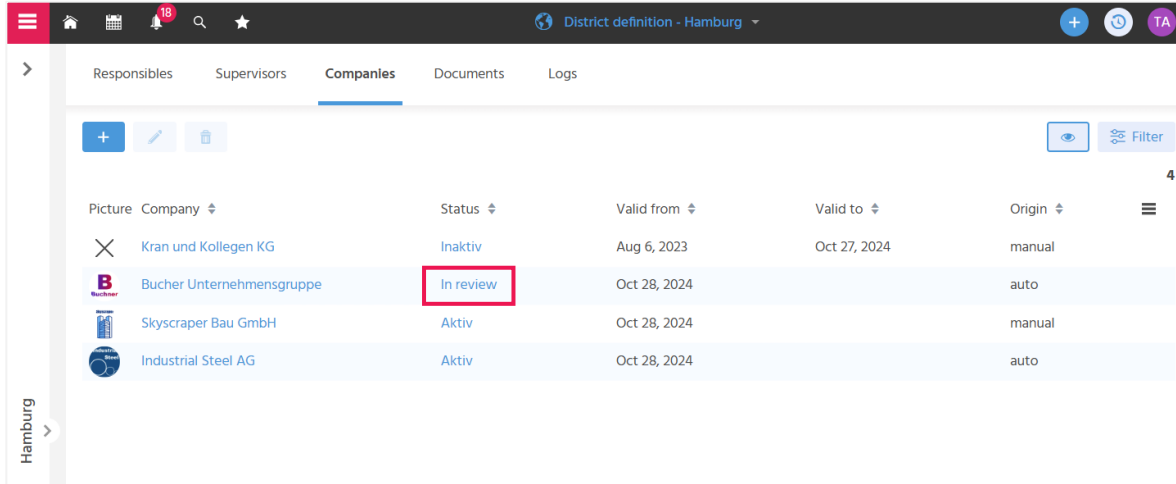


Picture	Company	Employee	Role	Status	Rule active	Origin	Operation frequency	Valid from	Valid to
☐	Industrial Steel AG	Susanne Lustig	Office Duty	Active	Yes	manual		16 Mar 2026	
☐	Kran und Kollegen KG	Susanne Lustig	Office Duty	Active	Yes	auto		16 Mar 2026	
☐	Bucher Unternehmensgruppe	Susanne Lustig	Office Duty	Active	Yes	auto		16 Mar 2026	
☒	Bucher Unternehmensgruppe	Harold Smith	Field Service	Active	No	manual	Semiannually	1 Jul 2025	
☐	Kran und Kollegen KG	Harold Smith	Field Service	Active	Yes	auto		1 Jul 2025	
☐	Industrial Steel AG	Harold Smith	Field Service	Active	Yes	auto		1 Jul 2025	

If you deactivate the button “**Rule active**”, the associated operation recommendations are also deactivated, but not deleted. You use this button if an employee is absent for a period of time, e.g. due to a sabbatical, parental leave or prolonged illness.

District definition

Change of the area filter => Reassign area



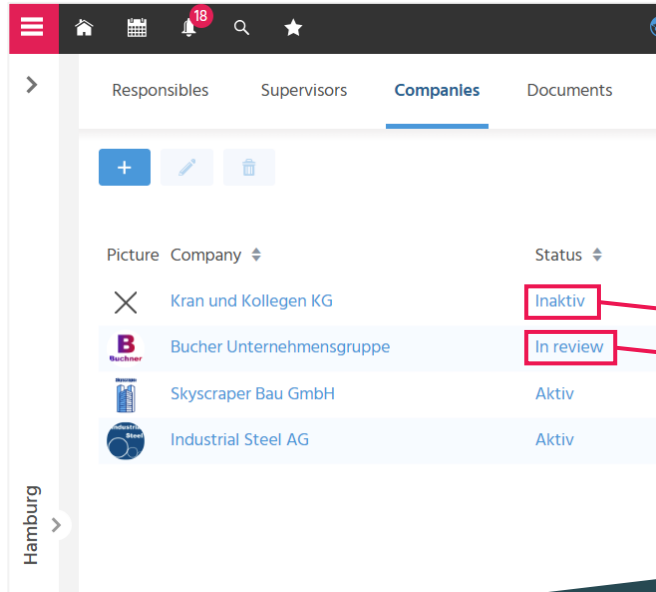
Picture	Company	Status	Valid from	Valid to	Origin
	Kran und Kollegen KG	Inaktiv	Aug 6, 2023	Oct 27, 2024	manual
	Bucher Unternehmensgruppe	In review	Oct 28, 2024		auto
	Skyscraper Bau GmbH	Aktiv	Oct 28, 2024		manual
	Industrial Steel AG	Aktiv	Oct 28, 2024		auto

Companies that fall out of the district due to the change of a district filter or because the company has moved are given the **status “In review”** and can **be deleted manually**.

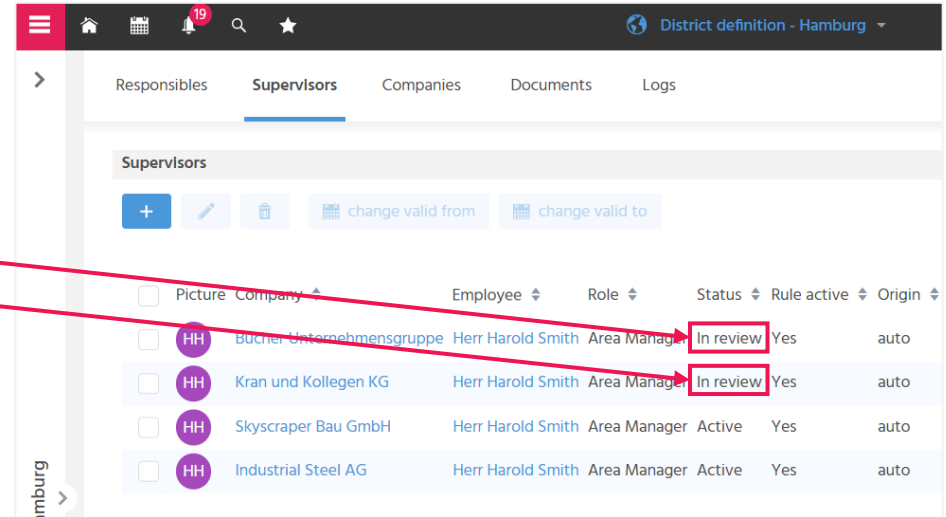
The associated supervisor data records are also set to “in review”.

District definition

Supervisor status depends on the status of the company assignment



Picture	Company	Status
✕	Kran und Kollegen KG	Inaktiv
B Wachner	Bucher Unternehmensgruppe	In review
Skyscraper Bau GmbH	Skyscraper Bau GmbH	Aktiv
Industrial Steel AG	Industrial Steel AG	Aktiv

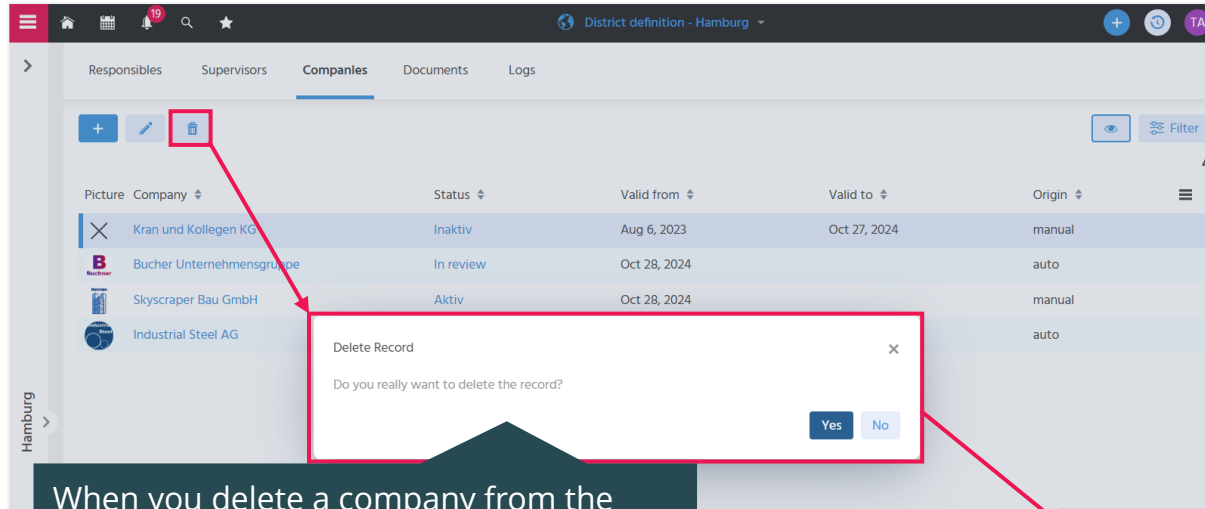


Picture	Company	Employee	Role	Status	Rule active	Origin
HH	Bucher Unternehmensgruppe	Herr Harold Smith	Area Manager	In review	Yes	auto
HH	Kran und Kollegen KG	Herr Harold Smith	Area Manager	In review	Yes	auto
HH	Skyscraper Bau GmbH	Herr Harold Smith	Area Manager	Active	Yes	auto
HH	Industrial Steel AG	Herr Harold Smith	Area Manager	Active	Yes	auto

If a company data record has the status “Inactive” or “In review” and you restart the supervisor assignment, the status of the supervisor data records is set to “In review”.

District definition

Delete company



Picture	Company	Status	Valid from	Valid to	Origin
	Kran und Kollegen KO	Inaktiv	Aug 6, 2023	Oct 27, 2024	manual
	Buchner Unternehmensgruppe	In review	Oct 28, 2024		auto
	Skyscraper Bau GmbH	Aktiv	Oct 28, 2024		manual
	Industrial Steel AG				auto

Delete Record

Do you really want to delete the record?

Yes No

Sales_Delete Supervisors

Sales_Do you want to delete all supervisors that belong to this district?

Yes No

When you delete a company from the district, the system first asks whether the data record should actually be deleted.

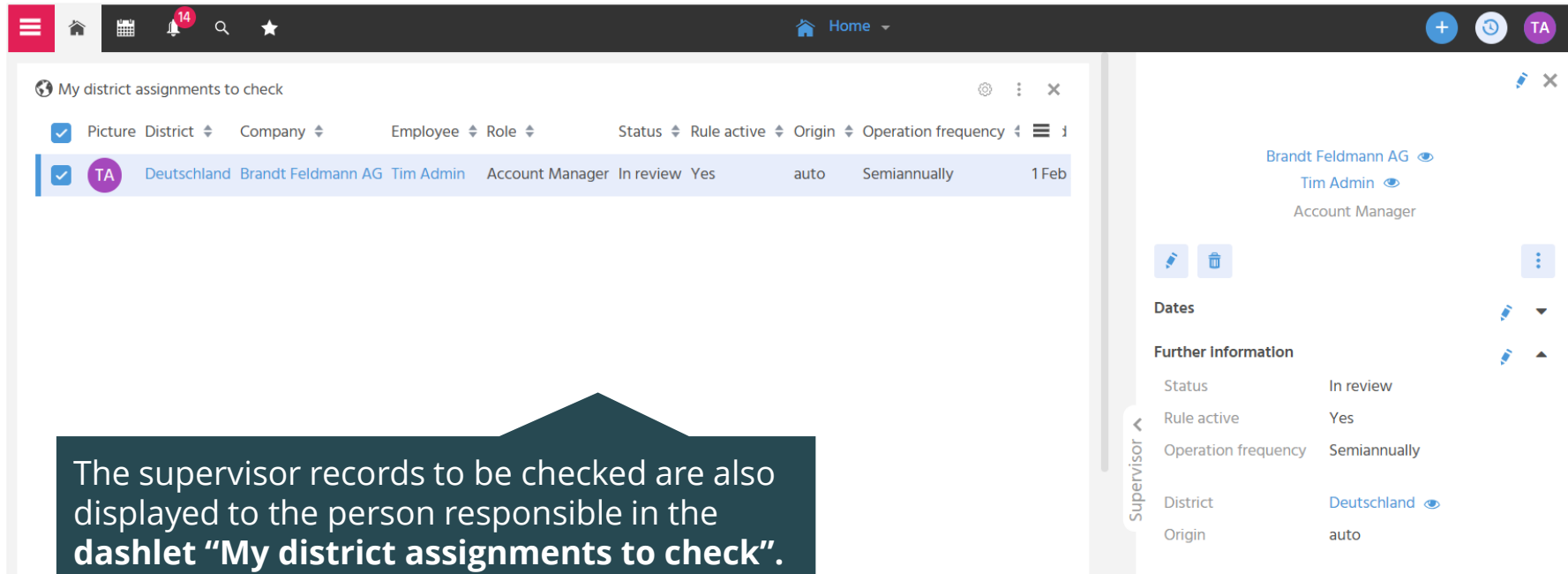
If you affirm the question as to whether the company data record should be deleted, the system will ask you whether all associated supervisor data records should also be deleted.



If you delete companies with the status "active", they will be included in the district again with the next company assignment.

District definition

Dashlet „My district assignment to check“



The screenshot shows the ADITO dashboard interface. At the top, there is a navigation bar with icons for home, calendar, notifications (14), search, and a star. The main content area is divided into two sections. The left section, titled 'My district assignments to check', contains a table with columns for Picture, District, Company, Employee, Role, Status, Rule active, Origin, Operation frequency, and a date. The right section provides a detailed view of the selected assignment, including the company name, employee name, and role, along with a list of dates and further information.

Picture	District	Company	Employee	Role	Status	Rule active	Origin	Operation frequency	
	Deutschland	Brandt Feldmann AG	Tim Admin	Account Manager	In review	Yes	auto	Semiannually	1 Feb

Brandt Feldmann AG
Tim Admin
Account Manager

Dates

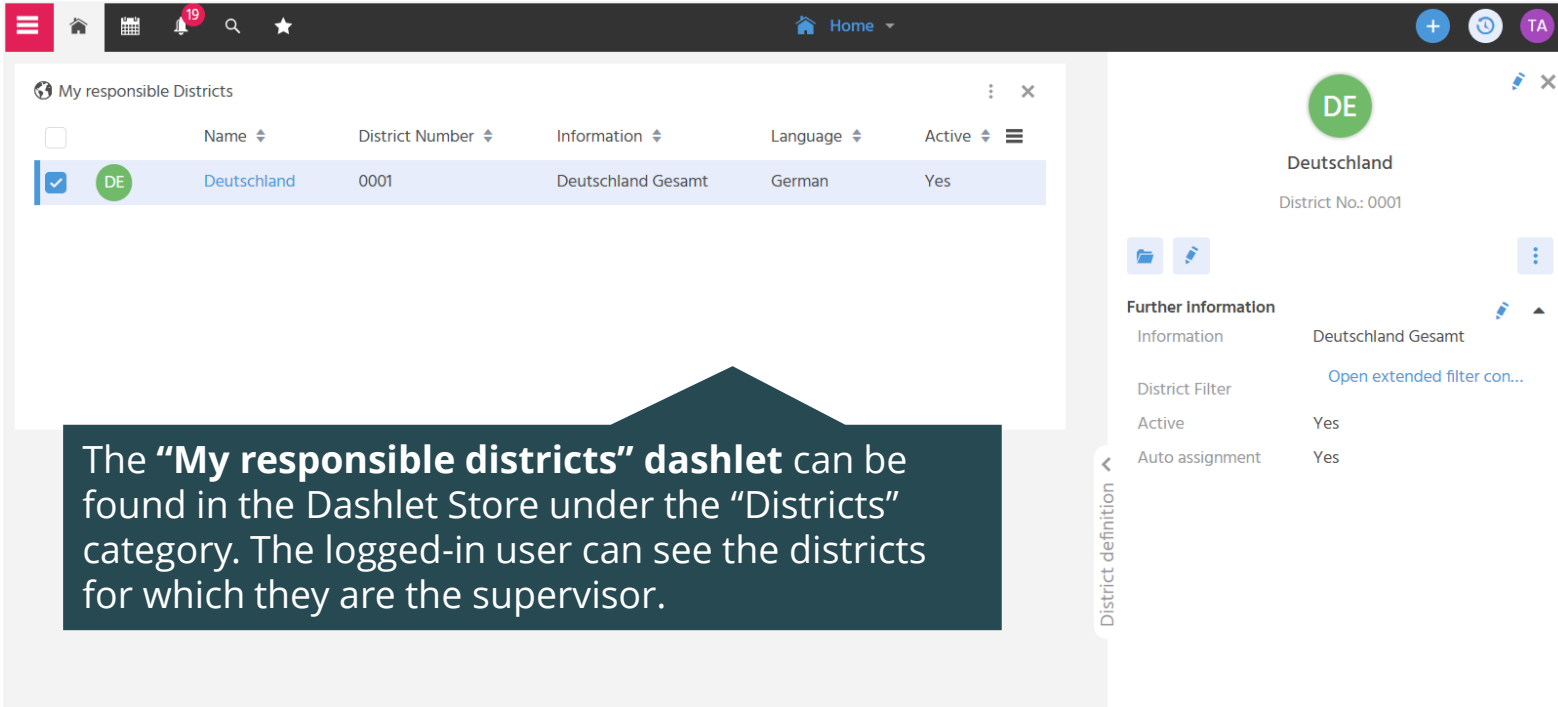
Further Information

Status: In review
Rule active: Yes
Operation frequency: Semiannually
District: Deutschland
Origin: auto

The supervisor records to be checked are also displayed to the person responsible in the dashlet “My district assignments to check”.

District definition

Dashlet „My responsible districts“



The screenshot displays the ADITO user interface. At the top, a dark navigation bar contains icons for menu, home, calendar, notifications (19), search, and favorites. The main content area is divided into two panels. The left panel, titled 'My responsible Districts', features a table with columns for Name, District Number, Information, Language, and Active. A single row for 'Deutschland' is shown, with a green 'DE' icon and a blue checkmark in the Active column. The right panel provides a detailed view of the 'Deutschland' district, showing its name, district number (0001), and a 'Further Information' section with details like 'Information: Deutschland Gesamt', 'District Filter: Open extended filter con...', 'Active: Yes', and 'Auto assignment: Yes'. A vertical label 'District definition' is positioned between the two panels.

Name	District Number	Information	Language	Active
Deutschland	0001	Deutschland Gesamt	German	Yes

Further Information

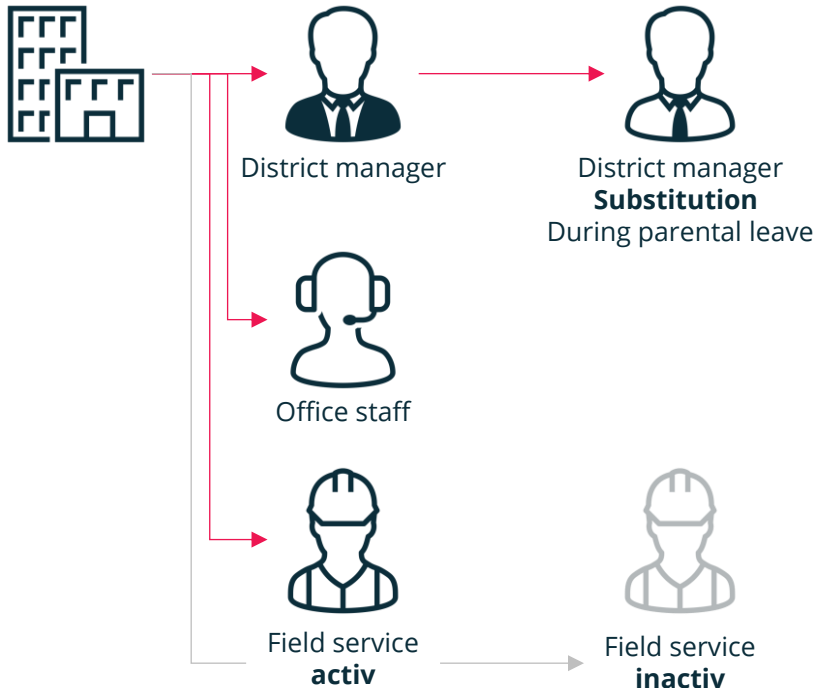
- Information: Deutschland Gesamt
- District Filter: [Open extended filter con...](#)
- Active: Yes
- Auto assignment: Yes

District definition

The **“My responsible districts” dashlet** can be found in the Dashlet Store under the “Districts” category. The logged-in user can see the districts for which they are the supervisor.

Excursus "Company"

Visible in the company



- Which districts the company is assigned to.
- Who is assigned as a supervisor with which role.
- Who was assigned as a supervisor.
- Whose assignment is to be checked.
- Who was assigned as a non-district-specific supervisor.

Exkursus „Company“ – Tab „Supervision“



Industrial Steel AG

Company - Industrial Steel AG

Activities 360 Degree Contacts Appointments/Tasks Operations/Tasks Attributes Documents Relations Checklist entries Advertising Duplicates Logs Conditions Planning **Supervision** Dunning History

Districts

Picture District Status Valid from Valid to Origin

DE	Deutschland	Active	7 Jun 2025		
NO	Nord	Active	7 Jun 2025		
KA	Key Account	Active	10 Jun 2025		
HA	Hamburg	Active	16 Mar 2026		

Supervisors

Picture District Employee Role Status Rule active Origin Operation frequency Valid from Valid to Next operation Follow up 1 Follow up 2 Date start End date

MH	Nord	Melanie Hueber	Field Service	Active	Yes	auto	Semiannually	10 Oct 2024						
MH	Nord	Melanie Hueber	Field Service	Active	No	manual	Semiannually	19 Apr 2024						
BL	Nord	Birgit Leicht	Account Manager	Active	Yes	auto	Semiannually	1 Feb 2025						
BL	Nord	Birgit Leicht	Account Manager	Active	No	manual	Semiannually	19 Apr 2024						
SL	Hamburg	Susanne Lustig	Office Duty	Active	Yes	manual		16 Mar 2026						
HS	Hamburg	Harold Smith	Field Service	Active	Yes	auto		1 Jul 2025						

Supervisor Archive

Picture District Employee Role Status Origin Operation frequency

X	Hamburg	Heiko Storbeck	Office Duty	Inactive	auto	
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In the "Districts" area, you can see all the districts to which the company is assigned.

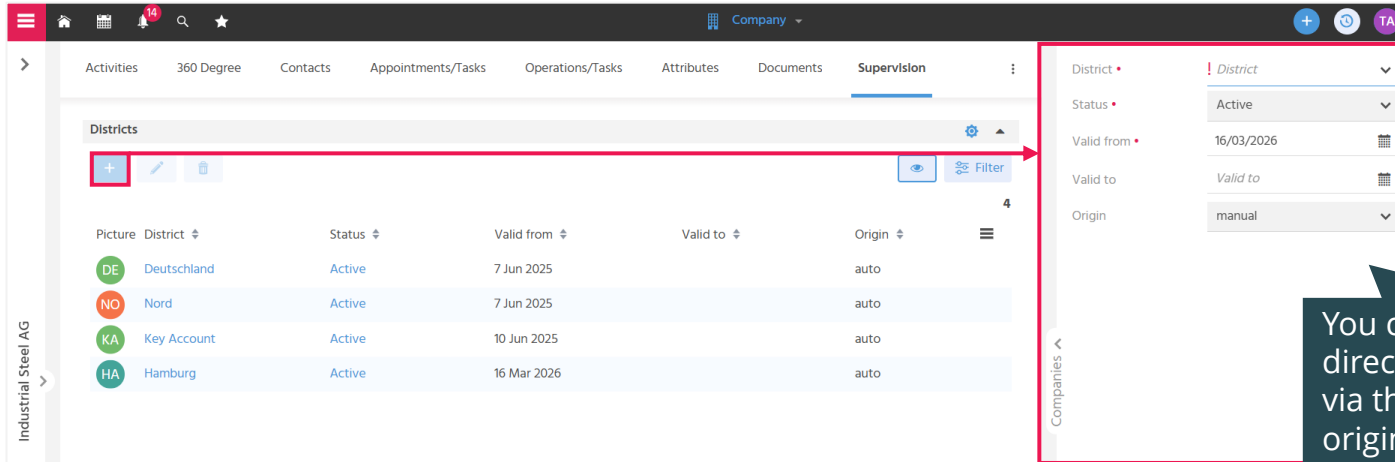
In the "Supervisors" area you can see all active supervisors of the company.

In the "Supervisor archive" area you can see all inactive supervisors of the company.



Exkursus „Company“ – Tab „Supervision“

Add district manually



The screenshot shows the ADITO interface with the 'Supervision' tab selected. The 'Districts' table is visible, and a red box highlights the '+' button to add a new district. A red arrow points from this button to a form on the right side of the screen. The form has the following fields:

- District: ! District (dropdown)
- Status: Active (dropdown)
- Valid from: 16/03/2026 (calendar icon)
- Valid to: Valid to (calendar icon)
- Origin: manual (dropdown)

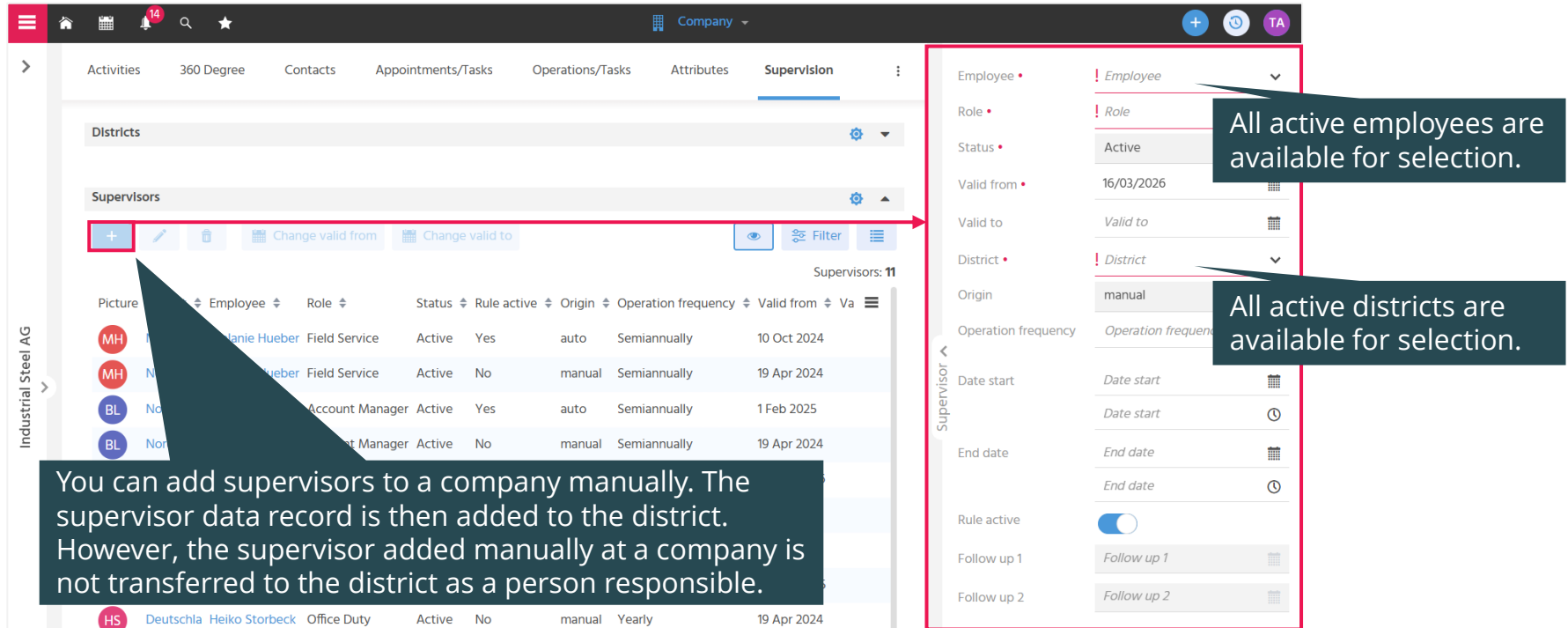
The table below shows the current districts:

Picture	District	Status	Valid from	Valid to	Origin
DE	Deutschland	Active	7 Jun 2025		auto
NO	Nord	Active	7 Jun 2025		auto
KA	Key Account	Active	10 Jun 2025		auto
HA	Hamburg	Active	16 Mar 2026		auto

You can assign the company directly to another district via the “Districts” area. The origin of the company is then displayed as “manual” in the district. The supervisor assignment must be updated in the district using the “Assign supervisors” action.

Exkursus „Company“ – Tab „Supervision“

Add supervisor manually



The screenshot displays the 'Supervision' tab in the ADITO application. On the left, a table lists existing supervisors with columns for Picture, Employee, Role, Status, Rule active, Origin, Operation frequency, Valid from, and Valid to. A red box highlights the '+' icon in the table's header, with a red arrow pointing to the right-hand form. The form contains fields for Employee, Role, Status, Valid from, Valid to, District, Origin, Operation frequency, Date start, End date, Rule active, Follow up 1, and Follow up 2. Two callout boxes provide additional information:

- All active employees are available for selection.** (pointing to the Employee field)
- All active districts are available for selection.** (pointing to the District field)

A text box at the bottom left explains: "You can add supervisors to a company manually. The supervisor data record is then added to the district. However, the supervisor added manually at a company is not transferred to the district as a person responsible."

Picture	Employee	Role	Status	Rule active	Origin	Operation frequency	Valid from	Valid to
MH	Manie Hueber	Field Service	Active	Yes	auto	Semiannually	10 Oct 2024	
MH	Manie Hueber	Field Service	Active	No	manual	Semiannually	19 Apr 2024	
BL	Manie Hueber	Account Manager	Active	Yes	auto	Semiannually	1 Feb 2025	
BL	Manie Hueber	Account Manager	Active	No	manual	Semiannually	19 Apr 2024	

Supervisors: 11

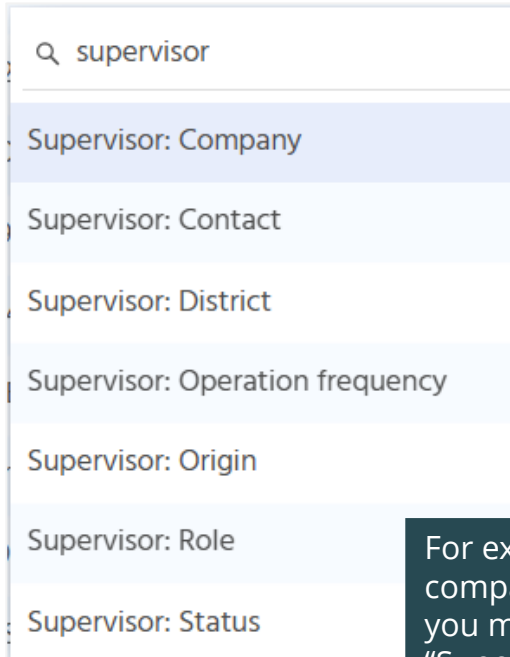
Industrial Steel AG

HS Deutschla Heiko Storbeck Office Duty Active No manual Yearly 19 Apr 2024

Excursus to the Company

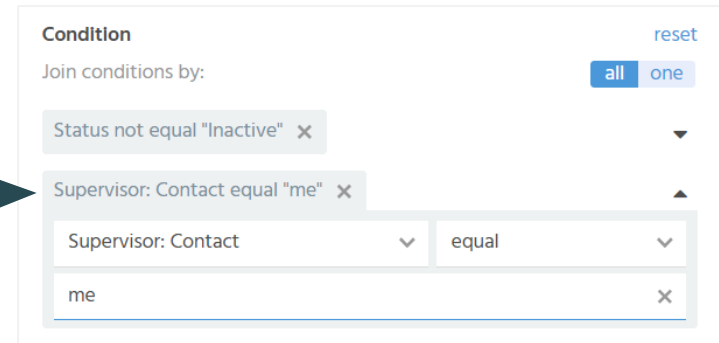
Filter set „Supervisor: ...“

In the Company, Contact, and Opportunity contexts, the filter set “Supervisor: ...” is available to you.



A search dropdown menu with the search term 'supervisor' entered. The dropdown lists several filter options: 'Supervisor: Company', 'Supervisor: Contact', 'Supervisor: District', 'Supervisor: Operation frequency', 'Supervisor: Origin', 'Supervisor: Role', and 'Supervisor: Status'. The 'Supervisor: Contact' option is highlighted.

For example, if you only want to see companies where you are a supervisor, you must select the filter condition “Supervisor: Contact equal me.”



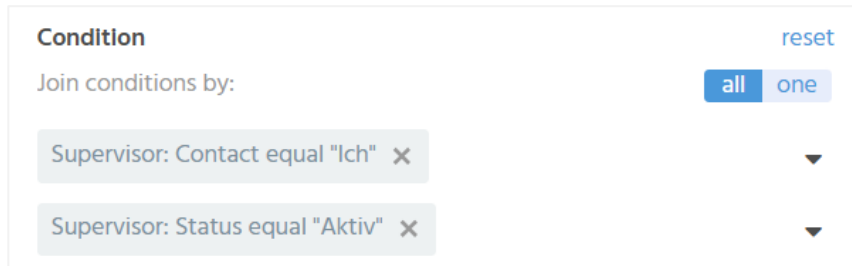
A filter condition configuration interface. It shows a 'Condition' section with a 'reset' button. Below it, 'Join conditions by:' is set to 'all'. The first condition is 'Status not equal "Inactive"'. The second condition is 'Supervisor: Contact equal "me"'. The 'Supervisor: Contact' part is selected from a dropdown, and 'equal' is selected from another dropdown. The value 'me' is entered in the final field.

Dashlet „My Organisations“



The screenshot shows a dashlet titled "My Companies" with a table of company data. The table has columns for "Picture", "Name", "Customercode", "Preferred language", and a partially visible "Ac" column. The data rows are as follows:

Picture	Name	Customercode	Preferred language	Ac
	Aquire GmbH	3469	English	Ac
	Bohrmarkt GmbH	9612	German	Ac
	Bornheimer Maschinenfabrik GmbH	4387	German	Ac
	Bucher Unternehmensgruppe	3698	German	Ac
	Emil Brandstätter AG	5609	German	Ac



The screenshot shows the "Condition" configuration panel. It includes a "reset" button, a "Join conditions by:" section with "all" and "one" options, and two conditions:

- Supervisor: Contact equal "Ich" x
- Supervisor: Status equal "Aktiv" x

In the Dashlet Store, you will find a dashlet that shows you all the companies to which you are assigned as a supervisor.

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