



Sales

ADITO Software GmbH

As of version 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 (1/3)

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Agenda (2/3)

- Offer
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 - Product configuration in the offer
 - Insert product as sub-item - Multiedit
 - Insert product as sub-item - Tree table
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 - Item without article
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 - Receipt process
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 - No E-Invoice
 - XRechnung
 - ZUGFeRD
 - E-Invoice: Excursus on laws and standards
 - E-Invoice: Exkursus on terms
 - E-Invoice: Implementation in ADITO xRM
 - Buyer Reference (Leitweg-ID)
 - Additional fields for invoices
 - Field differences receipt type “Credit”
 - Download XRechnung (XML)
 - Open Invoice as PDF inclusive XML-Datei
 - Difference xml „XRechnung“ und xml „ZUGFeRD“

Agenda (3/3)

- Beleg

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- [Visibility of the sales process at the company](#)

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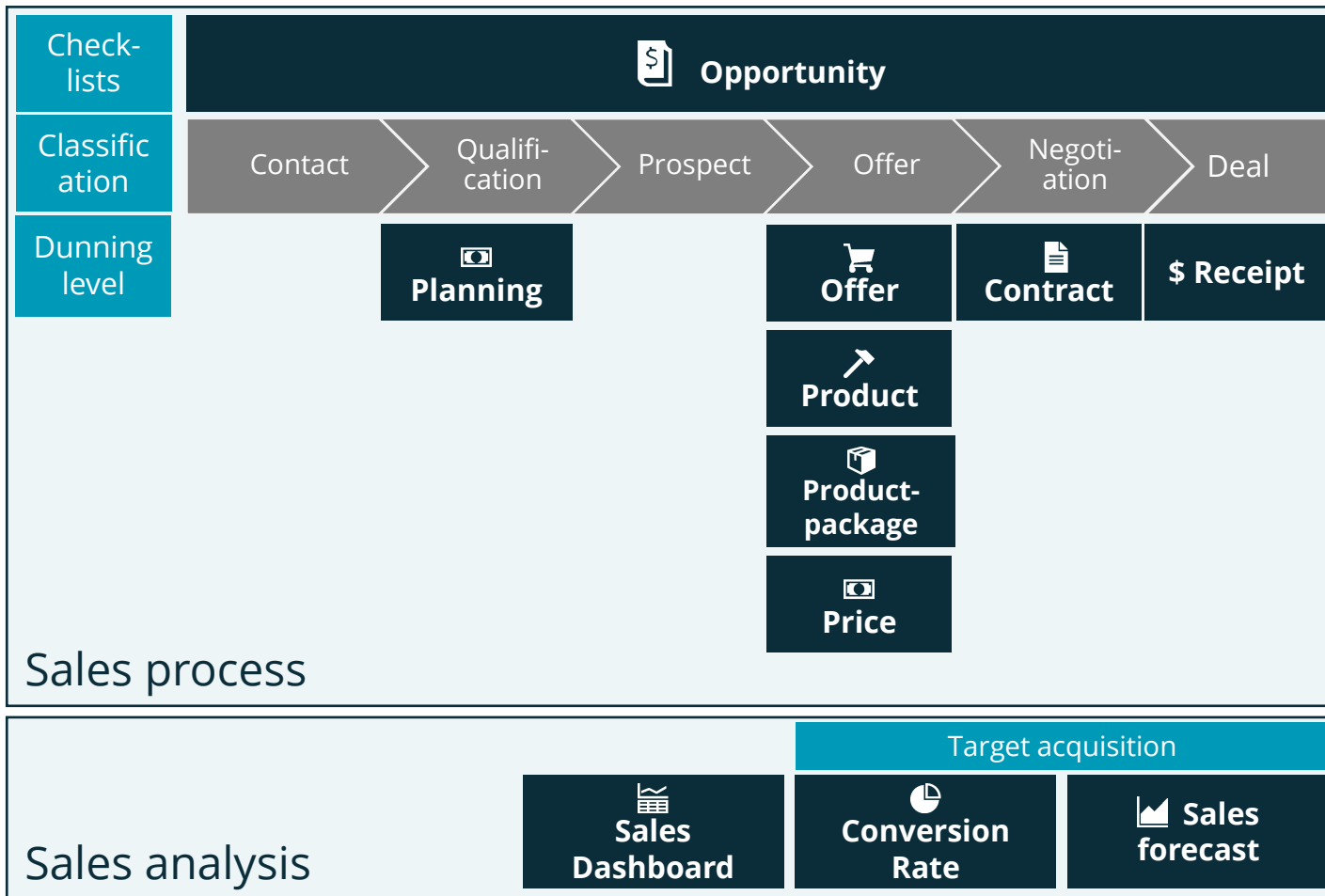
- [Conversion Rate](#)

- [Turnover planning & forecast](#)

- [Definition of terms](#)
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Overview sales



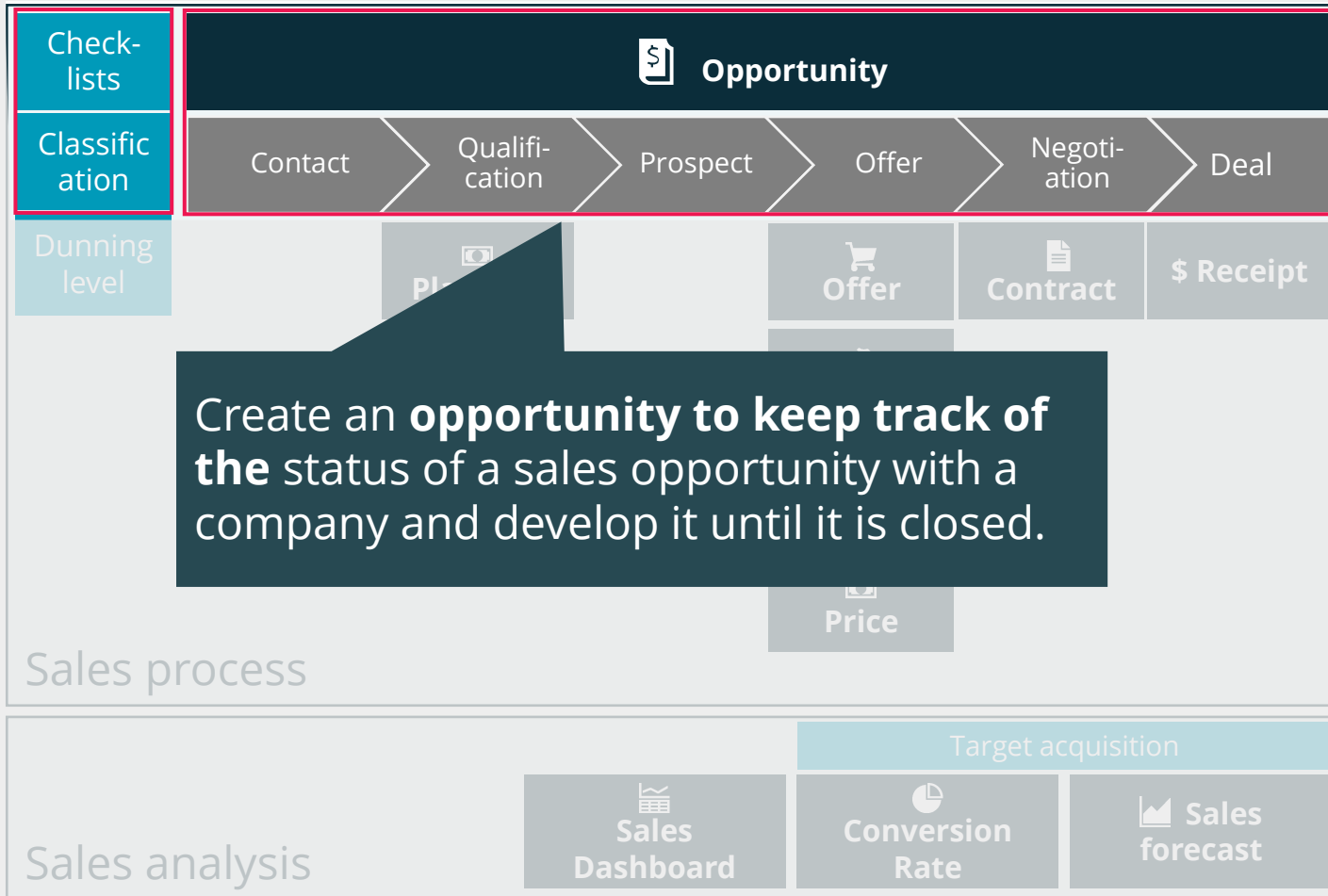


-  To be created in advance by the administrator
-  In use "daily" by end users

Sales process



Opportunity



Opportunity

Sales phases

Assignment of responsibilities:



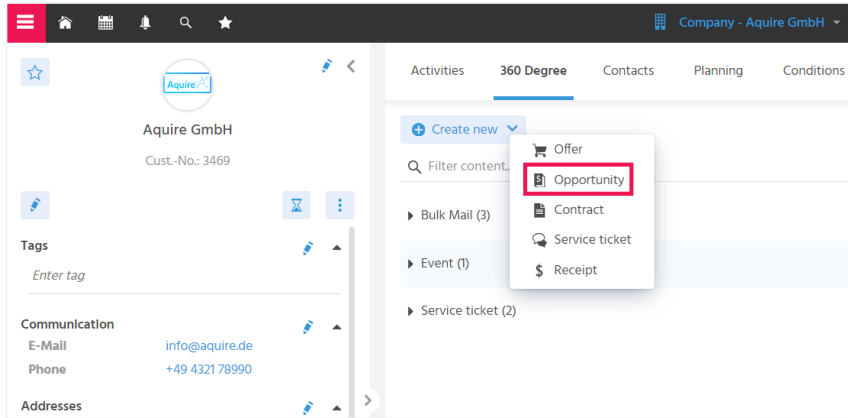
Opportunity

What information/processes are mapped in an opportunity?

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

Create opportunity

Start: Company



- Open company
- Open tab "360 Degree"
- Button "Create new" => Opportunity
- Automatically links the company to the opportunity
- All opportunities of a company are listed in the "360 Degree" view

Create opportunity



Start: Global bar

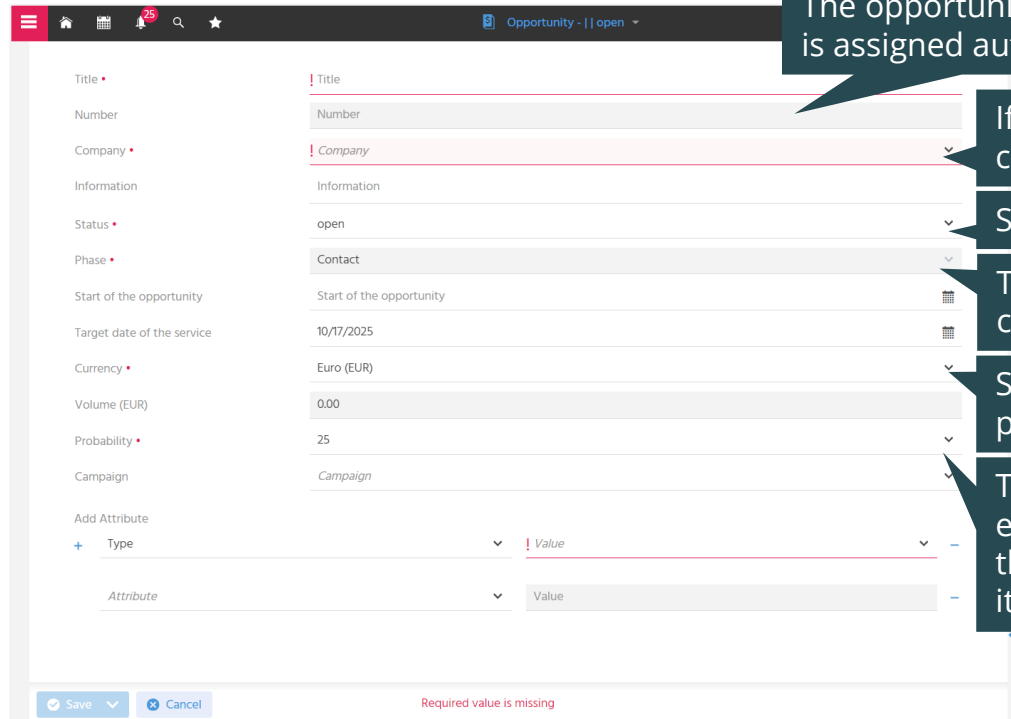
The screenshot displays the ADITO application interface. The top navigation bar includes a home icon, a calendar icon, a notification bell, a search icon, and a star icon. The main content area is divided into three panels: 'Import Mails' (with an 'Upload files' button and a 'No data present' message), 'Appointments/Tasks' (showing 10 overdue tasks, 8 new tasks, and 3 imminent appointments), and 'My Tasks' (a list of tasks with status and subject columns). A 'Quick Entry' menu is open on the right, listing various options: Quick Entry, Contact, Company, Receipt, Offer, Activity, Knowledge, Opportunity (highlighted with a red box), Task, Service ticket, and Contact & Serviceticket. A dark blue callout box with white text points to the 'Opportunity' option, stating: 'Create a new opportunity via the quick entry.'

Picture	Name	Customercode	Language	Status	Classification	Email	Phone	Address
	Aquire GmbH	3469	English	Active	--	info@aquire.de	+49 4321 78990	Friedenstraße 12 b - DE 93053 Regensburg
	Bohrmarkt GmbH	9612	German	Active		info@bohrmarkt.de	+49 9246 552	Innstraße 11 - DE 93059 Regensburg



Create opportunity

Create new opportunity



The opportunity number is assigned automatically.

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

Status is automatically "Open".

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

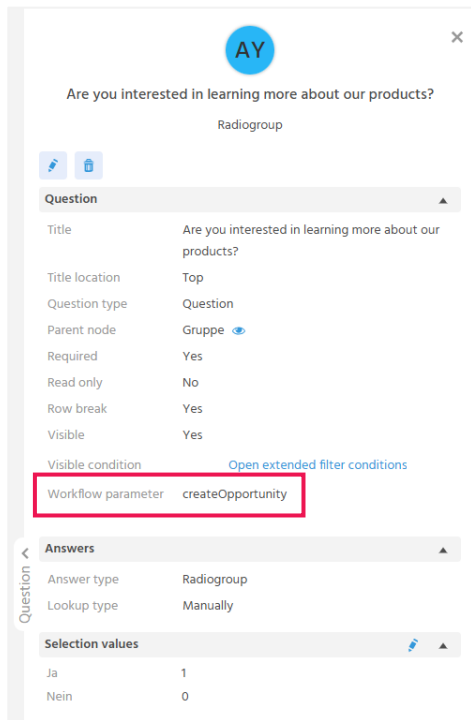
Select here the currency in which the project is to be processed.

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

Save Cancel Required value is missing

Create opportunity

Start: Questionnaire



AY

Are you interested in learning more about our products?

Radiogroup

Question

Title	Are you interested in learning more about our products?
Title location	Top
Question type	Question
Parent node	Gruppe
Required	Yes
Read only	No
Row break	Yes
Visible	Yes
Visible condition	Open extended filter conditions
Workflow parameter	createOpportunity

Answers

Answer type	Radiogroup
Lookup type	Manually

Selection values

Ja	1
Nein	0

You can have an opportunity created automatically based on an answer provided in a questionnaire.

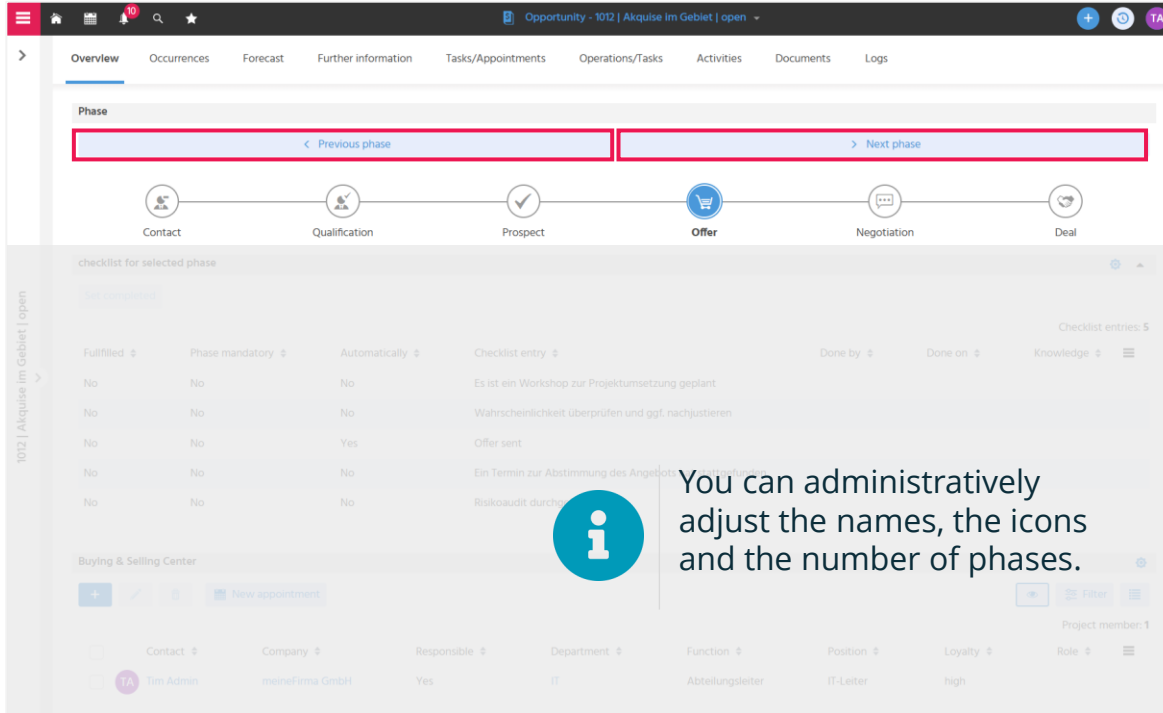
- The name of the questionnaire is used as the title for the opportunity.
- The contact recorded in the questionnaire is entered as the “Initiator” in the opportunity in the Buying & Selling Center.
- If an active supervisor with the “Field Service” role is associated with the company specified in the questionnaire, that supervisor is recorded in the opportunity in the Buying & Selling Center with the role “Internal: Sales.”.



Admin Note: To do this, use the “createOpportunity” workflow parameter. For more information on using workflow parameters in questionnaires, see the “Marketing: Questionnaires” documentation.

Opportunity

“Overview” tab: Phases



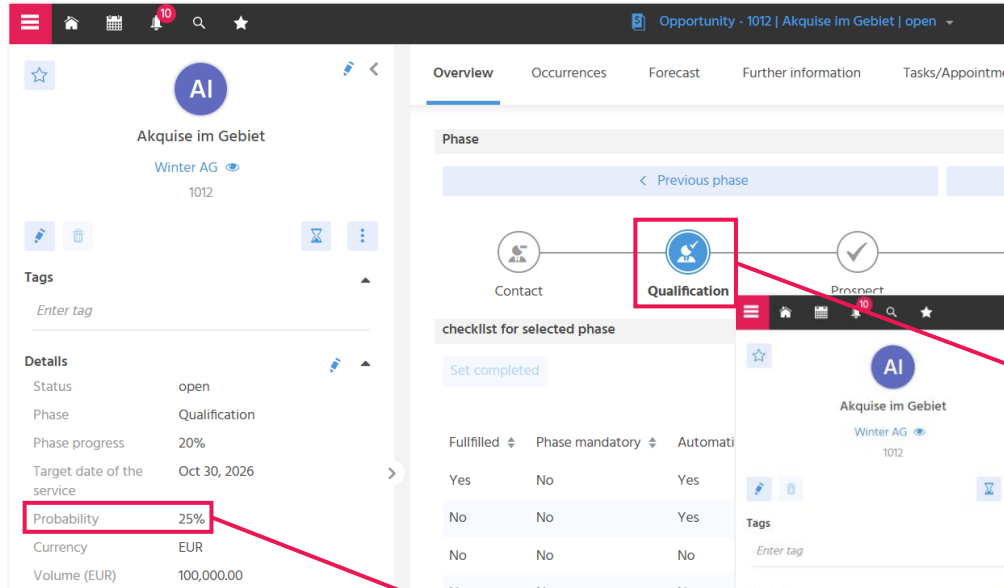
The screenshot shows the ADITO Opportunity Overview tab. The 'Phases' section is visible, showing a sequence of phases: Contact, Qualification, Prospect, Offer, Negotiation, and Deal. The 'Offer' phase is highlighted in blue. Above the phases, there are buttons for 'Previous phase' and 'Next phase'. Below the phases, there is a table with columns: Fulfilled, Phase mandatory, Automatically, Checklist entry, Done by, Done on, and Knowledge. The table contains several rows of data. A blue information icon is overlaid on the table.

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

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

Opportunity

Probability: Automatic adjustment in case of phase change



Overview Occurrences Forecast Further information Tasks/Appointme

Phase

< Previous phase

Contact Qualification Prospect

checklist for selected phase

Set completed

Fullfilled	Phase mandatory	Automati
Yes	No	Yes
No	No	Yes
No	No	No

Details

Status open

Phase Qualification

Phase progress 20%

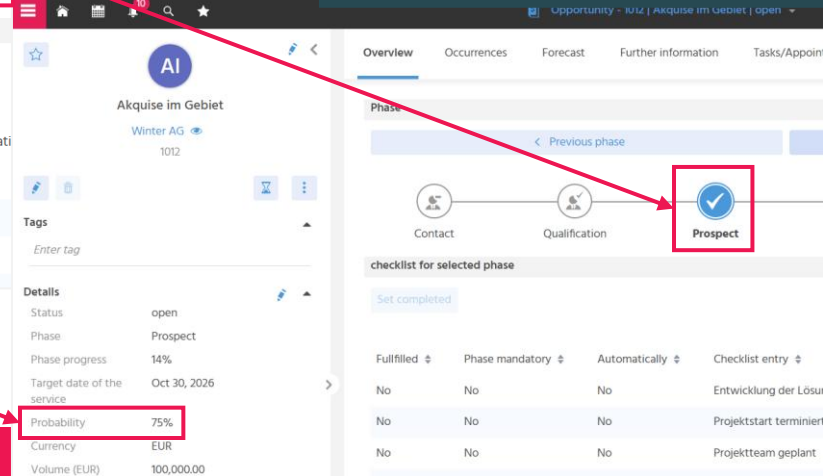
Target date of the service Oct 30, 2026

Probability 25%

Currency EUR

Volume (EUR) 100,000.00

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



Overview Occurrences Forecast Further information Tasks/Appoint

Phase

< Previous phase

Contact Qualification Prospect

checklist for selected phase

Set completed

Fullfilled	Phase mandatory	Automatically	Checklist entry
No	No	No	Entwicklung der Lösung
No	No	No	Projektstart terminiert
No	No	No	Projektteam geplant

Details

Status open

Phase Prospect

Phase progress 14%

Target date of the service Oct 30, 2026

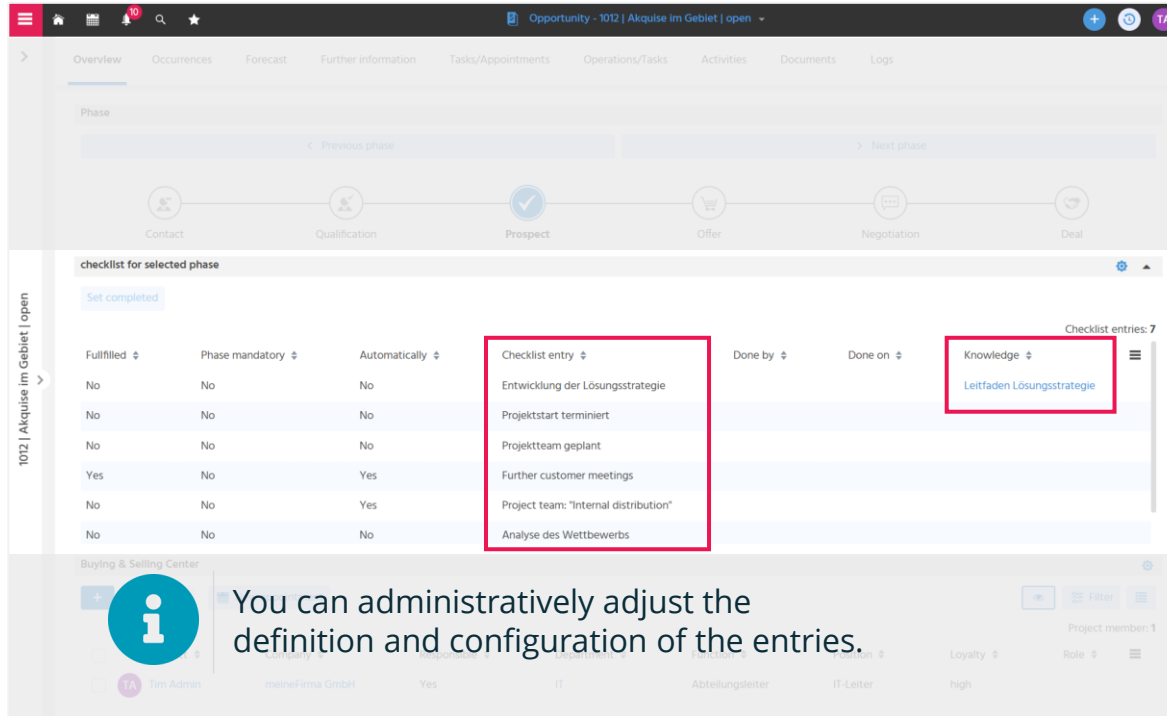
Probability 75%

Currency EUR

Volume (EUR) 100,000.00

Opportunity

Tab "Overview": Checklist for selected phase



1012 | Akquise im Gebiet | open

Overview Occurrences Forecast Further information Tasks/Appointments Operations/Tasks Activities Documents Logs

Phase

← Previous phase → Next phase

Contact Qualification **Prospect** Offer Negotiation Deal

checklist for selected phase

Set completed

Fulfilled	Phase mandatory	Automatically	Checklist entry	Done by	Done on	Knowledge
No	No	No	Entwicklung der Lösungsstrategie			Leitfaden Lösungsstrategie
No	No	No	Projektstart terminiert			
No	No	No	Projektteam geplant			
Yes	No	Yes	Further customer meetings			
No	No	Yes	Project team: "Internal distribution"			
No	No	No	Analyse des Wettbewerbs			

Checklist entries: 7

Buying & Selling Center

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

Project member: 1

Loyalty: high

Role: IT-Leiter

Abteilungsleiter

IT

Yes

menefirma GmbH

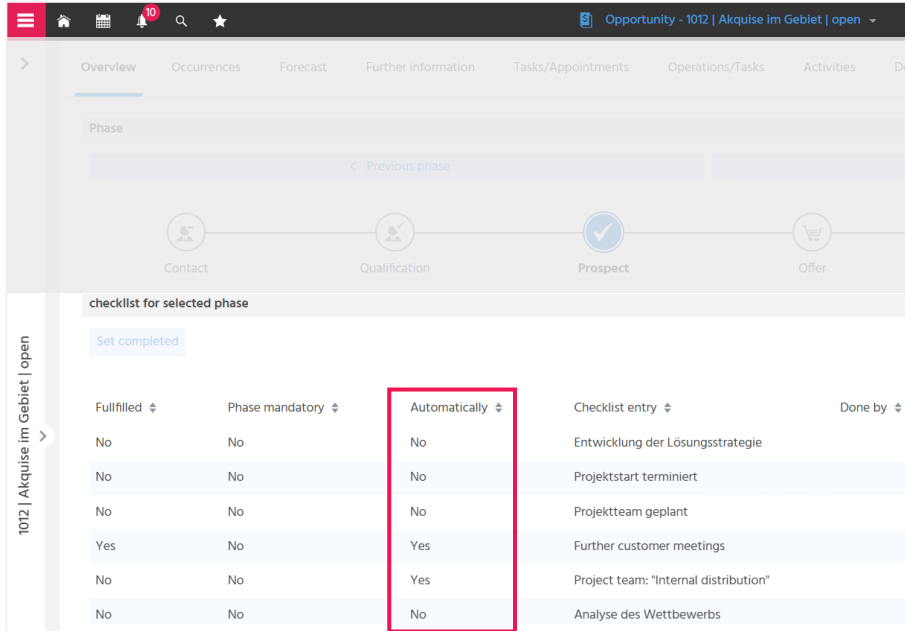
Tom Adran

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

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

Opportunity

Tab “Overview”: Checklist for selected phase

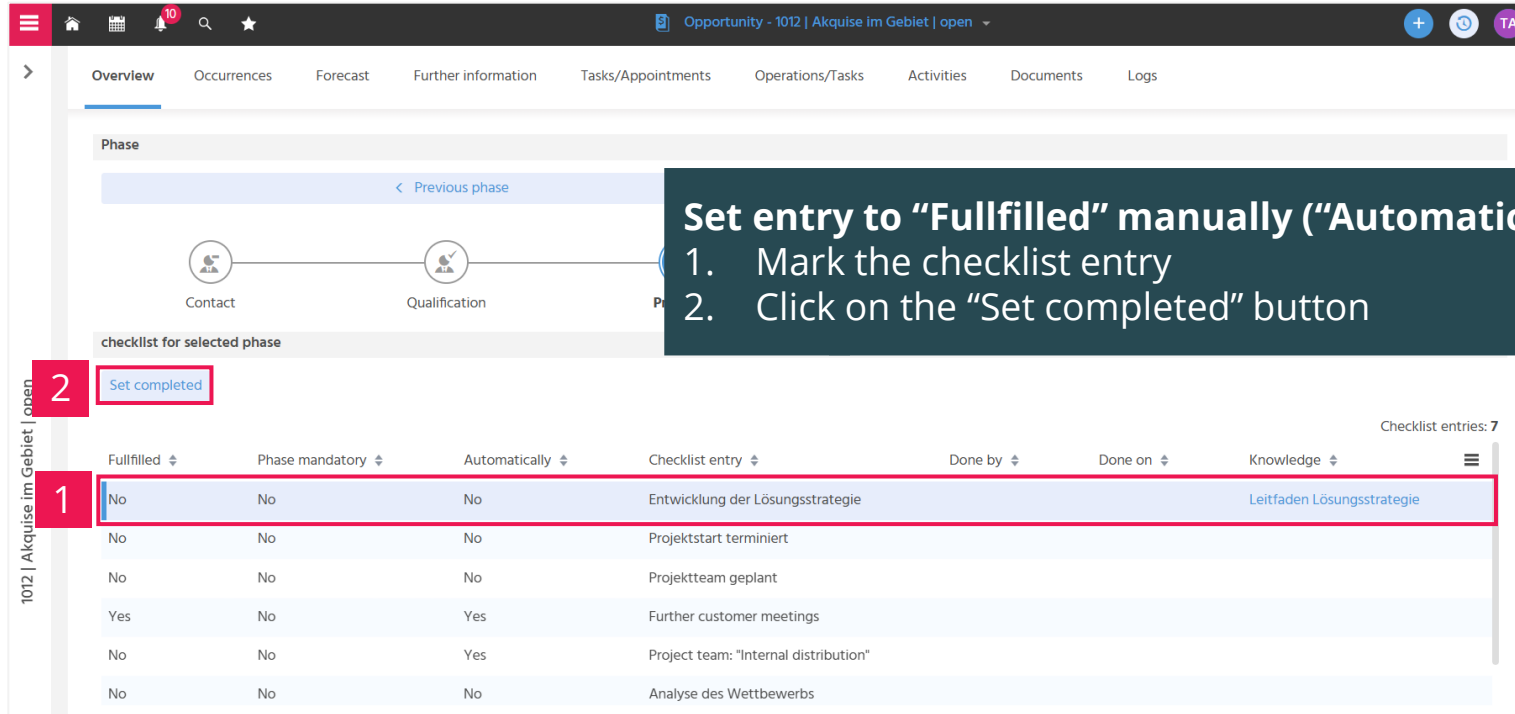


The screenshot shows the ADITO Opportunity Overview tab. At the top, there's a navigation bar with tabs: Overview, Occurrences, Forecast, Further information, Tasks/Appointments, Operations/Tasks, and Activities. Below this, a phase progression diagram shows four stages: Contact, Qualification, Prospect, and Offer. The Prospect stage is currently selected and highlighted. Below the diagram, a section titled "checklist for selected phase" contains a table. The table has five columns: "Fullfilled", "Phase mandatory", "Automatically", "Checklist entry", and "Done by". The "Automatically" column is highlighted with a red box. The table lists six checklist items, each with a "Fullfilled" status and a "Checklist entry" description.

Fullfilled	Phase mandatory	Automatically	Checklist entry	Done by
No	No	No	Entwicklung der Lösungsstrategie	
No	No	No	Projektstart terminiert	
No	No	No	Projektteam geplant	
Yes	No	Yes	Further customer meetings	
No	No	Yes	Project team: "Internal distribution"	
No	No	No	Analyse des Wettbewerbs	

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

Set entry to "Fullfilled" manually



Opportunity - 1012 | Akquise im Gebiet | open

Overview Occurrences Forecast Further information Tasks/Appointments Operations/Tasks Activities Documents Logs

Phase

< Previous phase

Contact Qualification

checklist for selected phase

Set completed

1012 | Akquise im Gebiet | open

2

1

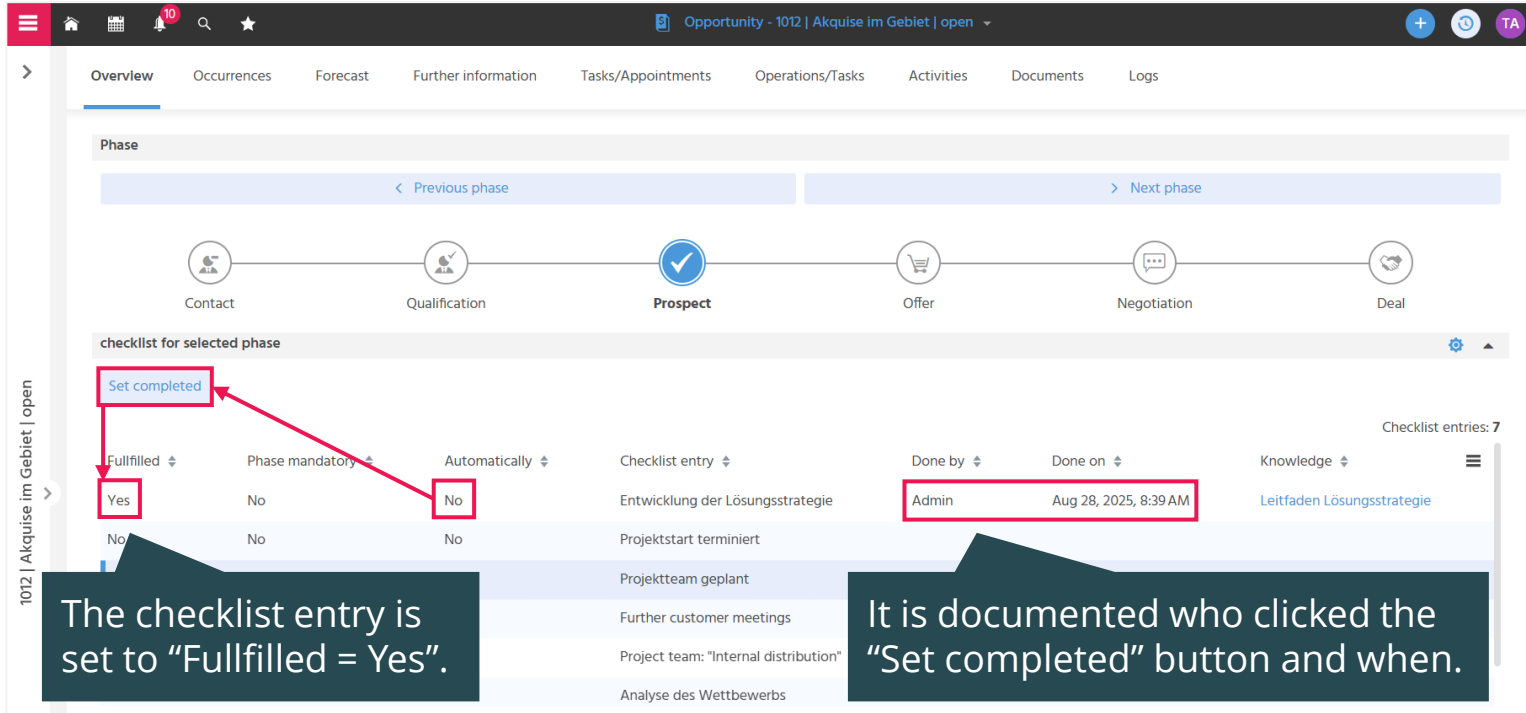
Set entry to "Fullfilled" manually ("Automatically" = "No")

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

Fullfilled	Phase mandatory	Automatically	Checklist entry	Done by	Done on	Knowledge
No	No	No	Entwicklung der Lösungsstrategie			Leitfaden Lösungsstrategie
No	No	No	Projektstart terminiert			
No	No	No	Projektteam geplant			
Yes	No	Yes	Further customer meetings			
No	No	Yes	Project team: "Internal distribution"			
No	No	No	Analyse des Wettbewerbs			

Opportunity

Set entry to "Fullfilled" manually



The screenshot displays the ADITO Opportunity management interface. The top navigation bar shows the current opportunity: "Opportunity - 1012 | Akquise im Gebiet | open". The main content area is divided into several tabs: Overview, Occurrences, Forecast, Further information, Tasks/Appointments, Operations/Tasks, Activities, Documents, and Logs. The "Overview" tab is selected, showing a phase diagram with icons for Contact, Qualification, Prospect (highlighted with a blue checkmark), Offer, Negotiation, and Deal. Below the phase diagram, a section titled "checklist for selected phase" contains a table with 7 entries. The first entry, "Entwicklung der Lösungsstrategie", is highlighted with a red box. A red arrow points from the "Set completed" button (also highlighted with a red box) to the "Yes" option in the "Fullfilled" column of this entry. The "Done by" column shows "Admin" and the "Done on" column shows "Aug 28, 2025, 8:39 AM", both highlighted with red boxes. A dark blue callout box at the bottom left states: "The checklist entry is set to 'Fullfilled = Yes'." Another dark blue callout box at the bottom right states: "It is documented who clicked the 'Set completed' button and when."

1012 | Akquise im Gebiet | open

Overview Occurrences Forecast Further information Tasks/Appointments Operations/Tasks Activities Documents Logs

Phase

< Previous phase > Next phase

Contact Qualification **Prospect** Offer Negotiation Deal

checklist for selected phase

Set completed

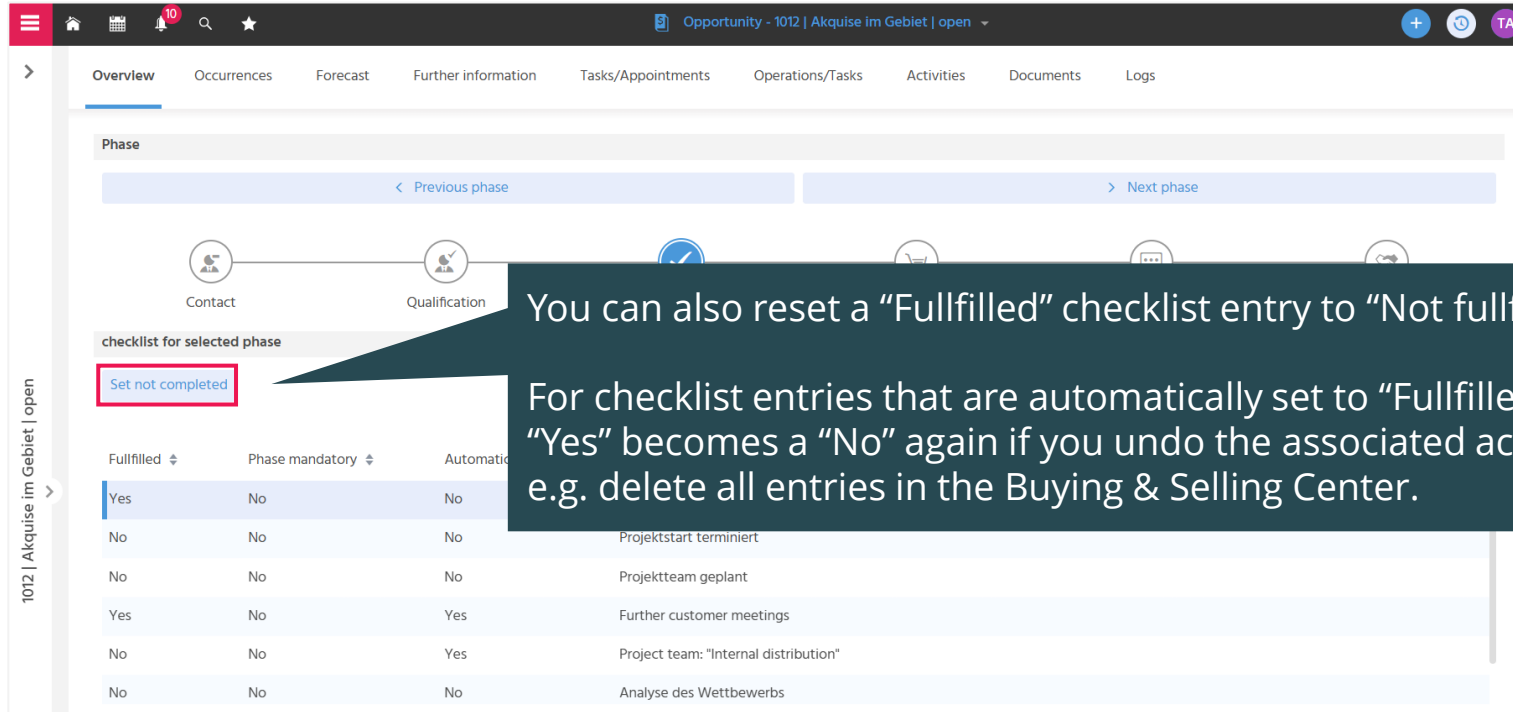
Fullfilled	Phase mandatory	Automatically	Checklist entry	Done by	Done on	Knowledge
Yes	No	No	Entwicklung der Lösungsstrategie	Admin	Aug 28, 2025, 8:39 AM	Leitfaden Lösungsstrategie
No	No	No	Projektstart terminiert			
			Projektteam geplant			
			Further customer meetings			
			Project team: "Internal distribution"			
			Analyse des Wettbewerbs			

Checklist entries: 7

The checklist entry is set to "Fullfilled = Yes".

It is documented who clicked the "Set completed" button and when.

Set entry to "Fullfilled" manually



The screenshot shows the ADITO Opportunity interface. The top navigation bar includes a menu icon, home, calendar, notifications (10), search, and star icons. The breadcrumb trail is 'Opportunity - 1012 | Akquise im Gebiet | open'. The main navigation tabs are Overview, Occurrences, Forecast, Further information, Tasks/Appointments, Operations/Tasks, Activities, Documents, and Logs. The 'Overview' tab is selected, showing a phase diagram with 'Contact' and 'Qualification' phases. A checklist for the selected phase is displayed, with a 'Set not completed' button highlighted. A dark blue callout box contains text explaining how to reset a 'Fullfilled' entry to 'Not fullfilled'.

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

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

Fullfilled	Phase mandatory	Automatic	
Yes	No	No	
No	No	No	Projektstart terminiert
No	No	No	Projektteam geplant
Yes	No	Yes	Further customer meetings
No	No	Yes	Project team: "Internal distribution"
No	No	No	Analyse des Wettbewerbs

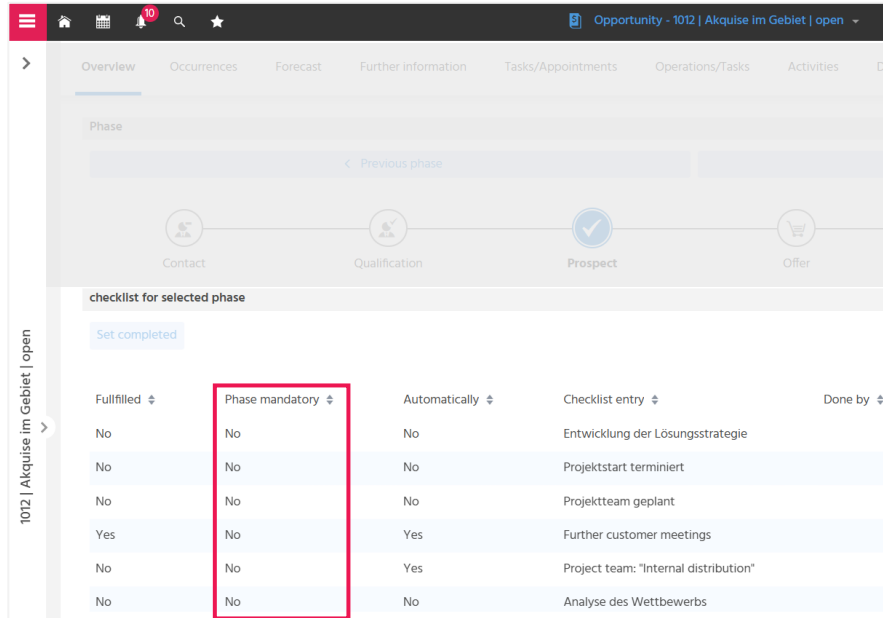
Opportunity - Excursus filter view

Progress

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

Opportunity

Tab “Overview”: Phase mandatory



The screenshot shows the ADITO Opportunity Overview tab. The top navigation bar includes tabs for Overview, Occurrences, Forecast, Further information, Tasks/Appointments, Operations/Tasks, and Activities. The main content area displays a phase progression diagram with four stages: Contact, Qualification, Prospect, and Offer. Below this, a table titled "checklist for selected phase" is shown. The table has five columns: "Fulfilled", "Phase mandatory", "Automatically", "Checklist entry", and "Done by". The "Phase mandatory" column is highlighted with a red box. The table contains six rows of data.

Fulfilled	Phase mandatory	Automatically	Checklist entry	Done by
No	No	No	Entwicklung der Lösungsstrategie	
No	No	No	Projektstart terminiert	
No	No	No	Projektteam geplant	
Yes	No	Yes	Further customer meetings	
No	No	Yes	Project team: "Internal distribution"	
No	No	No	Analyse des Wettbewerbs	

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

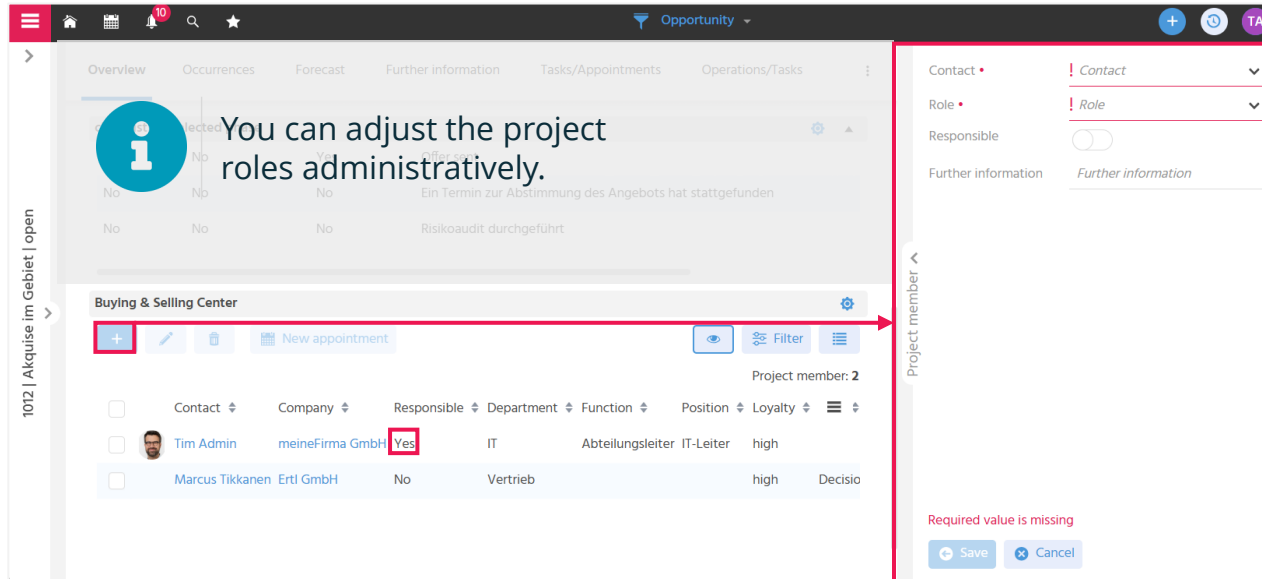
“Yes” means that the checklist entry must be set to **“Fullfilled”** in order to move to the next phase.



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

Opportunity

“Overview” tab: Buying & Selling Center



You can adjust the project roles administratively.

Buying & Selling Center

Project member: 2

	Contact	Company	Responsible	Department	Function	Position	Loyalty	
☐	Tim Admin	meineFirma GmbH	Yes	IT	Abteilungsleiter	IT-Leiter	high	
☐	Marcus Tikkanen	Erti GmbH	No	Vertrieb			high	Decisio

Required value is missing

Save Cancel

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

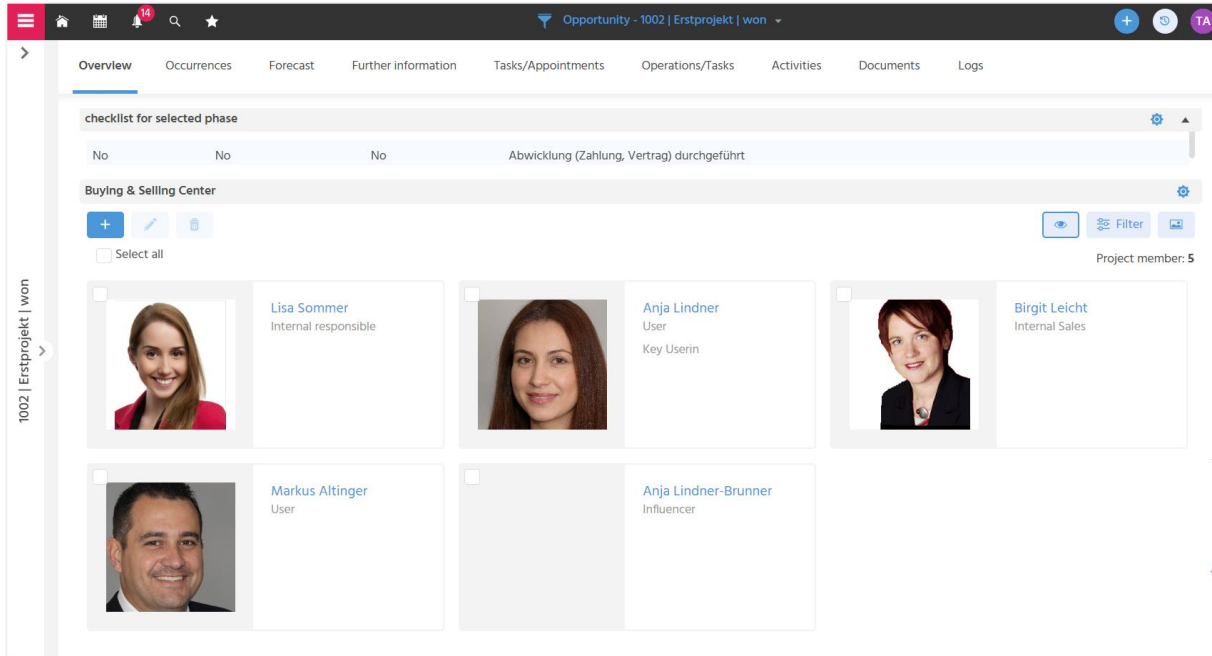
The person who creates the opportunity is **automatically entered** and marked as the person **responsible**.

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

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

Opportunity

“Overview” tab: Buying & Selling Center



The screenshot shows the ADITO interface for a project named '1002 | Erstprojekt | won'. The 'Overview' tab is selected, displaying a checklist for the selected phase and a 'Buying & Selling Center' section. The 'Buying & Selling Center' section shows a grid of user tiles, each with a photo and name. The tiles are:

- Lisa Sommer (Internal responsible)
- Anja Lindner (User, Key Userin)
- Birgit Leicht (Internal Sales)
- Markus Altinger (User)
- Anja Lindner-Brunner (Influencer)

There are also icons for '+', 'Filter', and 'Select all' in the top left of the grid. The project member count is 5.

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

Opportunity

Buying Center and...

Each contact is given a specific role in an opportunity:

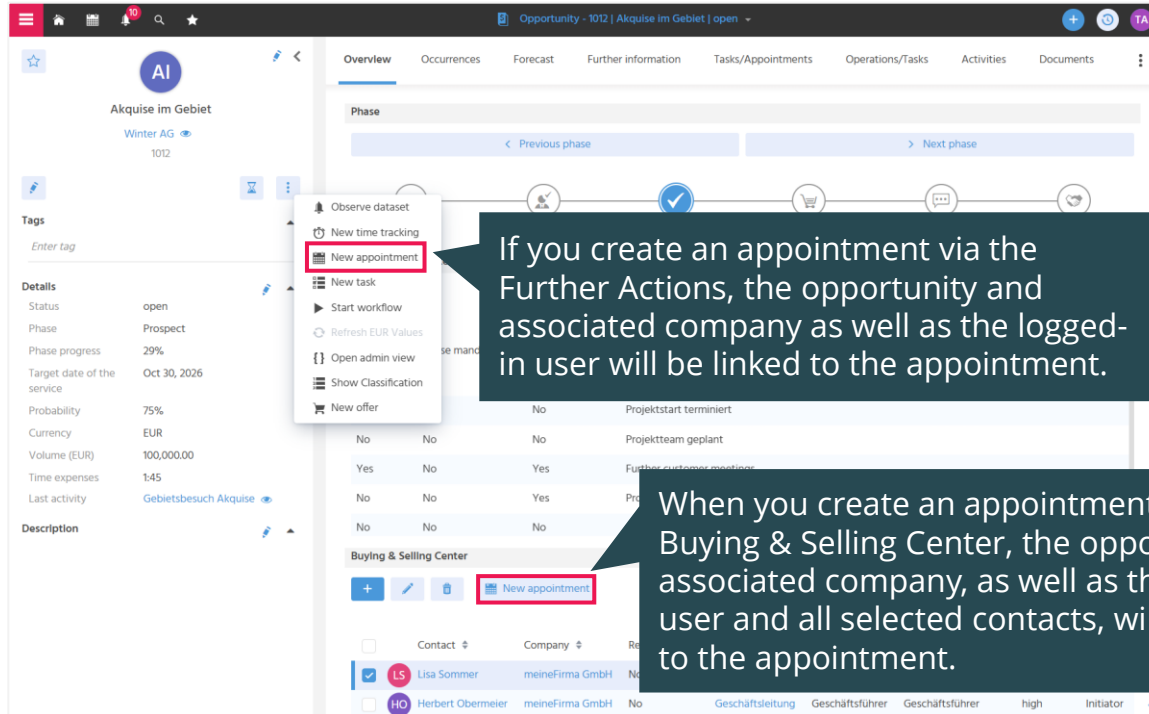
- The **initiator** identifies a need that is to be purchased in order to be able to achieve a goal.
- The **decision-maker** strengthens the company through his decisions.
- The **influencer** supports the profiling of the new problem solution.
- **The user's** work is made easier by the application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

...Selling Center

- internal sales

Opportunity

Appointments



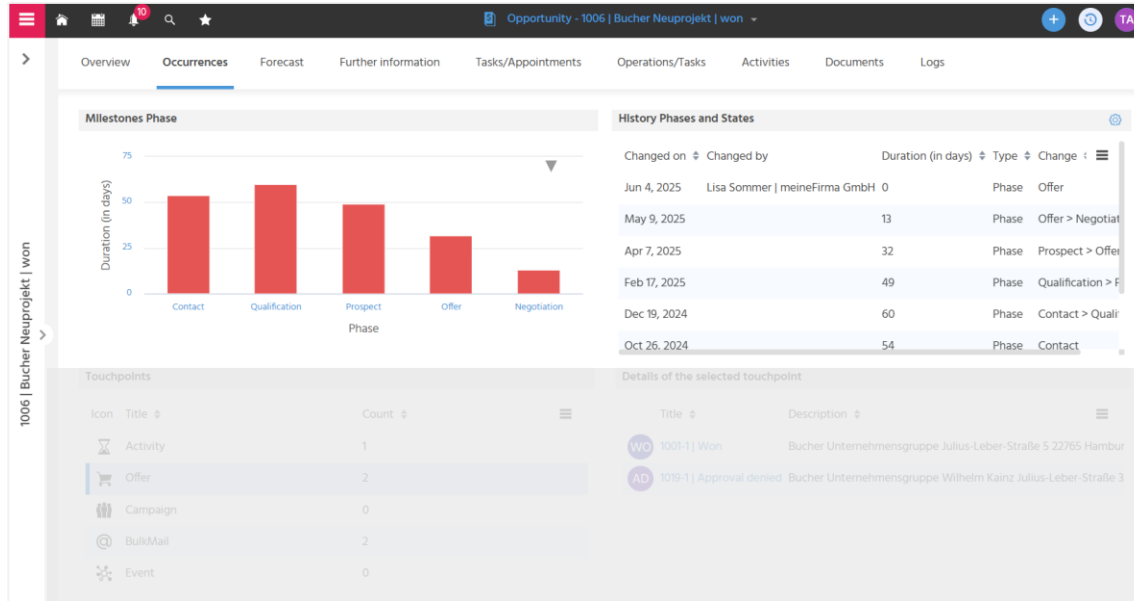
The screenshot displays the ADITO interface for an opportunity named 'Akquise im Gebiet' (1012). The left sidebar shows details like status (open), phase (Prospect), and target date (Oct 30, 2026). The main area has tabs for Overview, Occurrences, Forecast, Further information, Tasks/Appointments, Operations/Tasks, Activities, and Documents. A 'Further Actions' menu is open, highlighting 'New appointment'. Below, the 'Buying & Selling Center' shows a table of contacts with a 'New appointment' button highlighted.

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

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

Opportunity

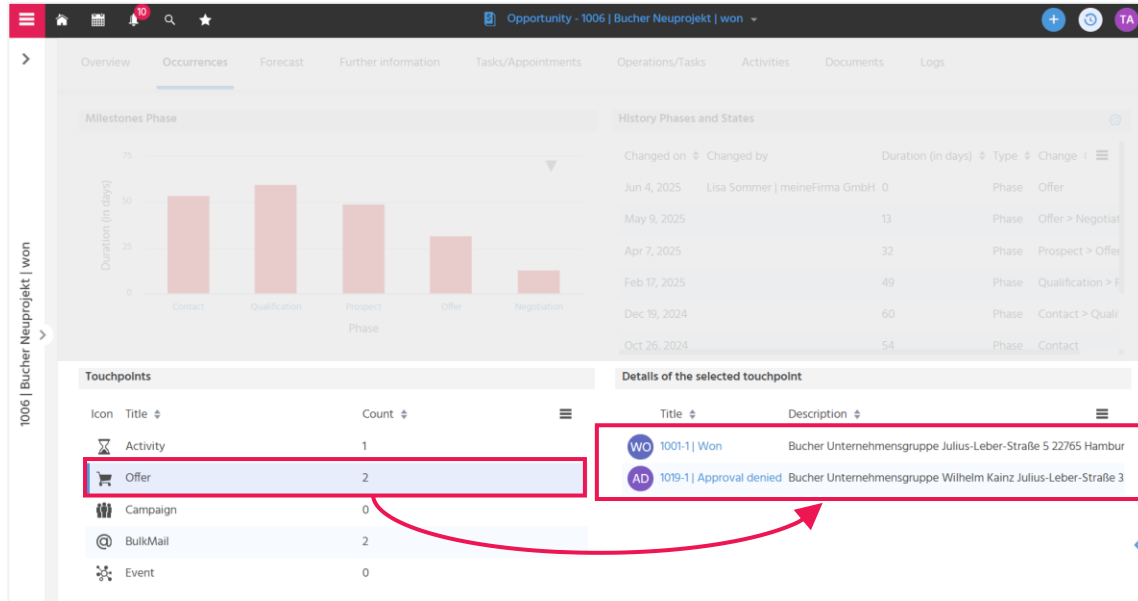
Tab “Occurrences” - “Phases” and “States”



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

Opportunity

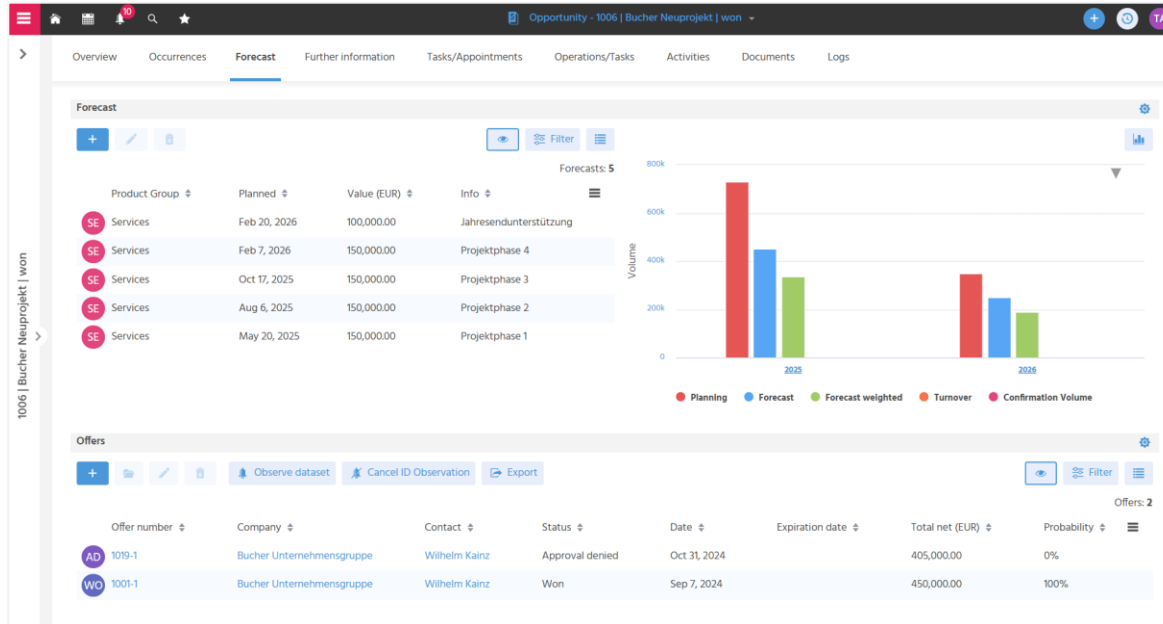
Tab “Occurrences” - Touchpoints and related details



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

Opportunity

Tab “Forecast”

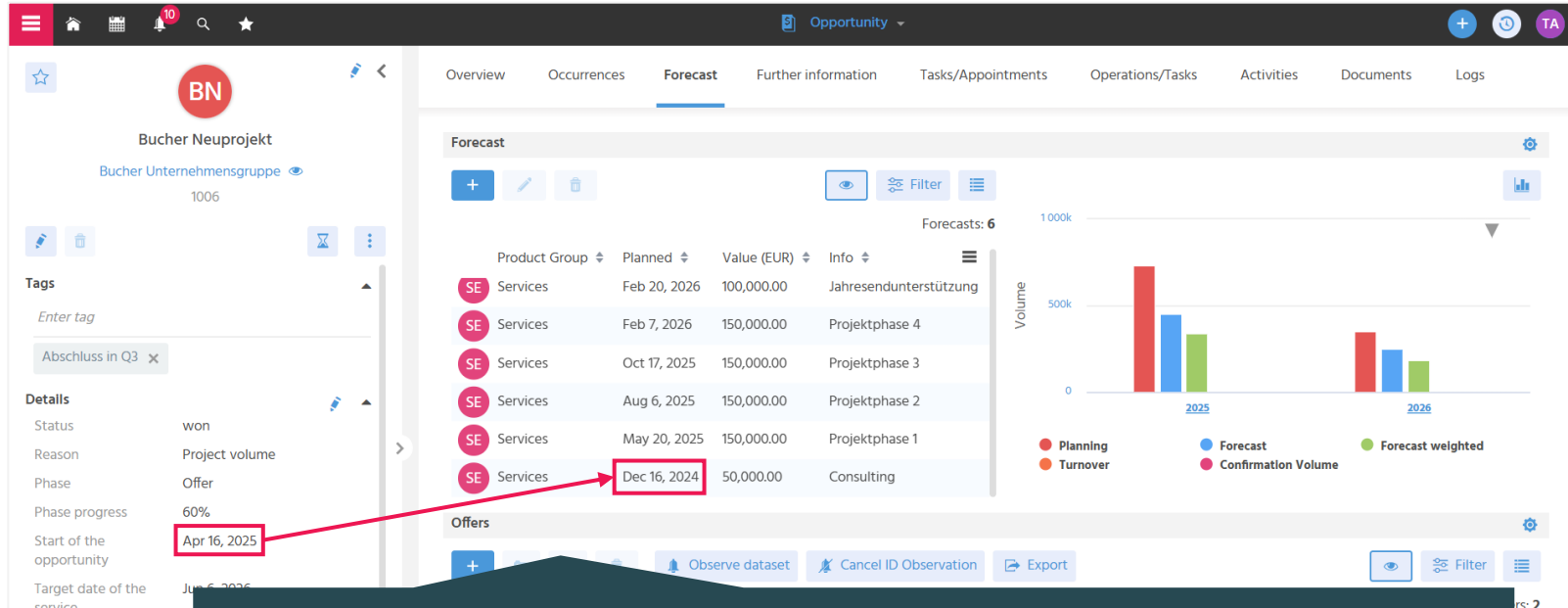


In the **“Forecast”** area, you can enter forecasts for the opportunity on the left. Forecasts **with planning dates after the start date of the opportunity** are shown graphically on the right and are compared with the following values:

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

Opportunity

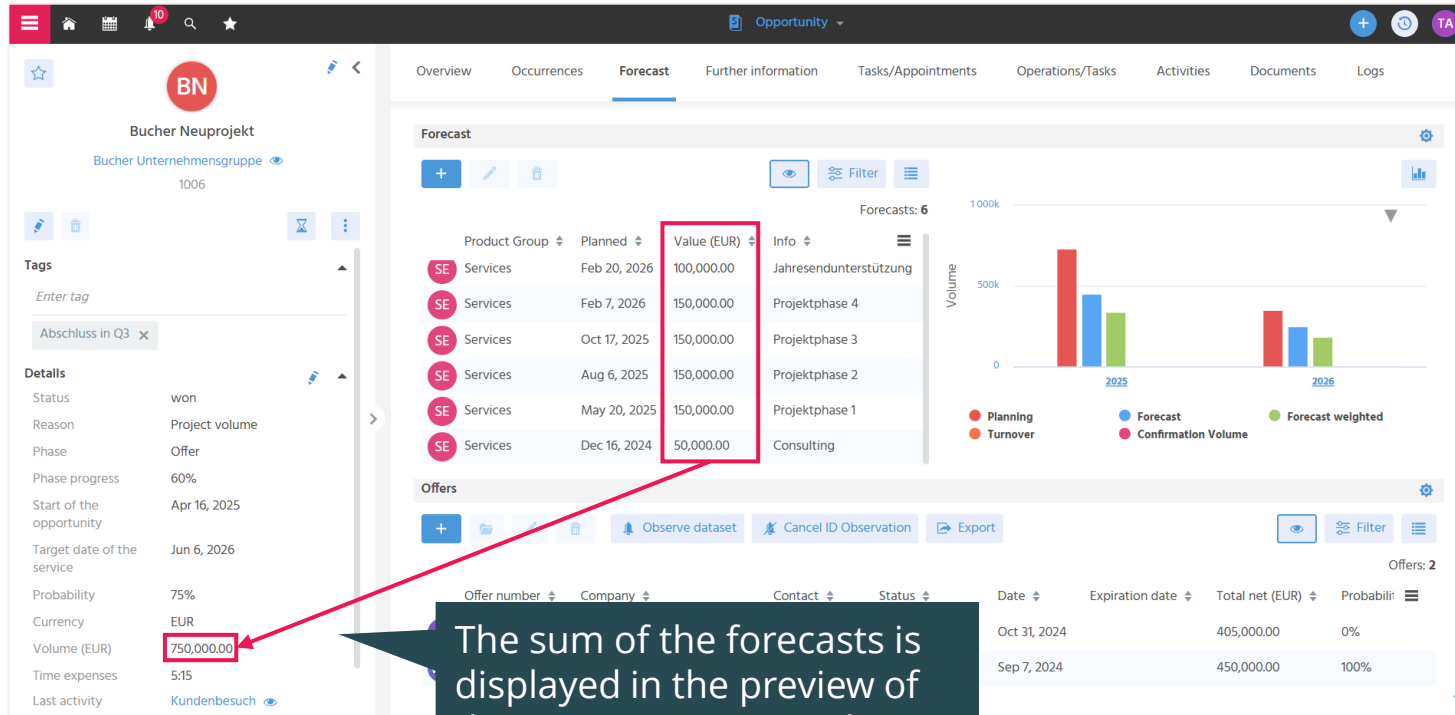
Tab "Forecast"



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

Opportunity

Tab "Forecast"



The screenshot displays the ADITO Opportunity Forecast tab. On the left, a sidebar shows details for 'Bucher Neuprojekt' (Bucher Unternehmensgruppe, 1006), including tags like 'Abschluss in Q3' and a volume of 750,000.00 EUR. The main area features a 'Forecast' table with columns for Product Group, Planned date, Value (EUR), and Info. A red box highlights the 'Value (EUR)' column, which lists six entries totaling 750,000.00 EUR. To the right, a bar chart shows 'Volume' for 2025 and 2026, with a legend for Planning, Forecast, Confirmation Volume, and Forecast weighted. Below the forecast table, an 'Offers' section shows two offers with dates and total net values.

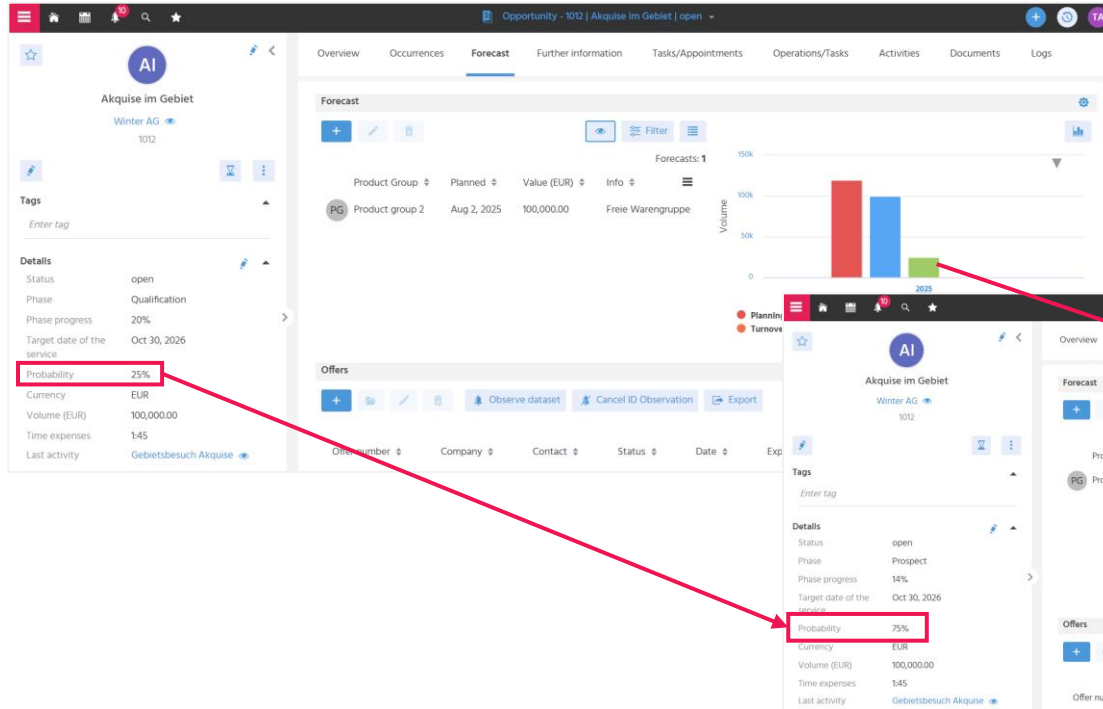
Product Group	Planned	Value (EUR)	Info
SE Services	Feb 20, 2026	100,000.00	Jahresendunterstützung
SE Services	Feb 7, 2026	150,000.00	Projektphase 4
SE Services	Oct 17, 2025	150,000.00	Projektphase 3
SE Services	Aug 6, 2025	150,000.00	Projektphase 2
SE Services	May 20, 2025	150,000.00	Projektphase 1
SE Services	Dec 16, 2024	50,000.00	Consulting

Offer number	Company	Contact	Status	Date	Expiration date	Total net (EUR)	Probabili
				Oct 31, 2024		405,000.00	0%
				Sep 7, 2024		450,000.00	100%

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

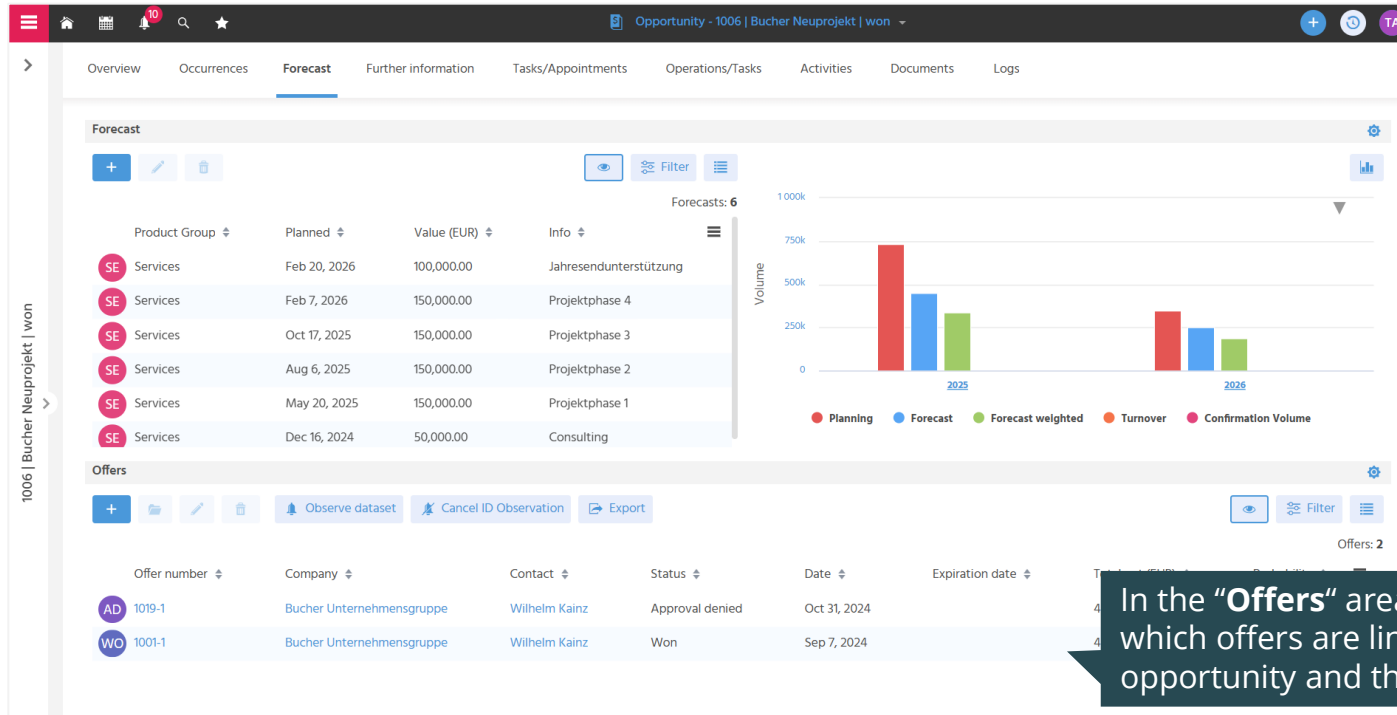
Opportunity

Probability: Forecast weighted



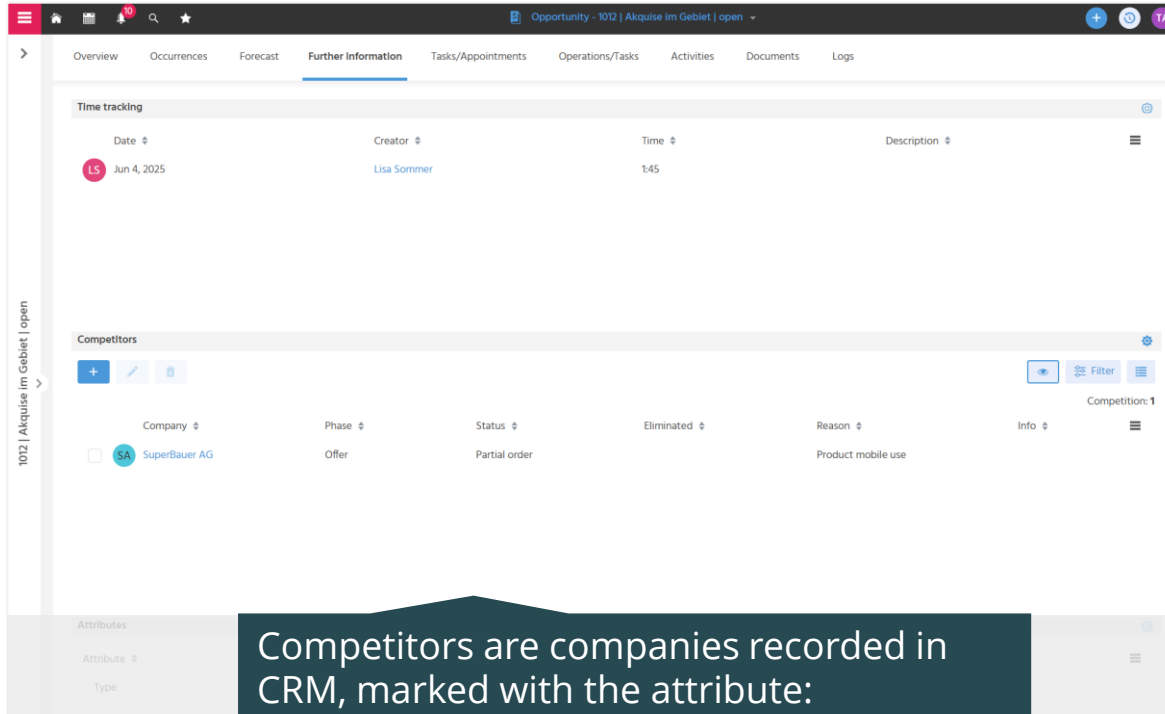
The probability times the volume (sum of the forecasts) gives the weighted forecast.

Tab "Forecast"



Opportunity

Tab “Further Information”



1012 | Akquise im Gebiet | open

Overview Occurrences Forecast **Further Information** Tasks/Appointments Operations/Tasks Activities Documents Logs

Time tracking

Date	Creator	Time	Description
Jun 4, 2025	Lisa Sommer	1:45	

Competitors

Company	Phase	Status	Eliminated	Reason	Info
SuperBauer AG	Offer	Partial order		Product mobile use	

Attributes

Attribute

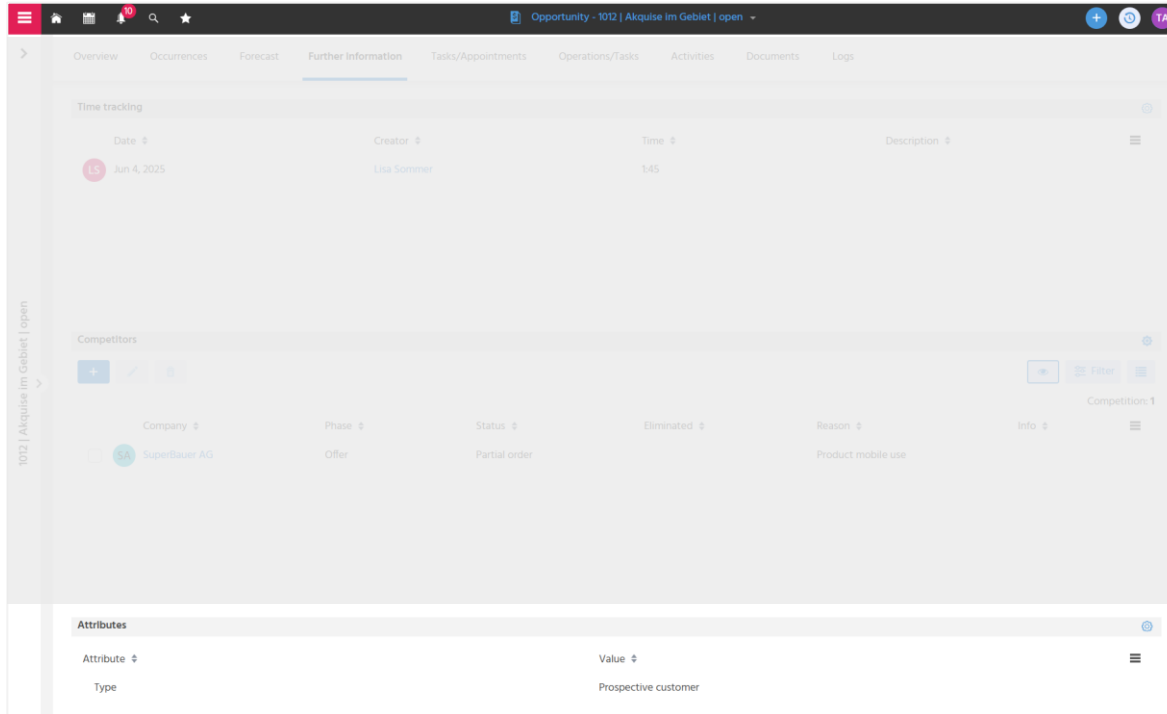
Type

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

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

Opportunity

Tab “Further Information”



The screenshot shows the 'Further Information' tab of an opportunity record in ADITO. The top navigation bar includes tabs for Overview, Occurrences, Forecast, Further Information (selected), Tasks/Appointments, Operations/Tasks, Activities, Documents, and Logs. The main content area is divided into two sections: 'Time tracking' and 'Competitors'.

Time tracking

Date	Creator	Time	Description
Jun 4, 2025	Lisa Sommer	1:45	

Competitors

Company	Phase	Status	Eliminated	Reason	Info
SuperBauer AG	Offer	Partial order		Product mobile use	

Attributes

Attribute	Value
Type	Prospective customer

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

Opportunity

Tab “Operations/Tasks”



Operations

Operation Tasks

Operations: 1

Number	Title	Kind	Begin	End
017	Product presentation	service operation	Aug 28, 2025, 2:00 PM	Aug 28, 2025, 2:30 PM

Operation Tasks

Subject	Operation	Status	Priority	estimated ti
Hand over product samples	Product presentation	new	low	
Present product	Product presentation	new	low	

Resource planning

August 28, 2025

Resource	2am	3am	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	4pm
Lisa Sommer															
Melanie Hueber															
Birgit Leicht															

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



Opportunity

More tabs

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

Evaluate opportunity AI-supported according to BANT criteria

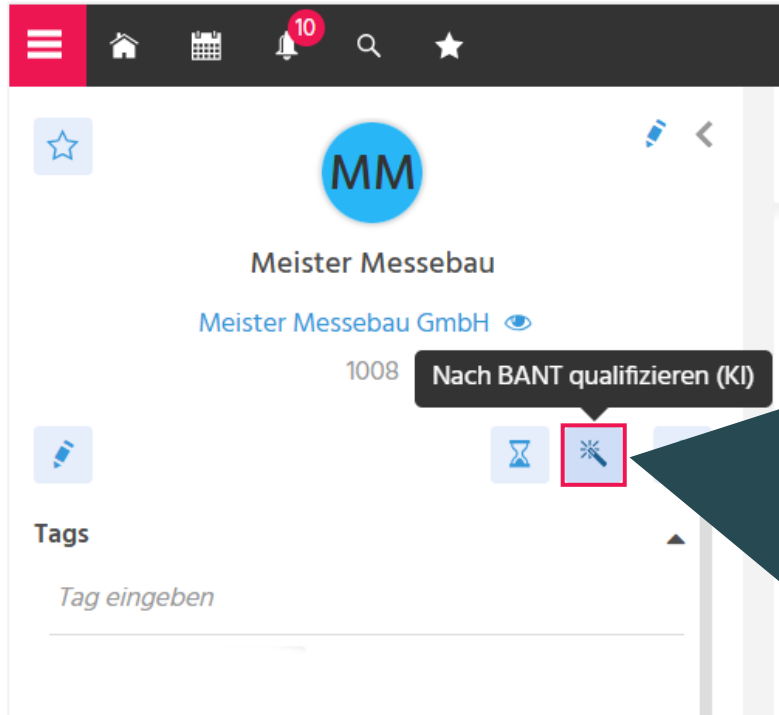
What is the BANT method?

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

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

Evaluate opportunity AI-supported according to BANT criteria

Action „Qualify by BANT (AI)“



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

Budget

- Activities
- Opportunity Description

Authority

- Activities
- Opportunity Description
- Buying Center

Need

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

Timing

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

Opportunity KI-gestützt nach BANT-Kriterien bewerten



Aktion „Nach BANT qualifizieren (KI)“

Opportunitätsbewertung (BANT)

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

Budget 

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

Empfohlene Fragen:

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

Authority 

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

Empfohlene Fragen:

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

Need 

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

Empfohlene Fragen:

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

Als Aktivität speichern

You can save the evaluation as an activity.

The evaluation shows you whether the BANT criteria are

-  fulfilled,
-  partially fulfilled or
-  not fulfilled.

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



Opportunity

Preview

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

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

The screenshot shows the 'Opportunity' detail view in a software application. At the top, there is a star icon, a purple circle with 'ER', and a close button. Below this, the title 'Erstprojekt' is displayed, followed by 'Industrial Steel AG' and the number '1002'. A sidebar on the left contains icons for a folder and a pencil, and a vertical label 'Opportunity'. The main content area is divided into sections: 'Tags' (empty), 'Details' (containing a list of fields and values), 'Description' (empty), and 'Relevant Documents' (containing a link to 'Anforderungsdokument.pdf'). At the bottom, there are three summary boxes: '0 Days inactive', '0 Days remaining', and 'AB Classification'.

Details	Value
Status	won
Reason	Project volume, Project reference, Product GUI, Product flexibility
Phase	Negotiation
Phase progress	80%
Start of the opportunity	Jan 25, 2025
Target date of the service	Jun 30, 2025
Probability	75%
Currency	EUR
Volume (EUR)	935,000.00
Time expenses	12:35
Campaign	Vertriebsmesse
Last activity	Telefonat
SharePoint Link	https://aditosoftware.sharepoint.com/sites/adit

Description

Relevant Documents

- [Anforderungsdokument.pdf](#)
- erste Anforderungen

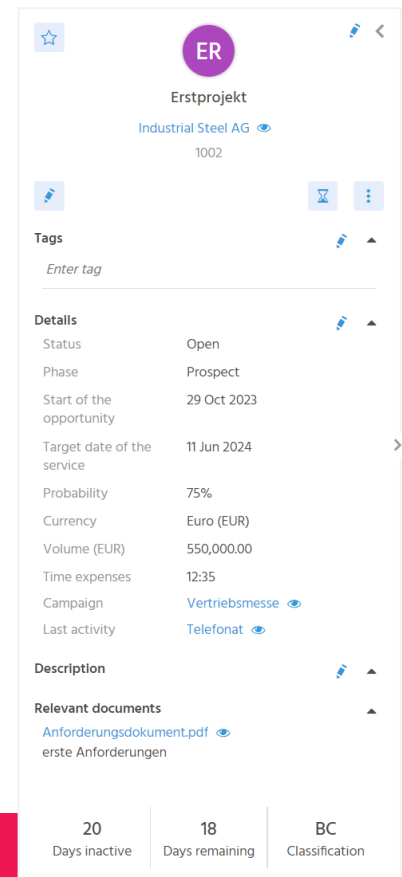
Summary:

- 0 Days inactive
- 0 Days remaining
- AB Classification

Opportunity

Preview

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



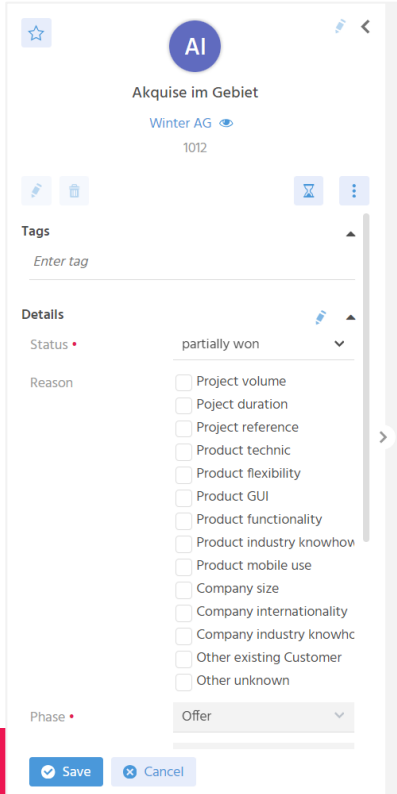
The screenshot shows the ADITO Opportunity Preview interface. At the top, there is a star icon, a purple circle with 'ER', and a back arrow. Below this, the text 'Erstprojekt' is displayed, followed by 'Industrial Steel AG' with an eye icon and the number '1002'. A pencil icon is on the left, and a clock and menu icon are on the right. The 'Tags' section has a text input field with the placeholder 'Enter tag'. The 'Details' section is a table with the following data:

Status	Open
Phase	Prospect
Start of the opportunity	29 Oct 2023
Target date of the service	11 Jun 2024
Probability	75%
Currency	Euro (EUR)
Volume (EUR)	550,000.00
Time expenses	12:35
Campaign	Vertriebsmesse
Last activity	Telefonat

The 'Description' section has a pencil icon and an upward arrow. The 'Relevant documents' section has an upward arrow and lists 'Anforderungsdokument.pdf' with an eye icon and 'erste Anforderungen'. At the bottom, there are three boxes: '20 Days inactive', '18 Days remaining', and 'BC Classification'.

Opportunity

Justify status



The screenshot shows the ADITO Opportunity form. The top section includes a star icon, a profile icon with 'AI', the text 'Akquise im Gebiet', 'Winter AG', and the number '1012'. Below this are icons for edit, delete, and a menu. The 'Tags' section has a text input 'Enter tag'. The 'Details' section shows 'Status' set to 'partially won' and a list of reasons for selection, each with a checkbox. The 'Phase' section shows 'Offer'.

Tags

Enter tag

Details

Status • partially won

Reason

- ☐ Project volume
- ☐ Project duration
- ☐ Project reference
- ☐ Product technic
- ☐ Product flexibility
- ☐ Product GUI
- ☐ Product functionality
- ☐ Product industry knowhow
- ☐ Product mobile use
- ☐ Company size
- ☐ Company internationality
- ☐ Company industry knowhwc
- ☐ Other existing Customer
- ☐ Other unknown

Phase • Offer

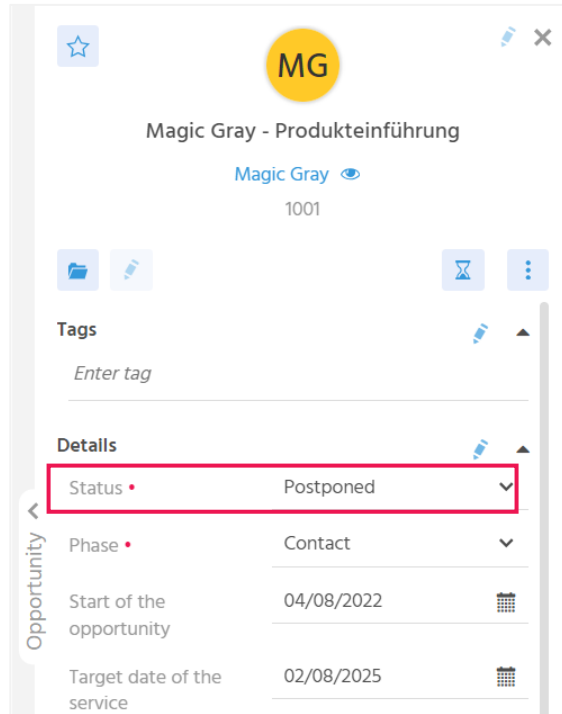
Save Cancel

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

- aborted
- partially won
- won
- lost

Excursus "Postpone opportunity"

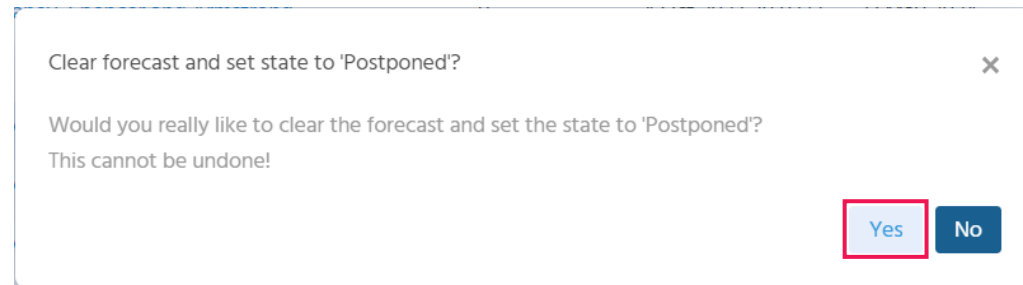
State "Postponed"



The screenshot shows an opportunity card in the ADITO system. The card is titled "Magic Gray - Produkteinführung" and is assigned to "Magic Gray" (ID 1001). The status is "Postponed", which is highlighted with a red box. The card also shows a "Phase" of "Contact" and a "Target date of the service" of "02/08/2025".

Details	
Status	Postponed
Phase	Contact
Start of the opportunity	04/08/2022
Target date of the service	02/08/2025

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



The screenshot shows a confirmation pop-up dialog box with the following text:

Clear forecast and set state to 'Postponed'?

Would you really like to clear the forecast and set the state to 'Postponed'?

This cannot be undone!

At the bottom right, there are two buttons: "Yes" (highlighted with a red box) and "No".

Opportunity



Classification

Why is the classification used in opportunities?

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

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

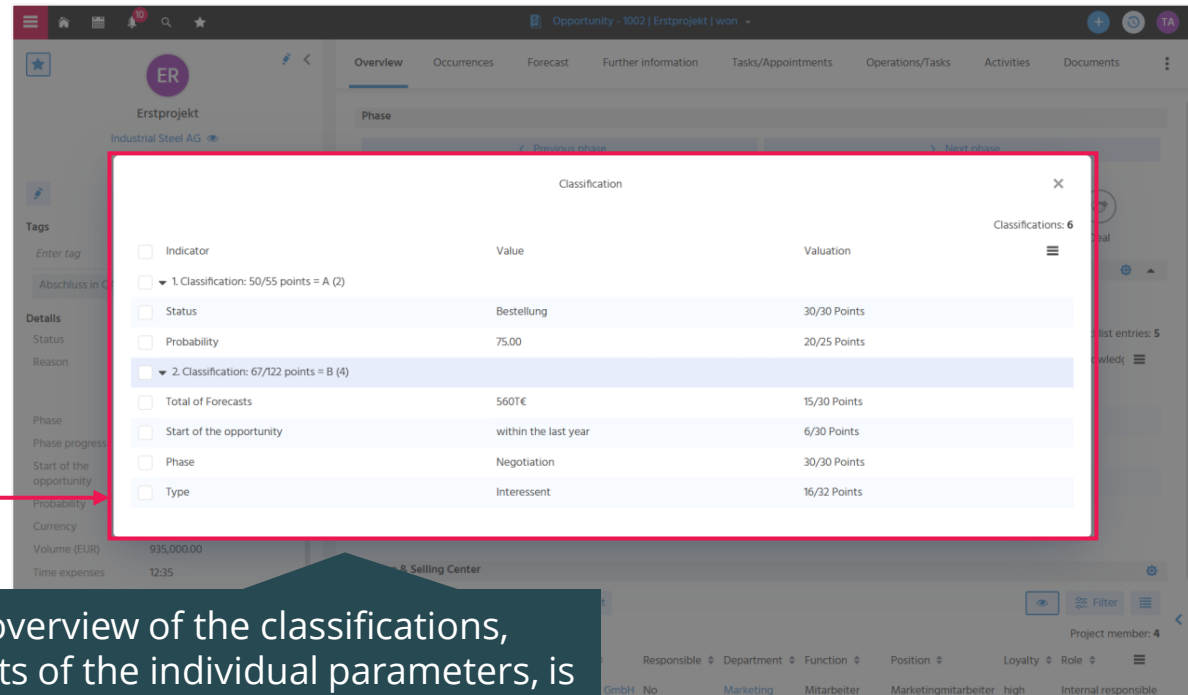
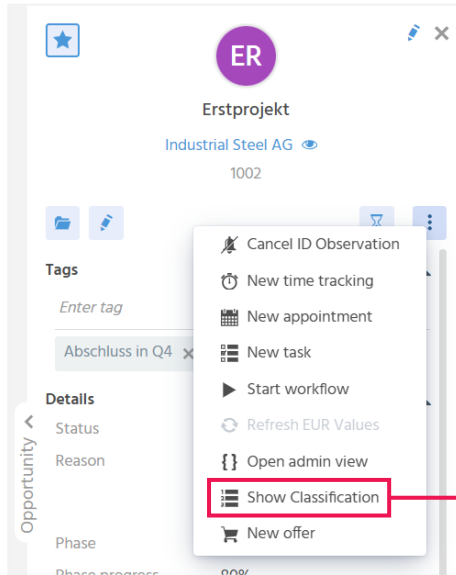
- An A-customer wants to buy a new car for his fleet.
- A C-customer only wants cars of your brand in his fleet in future and therefore orders 10 of them at once.

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



Opportunity

Classifications



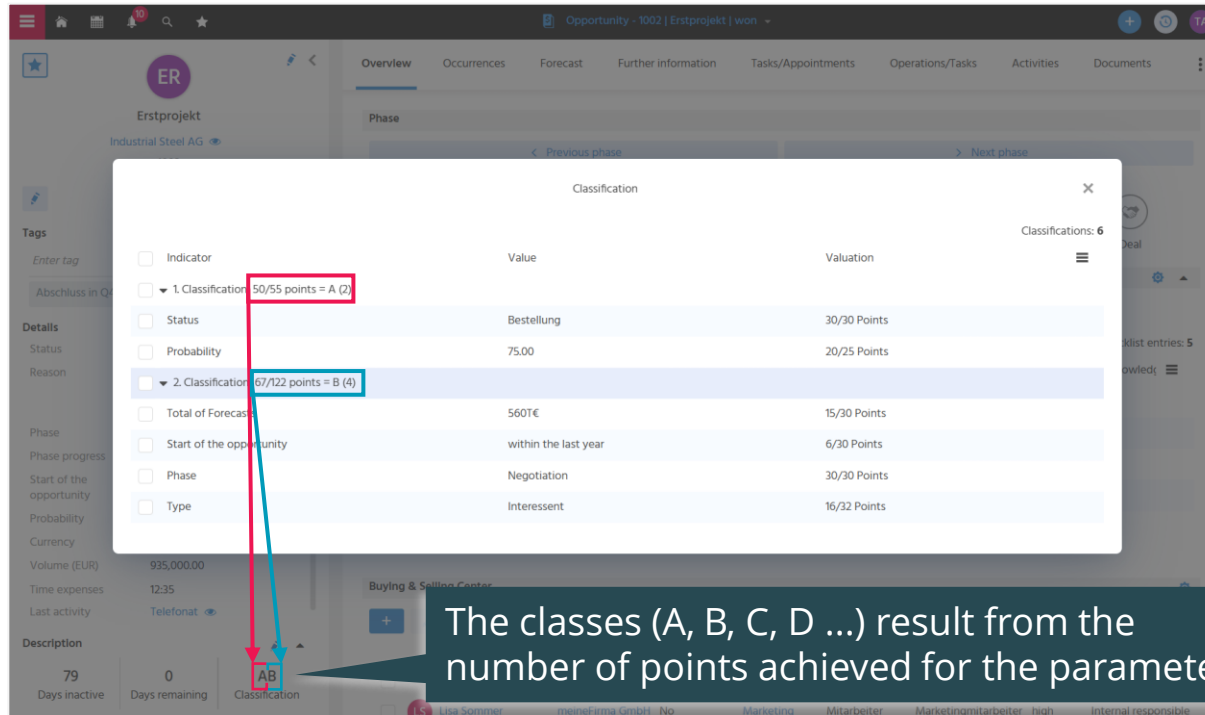
The detailed overview of the classifications, with the results of the individual parameters, is called up with the "Show classification" action.

Opportunity

Classifications



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



The screenshot shows the 'Classification' dialog box in the ADITO system. The dialog box contains a table with columns for 'Indicator', 'Value', and 'Valuation'. The table lists various indicators and their corresponding values and valuations. A red box highlights the first row, '1. Classification 50/55 points = A (2)', and a blue box highlights the second row, '2. Classification 67/122 points = B (4)'. A red arrow points from the first row to the 'AB' classification label in the bottom left corner of the dialog box. A blue arrow points from the second row to the same 'AB' label. The background shows the 'Opportunity - 1002 | Erstprojekt | won' page with various tabs and a sidebar.

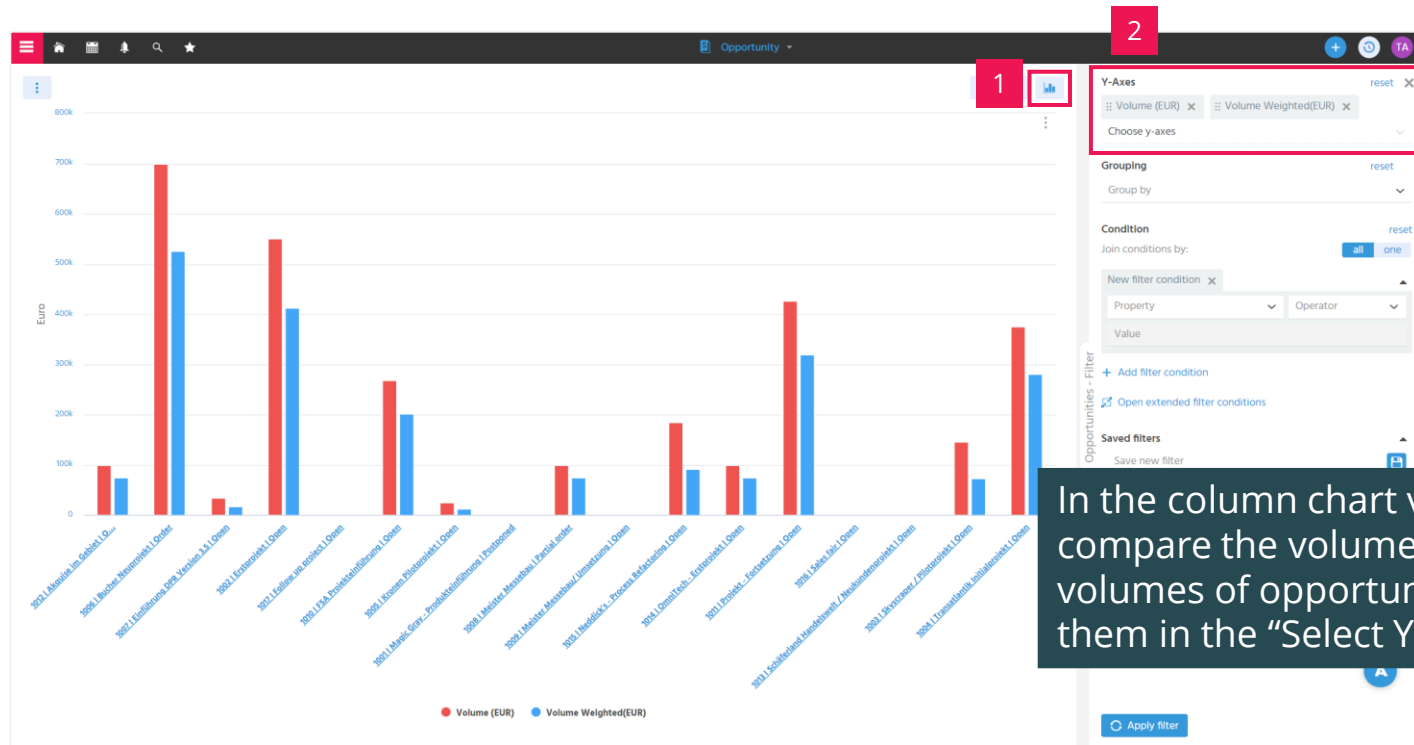
Indicator	Value	Valuation
1. Classification	50/55 points = A (2)	
Status	Bestellung	30/30 Points
Probability	75.00	20/25 Points
2. Classification	67/122 points = B (4)	
Total Forecast	560T€	15/30 Points
Start of the opportunity	within the last year	6/30 Points
Phase	Negotiation	30/30 Points
Type	Interessent	16/32 Points

AB

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

Opportunity

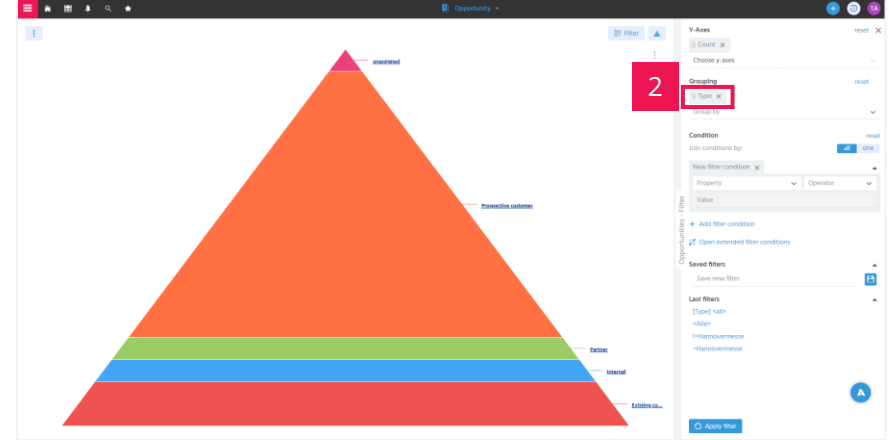
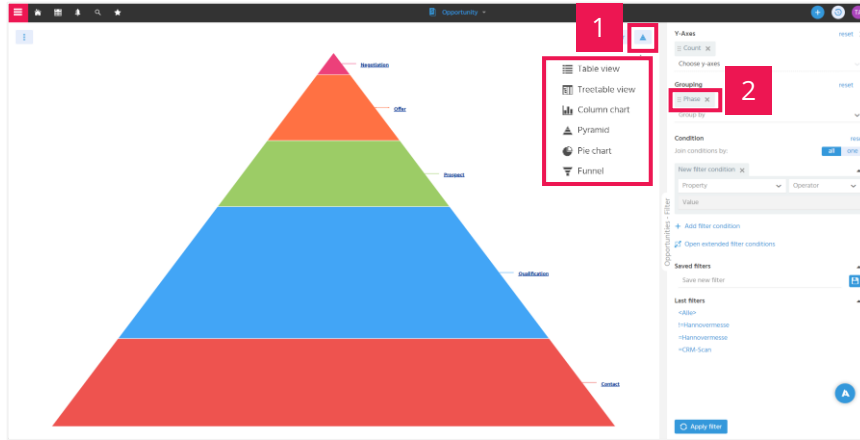
Column chart view



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

Opportunity

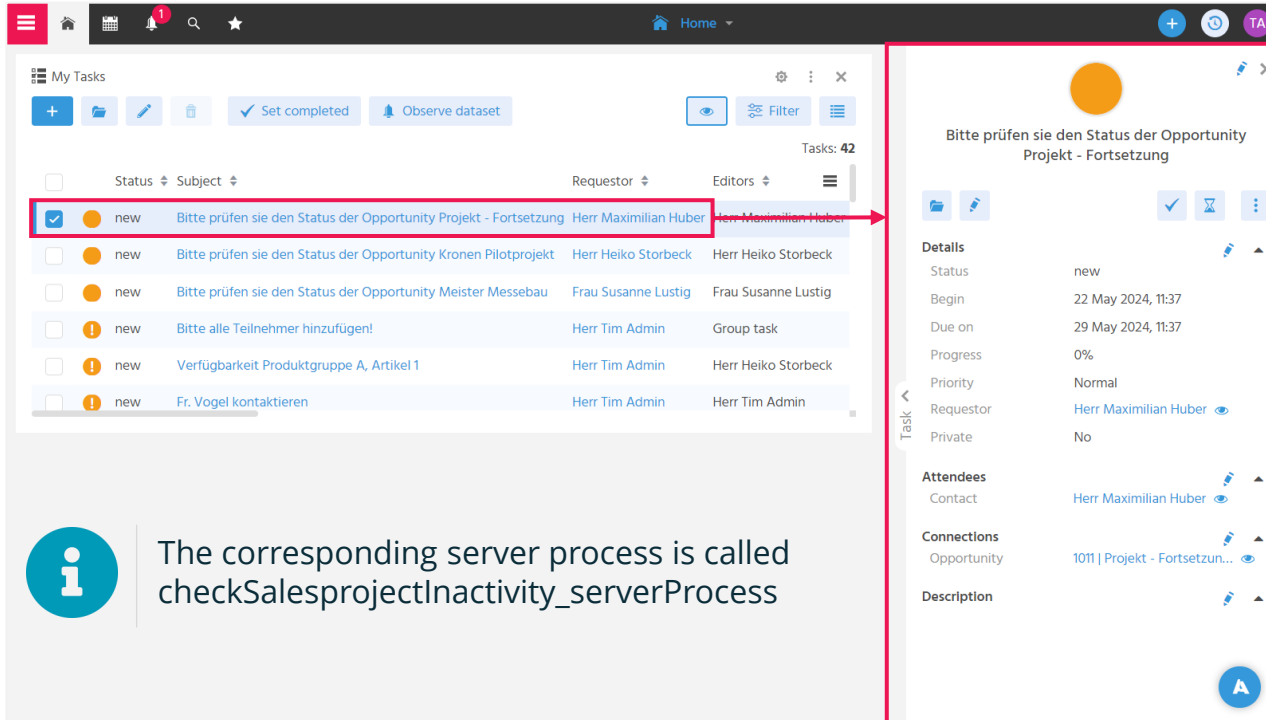
Pyramid, Pie chart, Funnel



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

Excursus server process

Task when opportunity is inactive



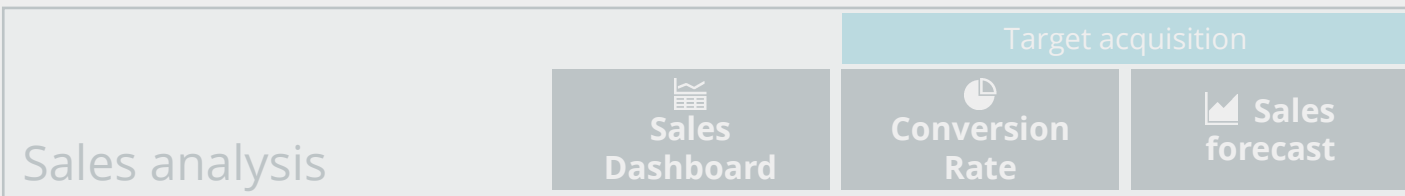
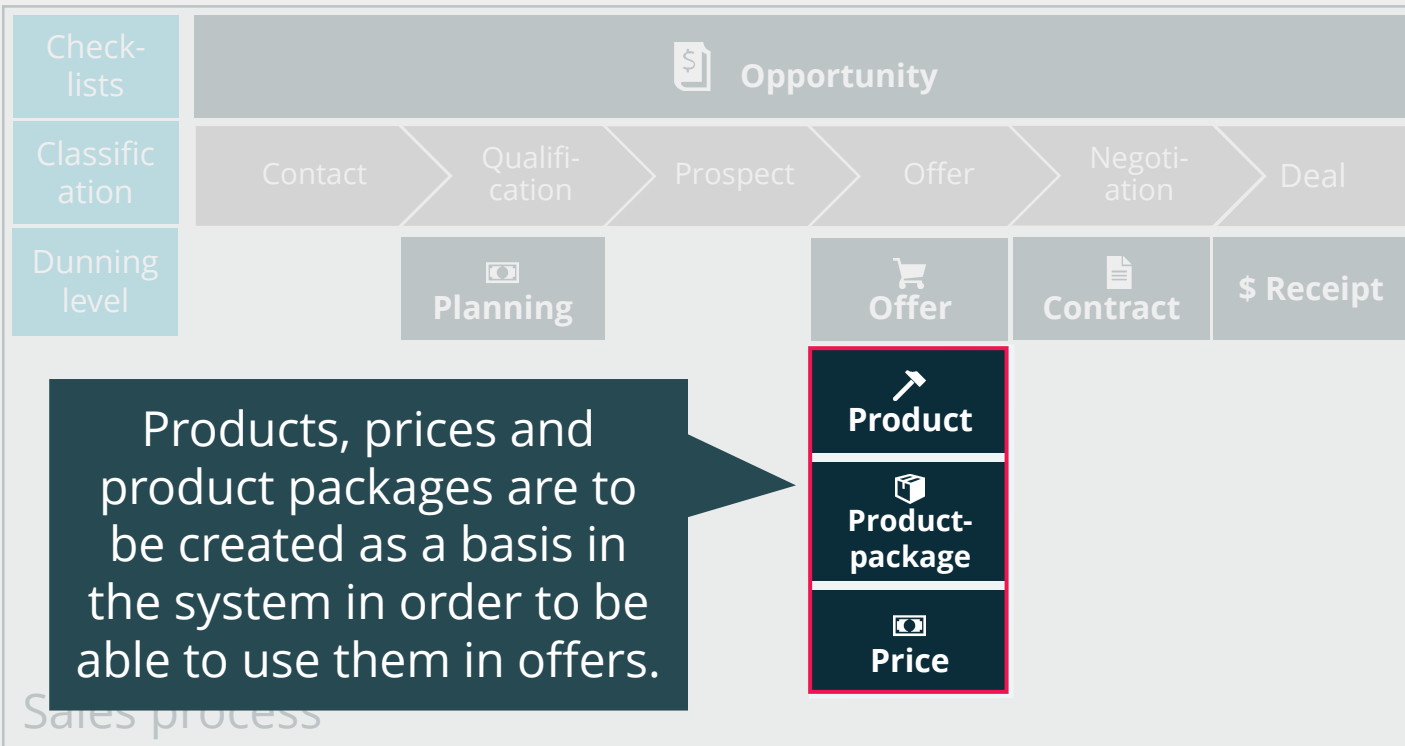
The screenshot displays the ADITO task management interface. On the left, a list of tasks is shown under the heading 'My Tasks'. The task 'Bitte prüfen sie den Status der Opportunity Projekt - Fortsetzung' by 'Herr Maximilian Huber' is selected and highlighted with a red box. A red arrow points from this task to the right pane, which shows the task details. The details pane shows the task title, status (new), begin and due dates (22 May 2024, 11:37), progress (0%), priority (Normal), requestor (Herr Maximilian Huber), and attendees (Herr Maximilian Huber). The task is linked to an opportunity '1011 | Projekt - Fortsetzun...'.

The corresponding server process is called `checkSalesprojectInactivity_serverProcess`

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

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

Products, Product packages & Prices

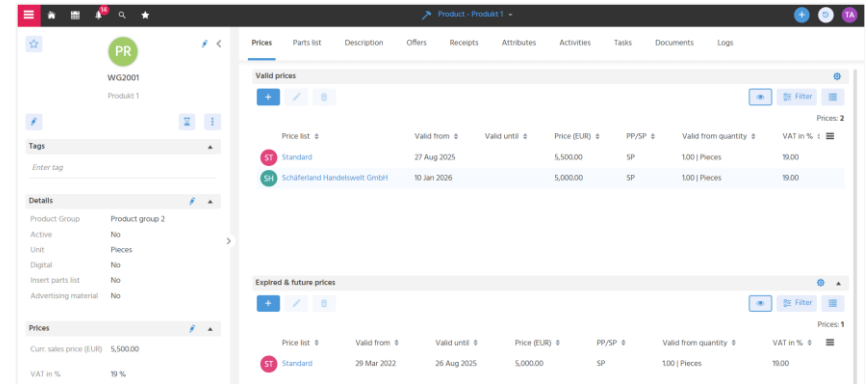


- To be created in advance by the administrator
- In use "daily" by end users

Product

What information can be recorded at the product?

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



The screenshot displays the ADITO software interface for a product named 'WG2001'. The left sidebar shows product details, including tags, a description, and pricing information. The main area displays two tables: 'Valid prices' and 'Expired & future prices'.

Valid prices

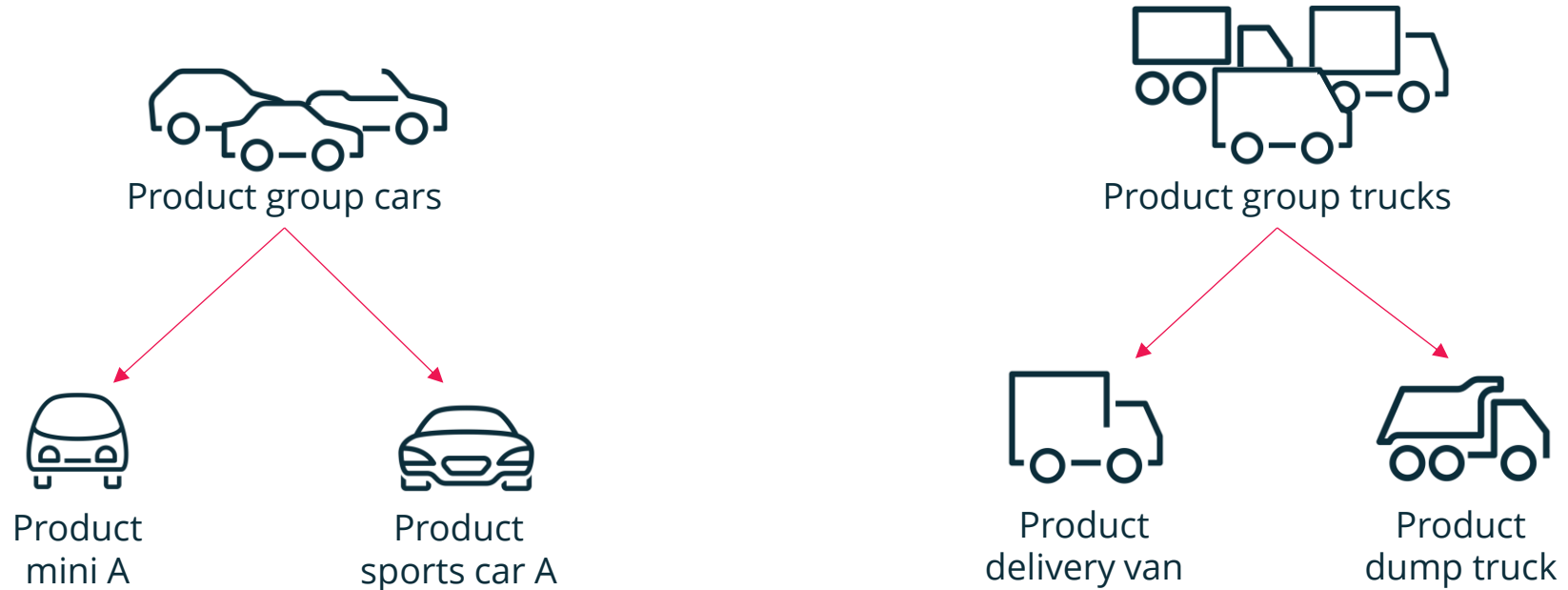
Price list	Valid from	Valid until	Price (EUR)	PP/SP	Valid from quantity	VAT in %
Standard	27 Aug 2025		5,500.00	SP	100 Pieces	19.00
Schäferland Handelskett GmbH	10 Jan 2026		5,000.00	SP	100 Pieces	19.00

Expired & future prices

Price list	Valid from	Valid until	Price (EUR)	PP/SP	Valid from quantity	VAT in %
Standard	29 Mar 2022	26 Aug 2025	5,000.00	SP	100 Pieces	19.00

Product

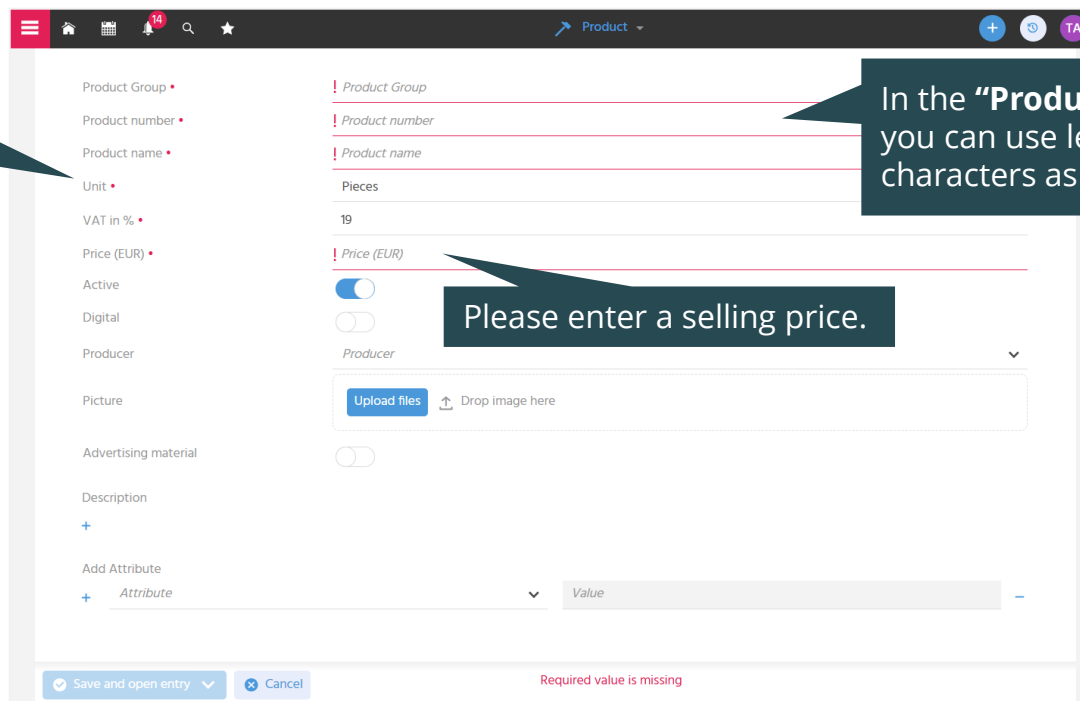
Product groups for product segmentation



Product

Create new

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



The screenshot shows the 'Create new' product form in the ADITO application. The form is divided into two main sections: a left sidebar with labels and a main form area with input fields. The sidebar labels include: Product Group, Product number, Product name, Unit, VAT in %, Price (EUR), Active, Digital, Producer, Picture, Advertising material, Description, Add Attribute, and a table header with 'Attribute' and 'Value'. The main form area contains input fields for each of these labels. The 'Unit' field is set to 'Pieces'. The 'Price (EUR)' field is set to '19'. The 'Active' field is a toggle switch that is currently turned on. The 'Digital' field is a toggle switch that is currently turned off. The 'Producer' field is a dropdown menu with 'Producer' selected. The 'Picture' field is a file upload area with a button labeled 'Upload files' and a text label 'Drop image here'. The 'Advertising material' field is a toggle switch that is currently turned off. The 'Description' field is a text area. The 'Add Attribute' section is a table with one row containing 'Attribute' and 'Value'. At the bottom of the form, there are two buttons: 'Save and open entry' and 'Cancel'. A red error message 'Required value is missing' is displayed at the bottom right of the form.

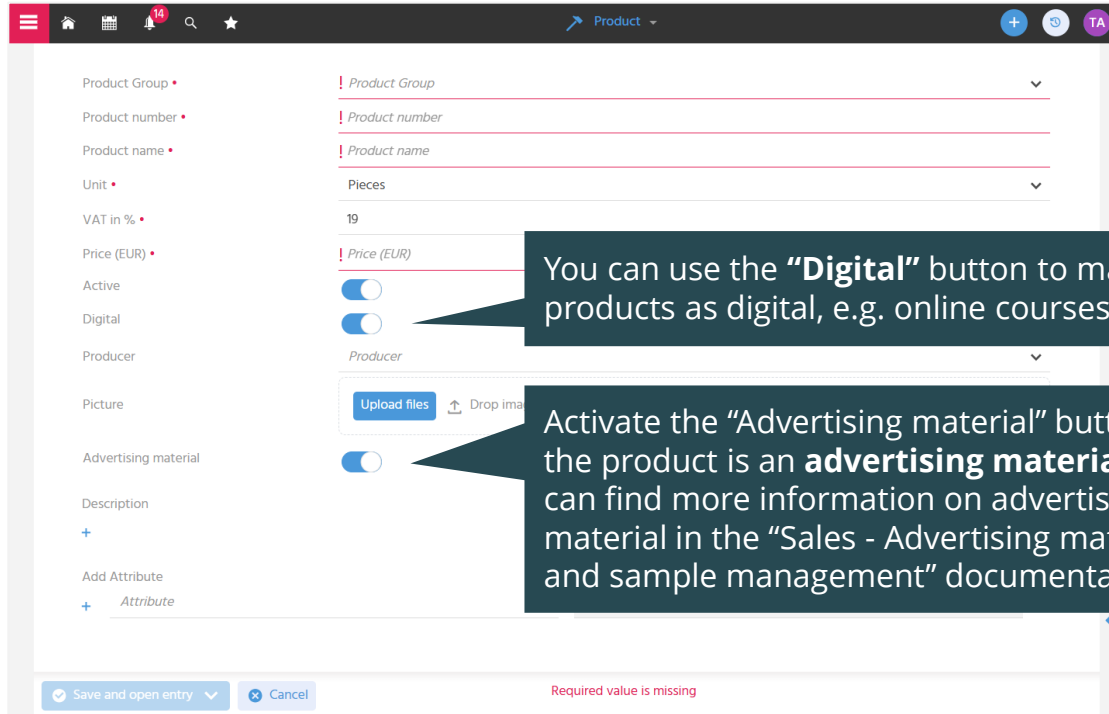
Attribute	Value

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

Please enter a selling price.

Product

Create new



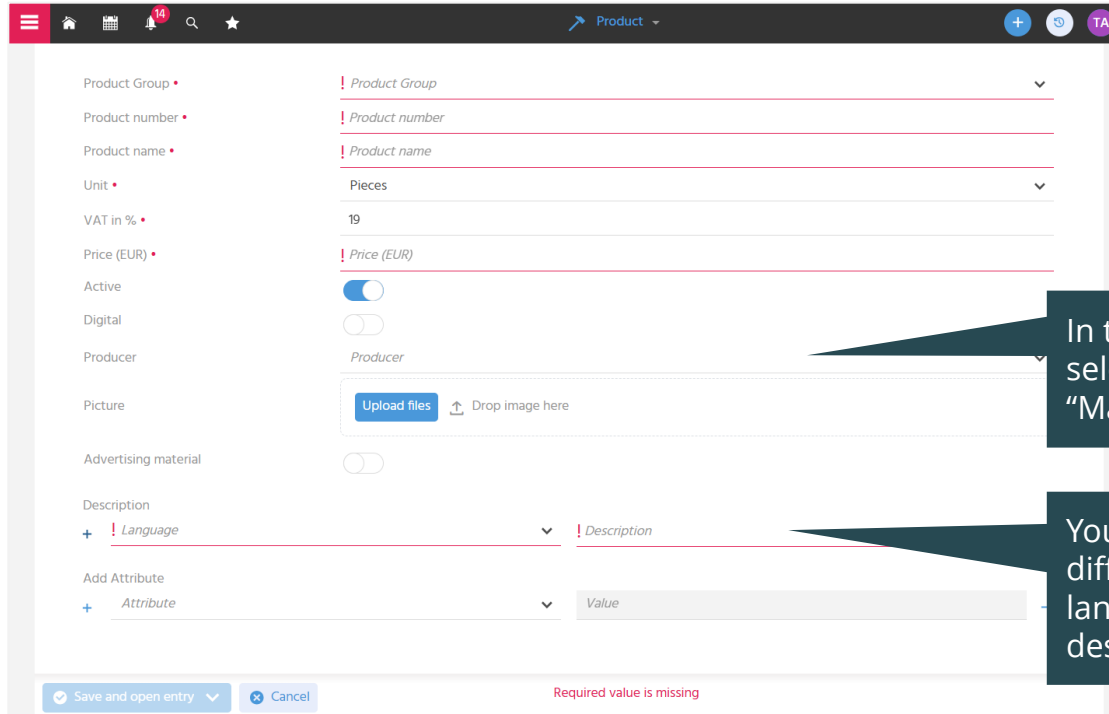
The screenshot shows the 'Create new' product form in the ADITO system. The form is divided into several sections:

- Product Group:** A dropdown menu with a red exclamation mark icon and a warning message 'Product Group'.
- Product number:** A text input field with a red exclamation mark icon and a warning message 'Product number'.
- Product name:** A text input field with a red exclamation mark icon and a warning message 'Product name'.
- Unit:** A dropdown menu with 'Pieces' selected.
- VAT in %:** A text input field with '19' entered.
- Price (EUR):** A text input field with a red exclamation mark icon and a warning message 'Price (EUR)'.
- Active:** A toggle switch that is currently turned on.
- Digital:** A toggle switch that is currently turned on. A callout box explains: "You can use the 'Digital' button to mark products as digital, e.g. online courses."
- Producer:** A dropdown menu with 'Producer' selected.
- Picture:** A section with an 'Upload files' button and a 'Drop image' area.
- Advertising material:** A toggle switch that is currently turned on. A callout box explains: "Activate the 'Advertising material' button if the product is an **advertising material**. You can find more information on advertising material in the 'Sales - Advertising material and sample management' documentation."
- Description:** A text area with a '+' icon.
- Add Attribute:** A text area with a '+' icon and the word 'Attribute'.

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

Product

Create new



Product Group • ! Product Group

Product number • ! Product number

Product name • ! Product name

Unit • Pieces

VAT in % • 19

Price (EUR) • ! Price (EUR)

Active ☒

Digital ☐

Producer Producer

Picture

Advertising material ☐

Description

+ ! Language Description

Add Attribute

+ Attribute Value

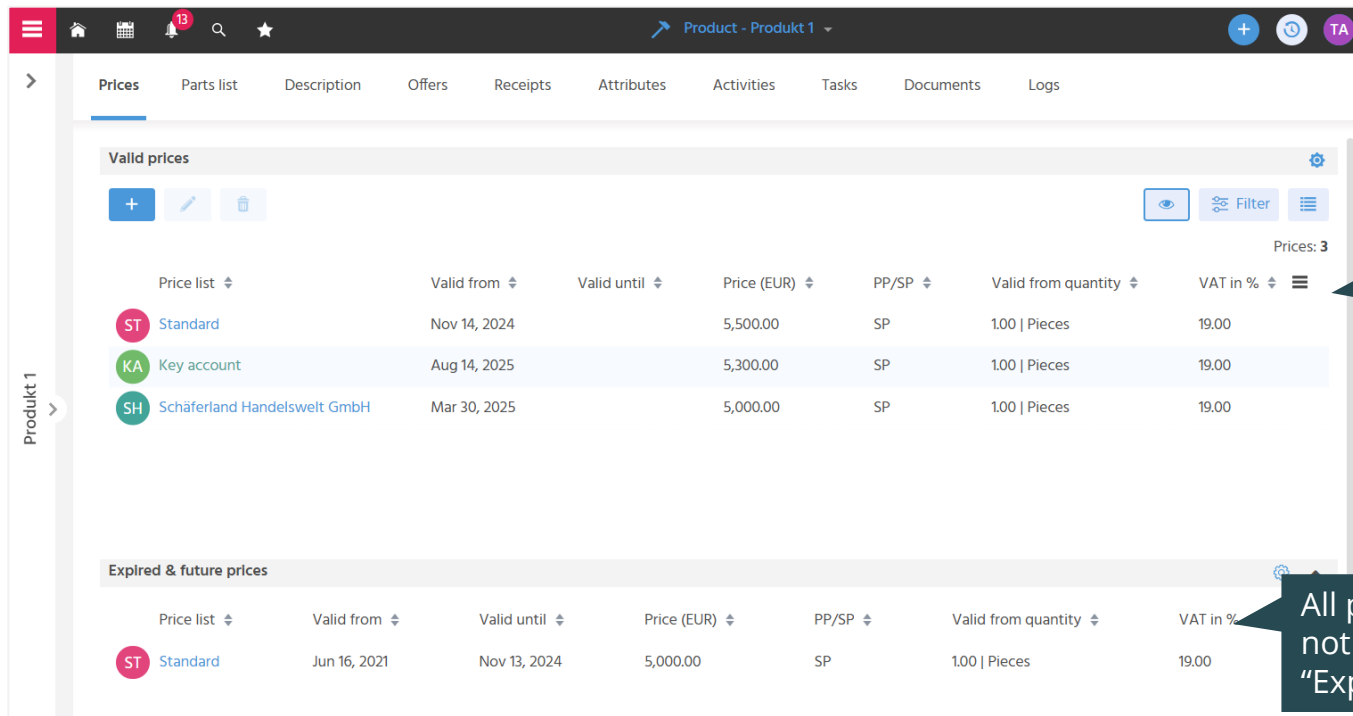
Required value is missing

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

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

Product

Tab "Prices"



Product - Produkt 1

Prices Parts list Description Offers Receipts Attributes Activities Tasks Documents Logs

Valid prices

Prices: 3

Price list	Valid from	Valid until	Price (EUR)	PP/SP	Valid from quantity	VAT in %
ST Standard	Nov 14, 2024		5,500.00	SP	1.00 Pieces	19.00
KA Key account	Aug 14, 2025		5,300.00	SP	1.00 Pieces	19.00
SH Schäferland Handelswelt GmbH	Mar 30, 2025		5,000.00	SP	1.00 Pieces	19.00

Expired & future prices

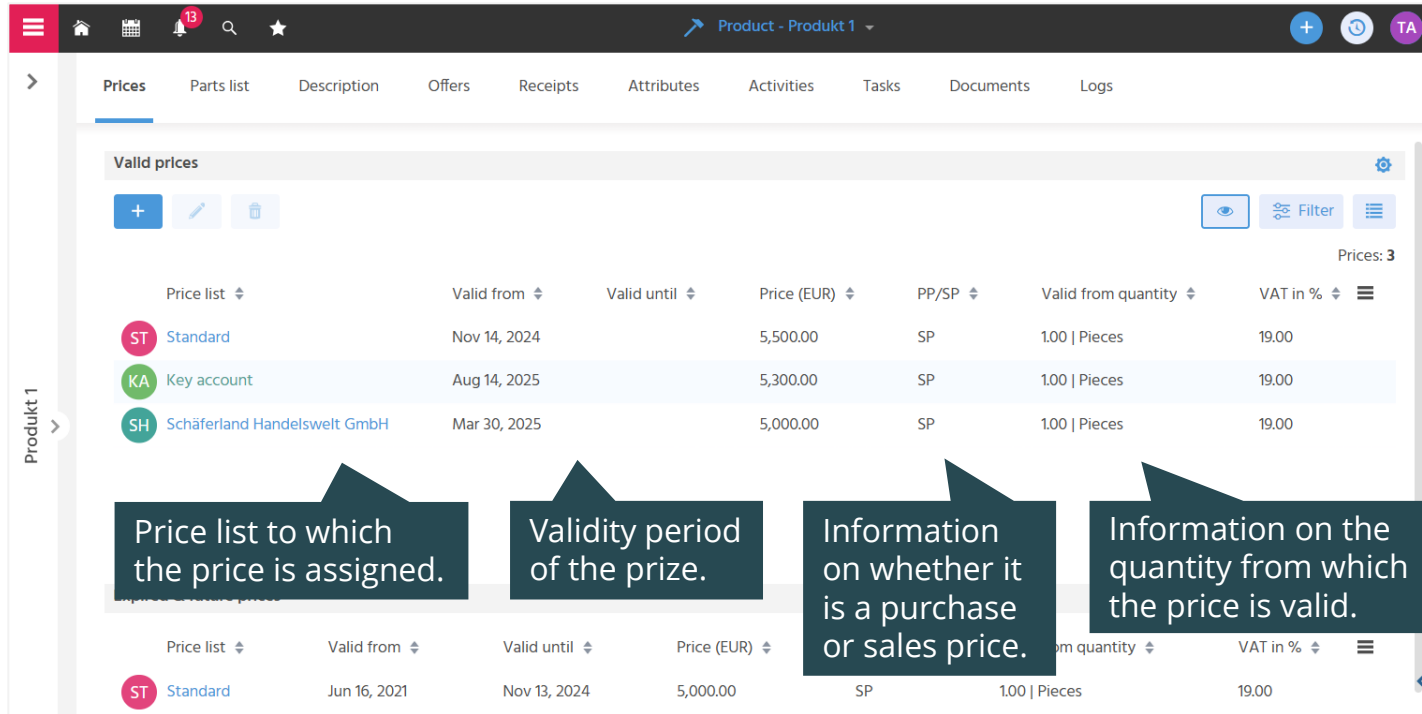
Price list	Valid from	Valid until	Price (EUR)	PP/SP	Valid from quantity	VAT in %
ST Standard	Jun 16, 2021	Nov 13, 2024	5,000.00	SP	1.00 Pieces	19.00

All currently valid prices are displayed in the "Valid prices" area.

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

Product

Tab "Prices"



Product - Produkt 1

Prices

Valid prices

Price list	Valid from	Valid until	Price (EUR)	PP/SP	Valid from quantity	VAT in %
ST Standard	Nov 14, 2024		5,500.00	SP	1.00 Pieces	19.00
KA Key account	Aug 14, 2025		5,300.00	SP	1.00 Pieces	19.00
SH Schäferland Handelswelt GmbH	Mar 30, 2025		5,000.00	SP	1.00 Pieces	19.00

Prices: 3

Price list to which the price is assigned.

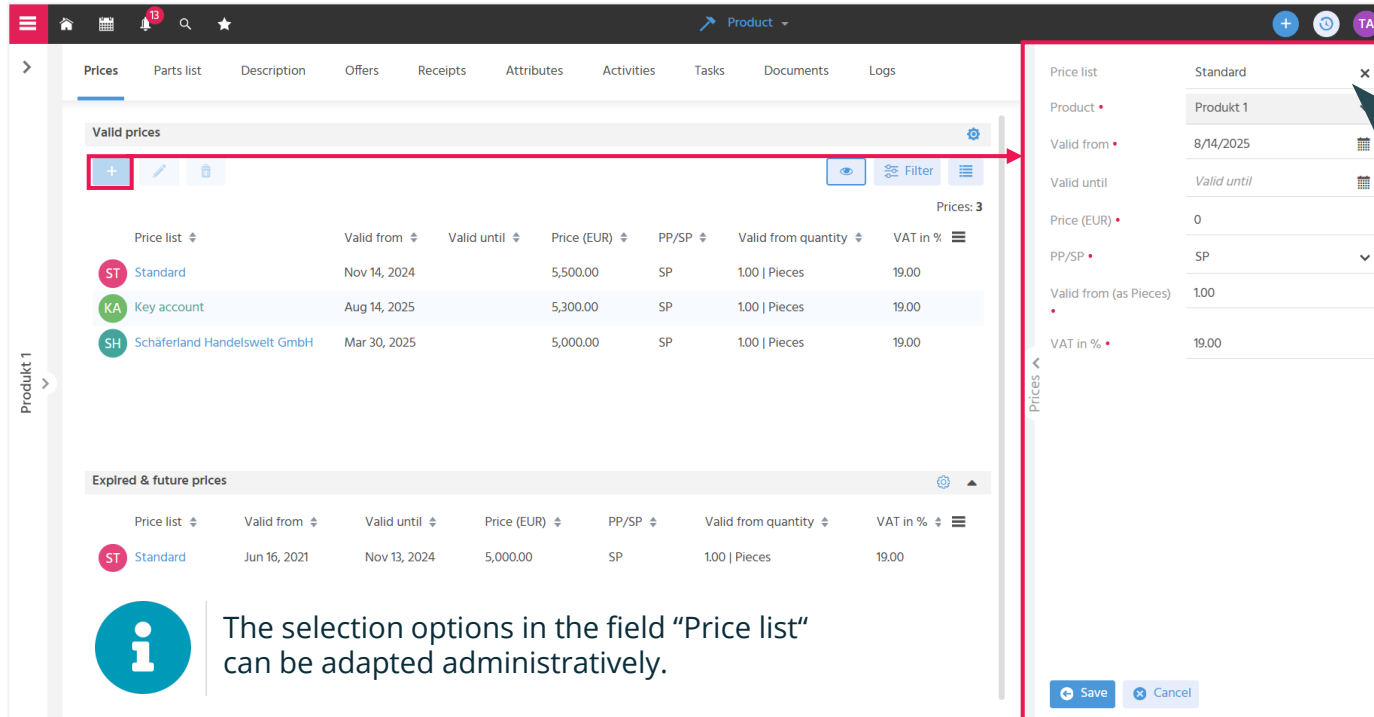
Validity period of the price.

Information on whether it is a purchase or sales price.

Information on the quantity from which the price is valid.

Product

Tab "Prices" - Add price



The screenshot shows the 'Product' interface with the 'Prices' tab selected. The 'Valid prices' section contains a table with columns: Price list, Valid from, Valid until, Price (EUR), PP/SP, Valid from quantity, and VAT in %. There are three entries in the table. A red box highlights the '+' button in the top left of the 'Valid prices' section. A red arrow points from this button to a modal window titled 'Price list'.

The modal window 'Price list' has the following fields:

- Price list: Standard
- Product: Produkt 1
- Valid from: 8/14/2025
- Valid until: Valid until
- Price (EUR): 0
- PP/SP: SP
- Valid from (as Pieces): 1.00
- VAT in %: 19.00

At the bottom of the modal are 'Save' and 'Cancel' buttons.

Valid prices

Price list	Valid from	Valid until	Price (EUR)	PP/SP	Valid from quantity	VAT in %
ST Standard	Nov 14, 2024		5,500.00	SP	1.00 Pieces	19.00
KA Key account	Aug 14, 2025		5,300.00	SP	1.00 Pieces	19.00
SH Schäferland Handelswelt GmbH	Mar 30, 2025		5,000.00	SP	1.00 Pieces	19.00

Expired & future prices

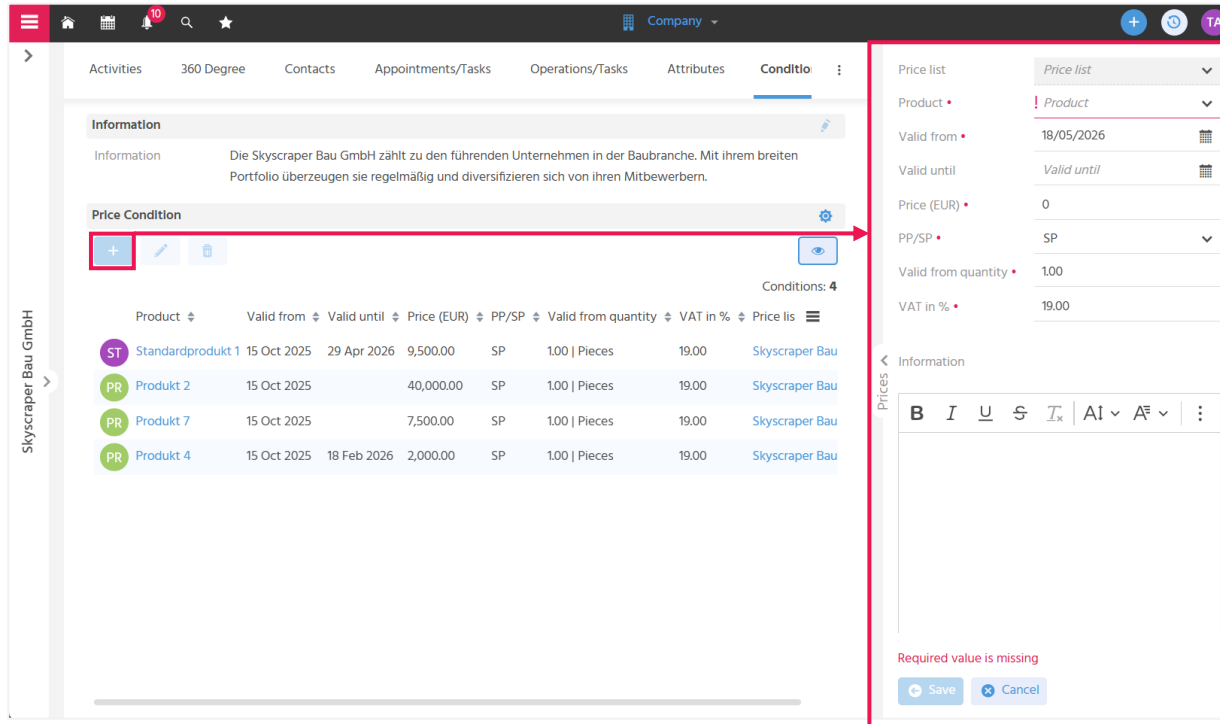
Price list	Valid from	Valid until	Price (EUR)	PP/SP	Valid from quantity	VAT in %
ST Standard	Jun 16, 2021	Nov 13, 2024	5,000.00	SP	1.00 Pieces	19.00

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

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

Excursus into the company

Maintenance of customer-specific prices at the company



Activities 360 Degree Contacts Appointments/Tasks Operations/Tasks Attributes **Conditions**

Information

Information Die Skyscraper Bau GmbH zählt zu den führenden Unternehmen in der Baubranche. Mit ihrem breiten Portfolio überzeugen sie regelmäßig und diversifizieren sich von ihren Mitbewerbern.

Price Condition

+ -

Conditions: 4

Product	Valid from	Valid until	Price (EUR)	PP/SP	Valid from quantity	VAT in %	Price list
ST Standardprodukt 1	15 Oct 2025	29 Apr 2026	9,500.00	SP	1.00 Pieces	19.00	Skyscraper Bau
PR Produkt 2	15 Oct 2025		40,000.00	SP	1.00 Pieces	19.00	Skyscraper Bau
PR Produkt 7	15 Oct 2025		7,500.00	SP	1.00 Pieces	19.00	Skyscraper Bau
PR Produkt 4	15 Oct 2025	18 Feb 2026	2,000.00	SP	1.00 Pieces	19.00	Skyscraper Bau

Price list

Price list

Product

Valid from 18/05/2026

Valid until

Price (EUR) 0

PP/SP SP

Valid from quantity 1.00

VAT in % 19.00

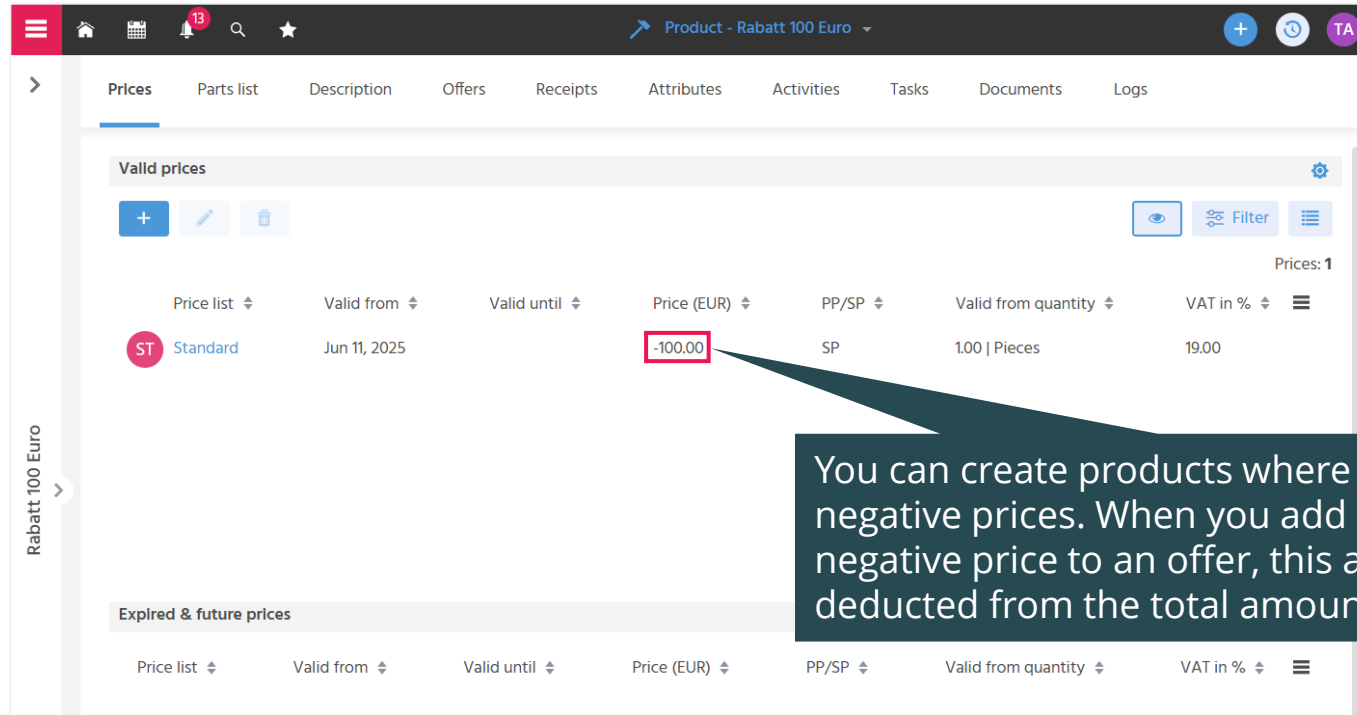
Required value is missing

Save Cancel

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

Prices

Negative prices



The screenshot shows the ADITO software interface for managing prices. The top navigation bar includes a menu icon, home, calendar, notifications (13), search, and star icons. The main header displays the product name "Product - Rabatt 100 Euro" and action buttons (+, refresh, and a user profile icon labeled "TA"). Below the header, a tabbed interface shows "Prices" as the active tab, with other tabs like "Parts list", "Description", "Offers", "Receipts", "Attributes", "Activities", "Tasks", "Documents", and "Logs".

The "Valid prices" section contains a table with the following columns: Price list, Valid from, Valid until, Price (EUR), PP/SP, Valid from quantity, and VAT in %. A single price entry is shown:

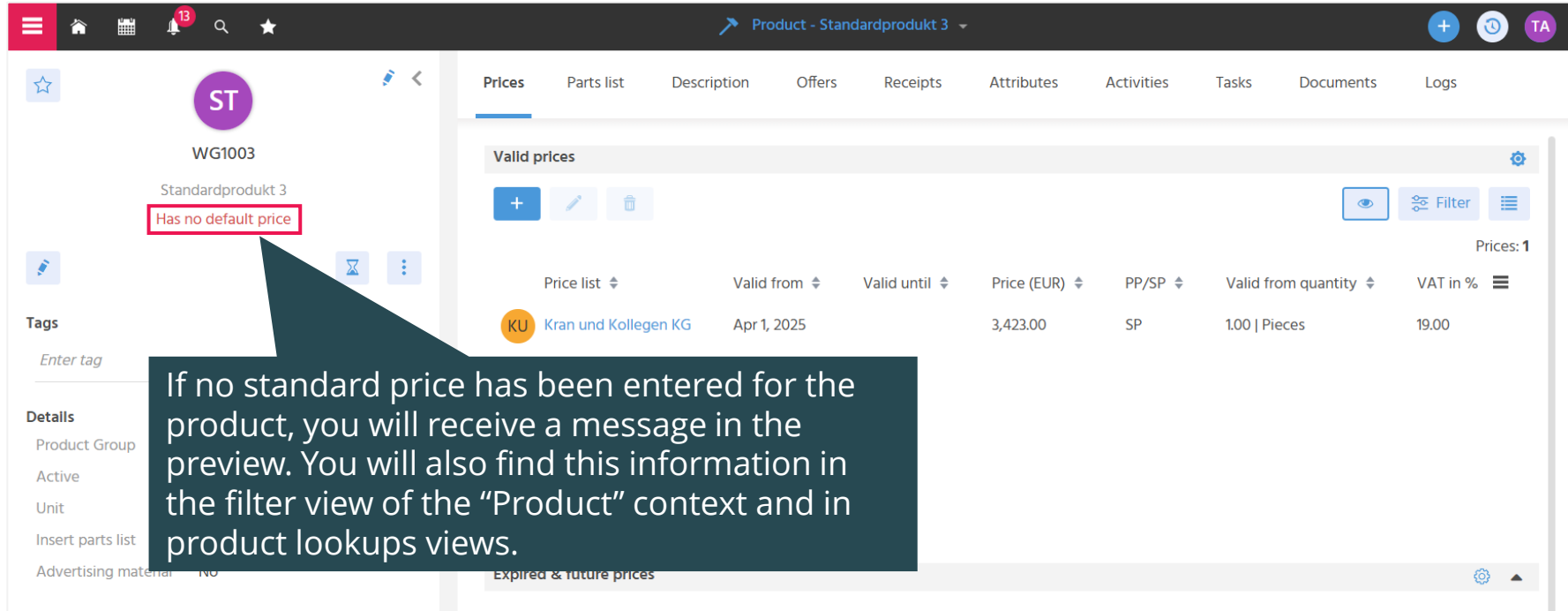
Price list	Valid from	Valid until	Price (EUR)	PP/SP	Valid from quantity	VAT in %
ST Standard	Jun 11, 2025		-100.00	SP	1.00 Pieces	19.00

The value "-100.00" in the Price (EUR) column is highlighted with a red box. A callout box points to this value, containing the text: "You can create products where you create negative prices. When you add a product with a negative price to an offer, this amount is deducted from the total amount of the offer."

Below the "Valid prices" section, there is a section for "Expired & future prices" with a similar table structure.

Prices

Standard price



The screenshot shows the ADITO interface for the 'Product - Standardprodukt 3'. The 'Prices' tab is active, displaying a table of 'Valid prices'. A red box highlights the message 'Has no default price' under the product name 'Standardprodukt 3'. A callout box explains that this message appears in the preview, filter view, and product lookups views.

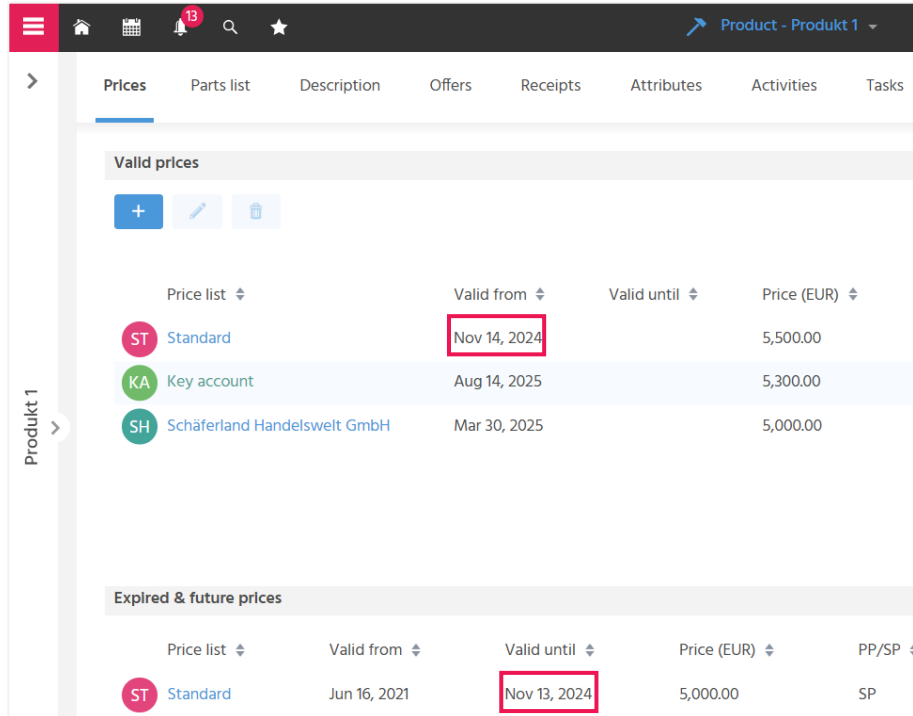
Valid prices

Price list	Valid from	Valid until	Price (EUR)	PP/SP	Valid from quantity	VAT in %
KU Kran und Kollegen KG	Apr 1, 2025		3,423.00	SP	1.00 Pieces	19.00

Expired & future prices

Prices

Validity period



The screenshot shows the ADITO interface for managing prices for 'Produkt 1'. The top navigation bar includes a menu icon, home, calendar, notifications (13), search, and star icons. The main header shows 'Product - Produkt 1'. The 'Prices' tab is active, displaying a table of 'Valid prices' and a section for 'Expired & future prices'.

Price list	Valid from	Valid until	Price (EUR)
ST Standard	Nov 14, 2024		5,500.00
KA Key account	Aug 14, 2025		5,300.00
SH Schäferland Handelswelt GmbH	Mar 30, 2025		5,000.00

Price list	Valid from	Valid until	Price (EUR)	PP/SP
ST Standard	Jun 16, 2021	Nov 13, 2024	5,000.00	SP

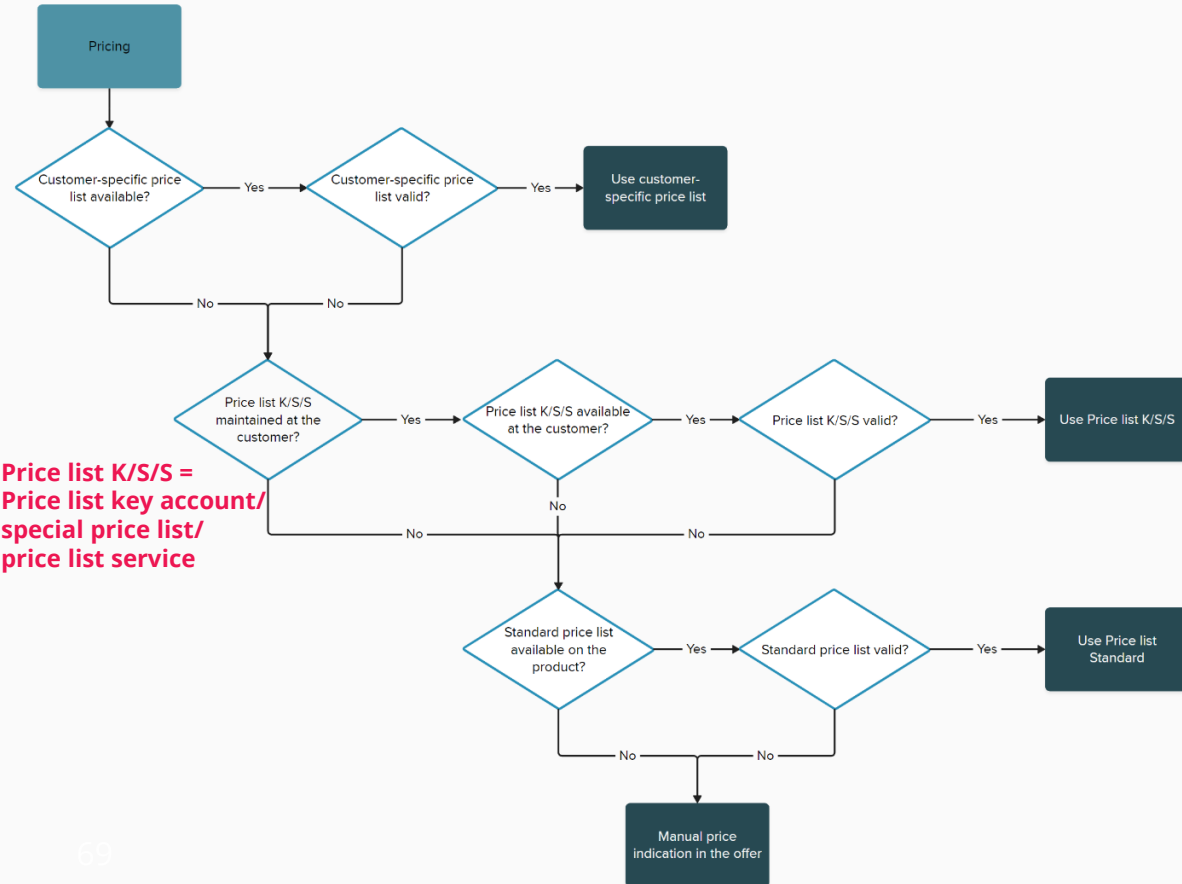
A price has been entered for a product and assigned to the “Standard” price list, for example. If you now enter a new price that you assign to the “Standard” price list, the **valid until** date of the previous price is **automatically set to one day before the valid from date** of the new price.

Pricing logic in the offer

What price is drawn in the offer?

1. Check whether a customer-specific price is stored for the product at the company
If **yes**: **transfer customer-specific price to the offer**
If **no**:
2. Check for the value of the “Price list” attribute in the “Attributes” tab in the company and check whether there is a price for this price list on the product (e.g. special price list)
If **match**: (e.g. special price list attribute in the company and product price with special price list), then **drag the price of this price list**
If **no match**: (e.g. special price list attribute in the company, but no product price with special price list),
3. **Drag the standard price**

Pricing logic in the offer



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

[illegible]

The screenshot displays the SAP S/4HANA Product Master interface, specifically the "Parts list" tab. The main area shows a hierarchical table of components:

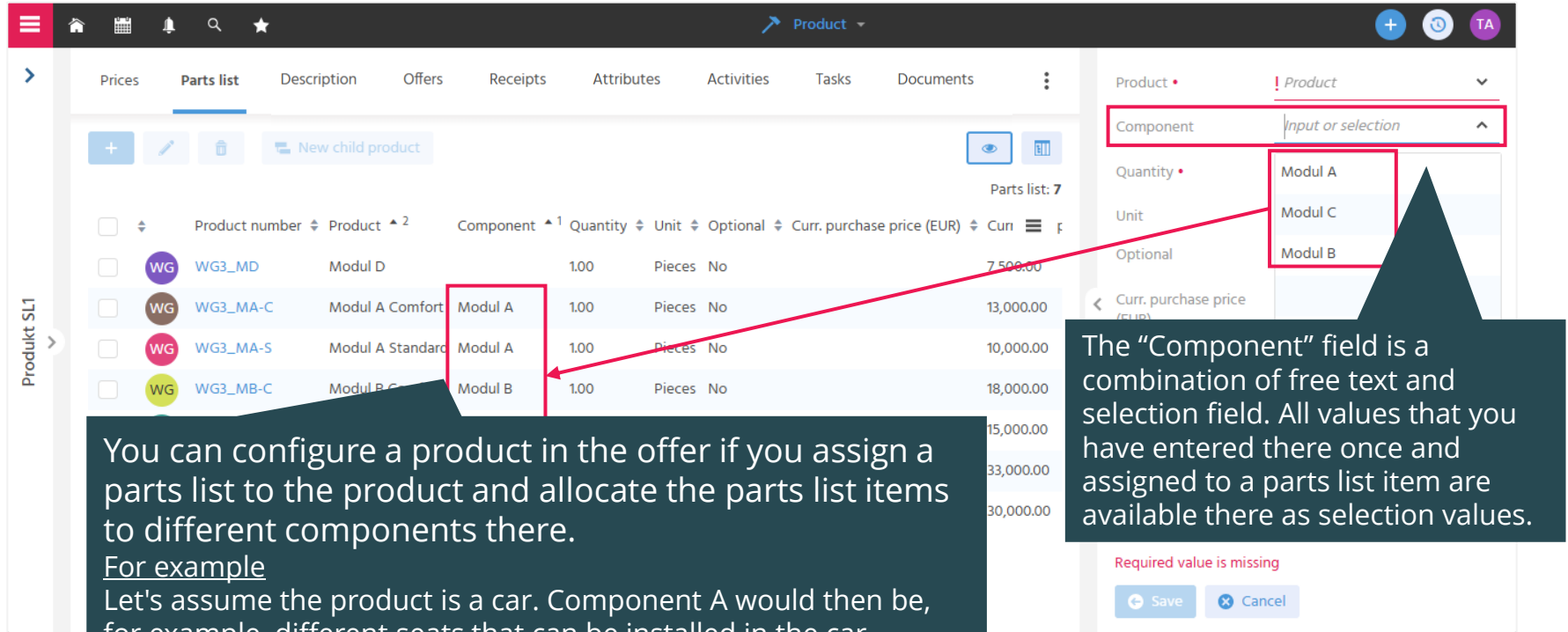
	Product number	Product	Component	Quantity	Unit	Optional	Curr. purchase price (EUR)	Curr. s.
☒	WG3_MD	Modul D		1.00	Pieces	No	7,500.00	
☐	WG3_MA-C	Modul A Comfort	Modul A	1.00	Pieces	No	13,000.00	
☐	WG3_MA-S	Modul A Standard	Modul A	1.00	Pieces	No	10,000.00	
☐	WG3_MB	Modul B	Modul A	1.00	Pieces	No	18,000.00	
☐							15,000.00	
☐							33,000.00	
☐							30,000.00	

A red box highlights the checkbox next to the first product (WG3_MD), and a red arrow points from it to the "New child product" button at the top. A dark blue callout box contains the text: "If you select a product, you can subordinate another product underneath it and thus create several levels in the parts list."

On the right side, there is a configuration panel for the selected product, showing fields like "Product", "Component", "Quantity", "Unit", "Optional", "Curr. purchase price (EUR)", and "Curr. sales price (EUR)".

Product parts list

Making a product configurable



The screenshot displays the ADITO software interface. The main window shows a 'Parts list' tab with a table of components. A red box highlights the 'Component' column, and a red arrow points from it to a callout box. The callout box contains the text: 'The "Component" field is a combination of free text and selection field. All values that you have entered there once and assigned to a parts list item are available there as selection values.'

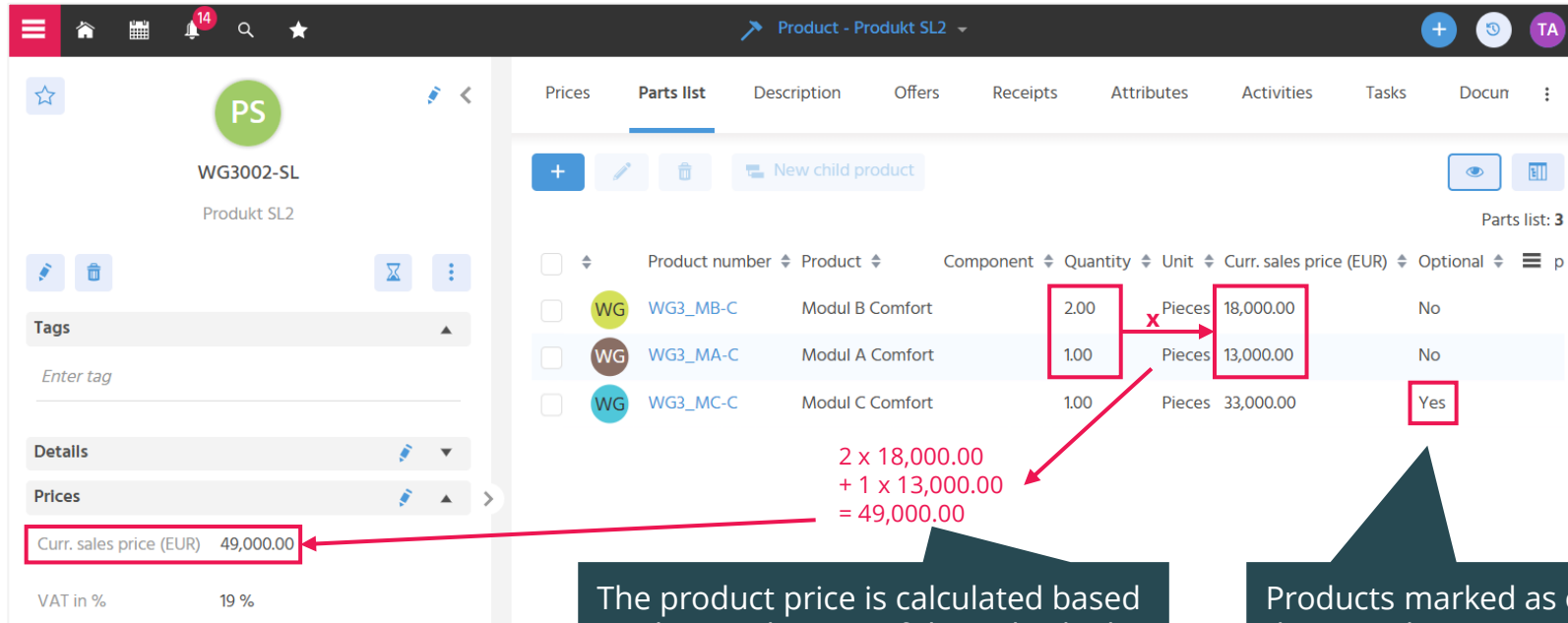
Below the table, a dark blue callout box contains the text: 'You can configure a product in the offer if you assign a parts list to the product and allocate the parts list items to different components there. For example Let's assume the product is a car. Component A would then be, for example, different seats that can be installed in the car. Component B would be the colors in which the car is available.'

The right sidebar shows a configuration panel for a product. The 'Component' field is highlighted with a red box, and a dropdown menu is open, showing the following options: 'Modul A', 'Modul C', and 'Modul B'. The 'Quantity' field is set to 1.00, and the 'Unit' is set to 'Pieces'. The 'Optional' field is set to 'No'. The 'Curr. purchase price (EUR)' is set to 13,000.00. A red error message at the bottom of the sidebar states: 'Required value is missing'. Below the error message are 'Save' and 'Cancel' buttons.

Product number	Product	Component	Quantity	Unit	Optional	Curr. purchase price (EUR)
WG3_MD	Modul D		1.00	Pieces	No	7,500.00
WG3_MA-C	Modul A Comfort	Modul A	1.00	Pieces	No	13,000.00
WG3_MA-S	Modul A Standard	Modul A	1.00	Pieces	No	10,000.00
WG3_MB-C	Modul B Comfort	Modul B	1.00	Pieces	No	18,000.00

Product parts list

Automatic total price calculation



Product: WG3002-SL (Produkt SL2)

Tags: Enter tag

Details: Prices

Curr. sales price (EUR) 49,000.00

VAT in % 19 %

Product number	Product	Component	Quantity	Unit	Curr. sales price (EUR)	Optional
WG3_MB-C	Modul B Comfort	2.00	Pieces	18,000.00	No	
WG3_MA-C	Modul A Comfort	1.00	Pieces	13,000.00	No	
WG3_MC-C	Modul C Comfort	1.00	Pieces	33,000.00	Yes	

Parts list: 3

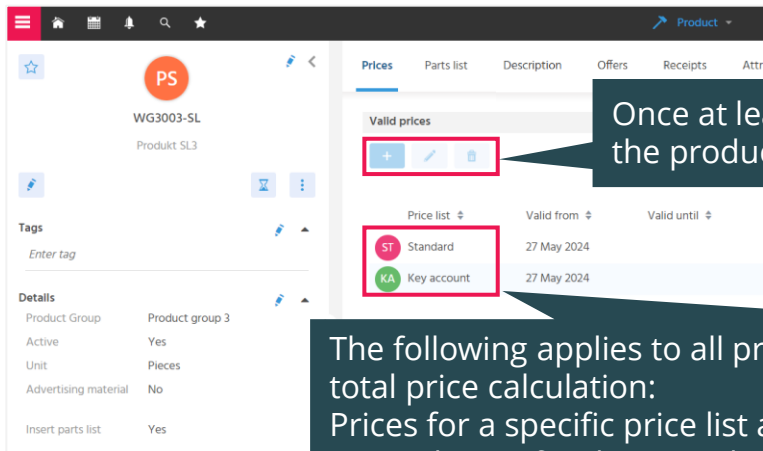
2 x 18,000.00
+ 1 x 13,000.00
= 49,000.00

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

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

Product parts list

Automatic total price calculation



Prices	Parts list	Description	Offers	Receipts	Attr
Valid prices					
+ [edit] [delete]					
Price list Valid from Valid until					
ST Standard	27 May 2024				
KA Key account	27 May 2024				

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

The following applies to all price lists (except customer-specific price lists) for the automatic total price calculation:

Prices for a specific price list are stored **for all non-optional sub-items** of a parts list product => total price for this price list is calculated automatically.

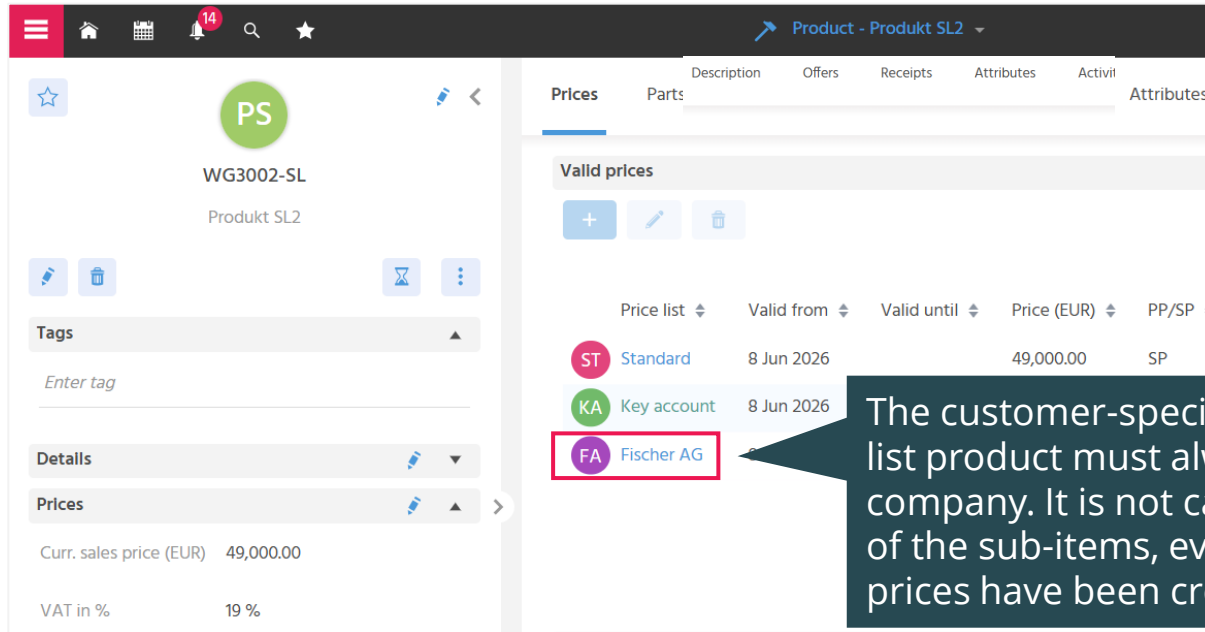
For example:

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

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

Product parts list

Automatic total price calculation



Product - Produkt SL2

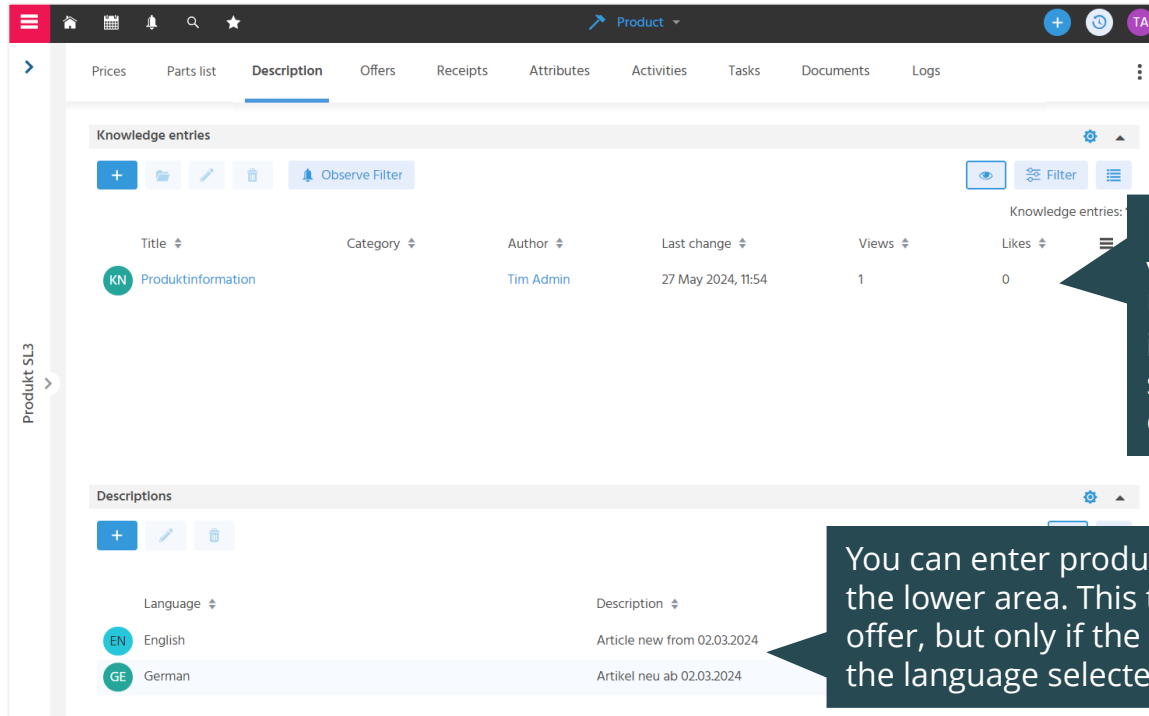
Valid prices

Price list	Valid from	Valid until	Price (EUR)	PP/SP
ST Standard	8 Jun 2026		49,000.00	SP
KA Key account	8 Jun 2026			
FA Fischer AG				

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

Product description

Complete the description on the product



The screenshot shows the ADITO product description interface. The top navigation bar includes a menu icon, home, calendar, notifications, search, and star icons, along with a 'Product' dropdown and user profile icons. The main content area is divided into two sections: 'Knowledge entries' and 'Descriptions'.

Knowledge entries section:

- Buttons: +, folder icon, edit icon, delete icon, and 'Observe Filter'.
- Table with columns: Title, Category, Author, Last change, Views, and Likes.
- Table content:

Title	Category	Author	Last change	Views	Likes
KN Produktinformation		Tim Admin	27 May 2024, 11:54	1	0
- Right sidebar: Knowledge entries (eye icon), Filter, and a list icon.

Descriptions section:

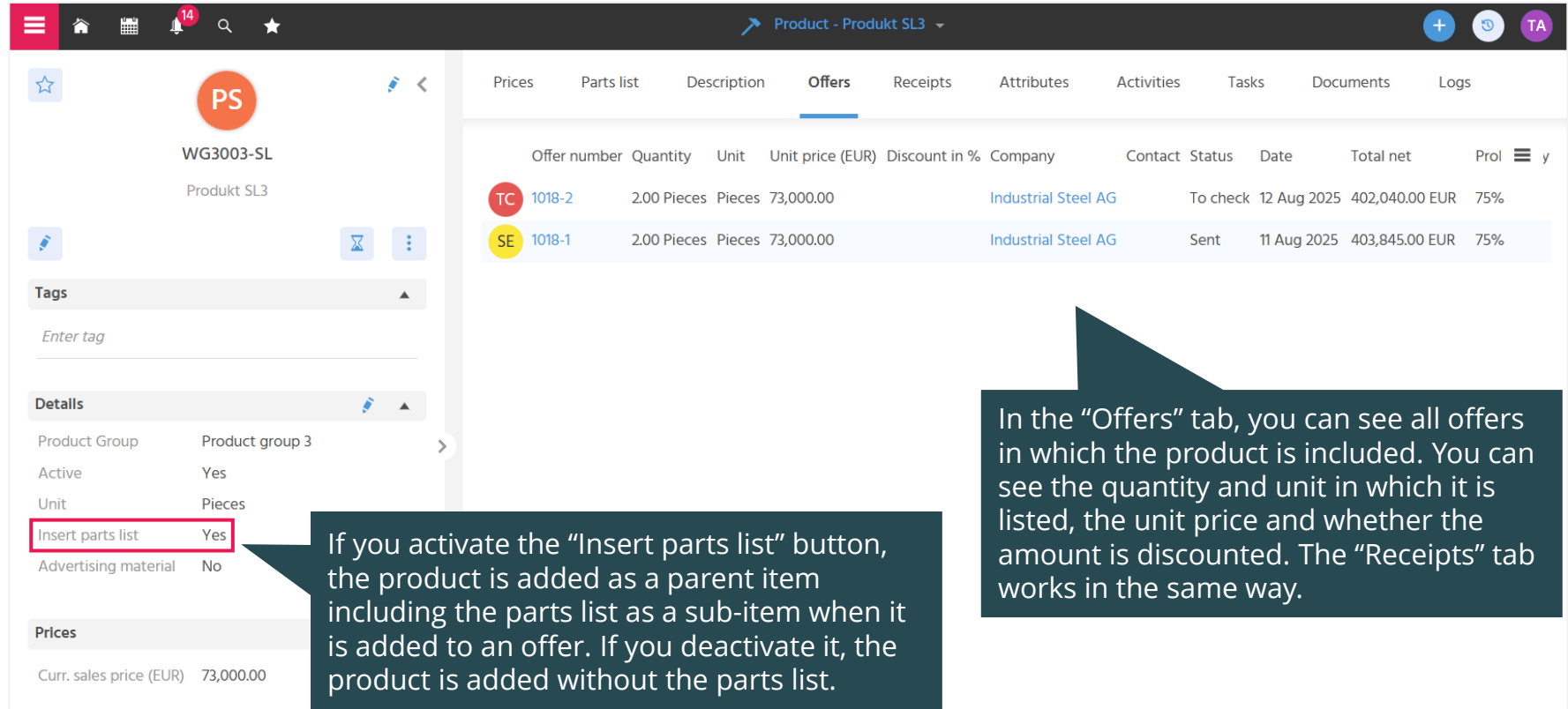
- Buttons: +, edit icon, and delete icon.
- Table with columns: Language and Description.
- Table content:

Language	Description
EN English	Article new from 02.03.2024
GE German	Artikel neu ab 02.03.2024

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

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

Product in offers/receipts



The screenshot shows the ADITO software interface. The top navigation bar includes a menu icon, home, calendar, notifications (14), search, and star icons. The main header shows 'Product - Produkt SL3' with a dropdown arrow. The sidebar on the left contains a star icon, a product icon 'PS', the product name 'WG3003-SL', and 'Produkt SL3'. Below this are tags, details, and prices sections. The 'Details' section has a red box around the 'Insert parts list' button, which is currently set to 'Yes'. The 'Prices' section shows 'Curr. sales price (EUR)' as '73,000.00'. The main area displays the 'Offers' tab with a table of offers.

	Offer number	Quantity	Unit	Unit price (EUR)	Discount in %	Company	Contact	Status	Date	Total net	Prol	y
TC	1018-2	2.00	Pieces	Pieces	73,000.00		Industrial Steel AG	To check	12 Aug 2025	402,040.00 EUR	75%	
SE	1018-1	2.00	Pieces	Pieces	73,000.00		Industrial Steel AG	Sent	11 Aug 2025	403,845.00 EUR	75%	

Details:

- Product Group: Product group 3
- Active: Yes
- Unit: Pieces
- Insert parts list: Yes**
- Advertising material: No

Prices:

- Curr. sales price (EUR): 73,000.00

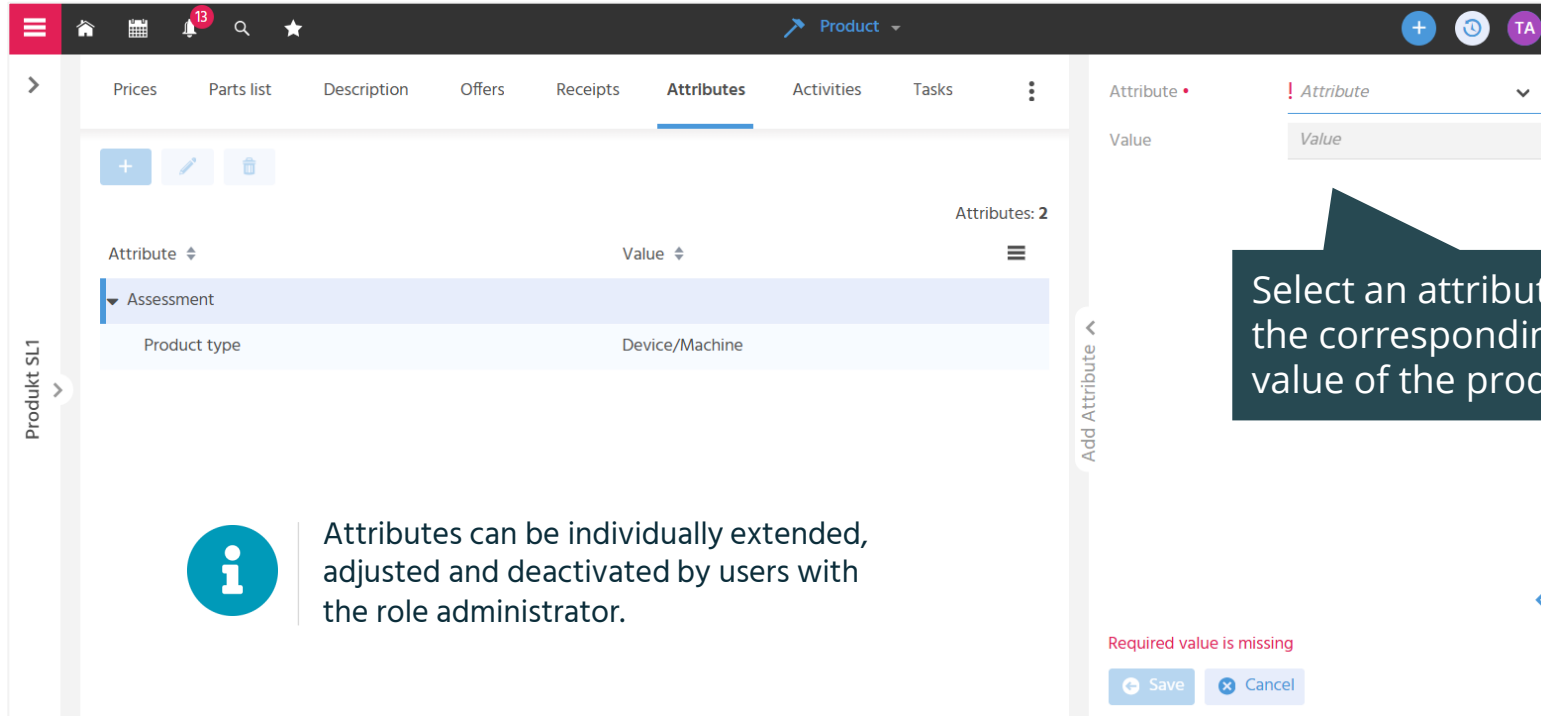
Offers:

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

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

Product features

Maintain attributes on the product



Product SL1

Attributes: 2

Attribute	Value
Assessment	Device/Machine

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

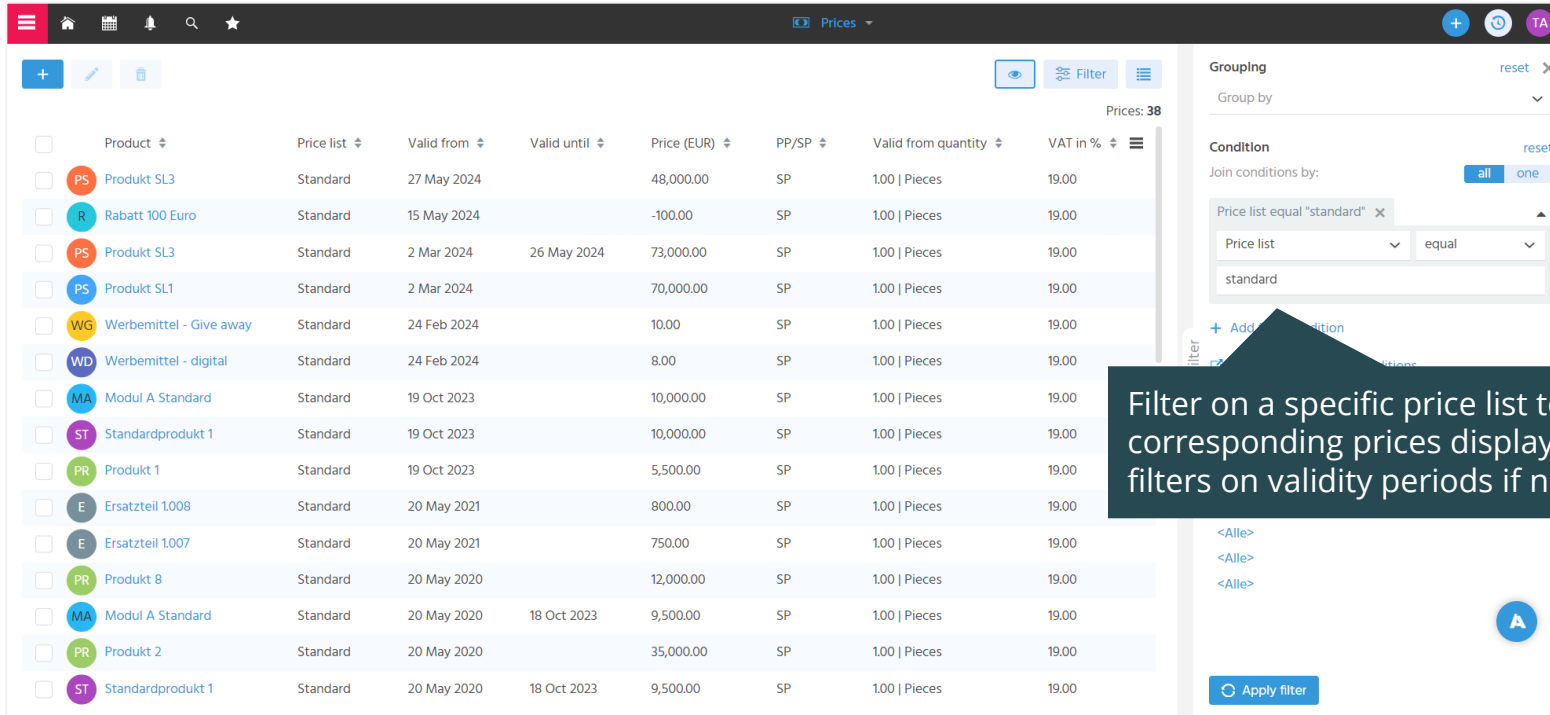
Required value is missing

Save Cancel

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

Context "Prices"

Filter by price list



The screenshot displays the ADITO 'Prices' interface. The main table lists various products and their associated price lists. The table has columns for Product, Price list, Valid from, Valid until, Price (EUR), PP/SP, Valid from quantity, and VAT in %. The table shows 18 rows of data, including products like 'Produkt SL3', 'Rabatt 100 Euro', 'Produkt SL1', 'Werbemittel - Give away', 'Werbemittel - digital', 'Modul A Standard', 'Standardprodukt 1', 'Produkt 1', 'Ersatzteil 1.008', 'Ersatzteil 1.007', 'Produkt 8', 'Modul A Standard', 'Produkt 2', and 'Standardprodukt 1'.

On the right side, there is a 'Filter' sidebar. The 'Grouping' section shows 'Group by' set to 'Price list'. The 'Condition' section shows 'Join conditions by' set to 'all'. The 'Price list' dropdown is set to 'standard'. The 'Valid from' and 'Valid until' dropdowns are set to 'standard'. The 'Apply filter' button is visible at the bottom of the sidebar.

Prices: 38

Product	Price list	Valid from	Valid until	Price (EUR)	PP/SP	Valid from quantity	VAT in %
Produkt SL3	Standard	27 May 2024		48,000.00	SP	1.00 Pieces	19.00
Rabatt 100 Euro	Standard	15 May 2024		-100.00	SP	1.00 Pieces	19.00
Produkt SL3	Standard	2 Mar 2024	26 May 2024	73,000.00	SP	1.00 Pieces	19.00
Produkt SL1	Standard	2 Mar 2024		70,000.00	SP	1.00 Pieces	19.00
Werbemittel - Give away	Standard	24 Feb 2024		10.00	SP	1.00 Pieces	19.00
Werbemittel - digital	Standard	24 Feb 2024		8.00	SP	1.00 Pieces	19.00
Modul A Standard	Standard	19 Oct 2023		10,000.00	SP	1.00 Pieces	19.00
Standardprodukt 1	Standard	19 Oct 2023		10,000.00	SP	1.00 Pieces	19.00
Produkt 1	Standard	19 Oct 2023		5,500.00	SP	1.00 Pieces	19.00
Ersatzteil 1.008	Standard	20 May 2021		800.00	SP	1.00 Pieces	19.00
Ersatzteil 1.007	Standard	20 May 2021		750.00	SP	1.00 Pieces	19.00
Produkt 8	Standard	20 May 2020		12,000.00	SP	1.00 Pieces	19.00
Modul A Standard	Standard	20 May 2020	18 Oct 2023	9,500.00	SP	1.00 Pieces	19.00
Produkt 2	Standard	20 May 2020		35,000.00	SP	1.00 Pieces	19.00
Standardprodukt 1	Standard	20 May 2020	18 Oct 2023	9,500.00	SP	1.00 Pieces	19.00

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

Product package



Definition

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

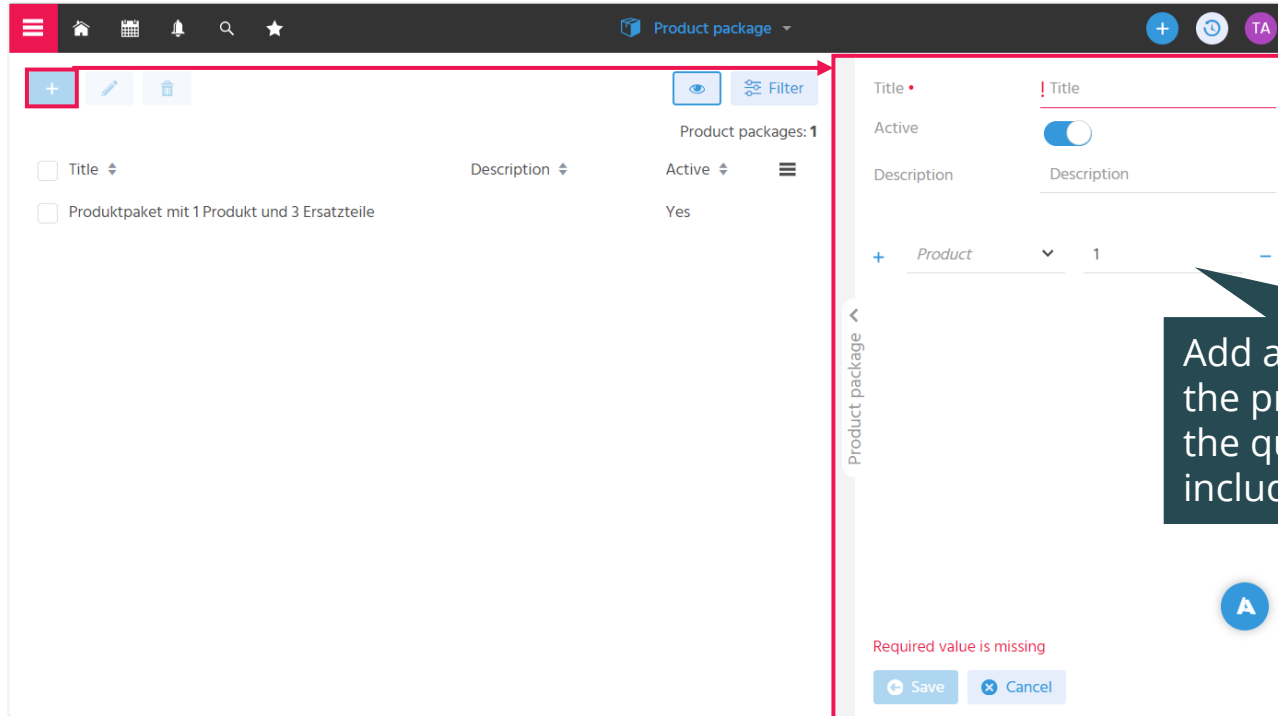
Example:

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



Product package

Create Product package



Product package

Product packages: 1

Title	Description	Active
Produktpaket mit 1 Produkt und 3 Ersatzteile		Yes

Product package

Title

Active

Description

Product

1

Required value is missing

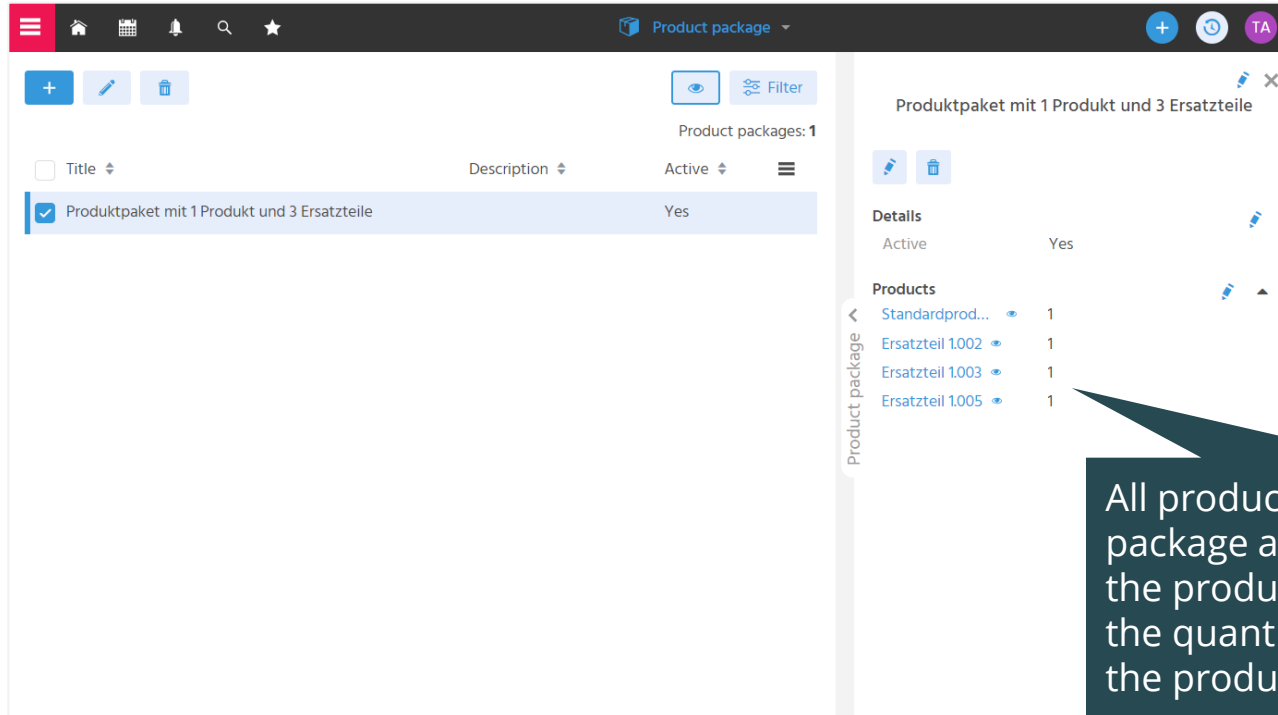
Save Cancel

Give the product package a title.

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

Product package

Preview



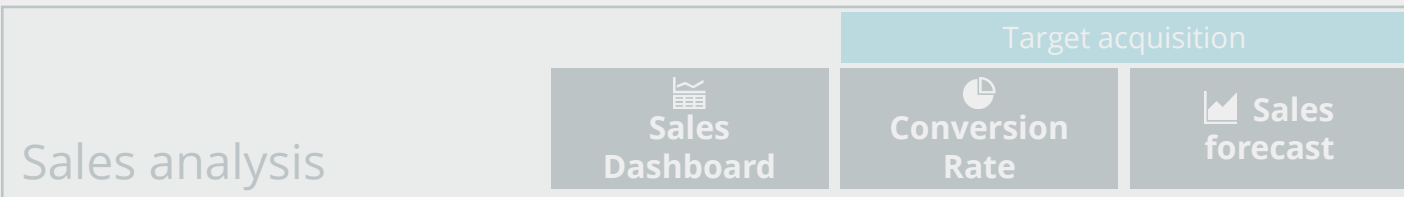
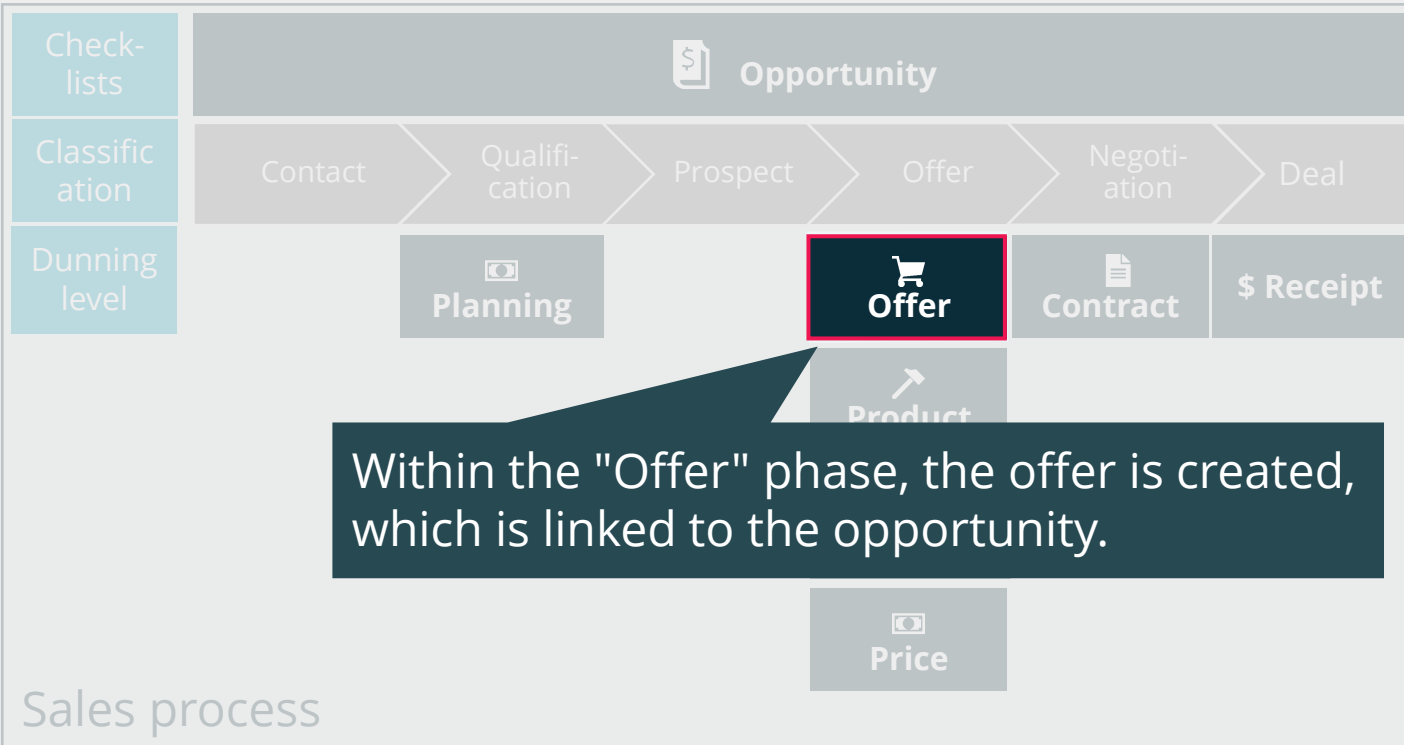
The screenshot shows the ADITO Product package preview interface. The top navigation bar includes a menu icon, home, calendar, notifications, search, and star icons. The main header displays 'Product package' with a dropdown arrow and three action buttons: '+', 'Filter', and 'TA'. Below the header, a table lists product packages. The first package, 'Produktpaket mit 1 Produkt und 3 Ersatzteile', is selected and marked as 'Active'. A right-hand panel provides a detailed preview of this package, showing its title, active status, and a list of included products with their quantities.

Title	Description	Active
☒ Produktpaket mit 1 Produkt und 3 Ersatzteile		Yes

Produktpaket mit 1 Produkt und 3 Ersatzteile	
Details	
Active	Yes
Products	
Standardprod...	1
Ersatzteil 1.002	1
Ersatzteil 1.003	1
Ersatzteil 1.005	1

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

Offer

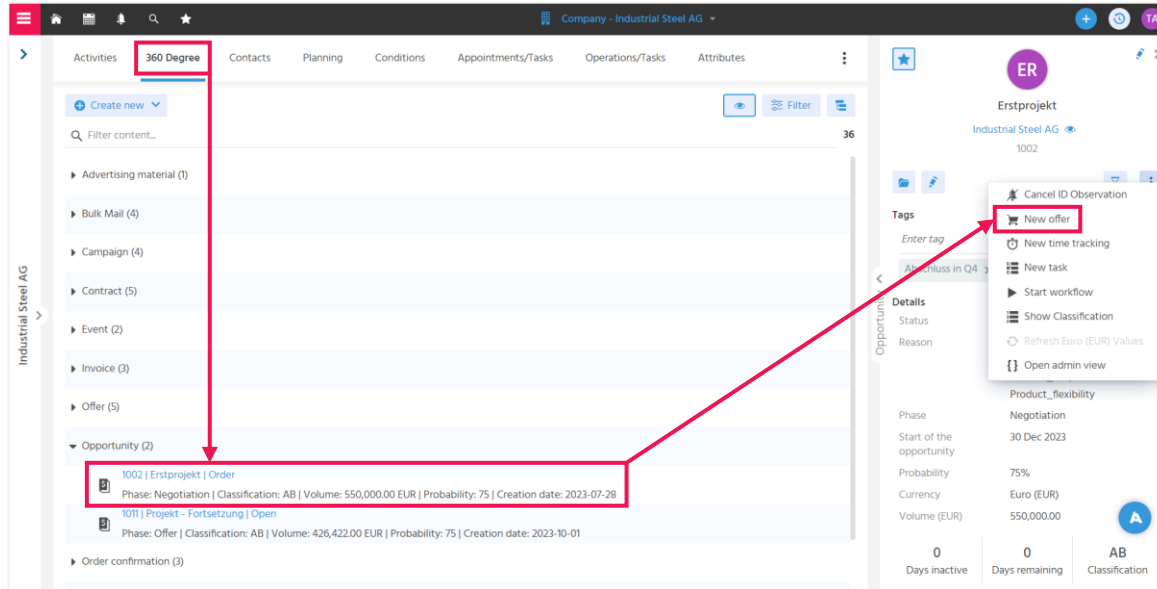


- To be created in advance by the administrator
- In use "daily" by end users

Offer in general

Offer

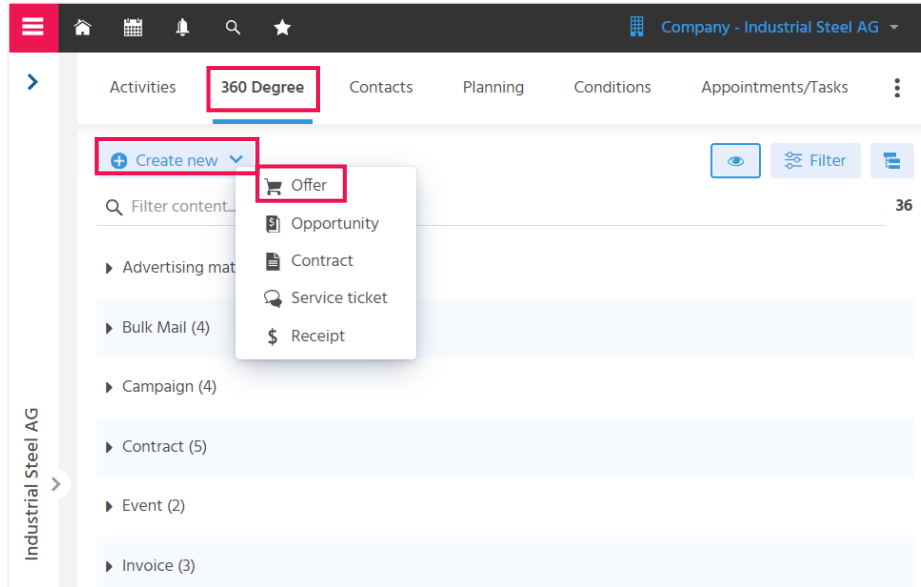
Create offer (option 1)



1. Open company
 2. Open tab "360 Degree"
 3. Open a preview of an opportunity
 4. Further actions: Create an offer
- Automatically links the offer to the company and the opportunity
 - All offers of a company are displayed in the 360 Degree view

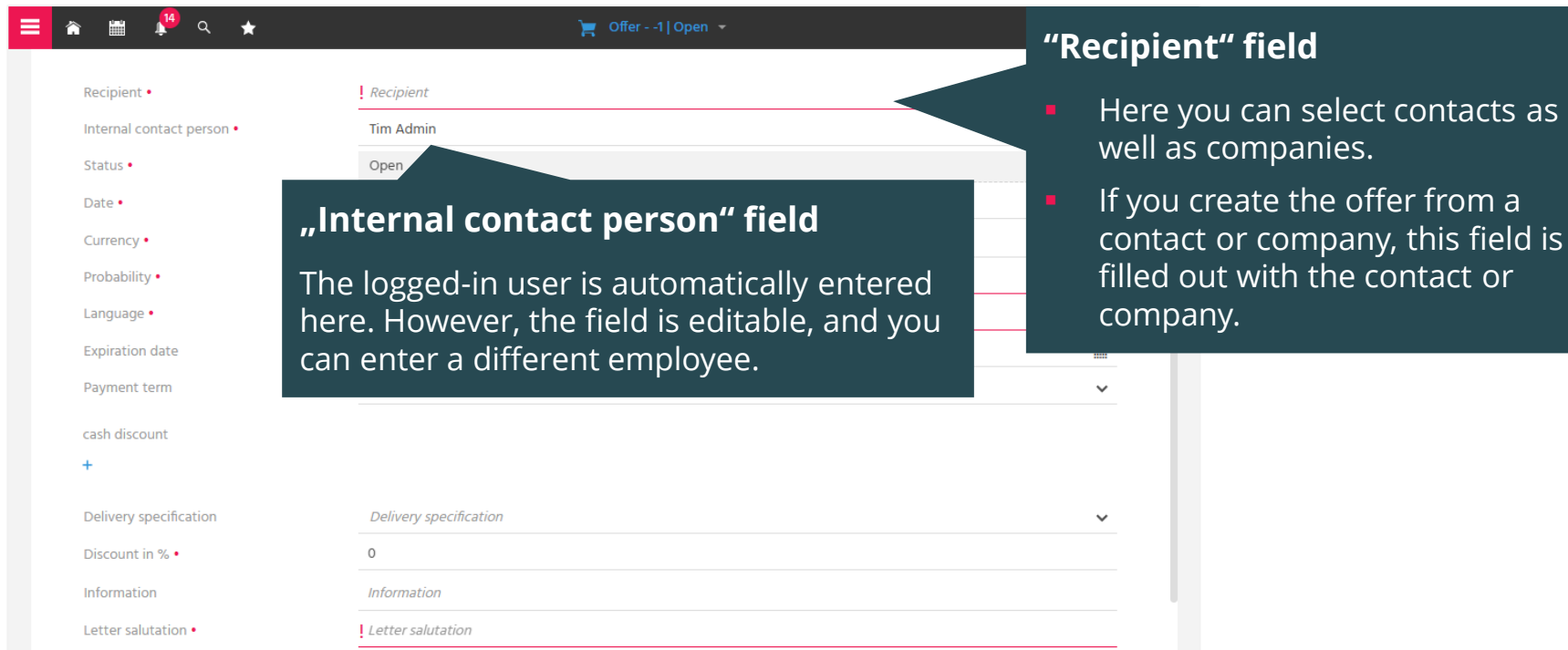
Offer

Create offer (option 2)



1. Open company
 2. Open tab "360 Degree"
 3. Button "Create new": Offer
- Automatically links the offer to the company and the opportunity **if there is only one opportunity.**

Create offer



“Recipient” field

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

„Internal contact person” field

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

Recipient • ! Recipient

Internal contact person • Tim Admin

Status • Open

Date •

Currency •

Probability •

Language •

Expiration date

Payment term

cash discount

+

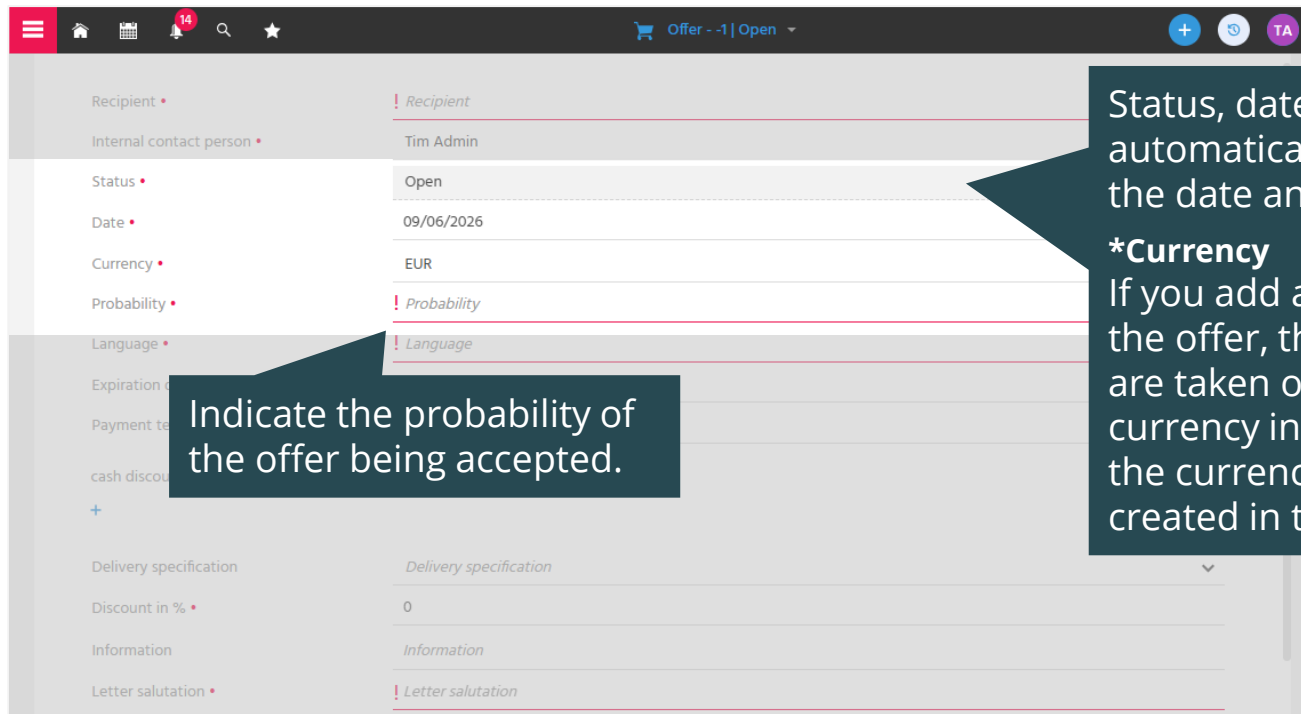
Delivery specification Delivery specification

Discount in % • 0

Information Information

Letter salutation • ! Letter salutation

Create offer



The screenshot shows the 'Create offer' form in the ADITO application. The form is divided into several sections with labels on the left and input fields on the right. The top navigation bar includes a menu icon, home, calendar, notifications (14), search, and star icons. The breadcrumb trail shows 'Offer - 1 | Open'. The form fields are as follows:

Field Label	Value
Recipient	! Recipient
Internal contact person	Tim Admin
Status	Open
Date	09/06/2026
Currency	EUR
Probability	! Probability
Language	! Language
Expiration date	
Payment terms	
Cash discount	
Delivery specification	Delivery specification
Discount in %	0
Information	Information
Letter salutation	! Letter salutation

Indicate the probability of the offer being accepted.

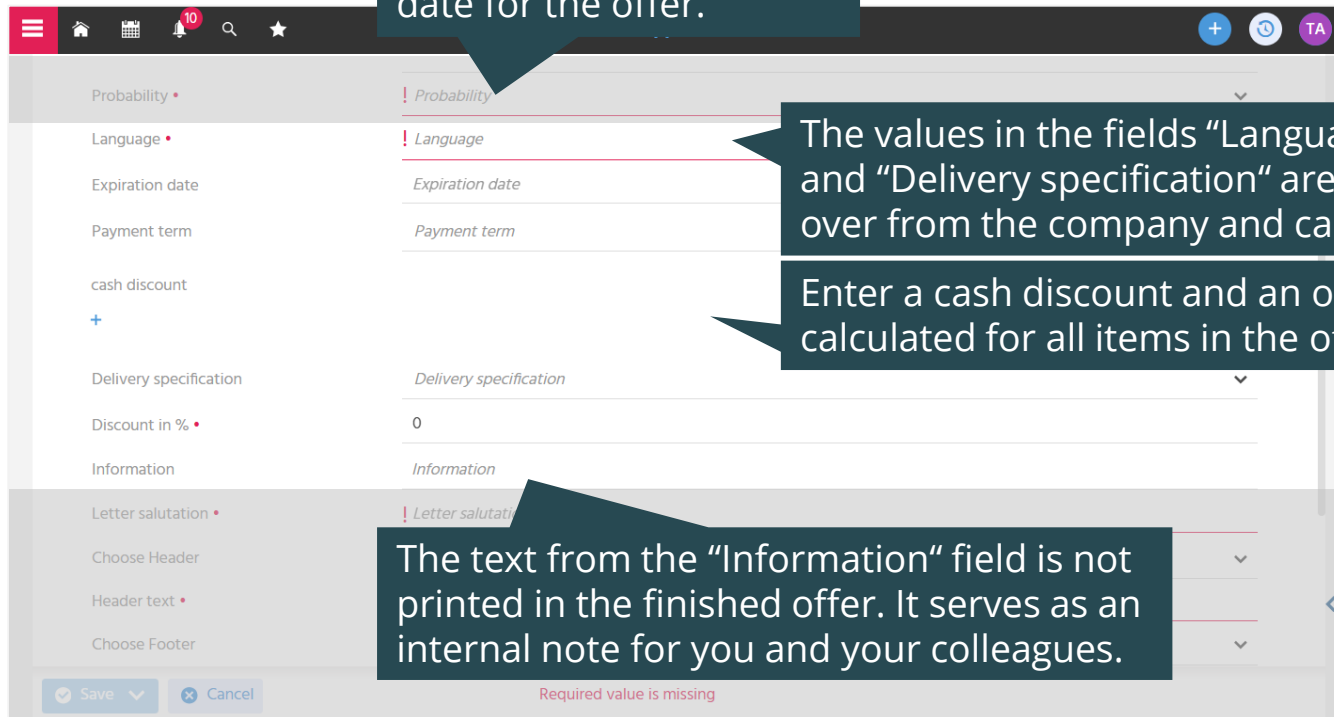
Status, date and currency* are automatically preset. You can adjust the date and currency manually.

*Currency

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

Create offer

You can set an Expiration date for the offer.



The screenshot shows the 'Create offer' form in the ADITO application. The form includes fields for Probability, Language, Expiration date, Payment term, cash discount, Delivery specification, Discount in %, Information, Letter salutation, Choose Header, Header text, and Choose Footer. Callouts provide additional information: 'You can set an Expiration date for the offer.' points to the 'Expiration date' field; 'The values in the fields "Language", "Payment term" and "Delivery specification" are automatically taken over from the company and can be adjusted manually.' points to the 'Language', 'Payment term', and 'Delivery specification' fields; 'Enter a cash discount and an offer discount that will be calculated for all items in the offer.' points to the 'cash discount' field; 'The text from the "Information" field is not printed in the finished offer. It serves as an internal note for you and your colleagues.' points to the 'Information' field. The form also has a 'Save' button and a 'Cancel' button. A red error message 'Required value is missing' is visible at the bottom.

Probability • ! Probability

Language • ! Language

Expiration date

Payment term

cash discount

+

Delivery specification

Discount in % • 0

Information

Letter salutation • ! Letter salutation

Choose Header

Header text •

Choose Footer

Save Cancel

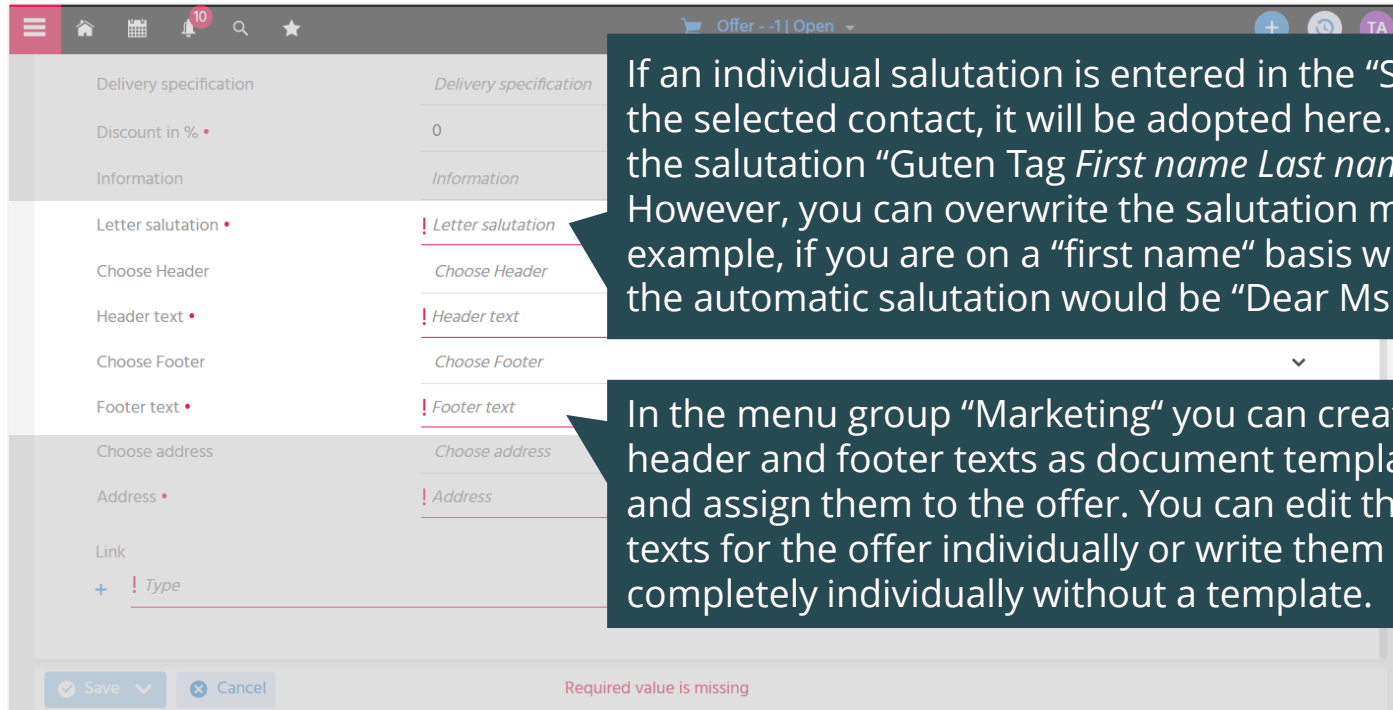
Required value is missing

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

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

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

Create offer



Delivery specification	Delivery specification
Discount in % •	0
Information	Information
Letter salutation •	! Letter salutation
Choose Header	Choose Header
Header text •	! Header text
Choose Footer	Choose Footer
Footer text •	! Footer text
Choose address	Choose address
Address •	! Address
Link	
+ ! Type	

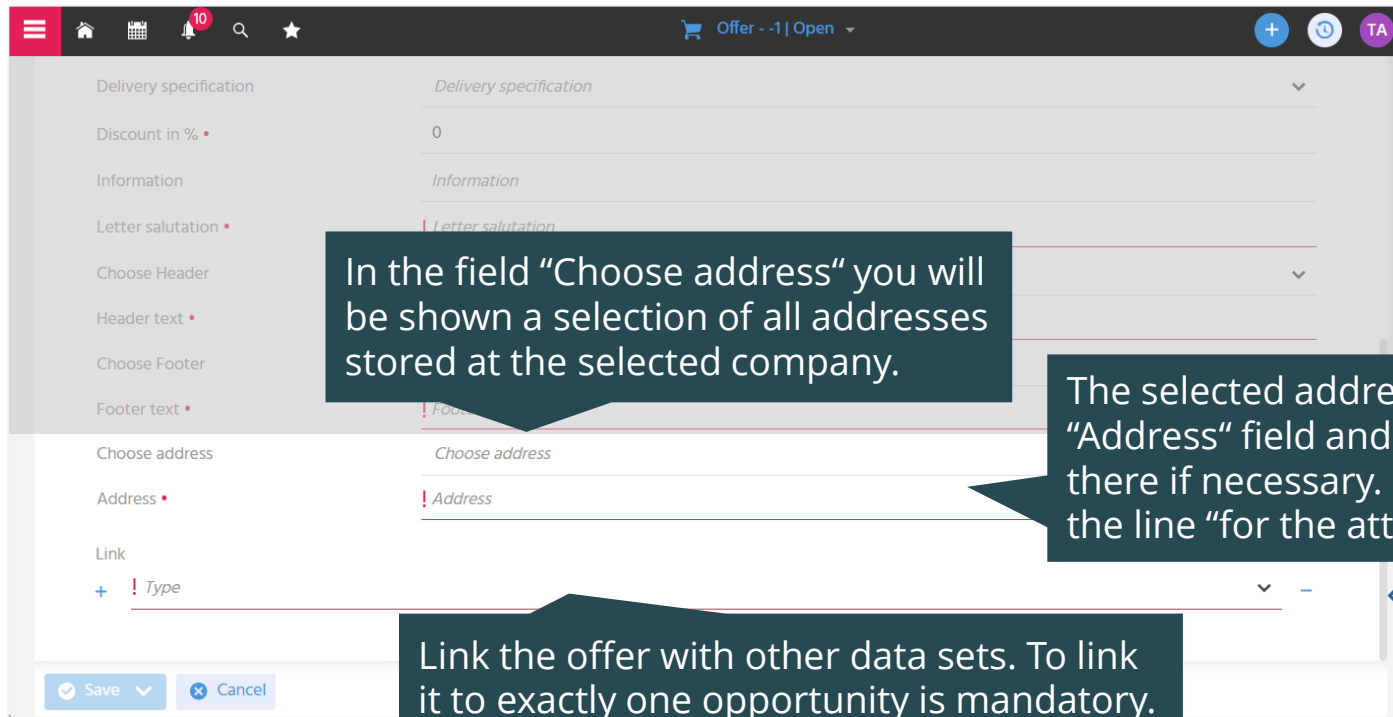
Save Cancel

Required value is missing

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

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

Create offer



Delivery specification

Discount in % • 0

Information

Letter salutation • ! Letter salutation

Choose Header

Header text •

Choose Footer

Footer text • ! Footer text

Choose address

Address • ! Address

Link

+ ! Type

Save Cancel

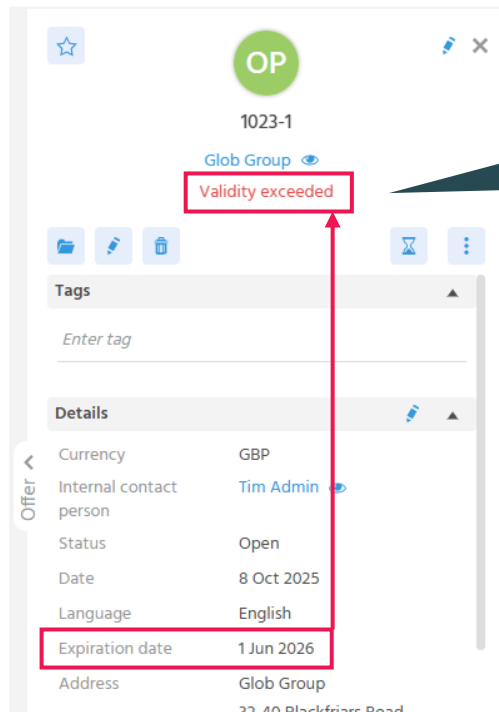
In the field "Choose address" you will be shown a selection of all addresses stored at the selected company.

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

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

Offer

Validity exceeded



Offer ID: 1023-1

Group: Glob Group

Status: **Validity exceeded**

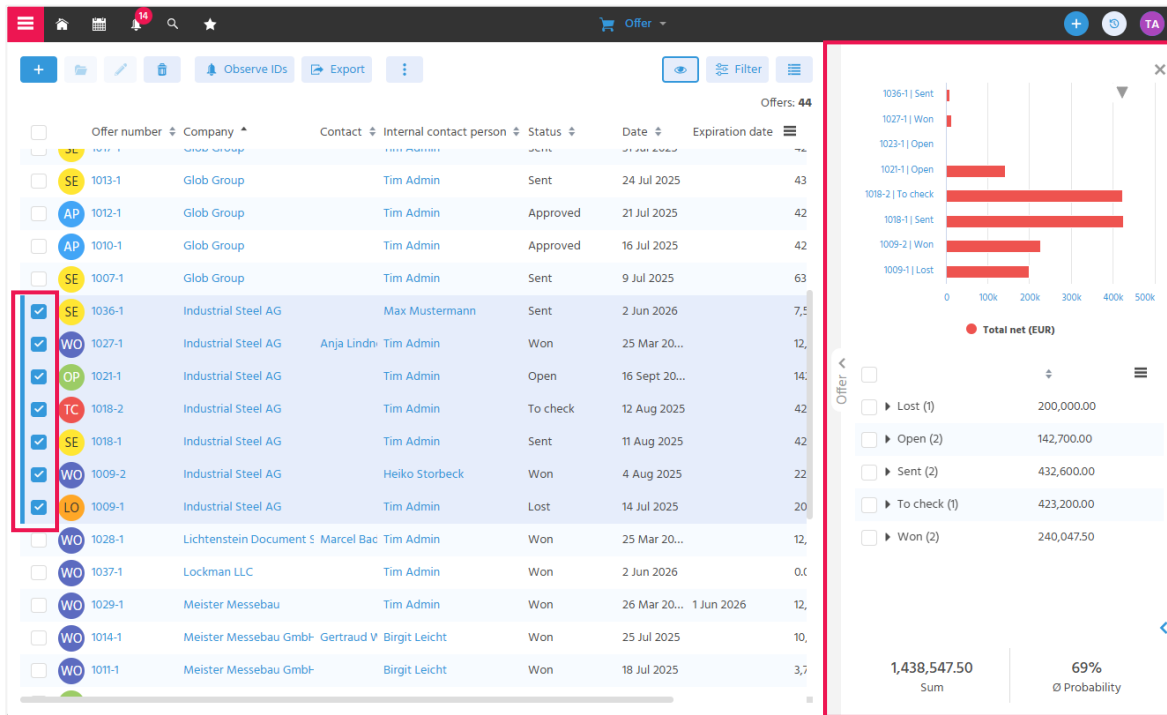
Tags:

Details:

Currency	GBP
Internal contact person	Tim Admin
Status	Open
Date	8 Oct 2025
Language	English
Expiration date	1 Jun 2026
Address	Glob Group 32-40 Blackfriars Road

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

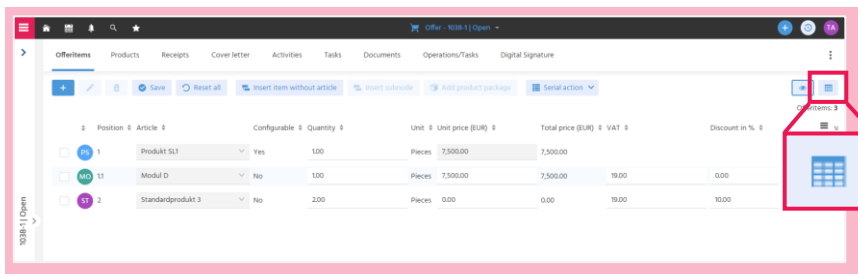
Overview in the filter view



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

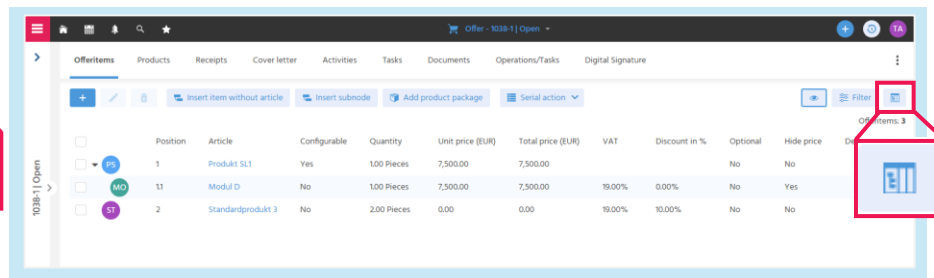
Different views

Multiedit-table



Position	Article	Configurable	Quantity	Unit	Unit price (EUR)	Total price (EUR)	VAT	Discount in %
1	Produkt SL1	Yes	100	Pieces	7,500.00	7,500.00		
11	Modul D	No	100	Pieces	7,500.00	7,500.00	19.00%	0.00%
2	Standardprodukt 3	No	200	Pieces	0.00	0.00	19.00%	10.00%

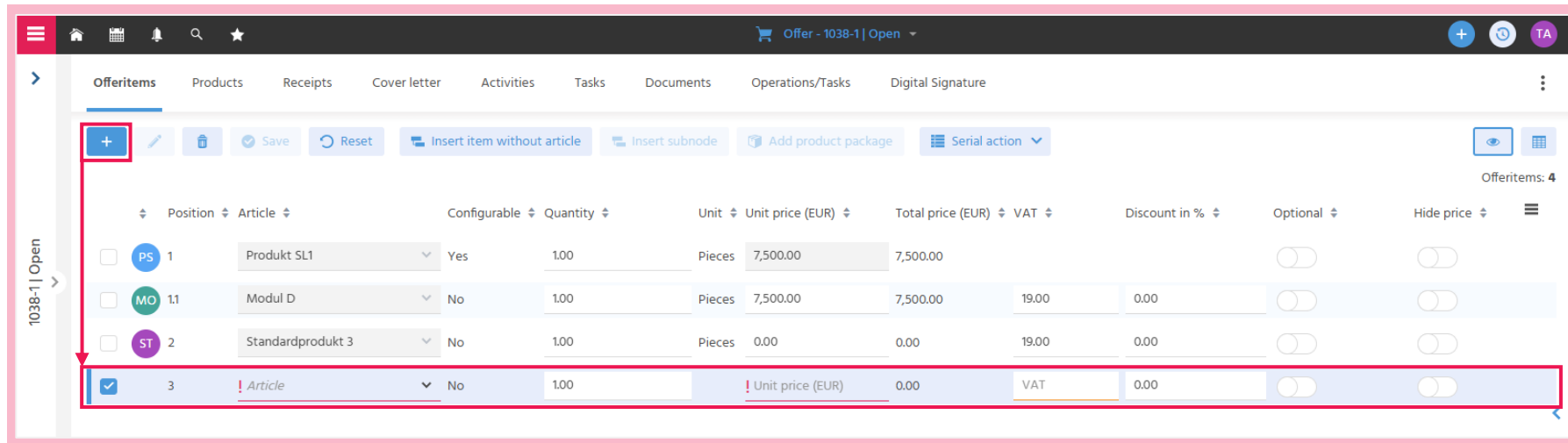
Treetable



Position	Article	Configurable	Quantity	Unit price (EUR)	Total price (EUR)	VAT	Discount in %	Optional	Hide price	Discount
1	Produkt SL1	Yes	100 Pieces	7,500.00	7,500.00			No	No	
11	Modul D	No	100 Pieces	7,500.00	7,500.00	19.00%	0.00%	No	Yes	
2	Standardprodukt 3	No	200 Pieces	0.00	0.00	19.00%	10.00%	No	No	

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

Insert items – multiedit table

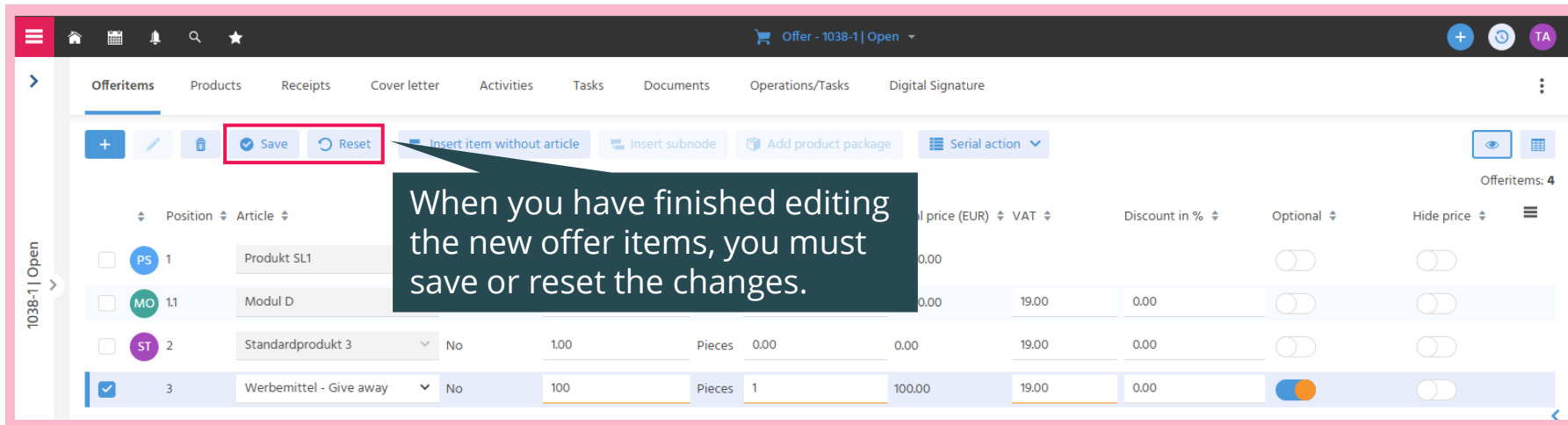


The screenshot shows the 'Offer - 1038-1 | Open' interface. The 'Offeritems' tab is active, displaying a table with 4 items. A new row is being added at the bottom, highlighted with a red box. The table columns are: Position, Article, Configurable, Quantity, Unit, Unit price (EUR), Total price (EUR), VAT, Discount in %, Optional, and Hide price. The new row has Position 3, Article '! Article', Configurable No, Quantity 1.00, Unit price (EUR) 0.00, Total price (EUR) 0.00, VAT VAT, Discount in % 0.00, and Optional and Hide price toggles.

Position	Article	Configurable	Quantity	Unit	Unit price (EUR)	Total price (EUR)	VAT	Discount in %	Optional	Hide price
1	Produkt SL1	Yes	1.00	Pieces	7,500.00	7,500.00			☐	☐
1.1	Modul D	No	1.00	Pieces	7,500.00	7,500.00	19.00	0.00	☐	☐
2	Standardprodukt 3	No	1.00	Pieces	0.00	0.00	19.00	0.00	☐	☐
3	! Article	No	1.00		! Unit price (EUR)	0.00	VAT	0.00	☐	☐

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

Insert items – multiedit table



Offer - 1038-1 | Open

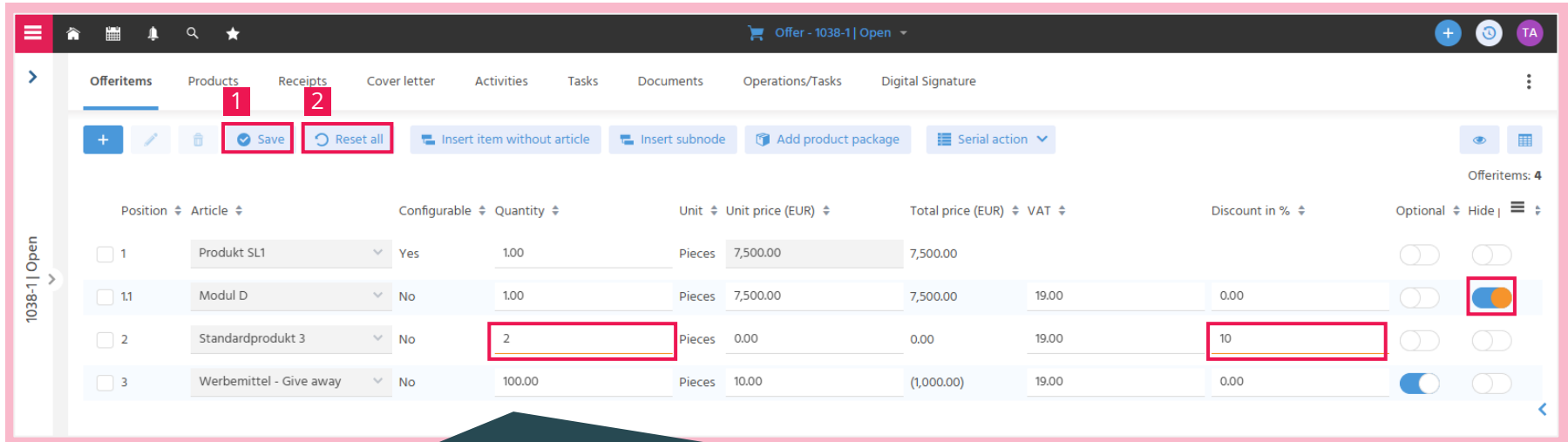
Offeritems Products Receipts Cover letter Activities Tasks Documents Operations/Tasks Digital Signature

Save Reset Insert item without article Insert subnode Add product package Serial action

When you have finished editing the new offer items, you must save or reset the changes.

Position	Article	Unit	Quantity	Unit price (EUR)	VAT	Discount in %	Optional	Hide price		
1	Produkt SL1			0.00			☐	☐		
1.1	Modul D			0.00	19.00	0.00	☐	☐		
2	Standardprodukt 3	No	1.00	Pieces	0.00	0.00	19.00	0.00	☐	☐
3	Werbemittel - Give away	No	100	Pieces	1	100.00	19.00	0.00	☒	☐

Make adjustments – multiedit table



1038-1 | Open

Offer - 1038-1 | Open

Offeritems Products Receipts Cover letter Activities Tasks Documents Operations/Tasks Digital Signature

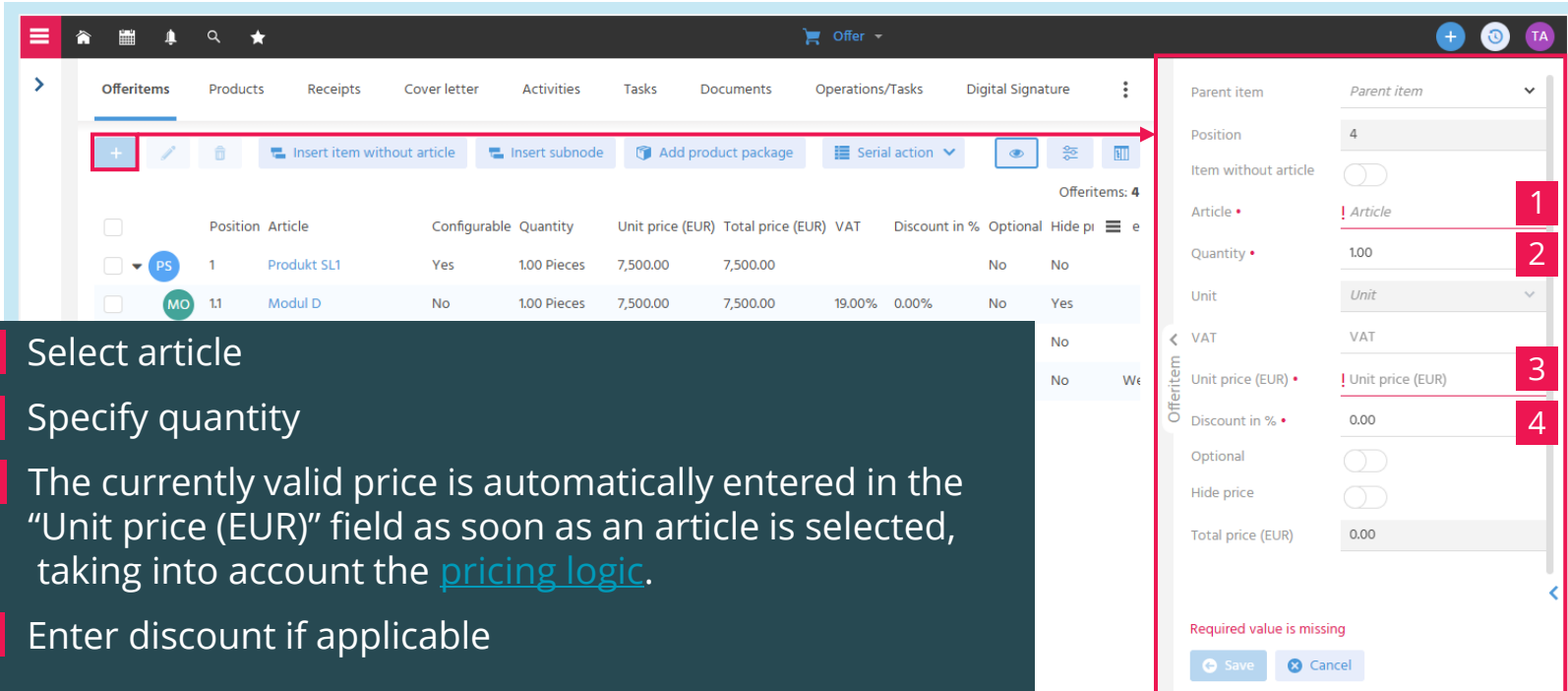
+ Save Reset all Insert item without article Insert subnode Add product package Serial action

Offeritems: 4

Position	Article	Configurable	Quantity	Unit	Unit price (EUR)	Total price (EUR)	VAT	Discount in %	Optional	Hide
1	Produkt SL1	Yes	1.00	Pieces	7,500.00	7,500.00			☐	☐
1.1	Modul D	No	1.00	Pieces	7,500.00	7,500.00	19.00	0.00	☐	☒
2	Standardprodukt 3	No	2	Pieces	0.00	0.00	19.00	10	☐	☐
3	Werbemittel - Give away	No	100.00	Pieces	10.00	(1,000.00)	19.00	0.00	☒	☐

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

Insert items – tree table



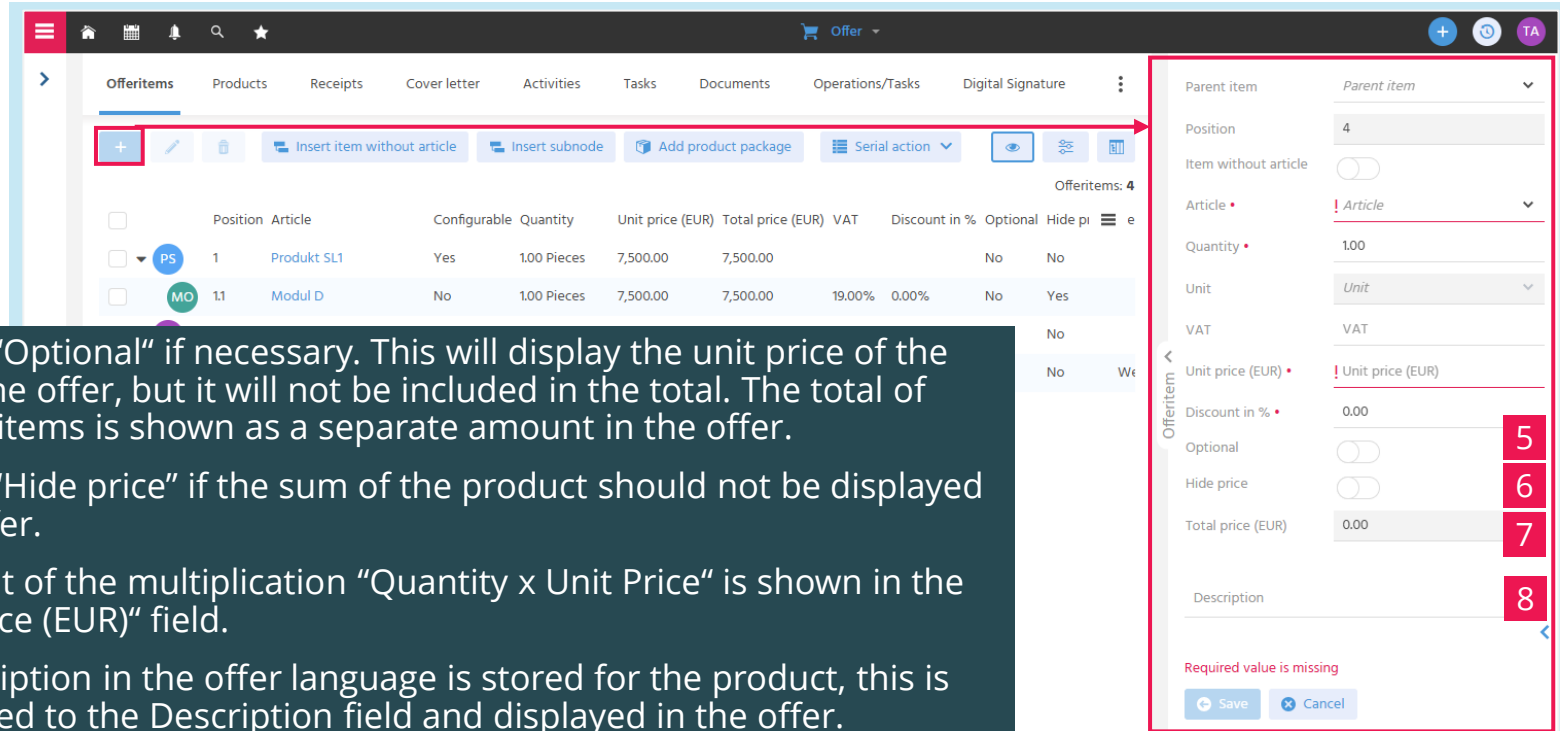
1 Select article

2 Specify quantity

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

4 Enter discount if applicable

Insert items – tree table



The screenshot displays the ADITO Offer management interface. The main table, 'Offeritems', lists items with columns for Position, Article, Configurable, Quantity, Unit price (EUR), Total price (EUR), VAT, Discount in %, Optional, and Hide price. A red box highlights the '+' button in the top toolbar. A detailed configuration panel for item 1.1 is shown on the right, with red boxes and numbers 5 through 8 indicating specific fields: 5 for 'Optional', 6 for 'Hide price', 7 for 'Total price (EUR)', and 8 for 'Description'. The panel also shows 'Unit price (EUR)' and 'Discount in %' fields.

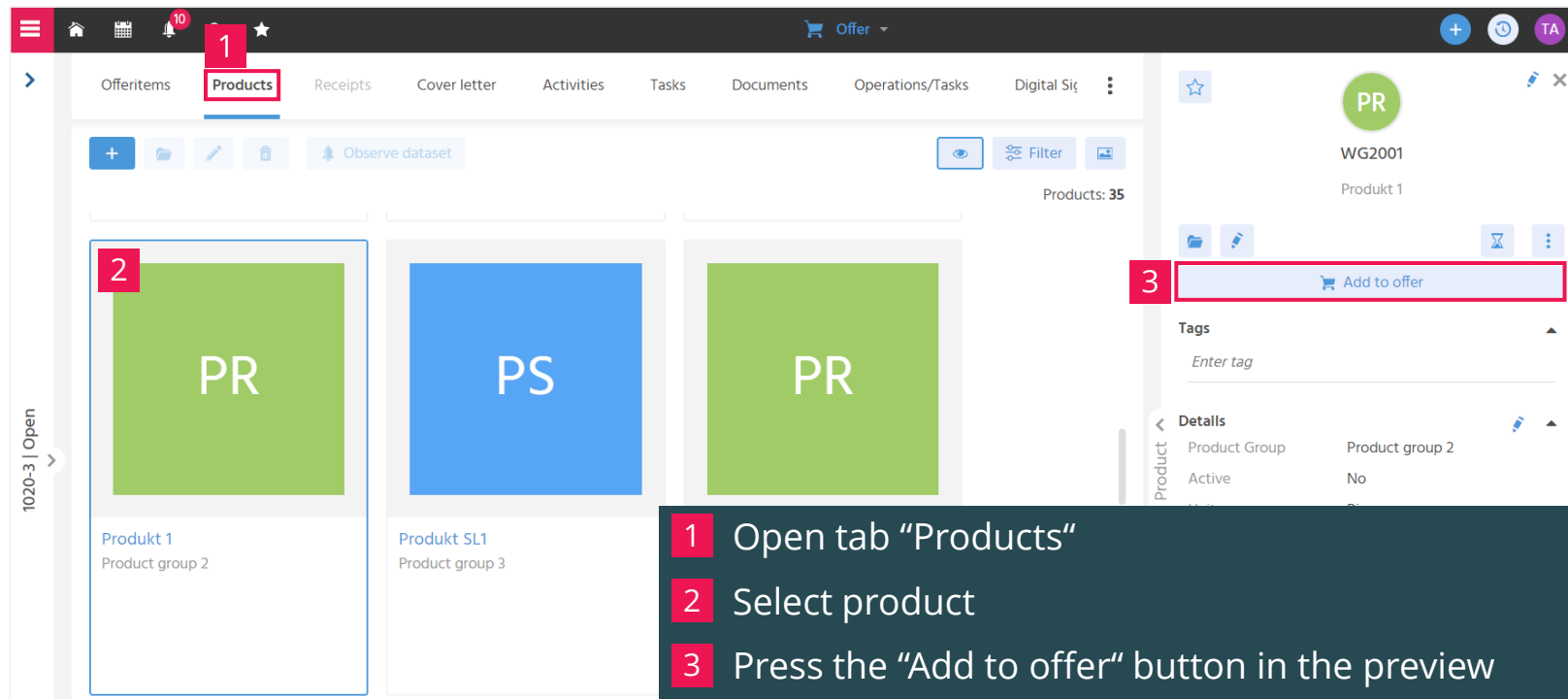
5 Activate "Optional" if necessary. This will display the unit price of the item in the offer, but it will not be included in the total. The total of optional items is shown as a separate amount in the offer.

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

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

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

Insert item - Alternative way in the "Products" tab



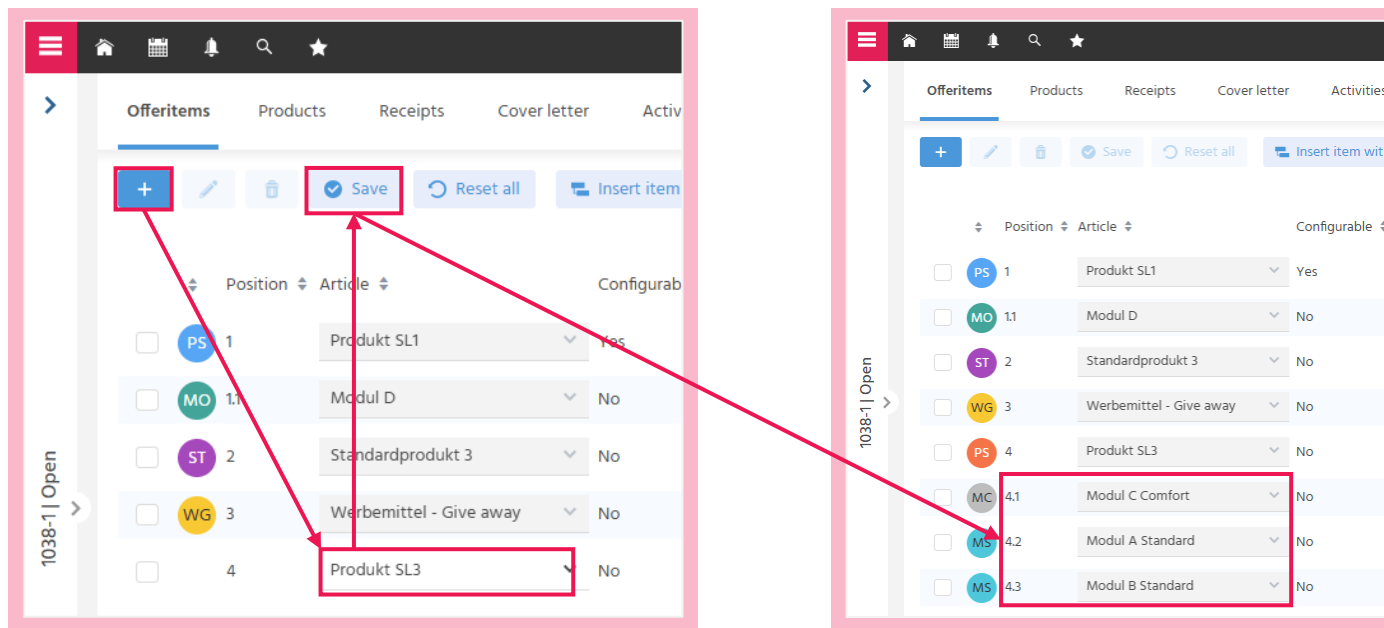
1020-3 | Open

1 Open tab "Products"

2 Select product

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

Insert parts list items – multiedit table



The interface shows the 'Offeritems' table with columns: Position, Article, and Configurab. The table contains the following items:

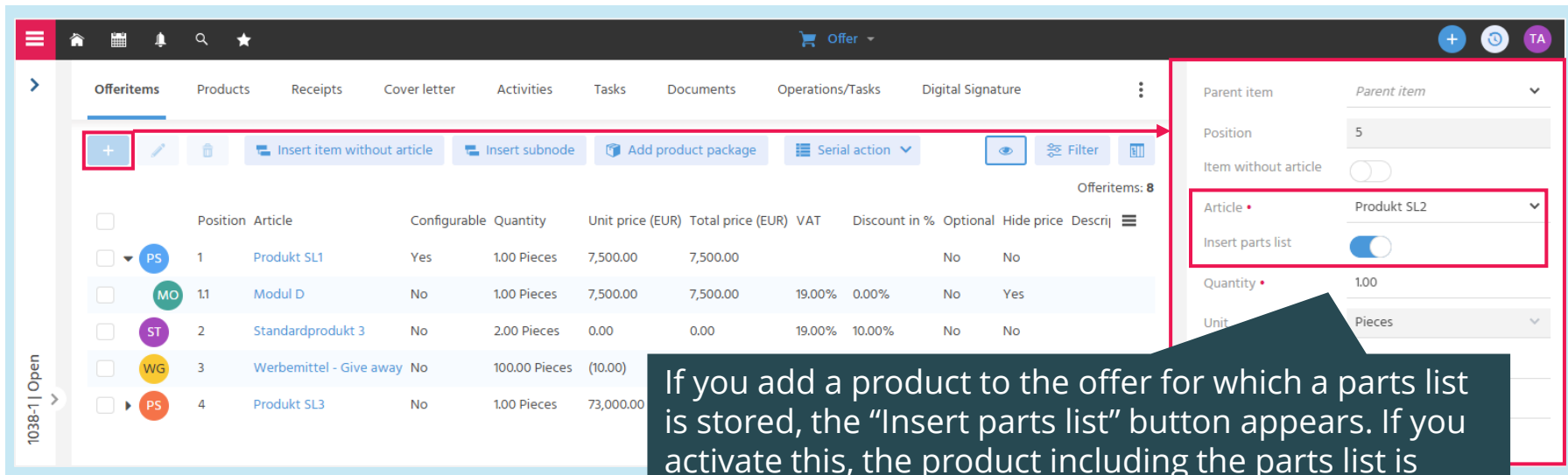
Position	Article	Configurab
PS 1	Produkt SL1	Yes
MO 1.1	Modul D	No
ST 2	Standardprodukt 3	No
WG 3	Werbemittel - Give away	No
4	Produkt SL3	No

The right screenshot shows the 'Offeritems' table with a new row added, also highlighted with a red box:

Position	Article	Configurab
PS 1	Produkt SL1	Yes
MO 1.1	Modul D	No
ST 2	Standardprodukt 3	No
WG 3	Werbemittel - Give away	No
PS 4	Produkt SL3	No
MC 4.1	Modul C Comfort	No
MS 4.2	Modul A Standard	No
MS 4.3	Modul B Standard	No

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

Insert parts list items – tree table



The screenshot shows the ADITO 'Offer' interface. The main table lists offer items with columns: Position, Article, Configurable, Quantity, Unit price (EUR), Total price (EUR), VAT, Discount in %, Optional, Hide price, and Description. The table contains five rows of data. A red box highlights the '+' button in the top left of the table. A red arrow points from this button to the side panel. The side panel shows the details for 'Produkt SL2' and includes a toggle switch for 'Insert parts list', which is currently turned on. A dark blue callout box explains the function of this toggle.

Position	Article	Configurable	Quantity	Unit price (EUR)	Total price (EUR)	VAT	Discount in %	Optional	Hide price	Description
1	Produkt SL1	Yes	1.00 Pieces	7,500.00	7,500.00			No	No	
1.1	Modul D	No	1.00 Pieces	7,500.00	7,500.00	19.00%	0.00%	No	Yes	
2	Standardprodukt 3	No	2.00 Pieces	0.00	0.00	19.00%	10.00%	No	No	
3	Werbemittel - Give away	No	100.00 Pieces	(10.00)						
4	Produkt SL3	No	1.00 Pieces	73,000.00						

Offeritems: 8

Parent item: *Parent item*

Position: 5

Item without article: ☐

Article: Produkt SL2

Insert parts list: ☒

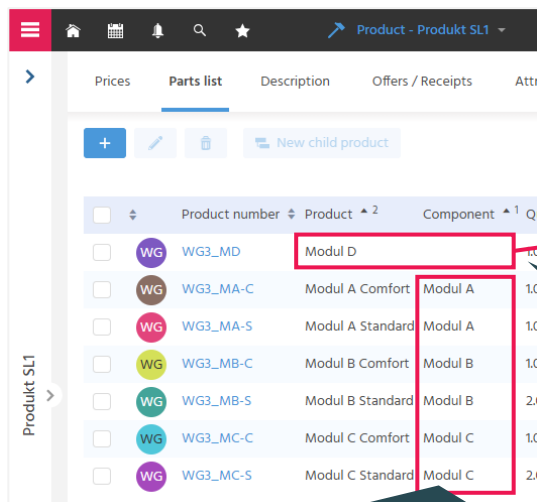
Quantity: 1.00

Unit: Pieces

1038-1 | Open

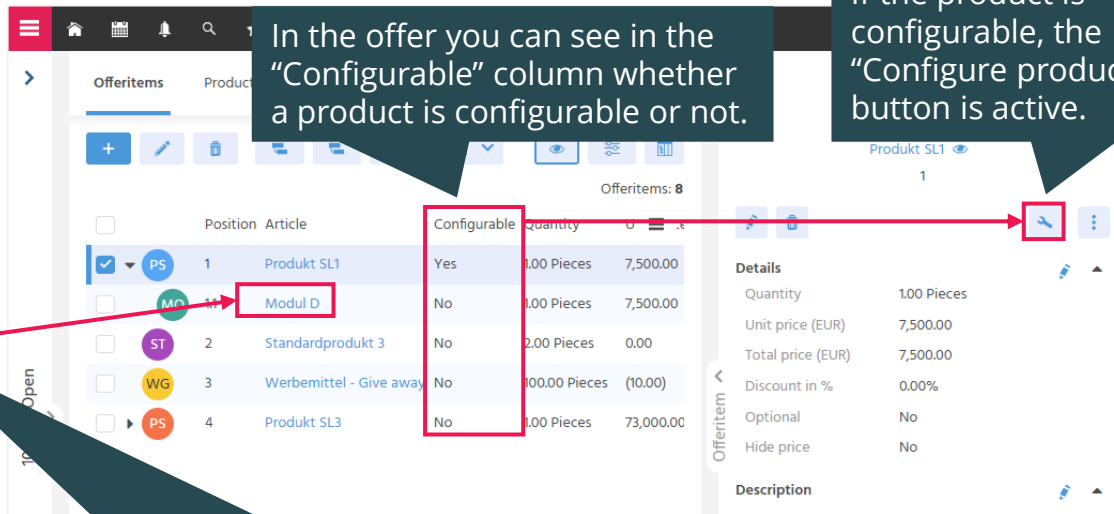
If you add a product to the offer for which a parts list is stored, the "Insert parts list" button appears. If you activate this, the product including the parts list is added, except for the parts list items that are assigned to a component. If you deactivate the button, the product is displayed without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

Product configuration



Product number	Product	Component	Quantity
WG3_MD	Modul D	Modul D	1.0
WG3_MA-C	Modul A Comfort	Modul A	1.0
WG3_MA-S	Modul A Standard	Modul A	1.0
WG3_MB-C	Modul B Comfort	Modul B	1.0
WG3_MB-S	Modul B Standard	Modul B	2.0
WG3_MC-C	Modul C Comfort	Modul C	1.0
WG3_MC-S	Modul C Standard	Modul C	2.0

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



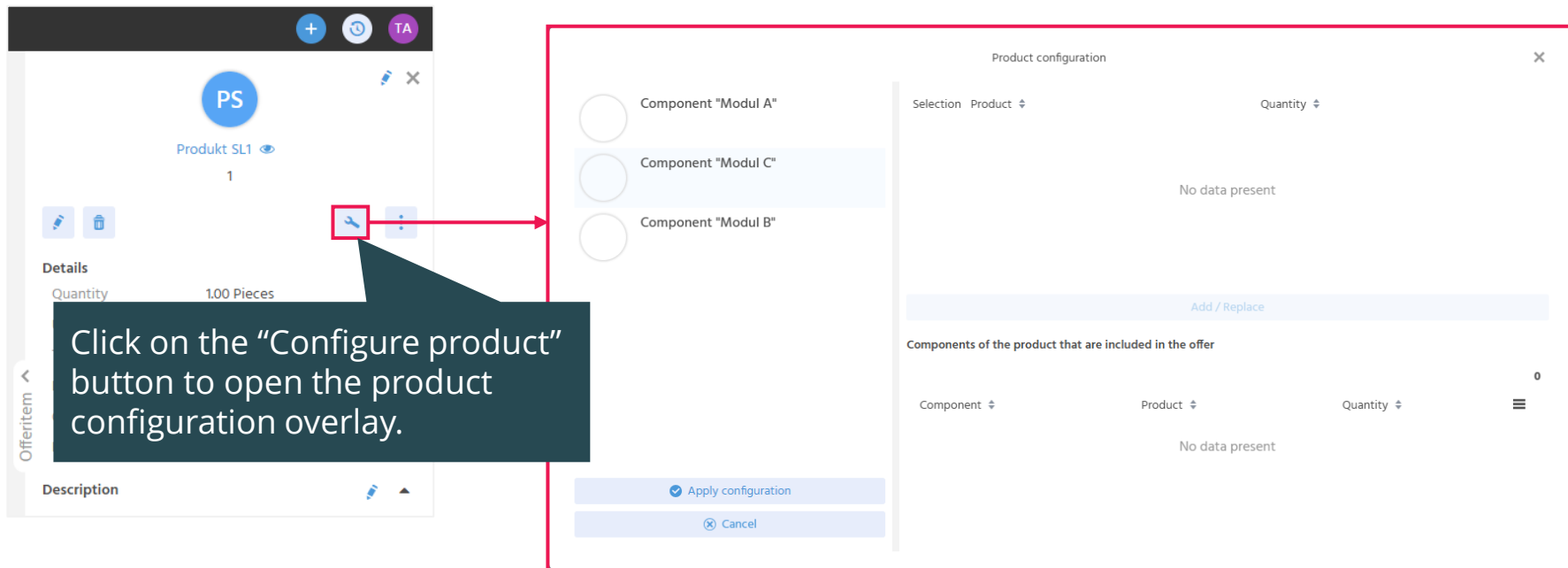
Position	Article	Configurable	Quantity	Price
1	Produkt SL1	Yes	1.00 Pieces	7,500.00
2	Standardprodukt 3	No	1.00 Pieces	7,500.00
3	Werbemittel - Give away	No	100.00 Pieces	(10.00)
4	Produkt SL3	No	1.00 Pieces	73,000.00

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

If the product is configurable, the "Configure product" button is active.

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

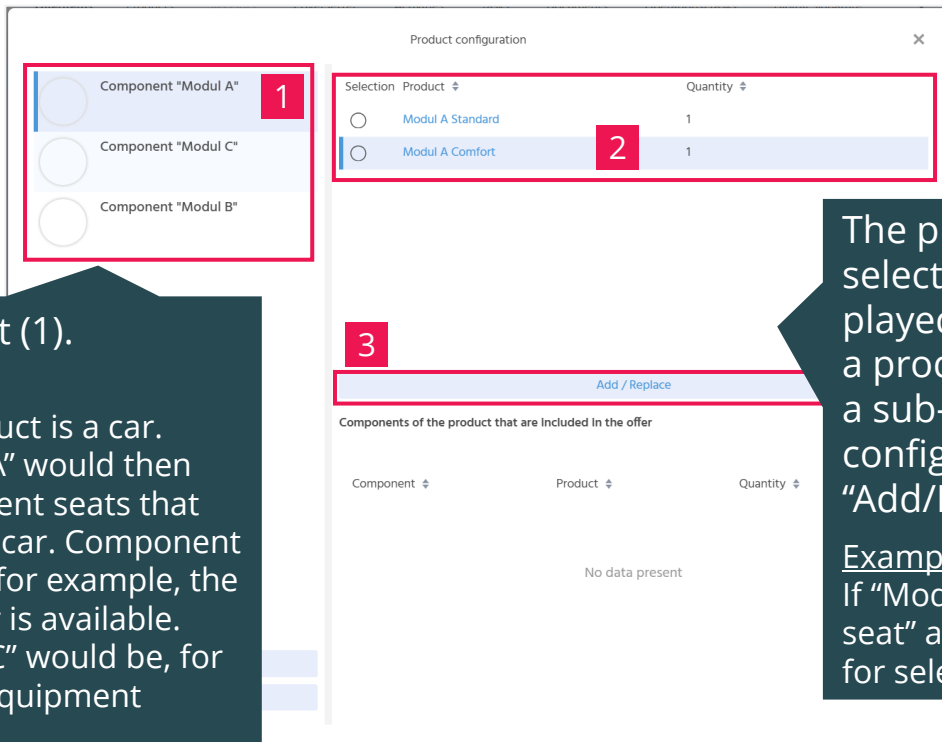
Product configuration



The image shows a software interface for managing offers. On the left, a sidebar displays an offer item 'PS' (Produkt SL1) with a quantity of 1.00 Pieces. A red box highlights a 'Configure product' button (a wrench icon) in the sidebar. A red arrow points from this button to a large, detailed view of the 'Product configuration' overlay on the right. The overlay is titled 'Product configuration' and contains a list of components: 'Component "Modul A"', 'Component "Modul C"', and 'Component "Modul B"'. Below this list is a table for 'Components of the product that are included in the offer'. The table has columns for 'Component', 'Product', and 'Quantity'. The table is currently empty, showing 'No data present'. At the bottom of the overlay are two buttons: 'Apply configuration' and 'Cancel'.

Click on the "Configure product" button to open the product configuration overlay.

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



The screenshot shows a 'Product configuration' overlay with three main sections:

- Component Selection (1):** A list of components with radio buttons: 'Component "Modul A"', 'Component "Modul C"', and 'Component "Modul B"'. 'Modul A' is selected.
- Product Selection (2):** A table showing products for the selected component.

Selection	Product	Quantity
☐	Modul A Standard	1
☒	Modul A Comfort	1
- Add/Replace Action (3):** A button labeled 'Add / Replace'.
- Components of the product that are Included In the offer:** A table with columns 'Component', 'Product', and 'Quantity'. It currently shows 'No data present'.

Select a component (1).

For example

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

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

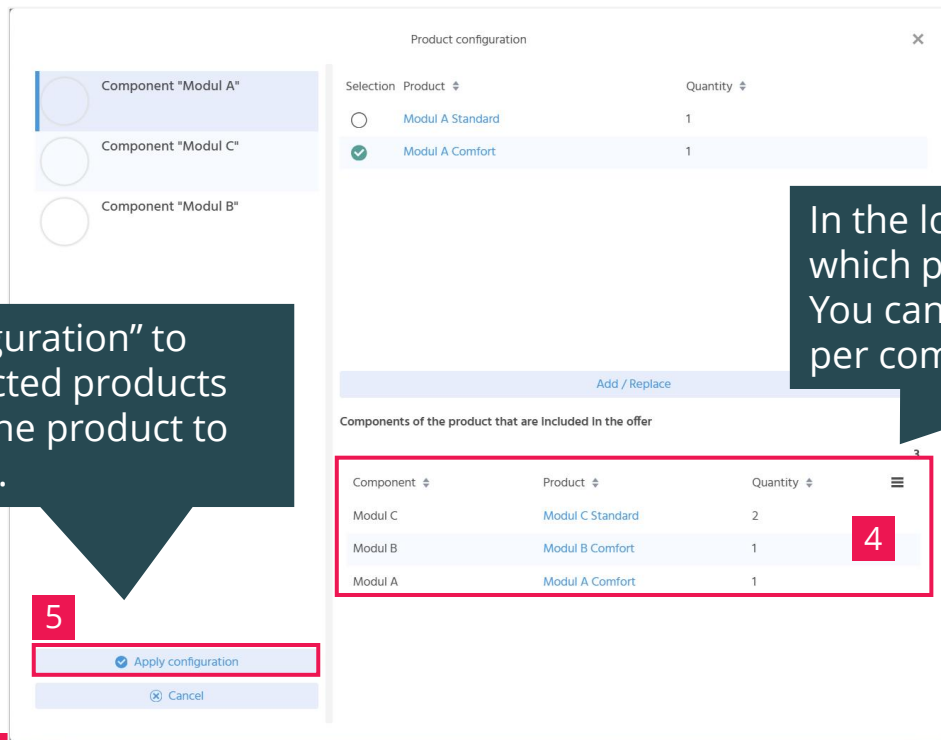
Example

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

Configure product

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

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



The dialog box is titled "Product configuration" and has a close button (X) in the top right corner. On the left side, there are three radio buttons for selecting components: "Component 'Modul A'" (selected), "Component 'Modul C'", and "Component 'Modul B'". On the right side, there is a table with columns "Selection", "Product", and "Quantity". The table shows two rows: "Modul A Standard" with a selection of 0 and quantity of 1, and "Modul A Comfort" with a selection of 1 (indicated by a checkmark) and quantity of 1. Below the table is a button labeled "Add / Replace". At the bottom of the dialog, there is a section titled "Components of the product that are included in the offer" containing a table with columns "Component", "Product", and "Quantity". This table lists three items: "Modul C" (Modul C Standard, quantity 2), "Modul B" (Modul B Comfort, quantity 1), and "Modul A" (Modul A Comfort, quantity 1). A red box highlights the "Modul B" row in this table, with a red square containing the number 4 next to it. At the bottom of the dialog, there are two buttons: "Apply configuration" (with a checkmark icon) and "Cancel" (with an X icon). A red box highlights the "Apply configuration" button, with a red square containing the number 5 next to it.

Selection	Product	Quantity
☐	Modul A Standard	1
☒	Modul A Comfort	1

Add / Replace

Components of the product that are included in the offer

Component	Product	Quantity
Modul C	Modul C Standard	2
Modul B	Modul B Comfort	1
Modul A	Modul A Comfort	1

5 Apply configuration

Cancel

Configure product

Offer - 1038-1 | Open

+

↺

TA

Offeritems

Products

Receipts

Cover letter

Activities

Tasks

Documents

Operations/Tasks

Digital Signature

+

Insert item without article

Insert subnode

Add product package

Serial action

Filter

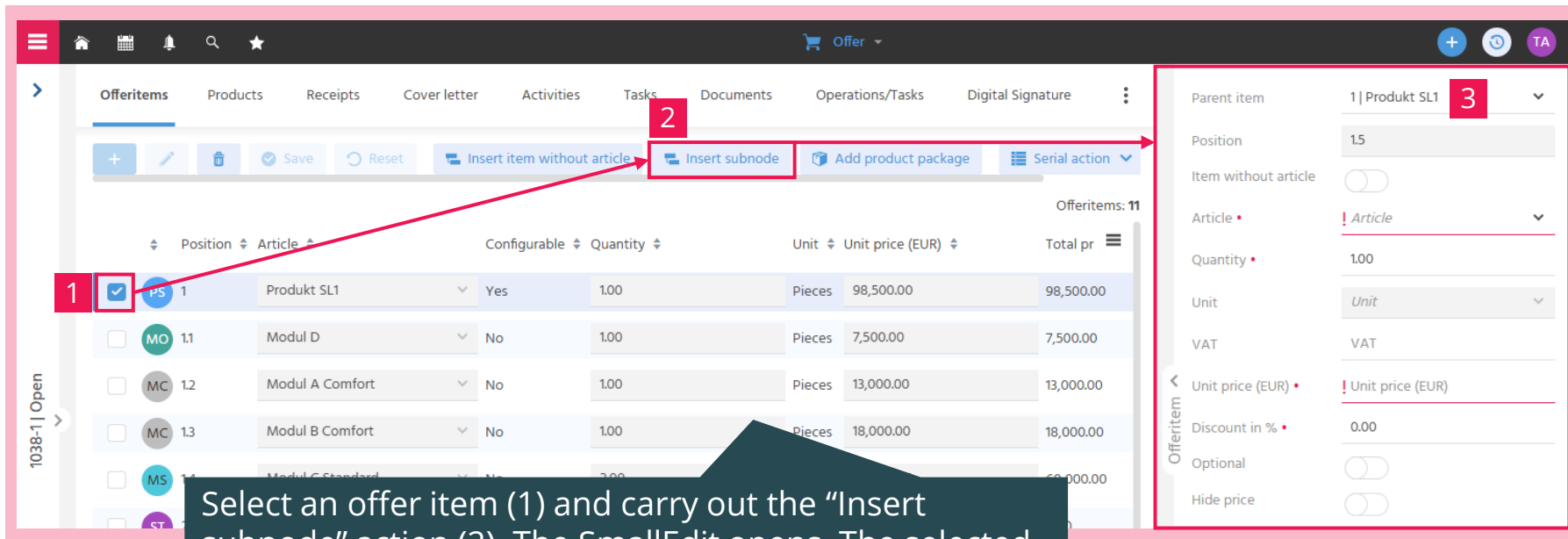
Offeritems: 11

	Position	Article	Configurable	Quantity	Unit price (EUR)	Total price (EUR)	VAT	Discount in %	Optional	Hide price	Description
☐	PS	1	Produkt SL1	Yes	1.00 Pieces	98,500.00	98,500.00		No	No	
☐	MO	1.1	Modul D	No	1.00				No	Yes	
☐	MC	1.2	Modul A Comfort	No	1.00				No	No	
☐	MC	1.3	Modul B Comfort	No	1.00				No	No	
☐	MS	1.4	Modul C Standard	No	2.00				No	No	
☐	ST	2	Standardprodukt 3	No	2.00 Pieces	0.00	0.00	19.00%	10.00%	No	No

1038-1 | Open

The products are transferred to the offer as defined in the configuration.

Insert product as subnode – **multedit** table



The screenshot illustrates the process of inserting a product as a subnode into an offer. The interface is divided into a main table and a right-hand 'SmallEdit' panel.

Main Table:

Position	Article	Configurable	Quantity	Unit	Unit price (EUR)	Total pr
1	PS Produkt SL1	Yes	1.00	Pieces	98,500.00	98,500.00
1.1	MO Modul D	No	1.00	Pieces	7,500.00	7,500.00
1.2	MC Modul A Comfort	No	1.00	Pieces	13,000.00	13,000.00
1.3	MC Modul B Comfort	No	1.00	Pieces	18,000.00	18,000.00

SmallEdit Panel (Right):

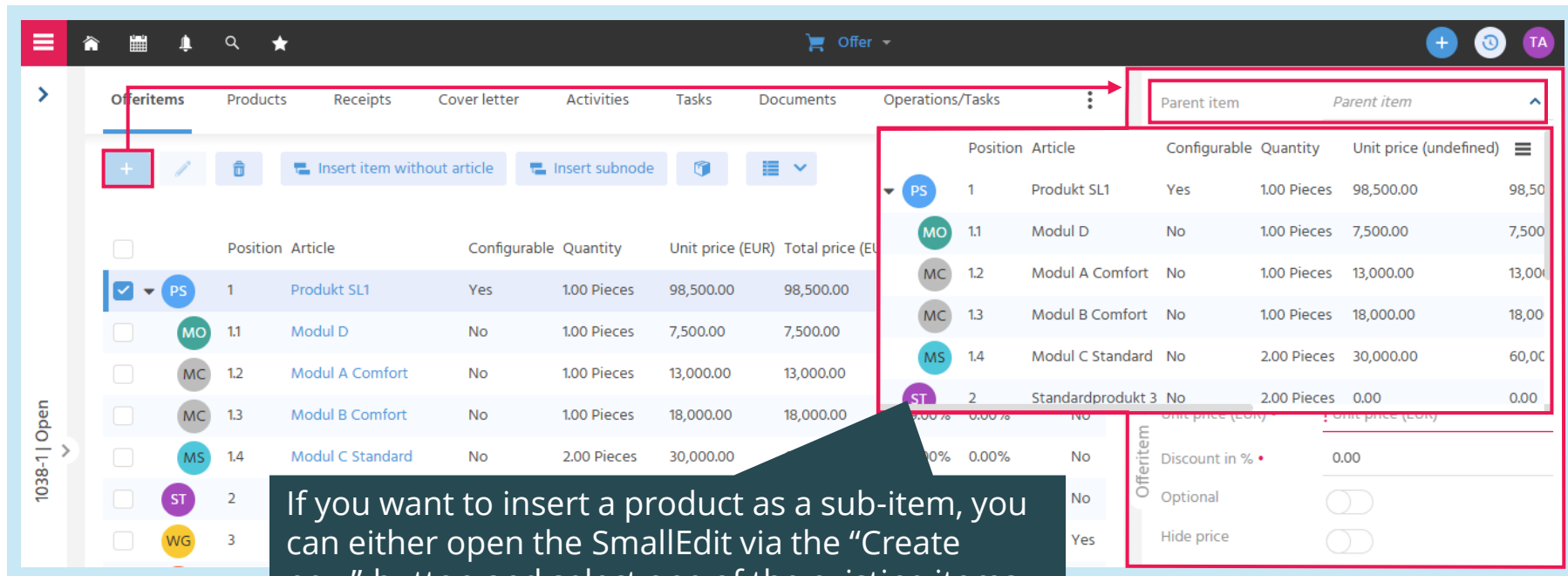
- Parent item: 1 | Produkt SL1
- Position: 1.5
- Item without article: ☐
- Article: ! Article
- Quantity: 1.00
- Unit: Unit
- VAT: VAT
- Unit price (EUR): ! Unit price (EUR)
- Discount in %: 0.00
- Optional: ☐
- Hide price: ☐

Annotations:

- 1:** Select an offer item (checkbox next to 'PS Produkt SL1').
- 2:** Click the 'Insert subnode' button in the top toolbar.
- 3:** The selected item is automatically entered as the 'Parent item' in the 'SmallEdit' panel.

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

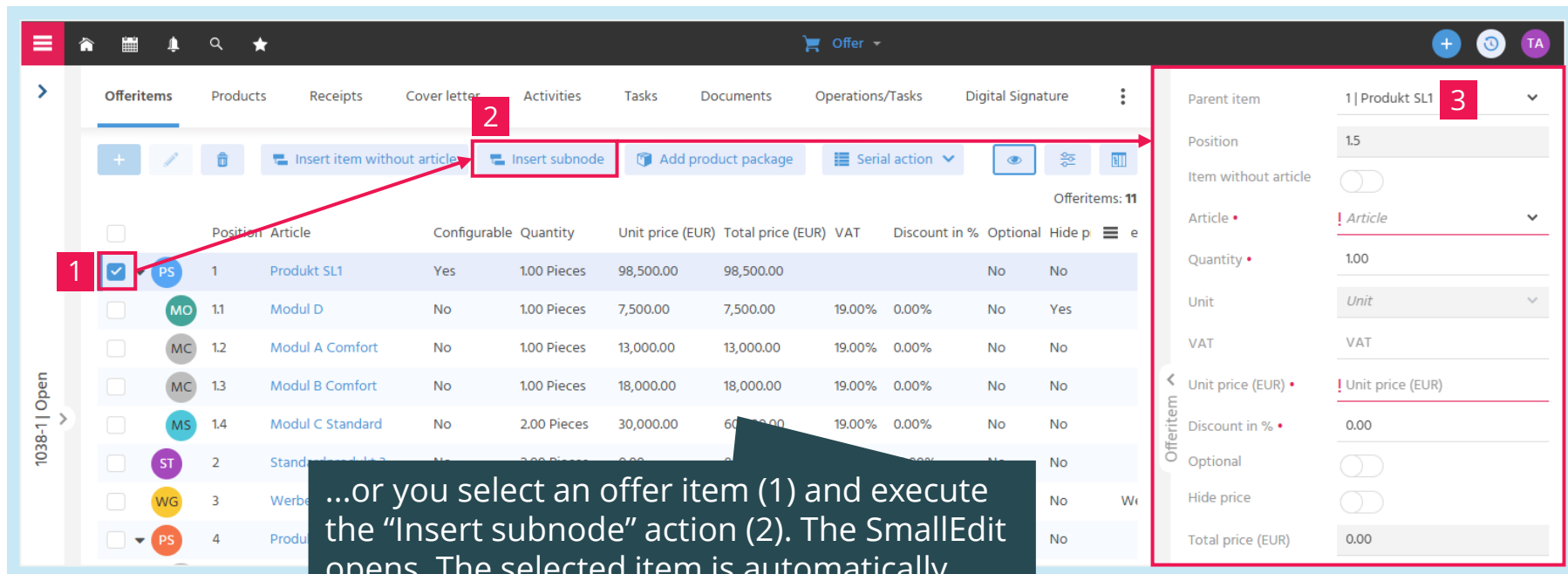
Insert product as subnode – tree table



The screenshot shows the ADITO 'Offer' interface. The top navigation bar includes icons for home, calendar, notifications, search, and a star. The main header shows 'Offer' with a dropdown arrow. The left sidebar has a '1038-1 | Open' button. The main content area is divided into tabs: Offeritems, Products, Receipts, Cover letter, Activities, Tasks, Documents, and Operations/Tasks. The 'Offeritems' tab is active, showing a table with columns: Position, Article, Configurable, Quantity, Unit price (EUR), and Total price (EUR). The table contains several items, including 'Produkt SL1' (PS), 'Modul D' (MO), 'Modul A Comfort' (MC), 'Modul B Comfort' (MC), 'Modul C Standard' (MS), and 'Standardprodukt 3' (ST). A red box highlights the '+ Insert subnode' button in the top left. A red box highlights the 'Parent item' dropdown in the top right. A red box highlights the 'ST' item in the table. A red box highlights the 'Offeritem' details panel on the right, which shows fields for 'Discount in %' and 'Optional'.

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

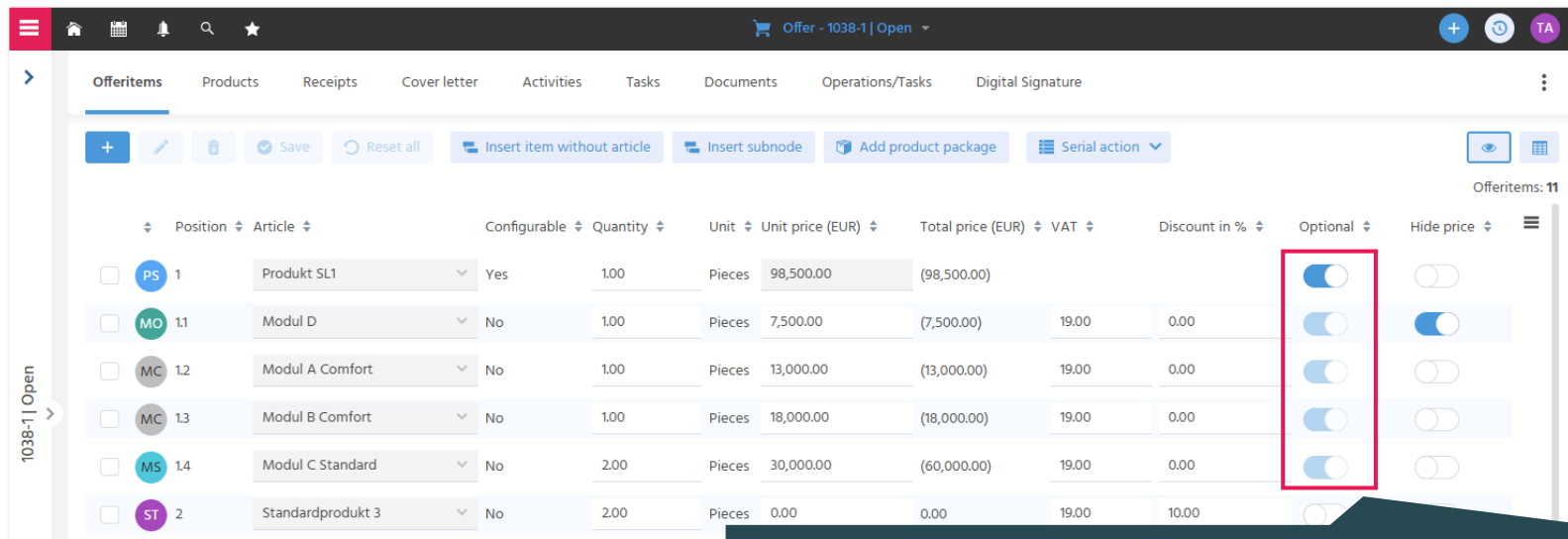
Insert product as subnode – tree table



The screenshot displays the ADITO Offer management interface. The 'Offeritems' table is visible, showing a list of items with columns for Position, Article, Configurable, Quantity, Unit price (EUR), Total price (EUR), VAT, Discount in %, Optional, and Hide p. A red box labeled '1' highlights the checkbox for the first item, 'Produkt SL1'. A red arrow labeled '2' points from the 'Insert subnode' button in the top toolbar to the 'Parent item' dropdown in the right-hand panel, which is labeled '3'.

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

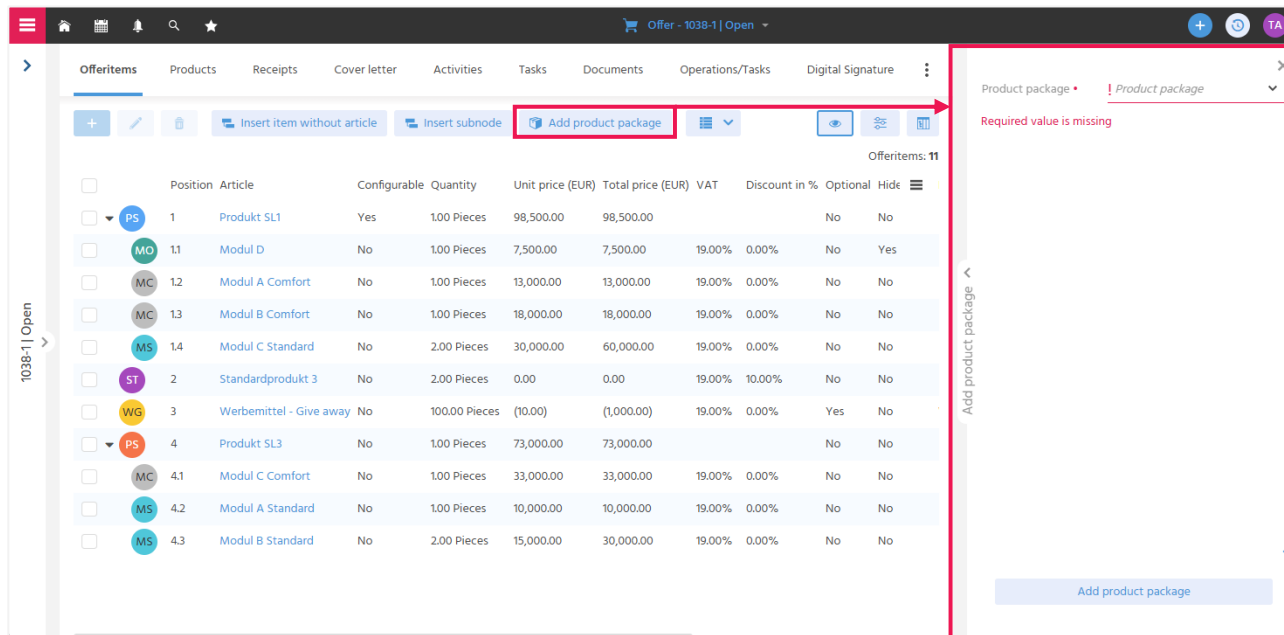
Optional parent item



	Position	Article	Configurable	Quantity	Unit	Unit price (EUR)	Total price (EUR)	VAT	Discount in %	Optional	Hide price
☐	PS 1	Produkt SL1	Yes	1.00	Pieces	98,500.00	(98,500.00)			☒	☐
☐	MO 1.1	Modul D	No	1.00	Pieces	7,500.00	(7,500.00)	19.00	0.00	☒	☒
☐	MC 1.2	Modul A Comfort	No	1.00	Pieces	13,000.00	(13,000.00)	19.00	0.00	☒	☐
☐	MC 1.3	Modul B Comfort	No	1.00	Pieces	18,000.00	(18,000.00)	19.00	0.00	☒	☐
☐	MS 1.4	Modul C Standard	No	2.00	Pieces	30,000.00	(60,000.00)	19.00	0.00	☒	☐
☐	ST 2	Standardprodukt 3	No	2.00	Pieces	0.00	0.00	19.00	10.00	☐	☐

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

Add Product package



The screenshot shows the 'Offer' application interface. The top navigation bar includes 'Offeritems', 'Products', 'Receipts', 'Cover letter', 'Activities', 'Tasks', 'Documents', 'Operations/Tasks', and 'Digital Signature'. The 'Offeritems' tab is active, displaying a table of offer items. A red box highlights the 'Add product package' button in the top toolbar. To the right, a modal dialog titled 'Product package' is open, showing a dropdown menu with 'Product package' selected and a red error message: 'Required value is missing'. At the bottom of the dialog is an 'Add product package' button.

Position	Article	Configurable	Quantity	Unit price (EUR)	Total price (EUR)	VAT	Discount in %	Optional	Hide
1	Produkt SL1	Yes	1.00 Pieces	98,500.00	98,500.00			No	No
1.1	Modul D	No	1.00 Pieces	7,500.00	7,500.00	19.00%	0.00%	No	Yes
1.2	Modul A Comfort	No	1.00 Pieces	13,000.00	13,000.00	19.00%	0.00%	No	No
1.3	Modul B Comfort	No	1.00 Pieces	18,000.00	18,000.00	19.00%	0.00%	No	No
1.4	Modul C Standard	No	2.00 Pieces	30,000.00	60,000.00	19.00%	0.00%	No	No
2	Standardprodukt 3	No	2.00 Pieces	0.00	0.00	19.00%	10.00%	No	No
3	Werbemittel - Give away	No	100.00 Pieces	(10.00)	(1,000.00)	19.00%	0.00%	Yes	No
4	Produkt SL3	No	1.00 Pieces	73,000.00	73,000.00			No	No
4.1	Modul C Comfort	No	1.00 Pieces	33,000.00	33,000.00	19.00%	0.00%	No	No
4.2	Modul A Standard	No	1.00 Pieces	10,000.00	10,000.00	19.00%	0.00%	No	No
4.3	Modul B Standard	No	2.00 Pieces	15,000.00	30,000.00	19.00%	0.00%	No	No

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



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

Calculation of the prices in the offer

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

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

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☐	Position	Article	Configurable	Quantity	Unit price (EUR)	Total price (EUR)	VAT	Discount in %	Optional	Hide price	Descr	
☐	PS	1	Produkt SL1	Yes	1.00 Pieces	98,500.00	98,500.00			No	No	
☐	MO	1.1	Modul D	No	1.00 Pieces	7,500.00	7,500.00	19.00%	0.00%	No	Yes	
☐	MC	1.2	Modul A Comfort	No	1.00 Pieces	13,000.00	13,000.00	19.00%	0.00%	No	No	
☐	MC	1.3	Modul B Comfort	No	1.00 Pieces	18,000.00	18,000.00	19.00%	0.00%	No	No	
☐	MS	1.4	Modul C Standard	No	2.00 Pieces	30,000.00	60,000.00	19.00%	0.00%	No	No	
☐	ST	2	Standardprodukt 3	No	1 2.00 Pieces	2 5,000.00	4 9,000.00	19.00%	3 10.00%	No	No	
☐	WG	3	Werbemittel - Give away	No	100.00 Pieces	6 (10.00)	(1,000.00)	19.00%	0.00%	5 Yes	No	Werb

Behavior when changing the quantity of a parent item

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

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

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

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



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

Behavior when changing quantity or price of a sub-item

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

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

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

OP

1038-1

Frau Anja Lindner | Industrial Steel AG

Offer - 1038-1 | Open

Tags

Details

Prices

Total net (EUR) 188,000.00

Discount in % 0.00%

Discount in (EUR) 0.00

Discounted price net (EUR) 188,000.00

Total VAT (EUR) 35,720.00

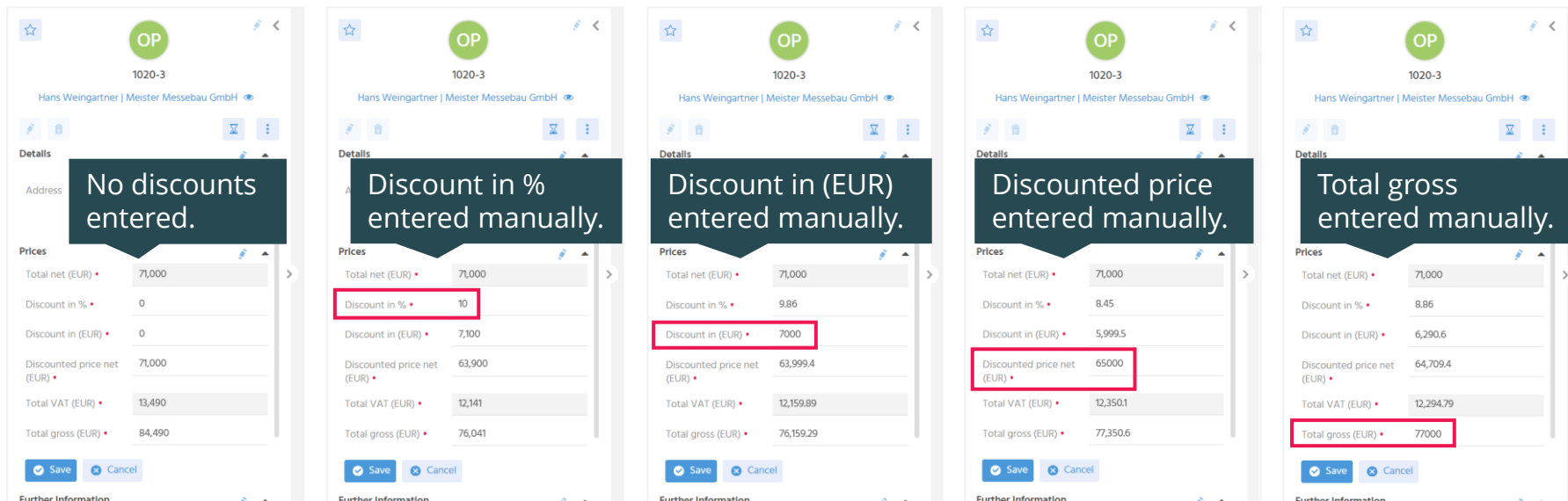
Total gross (EUR) 223,720.00

Offer items	Products	Receipts	Cover letter	Activities	Tasks	Documents	Operations/Tasks	Digital Signature			
Position	Article	Configurable	Quantity	Unit price (EUR)	Total price (EUR)	VAT	Discount in %	Optional	Hide price	De	c
PS 1	Produkt SL1	Yes	1.00 Pieces	106,000.00	106,000.00						
MO 1.1	Modul D	No	2.00 Pieces	7,500.00	15,000.00	19.00%	0.00%	No	Yes		
MC 1.2	Modul A Comfort	No	1.00 Pieces	13,000.00	13,000.00	19.00%	0.00%	No	No		
MC 1.3	Modul B Comfort	No	1.00 Pieces	18,000.00	18,000.00	19.00%	0.00%	No	No		
MS 1.4	Modul C Standard	No	2.00 Pieces	30,000.00	60,000.00	19.00%	0.00%	No	No		
ST 2	Standardprodukt 3	No	2.00 Pieces	5,000.00	9,000.00	19.00%	10.00%	No	No		
WG 3	Werbemittel - Give away	No	100.00 Pieces	(10.00)	(1,000.00)	19.00%	0.00%	Yes	No	Werbemittel	
PS 4	Produkt SL3	No	1.00 Pieces	73,000.00	73,000.00			No	No		
MC 4.1	Modul C Comfort	No	1.00 Pieces	33,000.00	33,000.00	19.00%	0.00%	No	No		
MS 4.2	Modul A Standard	No	1.00 Pieces	10,000.00	10,000.00	19.00%	0.00%	No	No		

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

Discounts

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



No discounts entered.

Field	Value
Total net (EUR)	71,000
Discount in %	0
Discount in (EUR)	0
Discounted price net (EUR)	71,000
Total VAT (EUR)	13,490
Total gross (EUR)	84,490

Discount in % entered manually.

Field	Value
Total net (EUR)	71,000
Discount in %	10
Discount in (EUR)	7,100
Discounted price net (EUR)	63,900
Total VAT (EUR)	12,141
Total gross (EUR)	76,041

Discount in (EUR) entered manually.

Field	Value
Total net (EUR)	71,000
Discount in %	9.86
Discount in (EUR)	7000
Discounted price net (EUR)	63,999.4
Total VAT (EUR)	12,159.89
Total gross (EUR)	76,159.29

Discounted price entered manually.

Field	Value
Total net (EUR)	71,000
Discount in %	8.45
Discount in (EUR)	5,999.5
Discounted price net (EUR)	65000
Total VAT (EUR)	12,350.1
Total gross (EUR)	77,350.6

Total gross entered manually.

Field	Value
Total net (EUR)	71,000
Discount in %	8.86
Discount in (EUR)	6,290.6
Discounted price net (EUR)	64,709.4
Total VAT (EUR)	12,294.79
Total gross (EUR)	77000

1039-1 | Open

1039-1 | Open

Offeritems Products Receipts Cover letter Activities Tasks Documents Operations/Tasks Digital Signature

+ Insert item without article Insert subnode Add product package Serial action Filter

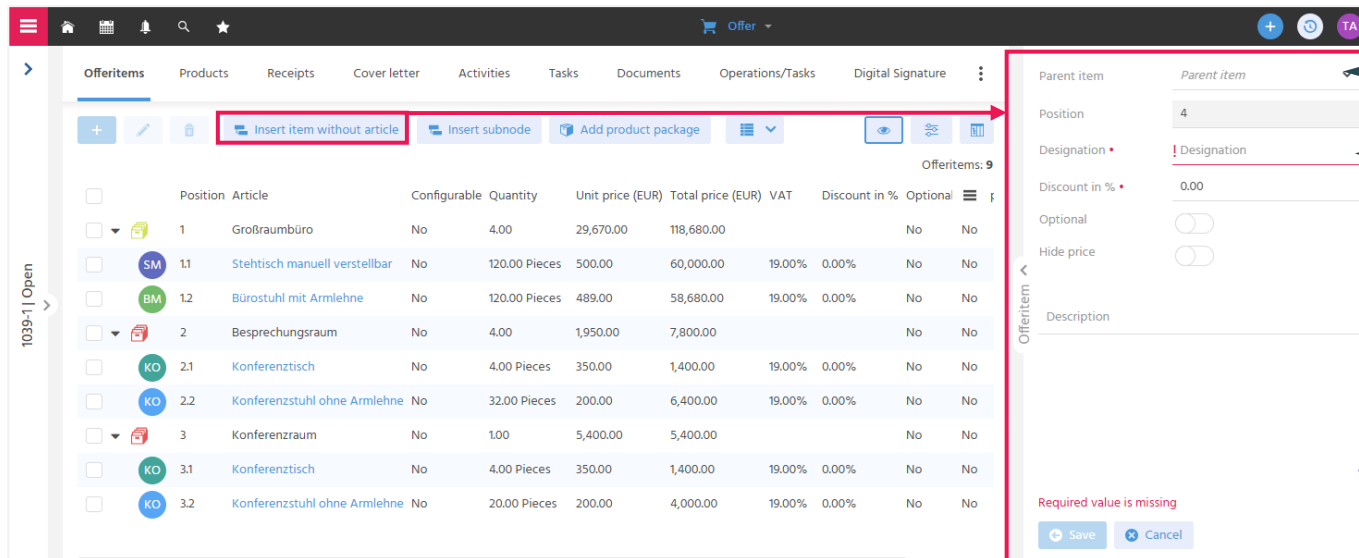
Offeritems: 9

☐	Position	Article	Configurable	Quantity	Unit price (EUR)	Total price (EUR)	VAT	Discount in %	Optional	Hide price	Descript
☐	1	Großraumbüro	No	4.00	29,670.00	118,680.00			No	No	
☐	1.1	Stehtisch manuell verstellbar	No	120.00 Pieces	500.00	60,000.00	19.00%	0.00%	No	No	
☐	1.2	Bürostuhl mit Armlehne	No	120.00 Pieces	489.00	58,680.00	19.00%	0.00%	No	No	
☐	2	Besprechungsraum	No	4.00	1,950.00	7,800.00			No	No	
☐	2.1	Konferenztisch	No	4.00 Pieces	350.00	1,400.00	19.00%	0.00%	No	No	
☐	2.2	Konferenzstuhl ohne Armlehne	No	32.00 Pieces	200.00	6,400.00	19.00%	0.00%	No	No	
☐	3	Konferenzraum	No	1.00	5,400.00	5,400.00			No	No	
☐	3.1	Konferenztisch	No								
☐	3.2	Konferenzstuhl ohne Armlehne	No								

You can use "Items without articles" to structure an offer. In the example, you can see the offer of a carpenter who manufactures various pieces of furniture for a customer.

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

Button „Insert item without article“



1039-1 | Open

Offeritems Products Receipts Cover letter Activities Tasks Documents Operations/Tasks Digital Signature

+ Insert item without article Insert subnode Add product package

Offeritems: 9

	Position	Article	Configurable	Quantity	Unit price (EUR)	Total price (EUR)	VAT	Discount in %	Optional
☐	1	Großraumbüro	No	4.00	29,670.00	118,680.00			No
☐	1.1	Stehtisch manuell verstellbar	No	120.00 Pieces	500.00	60,000.00	19.00%	0.00%	No
☐	1.2	Bürostuhl mit Armlehne	No	120.00 Pieces	489.00	58,680.00	19.00%	0.00%	No
☐	2	Besprechungsraum	No	4.00	1,950.00	7,800.00			No
☐	2.1	Konferenztisch	No	4.00 Pieces	350.00	1,400.00	19.00%	0.00%	No
☐	2.2	Konferenzstuhl ohne Armlehne	No	32.00 Pieces	200.00	6,400.00	19.00%	0.00%	No
☐	3	Konferenzraum	No	1.00	5,400.00	5,400.00			No
☐	3.1	Konferenztisch	No	4.00 Pieces	350.00	1,400.00	19.00%	0.00%	No
☐	3.2	Konferenzstuhl ohne Armlehne	No	20.00 Pieces	200.00	4,000.00	19.00%	0.00%	No

Parent item Parent item

Position 4

Designation ! Designation

Discount in % 0.00

Optional ☐

Hide price ☐

Description

Required value is missing

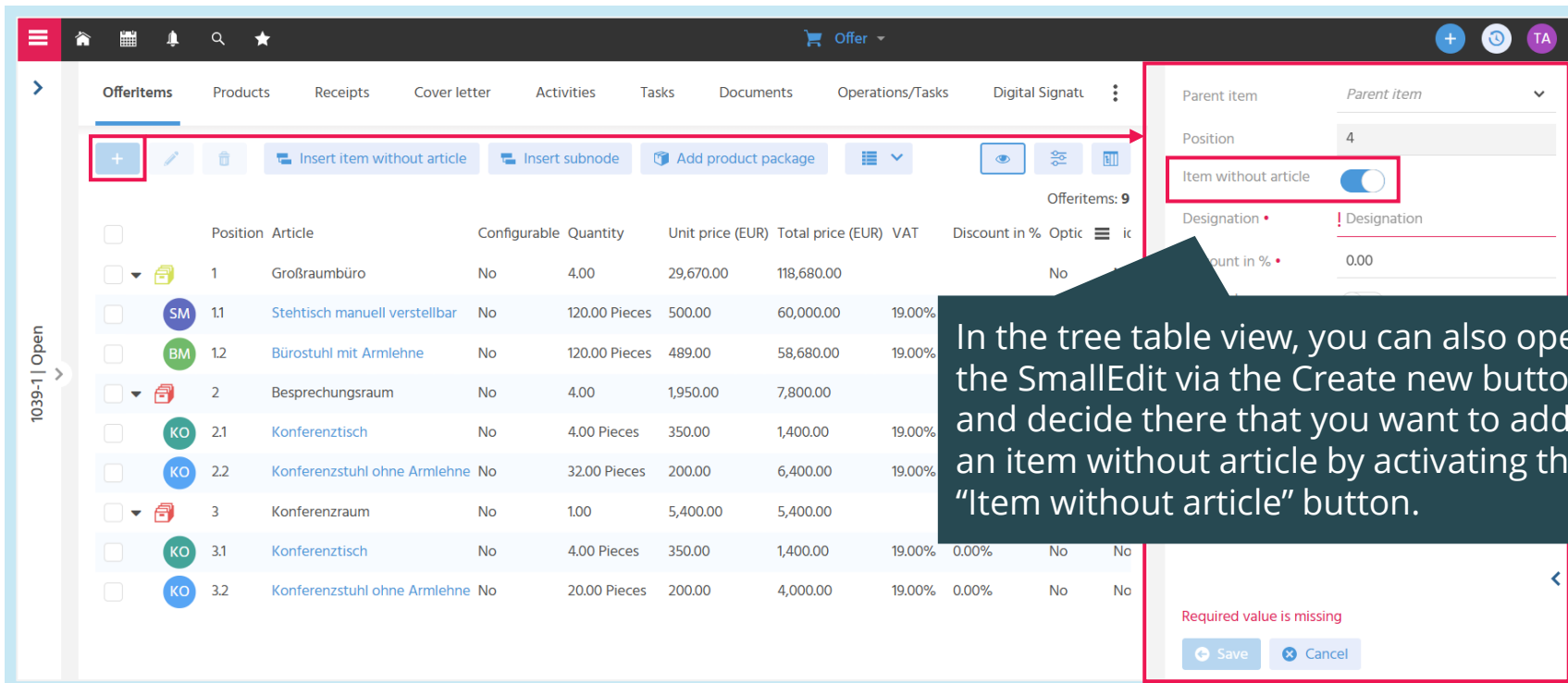
Save Cancel

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

Give the item without article a name.

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

Insert item without article – tree table



1039-1 | Open

Offeritems Products Receipts Cover letter Activities Tasks Documents Operations/Tasks Digital Signatu

+ Create new

Insert item without article Insert subnode Add product package

	Position	Article	Configurable	Quantity	Unit price (EUR)	Total price (EUR)	VAT	Discount in %	Optic	ic
	1	Großraumbüro	No	4.00	29,670.00	118,680.00			No	
	1.1	Stehtisch manuell verstellbar	No	120.00 Pieces	500.00	60,000.00	19.00%			
	1.2	Bürostuhl mit Armlehne	No	120.00 Pieces	489.00	58,680.00	19.00%			
	2	Besprechungsraum	No	4.00	1,950.00	7,800.00				
	2.1	Konferenztisch	No	4.00 Pieces	350.00	1,400.00	19.00%			
	2.2	Konferenzstuhl ohne Armlehne	No	32.00 Pieces	200.00	6,400.00	19.00%			
	3	Konferenzraum	No	1.00	5,400.00	5,400.00				
	3.1	Konferenztisch	No	4.00 Pieces	350.00	1,400.00	19.00%	0.00%	No	No
	3.2	Konferenzstuhl ohne Armlehne	No	20.00 Pieces	200.00	4,000.00	19.00%	0.00%	No	No

Offeritems: 9

Parent item Parent item

Position 4

Item without article ☒

Designation ! Designation

Count in % 0.00

Required value is missing

Save Cancel

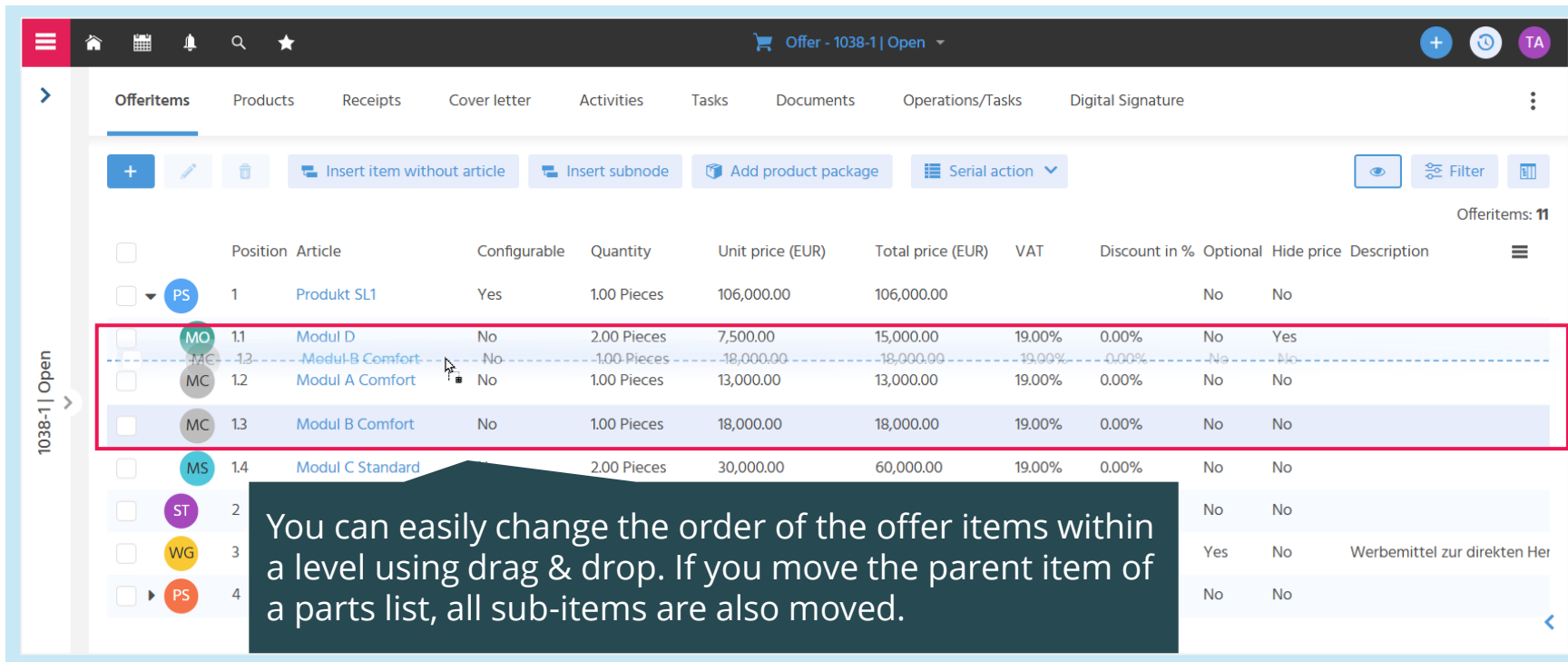
Item without article – total price calculation

1039-1 | Open

Offer											
Offeritems	Products	Receipts	Cover letter	Activities	Tasks	Documents	Operations/Tasks	Digital Signature			
+ ✎ 🗑️ 📄 Insert item without article 📄 Insert subnode 📦 Add product package ⋮ Serial action 👁️ 🔍 Filter 📄 Offeritems: 9											
☐	Position	Article	Configurable	Quantity	Unit price (EUR)	Total price (EUR)	VAT	Discount in %	Optional	Hide price	Descr
☐	1	Großraumbüro	No	4.00	29,670.00	118,680.00			No	No	
☐	1.1	Stehtisch manuell verstellbar	No	120.00 Pieces	500.00	60,000.00	19.00%	0.00%	No	No	
☐	1.2	Bürostuhl mit Armlehne	No	120.00 Pieces	489.00	58,680.00	19.00%	0.00%	No	No	
☐	2	Besprechungsraum	No	4.00	1,950.00	7,800.00			No	No	
☐	2.1	Konferenztisch	No	4.00 Pieces	350.00	1,400.00	19.00%	0.00%	No	No	
☐	2.2	Konferenzstuhl ohne Armlehne	No	32.00 Pieces	200.00	6,400.00	19.00%	0.00%	No	No	
☐	3	Konferenzraum	No	1.00	5,400.00	5,400.00			No	No	
☐	3.1	Konferenztisch	No	4.00 Pieces							
☐	3.2	Konferenzstuhl ohne Armlehne	No	20.00 Pieces							

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

Adjust the order of the offer items – tree table



Offer - 1038-1 | Open

OfferItems Products Receipts Cover letter Activities Tasks Documents Operations/Tasks Digital Signature

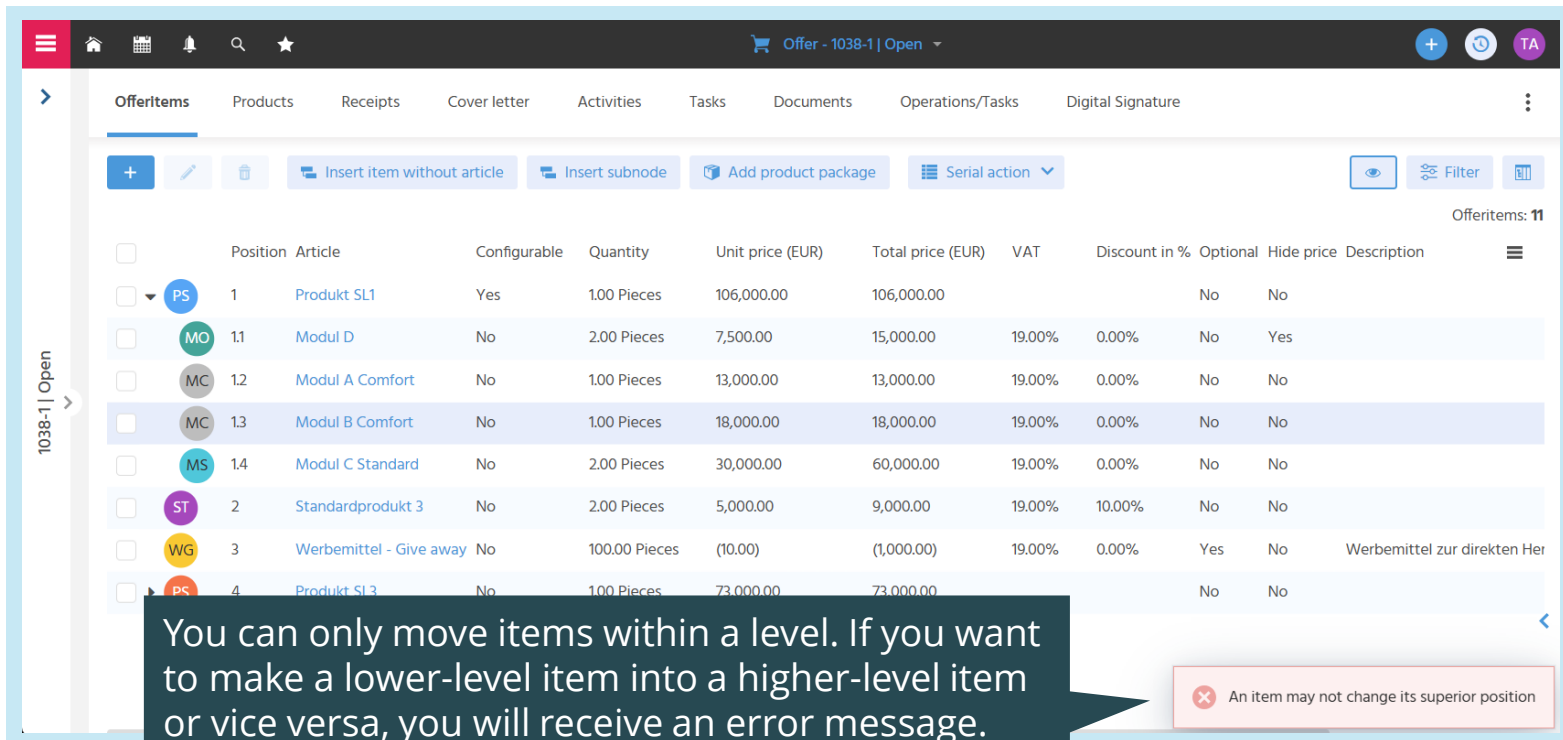
Insert item without article Insert subnode Add product package Serial action

OfferItems: 11

Position	Article	Configurable	Quantity	Unit price (EUR)	Total price (EUR)	VAT	Discount in %	Optional	Hide price	Description
1	Produkt SL1	Yes	1.00 Pieces	106,000.00	106,000.00			No	No	
1.1	Modul D	No	2.00 Pieces	7,500.00	15,000.00	19.00%	0.00%	No	Yes	
1.2	Modul A Comfort	No	1.00 Pieces	13,000.00	13,000.00	19.00%	0.00%	No	No	
1.3	Modul B Comfort	No	1.00 Pieces	18,000.00	18,000.00	19.00%	0.00%	No	No	
1.4	Modul C Standard	No	2.00 Pieces	30,000.00	60,000.00	19.00%	0.00%	No	No	
2								No	No	
3								Yes	No	Werbemittel zur direkten Her
4								No	No	

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

Adjust the order of the offer items – tree table



1038-1 | Open

Offer - 1038-1 | Open

Offeritems Products Receipts Cover letter Activities Tasks Documents Operations/Tasks Digital Signature

+ Insert item without article Insert subnode Add product package Serial action

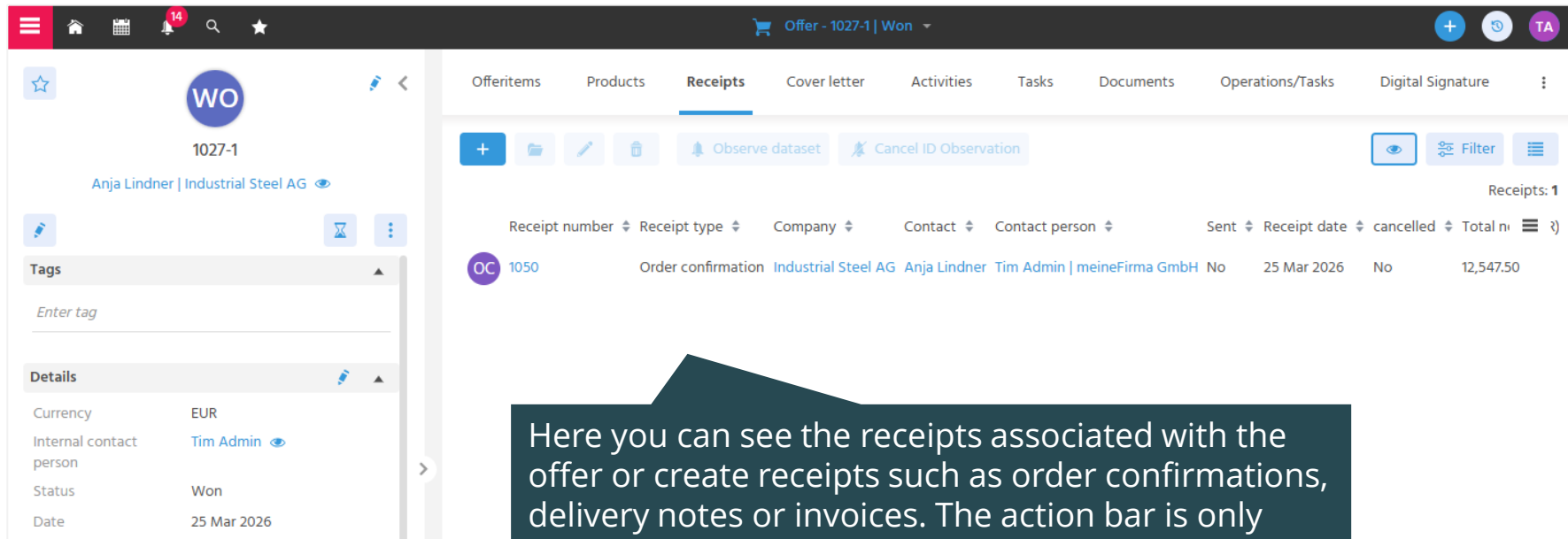
Offeritems: 11

	Position	Article	Configurable	Quantity	Unit price (EUR)	Total price (EUR)	VAT	Discount in %	Optional	Hide price	Description
PS	1	Produkt SL1	Yes	1.00 Pieces	106,000.00	106,000.00			No	No	
MO	1.1	Modul D	No	2.00 Pieces	7,500.00	15,000.00	19.00%	0.00%	No	Yes	
MC	1.2	Modul A Comfort	No	1.00 Pieces	13,000.00	13,000.00	19.00%	0.00%	No	No	
MC	1.3	Modul B Comfort	No	1.00 Pieces	18,000.00	18,000.00	19.00%	0.00%	No	No	
MS	1.4	Modul C Standard	No	2.00 Pieces	30,000.00	60,000.00	19.00%	0.00%	No	No	
ST	2	Standardprodukt 3	No	2.00 Pieces	5,000.00	9,000.00	19.00%	10.00%	No	No	
WG	3	Werbemittel - Give away	No	100.00 Pieces	(10.00)	(1,000.00)	19.00%	0.00%	Yes	No	Werbemittel zur direkten Her
PS	4	Produkt SL3	No	1.00 Pieces	73,000.00	73,000.00			No	No	

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

An item may not change its superior position

Overview of all receipts generated from an offer

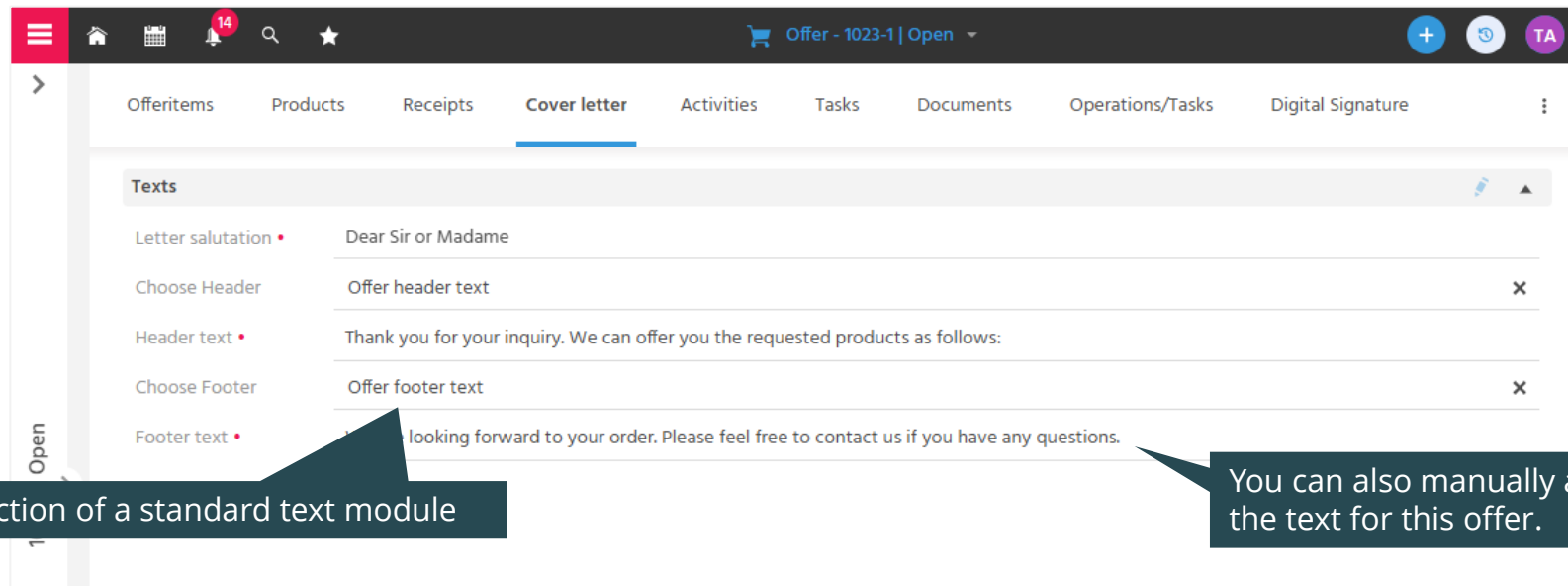


The screenshot shows the ADITO interface for offer 1027-1, which has a status of 'Won'. The 'Receipts' tab is selected, displaying a table of receipts. The table has columns for Receipt number, Receipt type, Company, Contact, Contact person, Sent, Receipt date, cancelled, and Total n. A callout box highlights that the action bar is only active if the offer has the status 'Won'.

Receipt number	Receipt type	Company	Contact	Contact person	Sent	Receipt date	cancelled	Total n
1050	Order confirmation	Industrial Steel AG	Anja Lindner	Tim Admin meineFirma GmbH	No	25 Mar 2026	No	12,547.50

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

Adapt text elements in the cover letter



The screenshot shows the ADITO 'Offer' interface. The top navigation bar includes a hamburger menu, home, calendar, notifications (14), search, and star icons. The main header displays 'Offer - 1023-1 | Open' with a dropdown arrow and three action buttons: a plus sign, a refresh icon, and a 'TA' button. Below the header is a tabbed interface with the following tabs: Offeritems, Products, Receipts, **Cover letter** (selected), Activities, Tasks, Documents, Operations/Tasks, and Digital Signature. The 'Cover letter' tab is active, showing a 'Texts' section with a list of text modules. Each module has a label on the left, a text input field in the middle, and a delete icon (X) on the right. The modules are: Letter salutation (Dear Sir or Madame), Choose Header (Offer header text), Header text (Thank you for your inquiry. We can offer you the requested products as follows:), Choose Footer (Offer footer text), and Footer text (looking forward to your order. Please feel free to contact us if you have any questions.). A dark blue callout box points to the 'Choose Header' module with the text 'Selection of a standard text module'. Another dark blue callout box points to the 'Footer text' module with the text 'You can also manually adjust the text for this offer.'.



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

More tabs

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

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

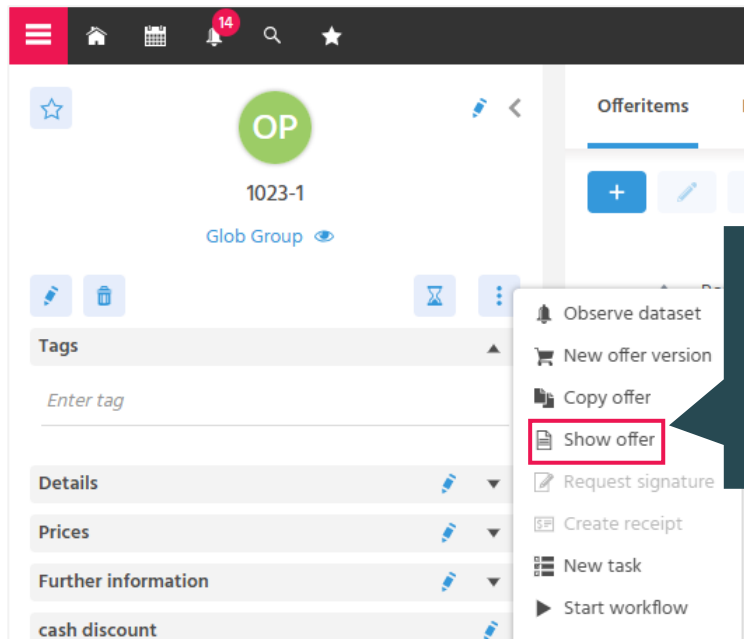
“Documents” tab: Here you can upload documents belonging to the offer.

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

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

Send offer

Show offer



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

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



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

Show offer

Offer report

Offer

@ Dispatch as mail

Automatic zoom

1 / 1

Pos.	Article Number	Article title	Quantity	Discount %	Optional	Unitprice EUR	VAT %	Total price EUR
1	S001	Serviceeinsatz	10.00 Hours	10.00	No			
2	WG3_MB-C	Modul B Comfort	1.00 Pieces		No	18,000.00	19.00	18,000.00
3	WG3001-SL	Produkt SL1	2.00 Pieces		No	83,000.00	19.00	166,000.00
3.1	WG3_MA-S	Modul A Standard	2.00 Pieces		No	10,000.00	19.00	20,000.00
3.2	WG3_MB-S	Modul B Standard	4.00 Pieces		Yes	2,500.00	0.00	(10,000.00)
3.3	WG3_MC-S	Modul C Standard	4.00 Pieces		No	30,000.00	19.00	120,000.00
3.4	WG3_MA-C	Modul A Comfort	2.00 Pieces		No	13,000.00	19.00	26,000.00
Total net excl. opt. items								184,900.00
25.00 % Invoice Discount								46,225.00
Total EUR without Vat								138,675.00
Plus Salestax								26,348.25
Total gross excl. opt. items								165,023.25
Total opt. item net								10,000.00
25.00 % Invoice Discount								2,500.00
Total EUR without Vat								7,500.00
Total opt. item gross								7,500.00

Terms of payment 8 days 2% discount, 30

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

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

Show offer

Offer report

Offer

Dispatch as mail

Automatic zoom

1 / 1

Sehr geehrter Herr Abend,

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

Pos.	Article Number	Article title	Quantity	Optional	Unitprice EUR	VAT %	Total price EUR
1		Living room	1.00	No	500.00		500.00
1.1	LT 1010	Living room table	1.00 Pieces	No	500.00	19.00	500.00
2		Kitchen	1.00	No	3,100.00		3,100.00
2.1	CB 2012	Corner bench	1.00 Pieces	No	1,200.00	19.00	1,200.00
2.2	C 2013	Chair	3.00 Pieces	No	200.00	19.00	600.00
2.3	C 2016	Chair with armrest	1.00 Pieces	No	300.00	19.00	300.00
2.4	T 2014	Table	1.00 Pieces	No	1,000.00	19.00	1,000.00
3		Bedroom	1.00	No	1,200.00		1,200.00
3.1	B3013	Bed	1.00 Pieces	No	1,200.00	19.00	1,200.00
Total net							4,800.00
Plus Salestax							912.00
Total gross							5,712.00

Terms of payment 7 days net

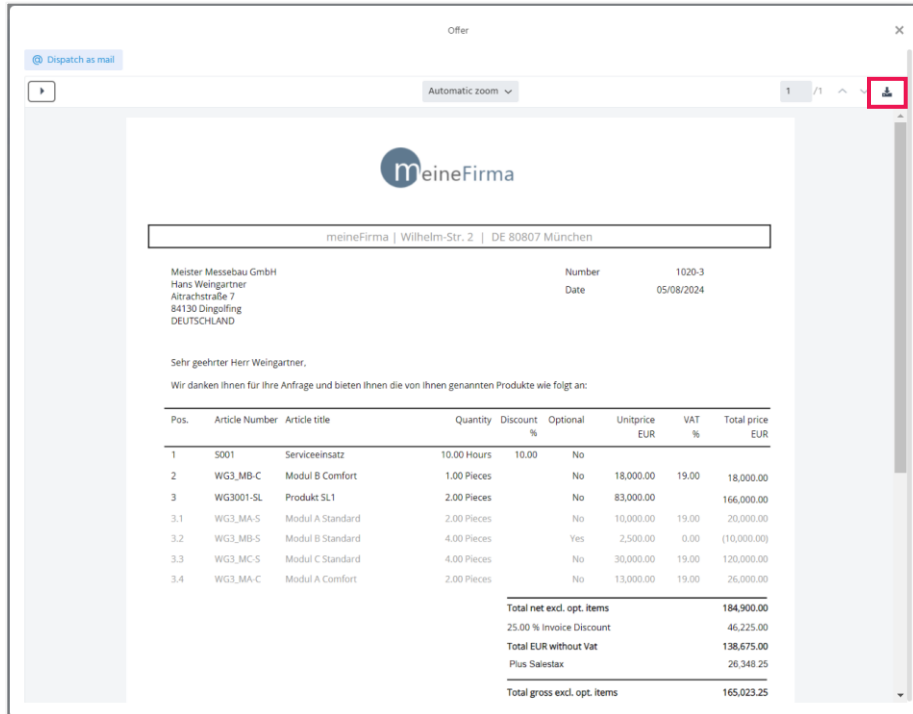
Delivery specification carriage free

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

Display of items without articles in the offer report.

Send offer

Print offer for mailing



Dispatch as mail

Automatic zoom

1 / 1

meineFirma

meineFirma | Wilhelm-Str. 2 | DE 80807 München

Meister Messebau GmbH
Hans Weingartner
Altmühlstraße 7
84130 Dingolfing
DEUTSCHLAND

Number 1020-3
Date 05/08/2024

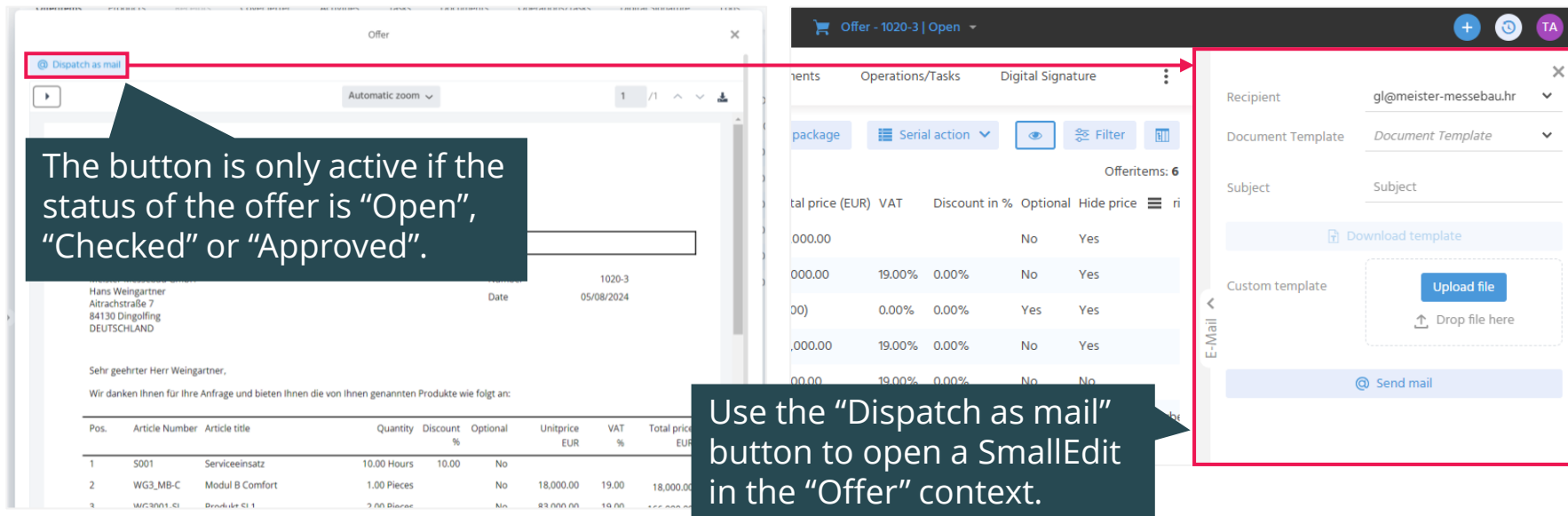
Sehr geehrter Herr Weingartner,
Wir danken Ihnen für Ihre Anfrage und bieten Ihnen die von Ihnen genannten Produkte wie folgt an:

Pos.	Article Number	Article title	Quantity	Discount %	Optional	Unitprice EUR	VAT %	Total price EUR
1	S001	Serviceeinsatz	10.00 Hours	10.00	No			
2	WG3_MB-C	Modul B Comfort	1.00 Pieces		No	18,000.00	19.00	18,000.00
3	WG3001-SL	Produkt SL1	2.00 Pieces		No	83,000.00		166,000.00
3.1	WG3_MA-S	Modul A Standard	2.00 Pieces		No	10,000.00	19.00	20,000.00
3.2	WG3_MB-S	Modul B Standard	4.00 Pieces		Yes	2,500.00	0.00	(10,000.00)
3.3	WG3_MC-S	Modul C Standard	4.00 Pieces		No	30,000.00	19.00	120,000.00
3.4	WG3_MA-C	Modul A Comfort	2.00 Pieces		No	13,000.00	19.00	26,000.00
Total net excl. opt. items								184,900.00
25.00 % Invoice Discount								46,225.00
Total EUR without Vat								138,675.00
Plus Sales tax								26,348.25
Total gross excl. opt. items								165,023.25

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

Send offer

Send offer by e-mail



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

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

Offer - 1020-3 | Open

Recipients: Operations/Tasks Digital Signature

package Serial action Filter

Offeritems: 6

total price (EUR)	VAT	Discount in %	Optional	Hide price
000.00			No	Yes
000.00	19.00%	0.00%	No	Yes
00)	0.00%	0.00%	Yes	Yes
000.00	19.00%	0.00%	No	Yes
00.00	19.00%	0.00%	No	No

Recipient: gl@meister-messebau.hr

Document Template: Document Template

Subject: Subject

Download template

Custom template: Upload file

Drop file here

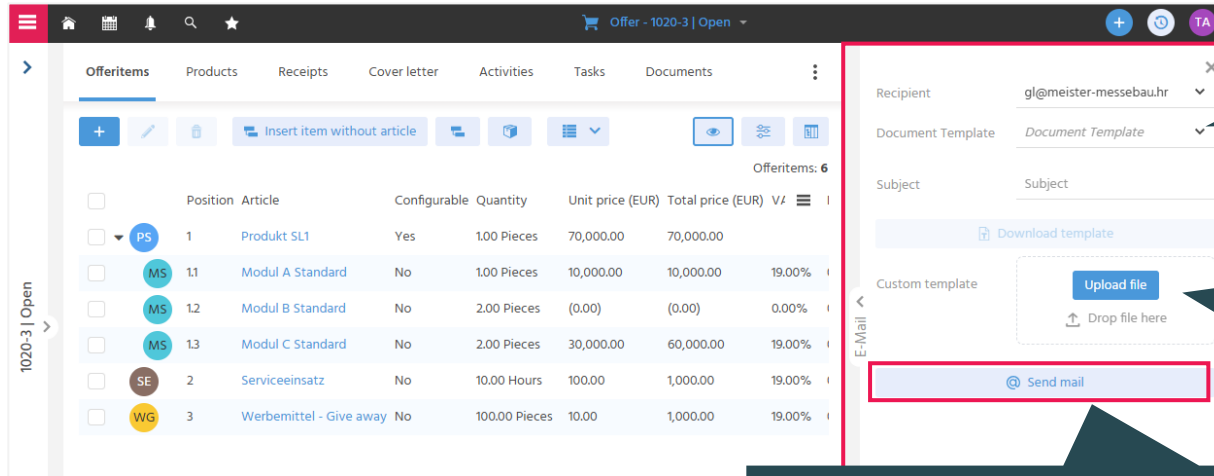
Send mail



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

Send offer

Send offer by e-mail



The screenshot shows the ADITO software interface. On the left, a table lists offer items for 'Offer - 1020-3'. The table has columns for Position, Article, Configurable, Quantity, Unit price (EUR), and Total price (EUR). The items are:

Position	Article	Configurable	Quantity	Unit price (EUR)	Total price (EUR)
1	Produkt SL1	Yes	1.00 Pieces	70,000.00	70,000.00
1.1	Modul A Standard	No	1.00 Pieces	10,000.00	10,000.00
1.2	Modul B Standard	No	2.00 Pieces	(0.00)	(0.00)
1.3	Modul C Standard	No	2.00 Pieces	30,000.00	60,000.00
2	Serviceeinsatz	No	10.00 Hours	100.00	1,000.00
3	Werbemittel - Give away	No	100.00 Pieces	10.00	1,000.00

On the right, an 'E-Mail' overlay is open. It contains fields for Recipient (gl@meister-messebau.hr), Document Template (Document Template), and Subject (Subject). There is a 'Download template' button and a 'Custom template' section with an 'Upload file' button and a 'Drop file here' area. At the bottom of the overlay is a 'Send mail' button.

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

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

Clicking on the "Send email" button opens an overlay.

Send offer

Send offer by e-mail

Check generated e-mail

Recipient: gl@meister-messebauhr

Signature: Signature

Subject: Subject

Content

Choose langu... Paragraph AI A A B I U Q X X T - @ P = = = = = < > Source RT H A U L G C < >

Sehr geehrter Herr Weingartner,

Thank you for your inquiry.
As discussed, please find our offer attached.
We hope that you are satisfied with our offer and are happy to assist you with any further questions!

Kind regards,

Herr Tim Admin

meineFirma GmbH
Liebigstraße 3
Germany - 84051 Essenbach

FON: +49 8743 9664433
Email: tadmin@meinefirmaadito.de

Attachments
Offer No.0020-3.pdf

Additional attachments

Upload files
Drop files here

Download generated e-mail

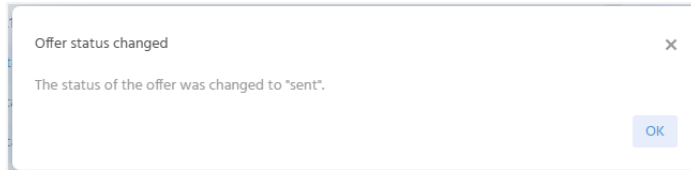
Depending on what you have defined in the SmallEdit, the recipient, subject, and content are already pre-filled here.

The offer is added as an attachment in PDF format.

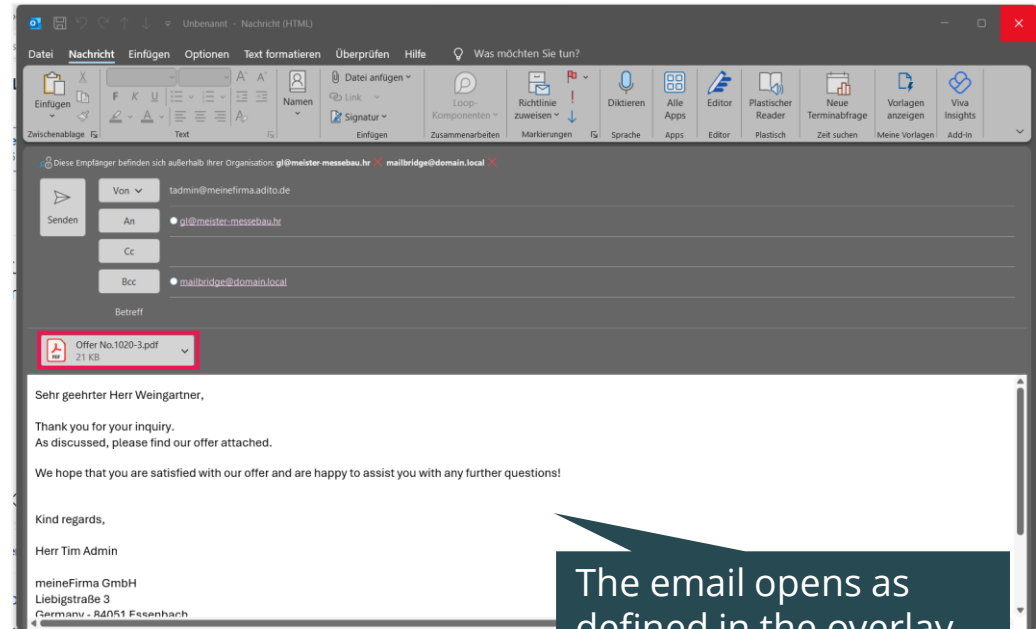
Execute the "Download generated e-mail" action to open the email.

Send offer

Send offer by e-mail

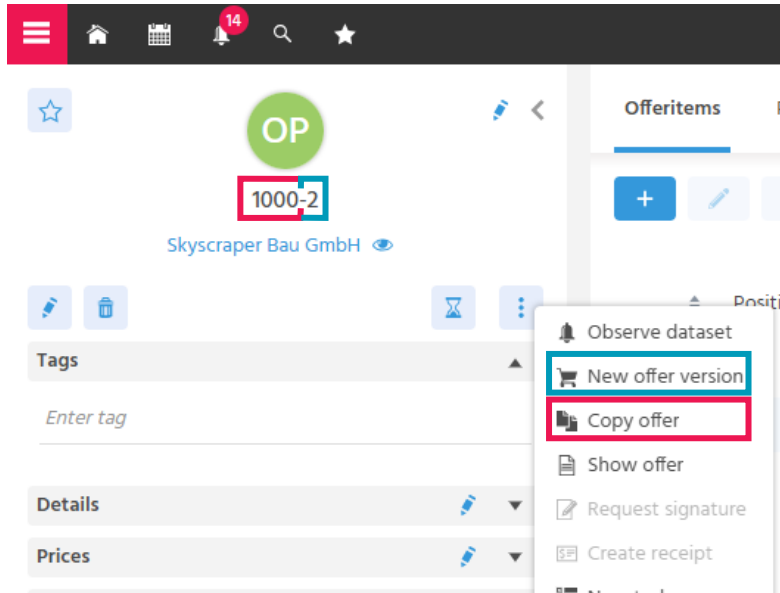


The system informs you that the offer status has been set to „sent“.



Versioned offers

Offer number - Version number



New offer version:

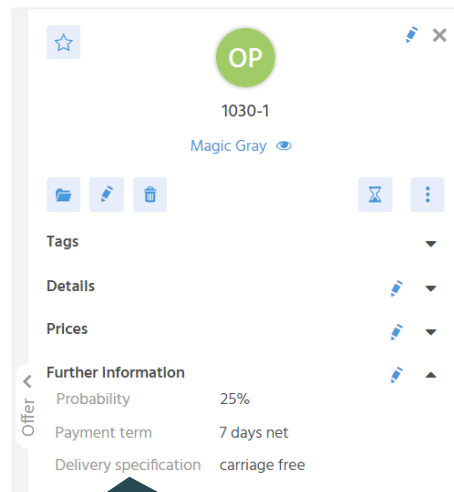
Offer items are to be adjusted. Version number is increased.

Copy offer:

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

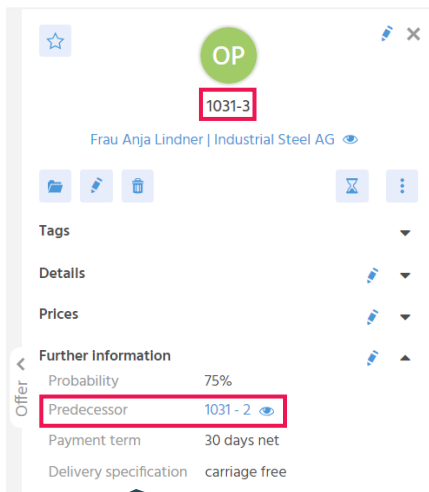
Versioned offers

Predecessor and successor in the preview of the offer



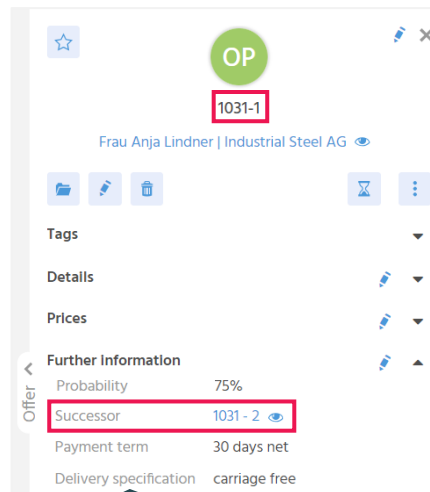
Offer preview for 1030-1. The offer is titled "1030-1" and is associated with "Magic Gray". The "Further Information" section shows a probability of 25%, a payment term of 7 days net, and a delivery specification of carriage free. There are no predecessor or successor links displayed.

Offer without predecessor and successor.



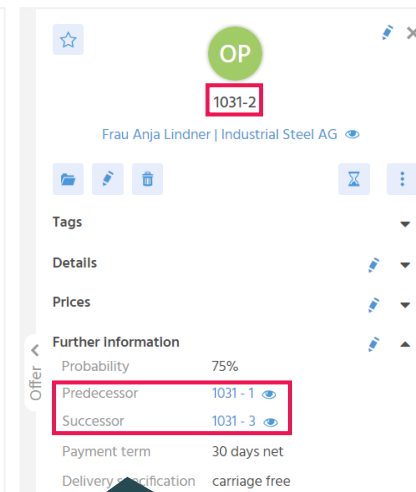
Offer preview for 1031-3. The offer is titled "1031-3" and is associated with "Frau Anja Lindner | Industrial Steel AG". The "Further Information" section shows a probability of 75%, a payment term of 30 days net, and a delivery specification of carriage free. A predecessor link is displayed as "1031 - 2" with an eye icon.

Offer with predecessor.



Offer preview for 1031-1. The offer is titled "1031-1" and is associated with "Frau Anja Lindner | Industrial Steel AG". The "Further Information" section shows a probability of 75%, a payment term of 30 days net, and a delivery specification of carriage free. A successor link is displayed as "1031 - 2" with an eye icon.

Offer with successor.



Offer preview for 1031-2. The offer is titled "1031-2" and is associated with "Frau Anja Lindner | Industrial Steel AG". The "Further Information" section shows a probability of 75%, a payment term of 30 days net, and a delivery specification of carriage free. Both predecessor and successor links are displayed as "1031 - 1" and "1031 - 3" respectively, both with eye icons.

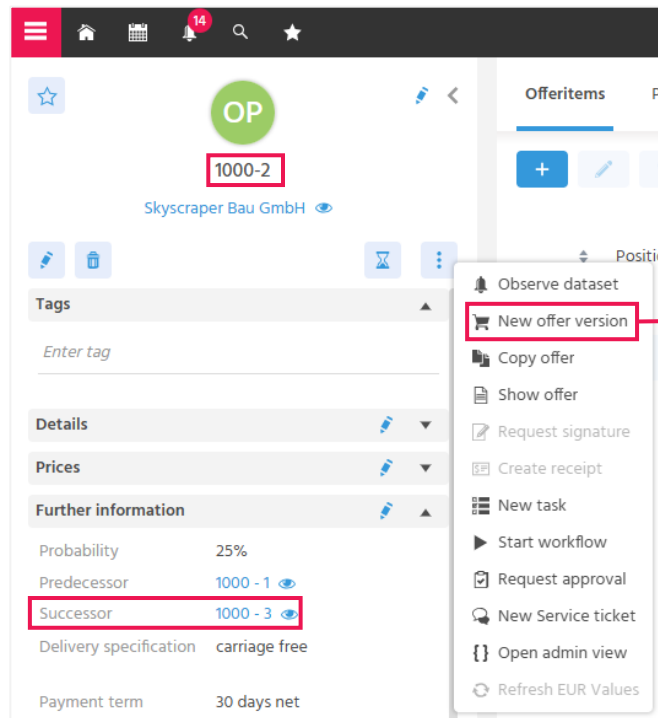
Offer with predecessor and successor.



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

Versioned offers

New offer version not from the latest version



OP

1000-2

Skyscraper Bau GmbH

Tags

Enter tag

Details

Prices

Further information

Probability 25%

Predecessor 1000 - 1

Successor 1000 - 3

Delivery specification carriage free

Payment term 30 days net

- Observe dataset
- New offer version
- Copy offer
- Show offer
- Request signature
- Create receipt
- New task
- Start workflow
- Request approval
- New Service ticket
- Open admin view
- Refresh EUR Values

Newer Offer Version Found

A newer version of this offer is available. Are you sure you want to create a new offer version from this one?

Yes No

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

Offer status

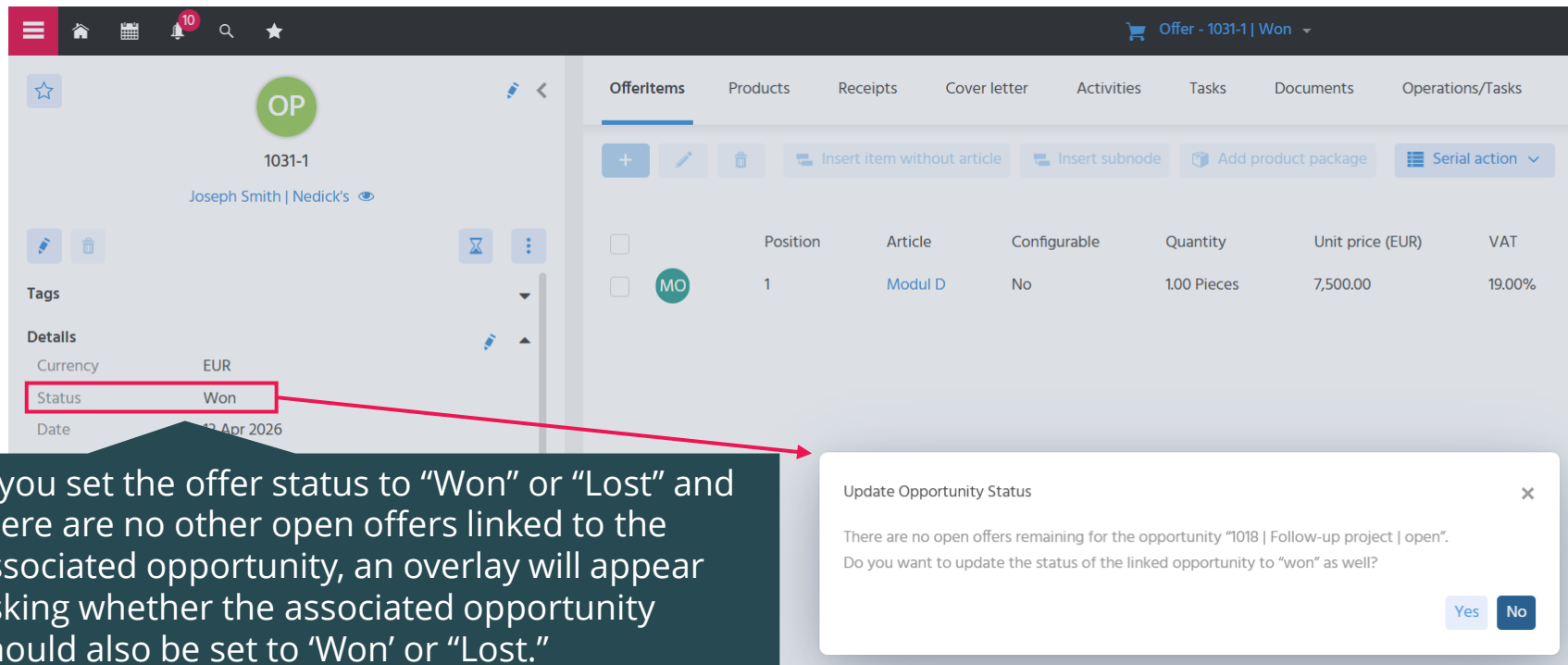
Offer status

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

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

Offer status

Automatically set the opportunity status based on the offer status

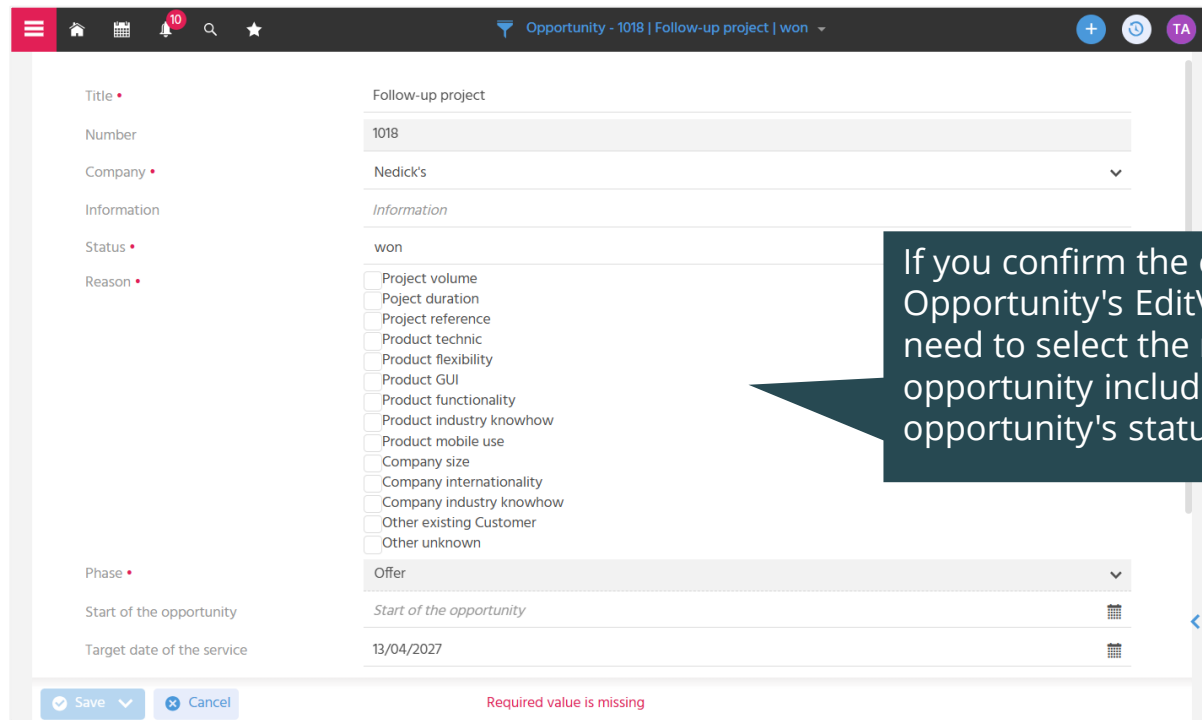


The screenshot displays the ADITO software interface. On the left, the 'Details' section shows the 'Status' field set to 'Won'. A red box highlights this field, and a red arrow points from it to a modal dialog on the right. The modal dialog is titled 'Update Opportunity Status' and contains the following text: 'There are no open offers remaining for the opportunity "1018 | Follow-up project | open". Do you want to update the status of the linked opportunity to "won" as well?'. At the bottom of the dialog are 'Yes' and 'No' buttons.

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

Offer status

Automatically set the opportunity status based on the offer status



Opportunity - 1018 | Follow-up project | won

Title • Follow-up project

Number 1018

Company • Nedick's

Information Information

Status • won

Reason •

- ☐ Project volume
- ☐ Project duration
- ☐ Project reference
- ☐ Product technic
- ☐ Product flexibility
- ☐ Product GUI
- ☐ Product functionality
- ☐ Product industry knowhow
- ☐ Product mobile use
- ☐ Company size
- ☐ Company internationality
- ☐ Company industry knowhow
- ☐ Other existing Customer
- ☐ Other unknown

Phase • Offer

Start of the opportunity Start of the opportunity

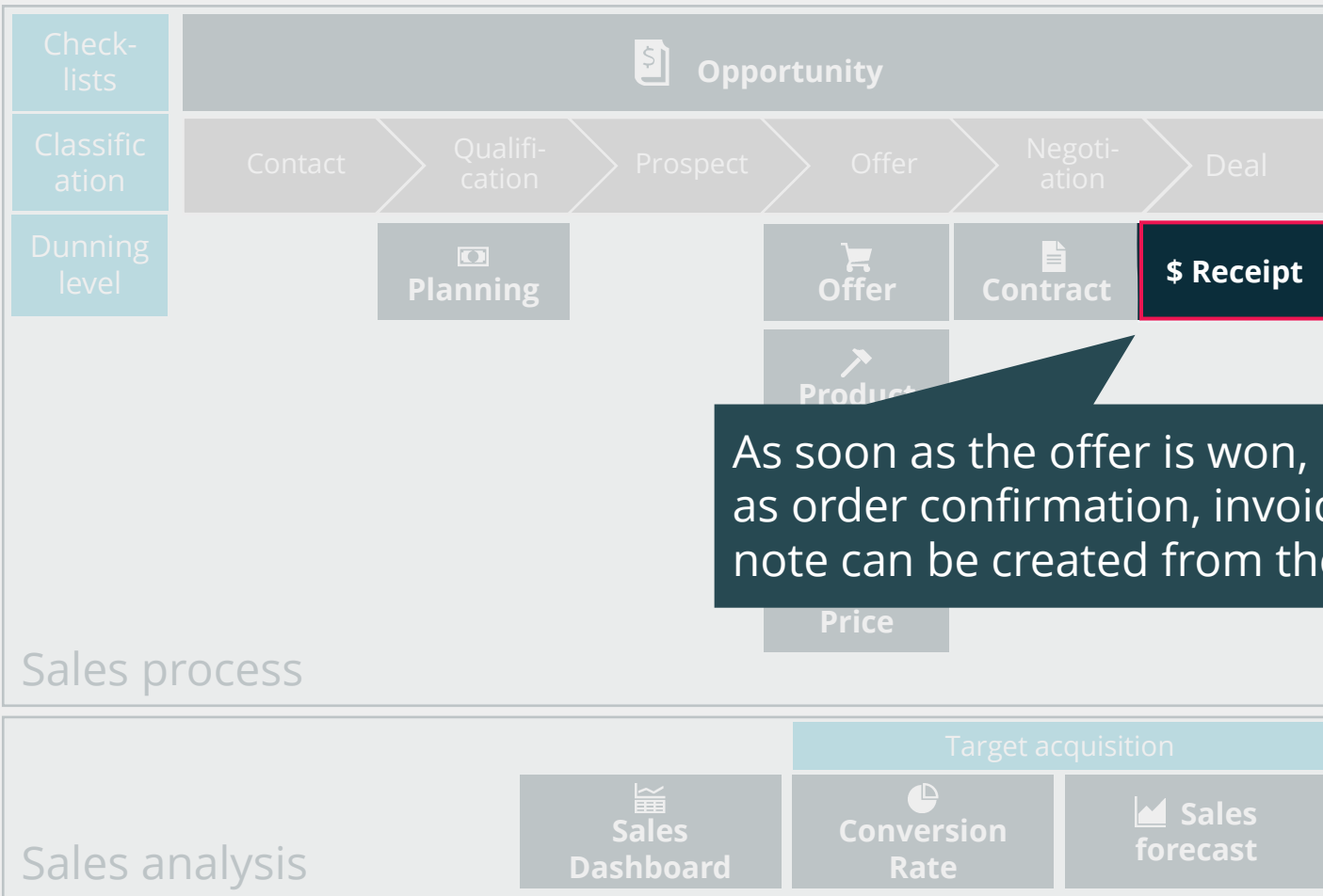
Target date of the service 13/04/2027

Save Cancel

Required value is missing

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

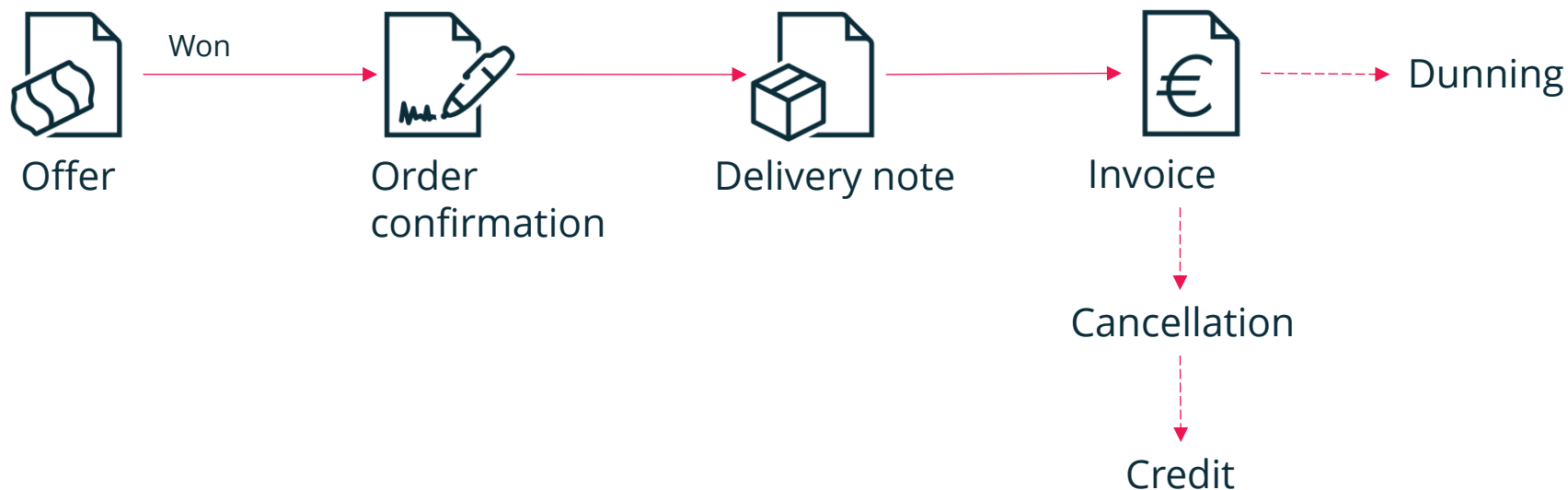
Receipt



- To be created in advance by the administrator
- In use "daily" by end users

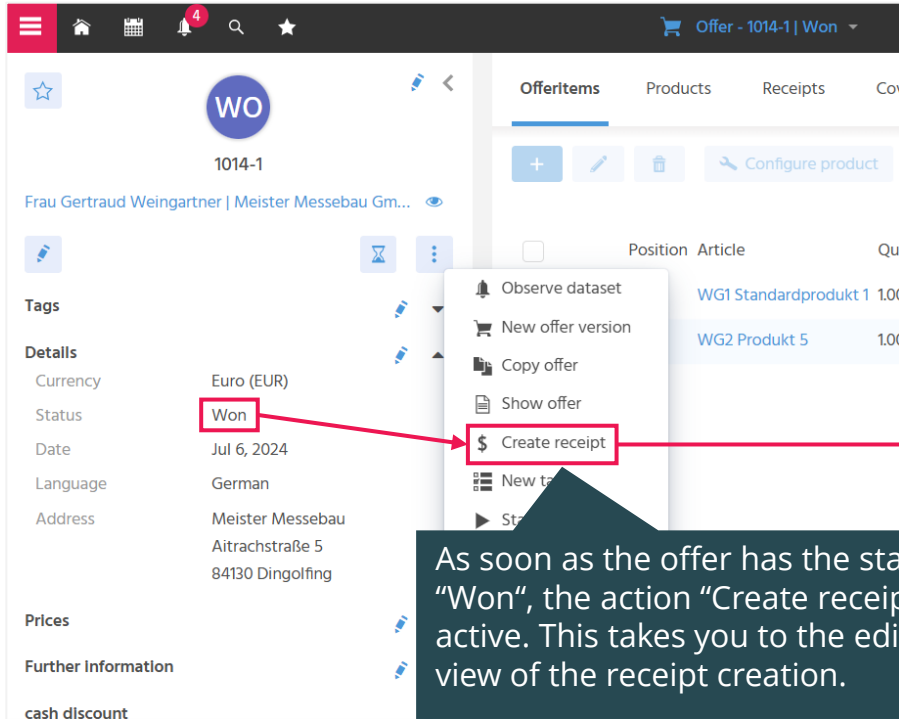
Receipt in general

Receipt



Receipt

Excursus into the offer



The screenshot shows the ADITO software interface. On the left, a sidebar contains navigation icons and a list of details for offer 1014-1, including currency (Euro), date (Jul 6, 2024), language (German), and address (Meister Messebau). The main area displays the offer details, including a table of items: WG1 Standardprodukt 1 and WG2 Produkt 5. A red box highlights the 'Won' status in the 'Details' section. A red arrow points from this box to a dropdown menu where the 'Create receipt' option is highlighted. Another red arrow points from this option to a modal dialog box on the right.

Offer - 1014-1 | Won

WO

1014-1

Frau Gertraud Weingartner | Meister Messebau Gm...

Tags

Details

Currency: Euro (EUR)

Status: **Won**

Date: Jul 6, 2024

Language: German

Address: Meister Messebau, Aitrachstraße 5, 84130 Dingolfing

Prices

Further Information

cash discount

OfferItems

Products

Receipts

Cov

Observe dataset

New offer version

Copy offer

Show offer

Create receipt

New ta

St

Position Article Qua

WG1 Standardprodukt 1 1.00

WG2 Produkt 5 1.00

Do you want to create the receipt?

The offer includes optional items. These will be included in the receipt as mandatory items.

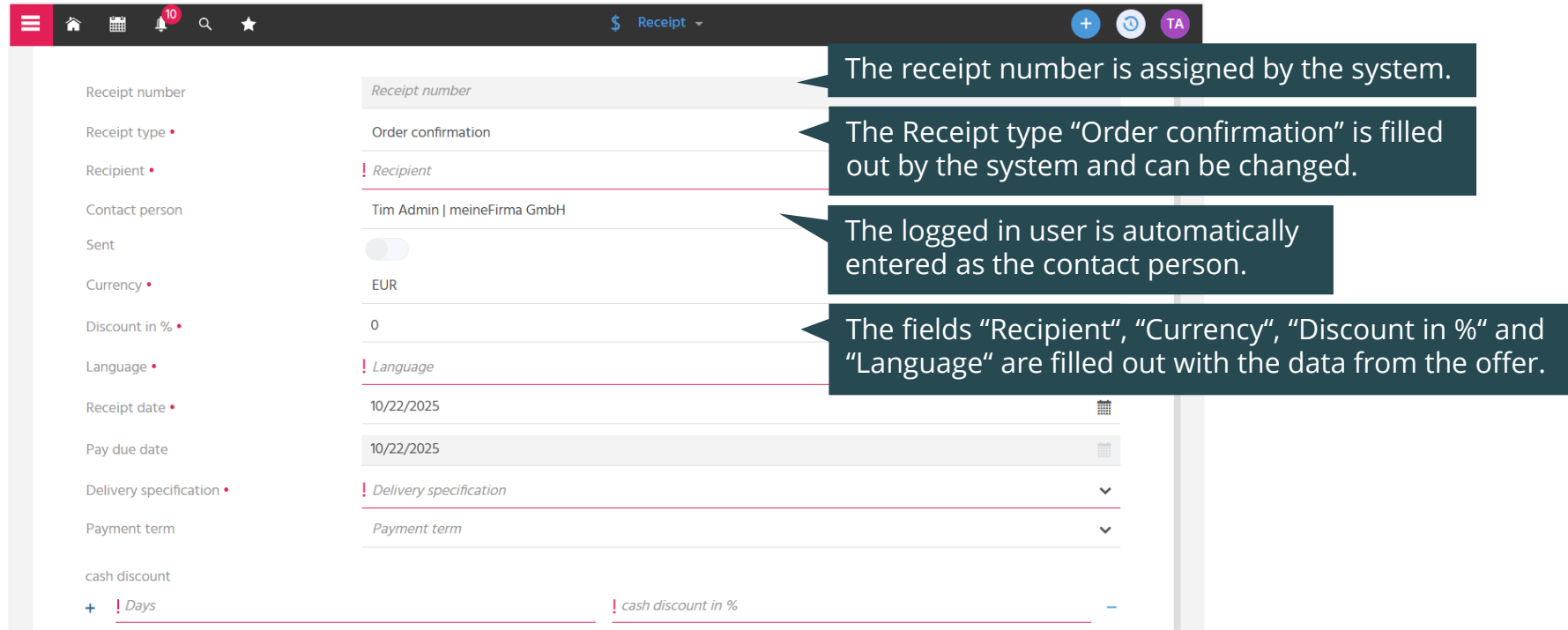
Yes No

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

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

Receipt

Create receipt

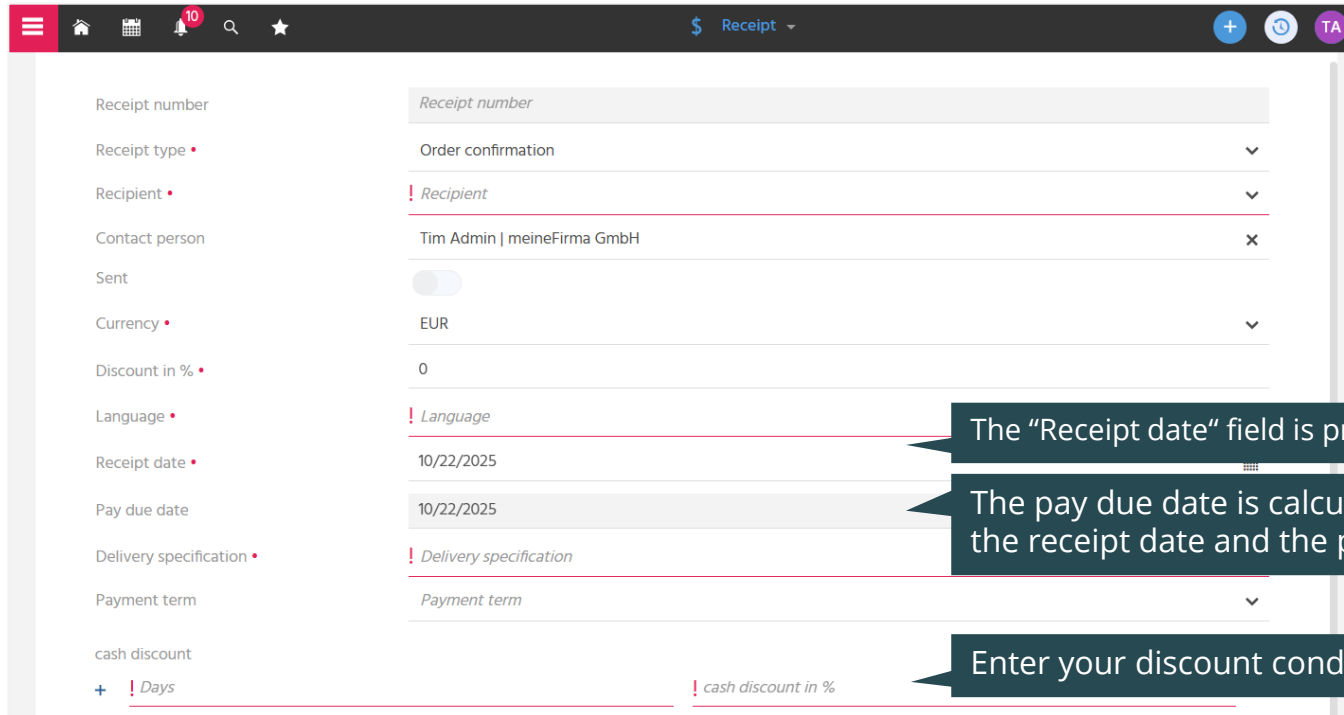


The screenshot shows the 'Create receipt' form in the ADITO system. The form is divided into two columns. The left column contains labels for various fields, and the right column contains the values. Callouts provide additional information about certain fields.

Field	Value	Callout
Receipt number	Receipt number	The receipt number is assigned by the system.
Receipt type	Order confirmation	The Receipt type "Order confirmation" is filled out by the system and can be changed.
Recipient	! Recipient	
Contact person	Tim Admin meineFirma GmbH	The logged in user is automatically entered as the contact person.
Sent	☐	
Currency	EUR	
Discount in %	0	The fields "Recipient", "Currency", "Discount in %" and "Language" are filled out with the data from the offer.
Language	! Language	
Receipt date	10/22/2025	
Pay due date	10/22/2025	
Delivery specification	! Delivery specification	
Payment term	Payment term	
cash discount	+ ! Days	
	! cash discount in %	

Receipt

Create receipt



The screenshot shows the 'Create receipt' form in the ADITO application. The form is displayed in a dark-themed interface. At the top, there is a navigation bar with a hamburger menu, home, calendar, notifications (10), search, and star icons. The main header shows a currency symbol and the word 'Receipt' with a dropdown arrow. On the right side of the header, there are three circular icons: a plus sign, a refresh/clock icon, and a user profile icon labeled 'TA'.

The form fields are as follows:

- Receipt number:
- Receipt type: (dropdown arrow)
- Recipient: (dropdown arrow)
- Contact person: (clear icon)
- Sent: ☐
- Currency: (dropdown arrow)
- Discount in %:
- Language: (dropdown arrow)
- Receipt date: (calendar icon)
- Pay due date: (dropdown arrow)
- Delivery specification: (dropdown arrow)
- Payment term: (dropdown arrow)
- cash discount: (dropdown arrow)
- (dropdown arrow)

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

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

Enter your discount conditions here.

Receipt

Create receipt

cash discount

+ ! Days

! cash discount in %

Letter salutation •	! Letter salutation
Choose Header	Choose Header
Header text •	! Header text
Choose Footer	Choose Footer
Footer text •	! Footer text

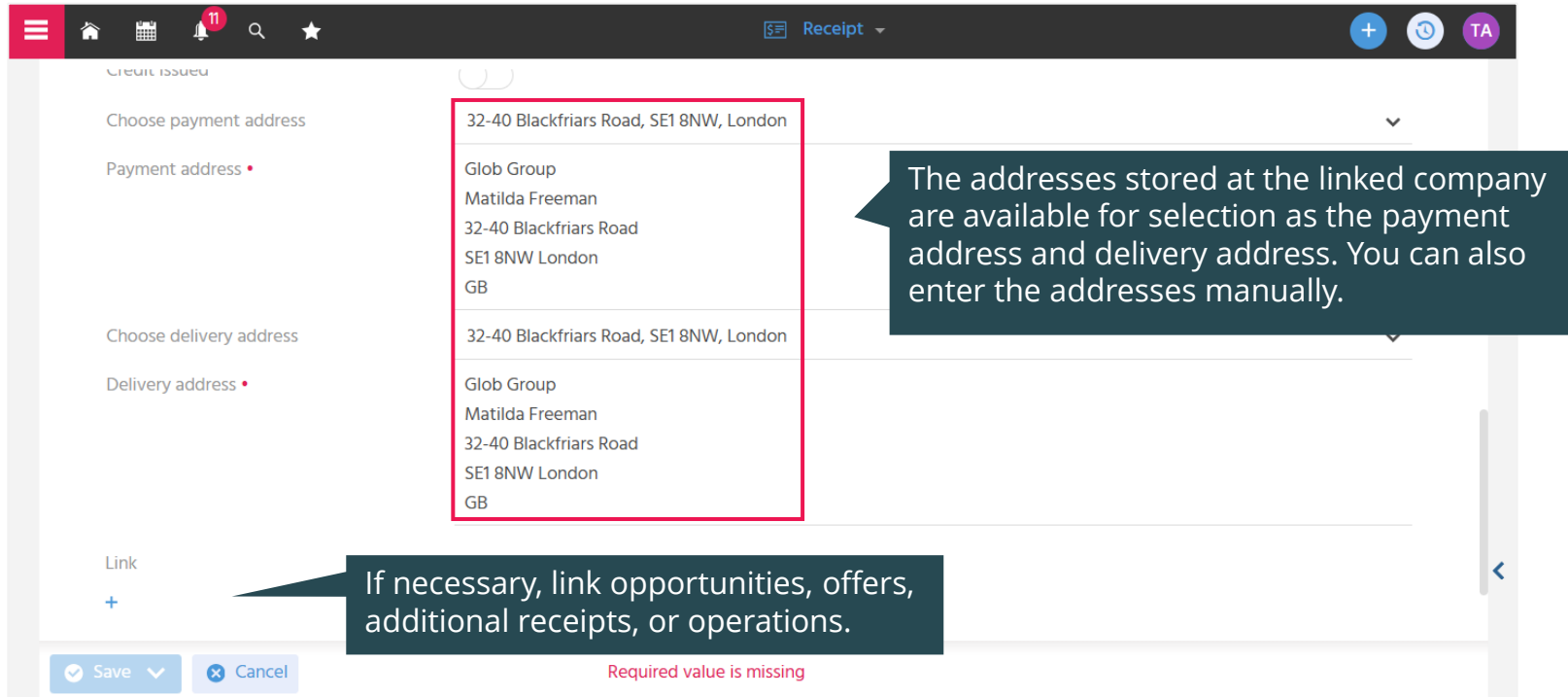
cancelled ☐

Credit issued ☐

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

Receipt

Create receipt



The screenshot shows the 'Create receipt' form in the ADITO application. The form has a dark header bar with navigation icons and a 'Receipt' dropdown. The main content area is divided into sections for 'Choose payment address', 'Choose delivery address', and 'Link'. The 'Choose payment address' and 'Choose delivery address' sections each have a text input field and a dropdown menu. The dropdown menus are open, showing a list of addresses: 'Glob Group', 'Matilda Freeman', '32-40 Blackfriars Road', 'SE1 8NW London', and 'GB'. A red box highlights these dropdown lists. A callout bubble points to the dropdowns with the text: 'The addresses stored at the linked company are available for selection as the payment address and delivery address. You can also enter the addresses manually.' Another callout bubble points to the 'Link' section with the text: 'If necessary, link opportunities, offers, additional receipts, or operations.' At the bottom, there are 'Save' and 'Cancel' buttons. A red error message 'Required value is missing' is displayed below the buttons.

Choose payment address

Payment address •

Choose delivery address

Delivery address •

Link

Save Cancel

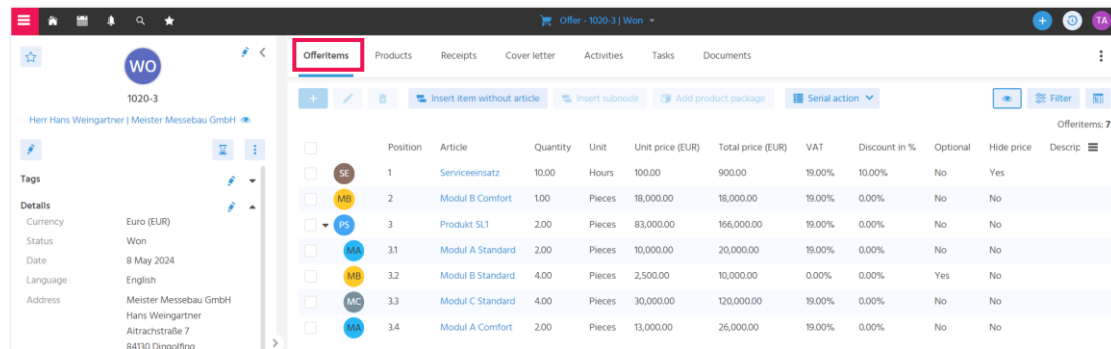
Required value is missing

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

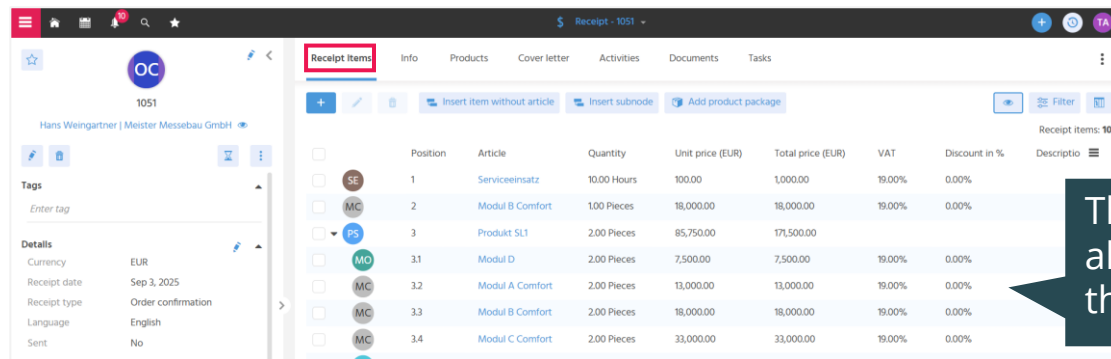
If necessary, link opportunities, offers, additional receipts, or operations.

Receipt

Order item



	Position	Article	Quantity	Unit	Unit price (EUR)	Total price (EUR)	VAT	Discount in %	Optional	Hide price	Descr:
☐	1	Serviceinsatz	10.00	Hours	100.00	900.00	19.00%	10.00%	No	Yes	
☐	2	Modul B Comfort	1.00	Pieces	18,000.00	18,000.00	19.00%	0.00%	No	No	
☐	3	Produkt SL1	2.00	Pieces	83,000.00	166,000.00	19.00%	0.00%	No	No	
☐	3.1	Modul A Standard	2.00	Pieces	10,000.00	20,000.00	19.00%	0.00%	No	No	
☐	3.2	Modul B Standard	4.00	Pieces	2,500.00	10,000.00	0.00%	0.00%	Yes	No	
☐	3.3	Modul C Standard	4.00	Pieces	30,000.00	120,000.00	19.00%	0.00%	No	No	
☐	3.4	Modul A Comfort	2.00	Pieces	13,000.00	26,000.00	19.00%	0.00%	No	No	

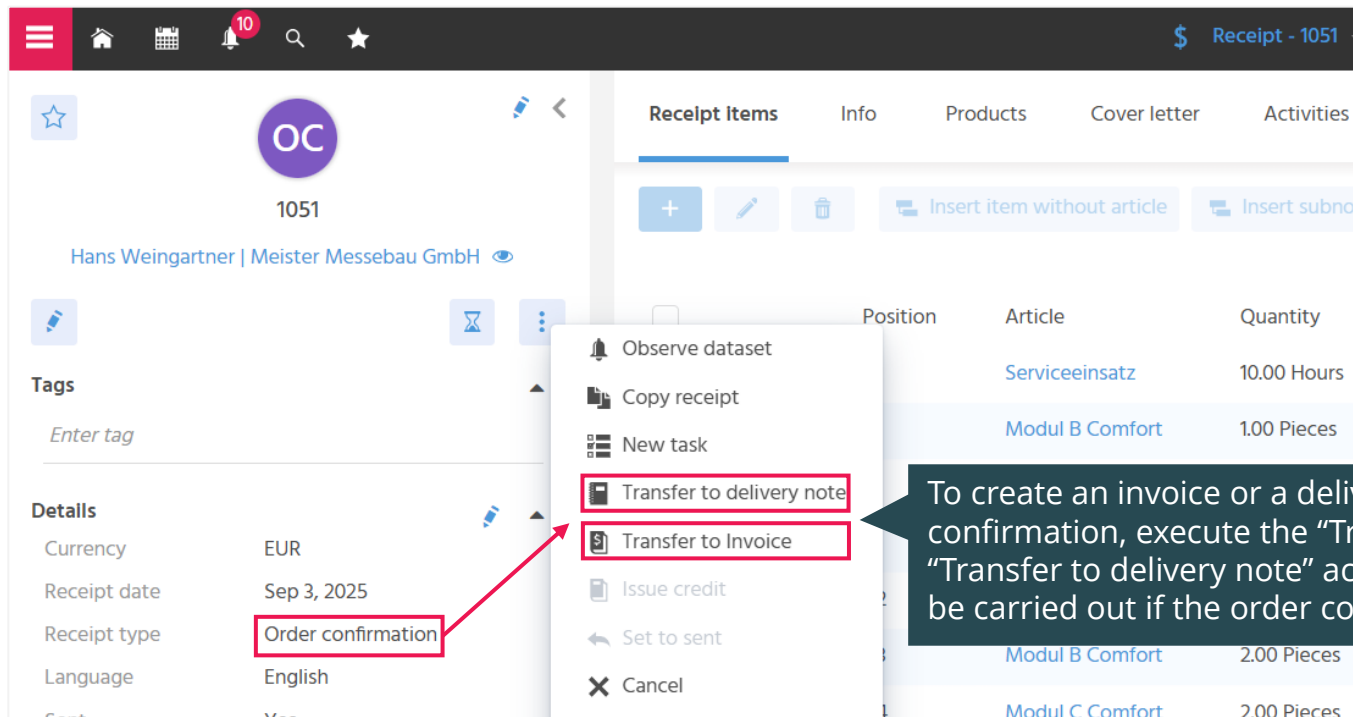


	Position	Article	Quantity	Unit price (EUR)	Total price (EUR)	VAT	Discount in %	Description
☐	1	Serviceinsatz	10.00	Hours	100.00	1,000.00	19.00%	0.00%
☐	2	Modul B Comfort	1.00	Pieces	18,000.00	18,000.00	19.00%	0.00%
☐	3	Produkt SL1	2.00	Pieces	85,750.00	171,500.00		
☐	3.1	Modul D	2.00	Pieces	7,500.00	7,500.00	19.00%	0.00%
☐	3.2	Modul A Comfort	2.00	Pieces	13,000.00	13,000.00	19.00%	0.00%
☐	3.3	Modul B Comfort	2.00	Pieces	18,000.00	18,000.00	19.00%	0.00%
☐	3.4	Modul C Comfort	2.00	Pieces	33,000.00	33,000.00	19.00%	0.00%

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

Receipt

Transfer to delivery note/invoice



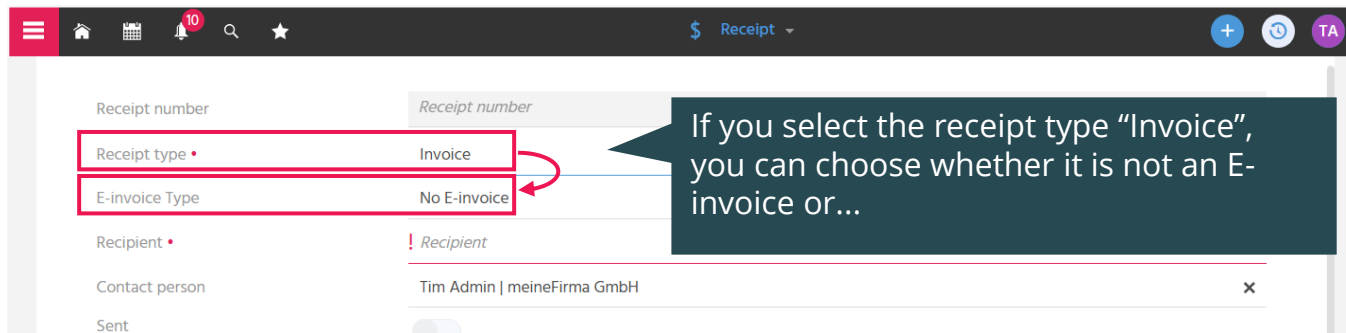
The screenshot shows the ADITO Receipt interface for receipt 1051. The left sidebar contains a header with a star icon, a purple circle with 'OC' and '1051', and the customer name 'Hans Weingartner | Meister Messebau GmbH'. Below this are 'Tags' and 'Details' sections. The 'Details' section shows 'Currency: EUR', 'Receipt date: Sep 3, 2025', 'Receipt type: Order confirmation', and 'Language: English'. The 'Order confirmation' text is highlighted with a red box. A red arrow points from this box to a context menu. The context menu is open, showing options: 'Observe dataset', 'Copy receipt', 'New task', 'Transfer to delivery note', 'Transfer to Invoice', 'Issue credit', 'Set to sent', and 'Cancel'. The 'Transfer to delivery note' and 'Transfer to Invoice' options are highlighted with red boxes. The main area shows the 'Receipt Items' tab with a table of items.

Position	Article	Quantity
	Serviceeeinsatz	10.00 Hours
	Modul B Comfort	1.00 Pieces
	Modul B Comfort	2.00 Pieces
	Modul C Comfort	2.00 Pieces

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

Receipt

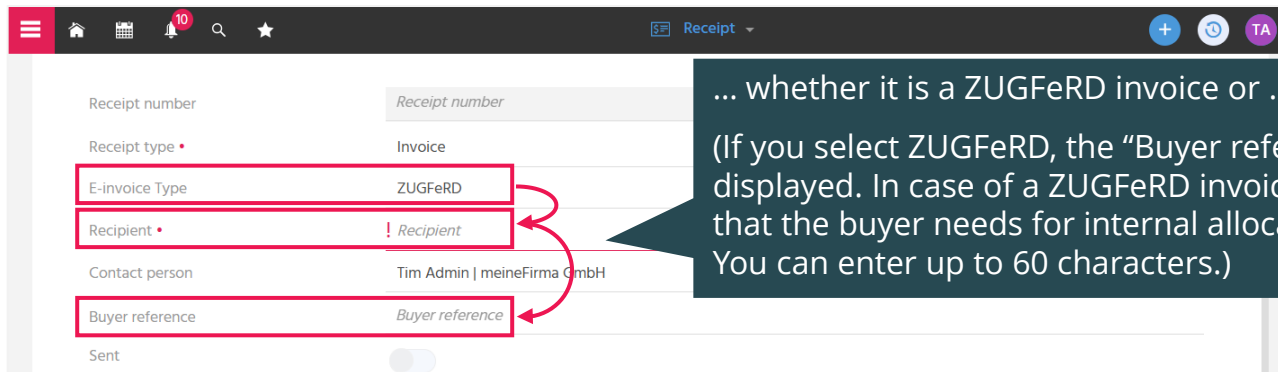
Create receipt - document types "Invoice", "Credit", "Cancellation"



The screenshot shows the ADITO receipt creation interface. The 'Receipt type' is set to 'Invoice'. The 'E-invoice Type' is set to 'No E-invoice'. The 'Recipient' field is empty, indicated by an exclamation mark. The 'Contact person' is 'Tim Admin | meineFirma GmbH'. The 'Sent' toggle is off.

Field	Value
Receipt number	Receipt number
Receipt type	Invoice
E-invoice Type	No E-invoice
Recipient	! Recipient
Contact person	Tim Admin meineFirma GmbH
Sent	☐

If you select the receipt type "Invoice", you can choose whether it is not an E-invoice or...



The screenshot shows the ADITO receipt creation interface. The 'Receipt type' is set to 'Invoice'. The 'E-invoice Type' is set to 'ZUGFeRD'. The 'Recipient' field is empty, indicated by an exclamation mark. The 'Contact person' is 'Tim Admin | meineFirma GmbH'. The 'Buyer reference' field is empty. The 'Sent' toggle is off.

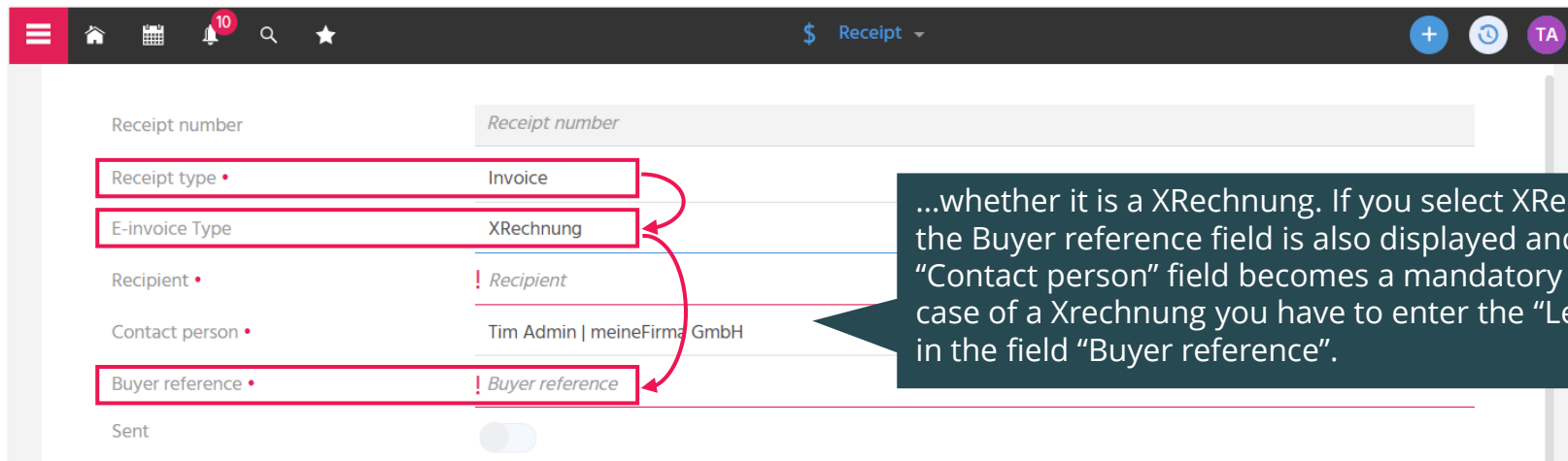
Field	Value
Receipt number	Receipt number
Receipt type	Invoice
E-invoice Type	ZUGFeRD
Recipient	! Recipient
Contact person	Tim Admin meineFirma GmbH
Buyer reference	Buyer reference
Sent	☐

... whether it is a ZUGFeRD invoice or ...

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

Receipt

Create receipt - document types "Invoice", "Credit", "Cancellation"



The screenshot shows the ADITO receipt creation interface. The top navigation bar includes a menu icon, home, calendar, notifications (10), search, and star icons. The main header displays a dollar sign, the word "Receipt", and three action buttons: a plus sign, a refresh icon, and a user icon labeled "TA".

The form fields are as follows:

- Receipt number**: A text input field with the placeholder "Receipt number".
- Receipt type**: A dropdown menu currently set to "Invoice".
- E-invoice Type**: A dropdown menu currently set to "XRechnung".
- Recipient**: A text input field with a red exclamation mark icon and the placeholder "Recipient".
- Contact person**: A text input field containing "Tim Admin | meineFirma GmbH".
- Buyer reference**: A text input field with a red exclamation mark icon and the placeholder "Buyer reference".
- Sent**: A toggle switch currently in the "off" position.

Red boxes highlight the "Receipt type", "E-invoice Type", and "Buyer reference" fields. Red arrows point from the "XRechnung" selection in the "E-invoice Type" dropdown to the "Recipient" and "Buyer reference" fields, indicating that these fields become mandatory when "XRechnung" is selected.

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

Excursus on laws and standards

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

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

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



EN 16931

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

The Growth Opportunities Act specifies that

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

*EDI-Format inclusive

**EDI-Format 2027 still independent of turnover

Excursus on terms

Generic term

E-	invoice
electronically transmittable, receivable & processable	Invoices, cancellations, credit notes and other “document types”
Must contain structured data à la EN 16931, e.g. <code><rsm:ExchangedDocument></code> <code><ram:ID>NUMFACT</ram:ID></code> <code><ram:TypeCode>380</ram:TypeCode></code>	

Other invoice

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

Standardized formats

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

Implementation in the ADITO xRM



Professional

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

Technical

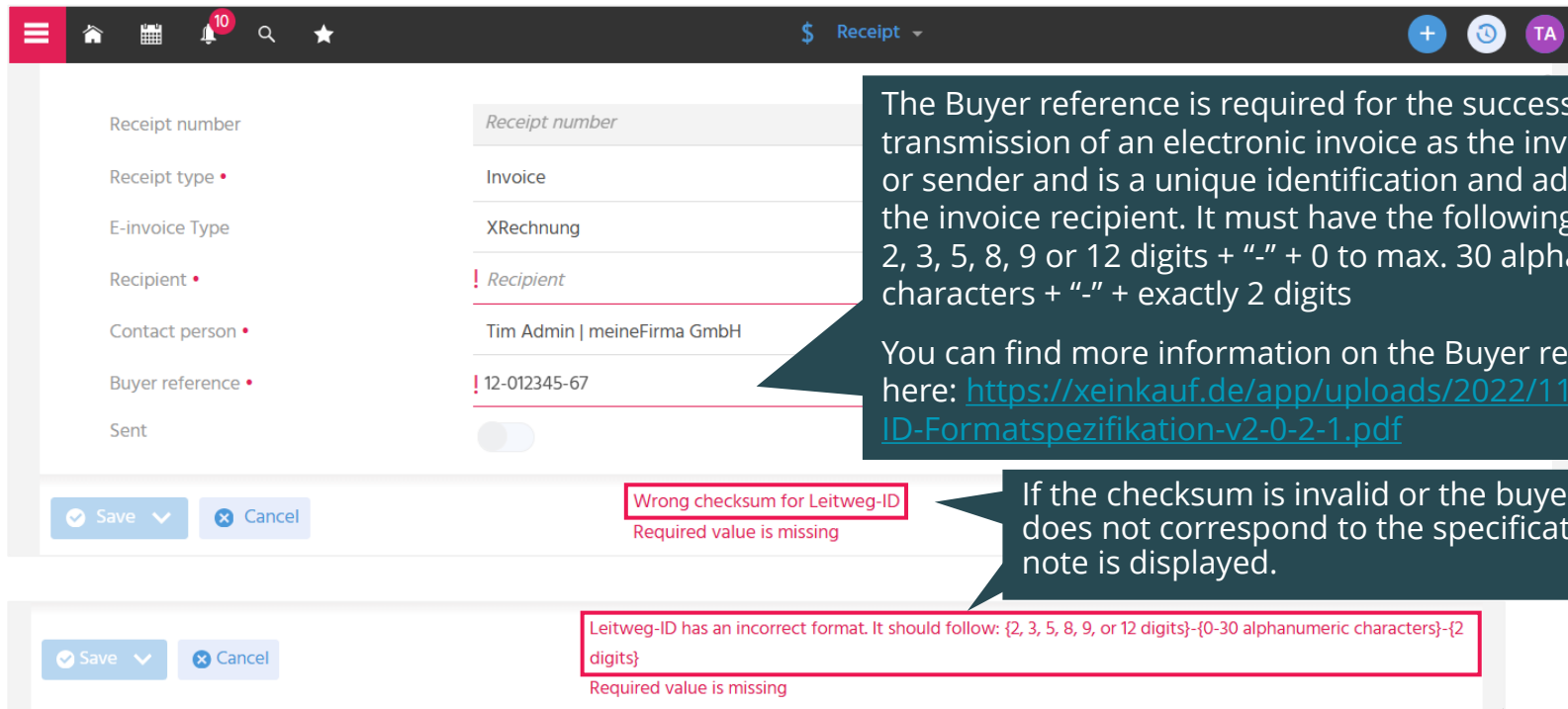
- new Java plugin with the open source library “mustangproject” (version 2.15.0)
- An XML file is generated and returned in xRM from the receipt data
- if you also transfer a PDF file to the plugin, this is converted to PDF/A-3 and provided with the previously created XML

[Plugins/E-invoice - GitLab](#)



Receipt

Create receipt - document types "Invoice", "Credit", "Cancellation"



The screenshot shows the ADITO receipt creation interface. The form includes the following fields:

- Receipt number: *Receipt number*
- Receipt type: Invoice
- E-invoice Type: XRechnung
- Recipient: *Recipient*
- Contact person: Tim Admin | meineFirma GmbH
- Buyer reference: *12-012345-67*
- Sent: ☐

At the bottom of the form, there are two buttons: "Save" and "Cancel". A red box highlights the error message:

Wrong checksum for Leitweg-ID
Required value is missing

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

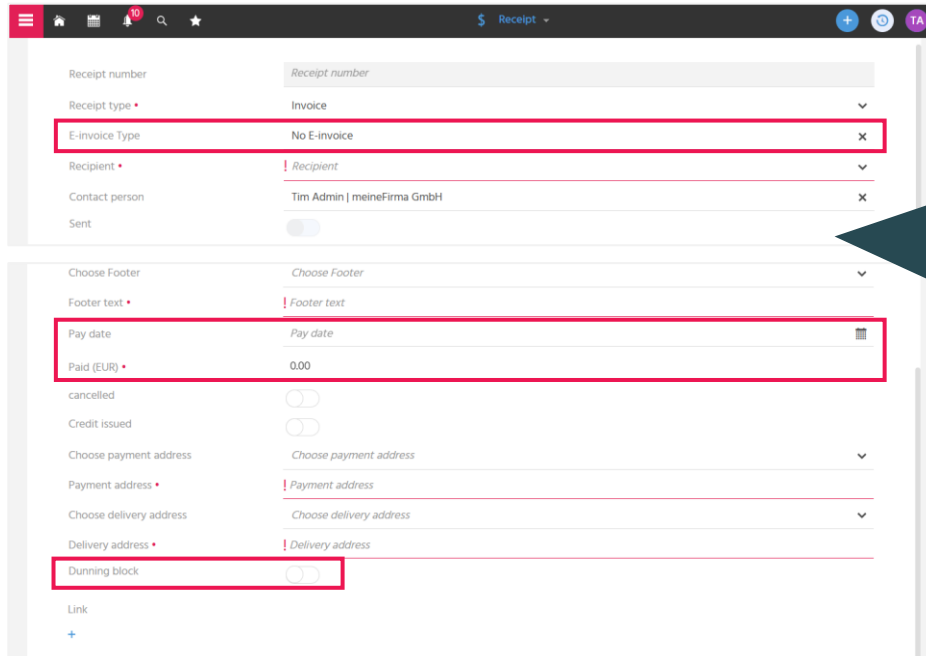
You can find more information on the Buyer reference here: <https://xeinkauf.de/app/uploads/2022/11/Leitweg-ID-Formatspezifikation-v2-0-2-1.pdf>

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

Leitweg-ID has an incorrect format. It should follow: {2, 3, 5, 8, 9, or 12 digits}-{0-30 alphanumeric characters}-{2 digits}
Required value is missing

Receipt

Create receipt - receipt type „Invoice“



Receipt number

Receipt type • Invoice

E-invoice Type No E-invoice

Recipient

Contact person Tim Admin | meineFirma GmbH

Sent

Choose Footer

Footer text

Pay date

Paid (EUR) • 0.00

cancelled

Credit issued

Choose payment address

Payment address

Choose delivery address

Delivery address

Dunning block

Link

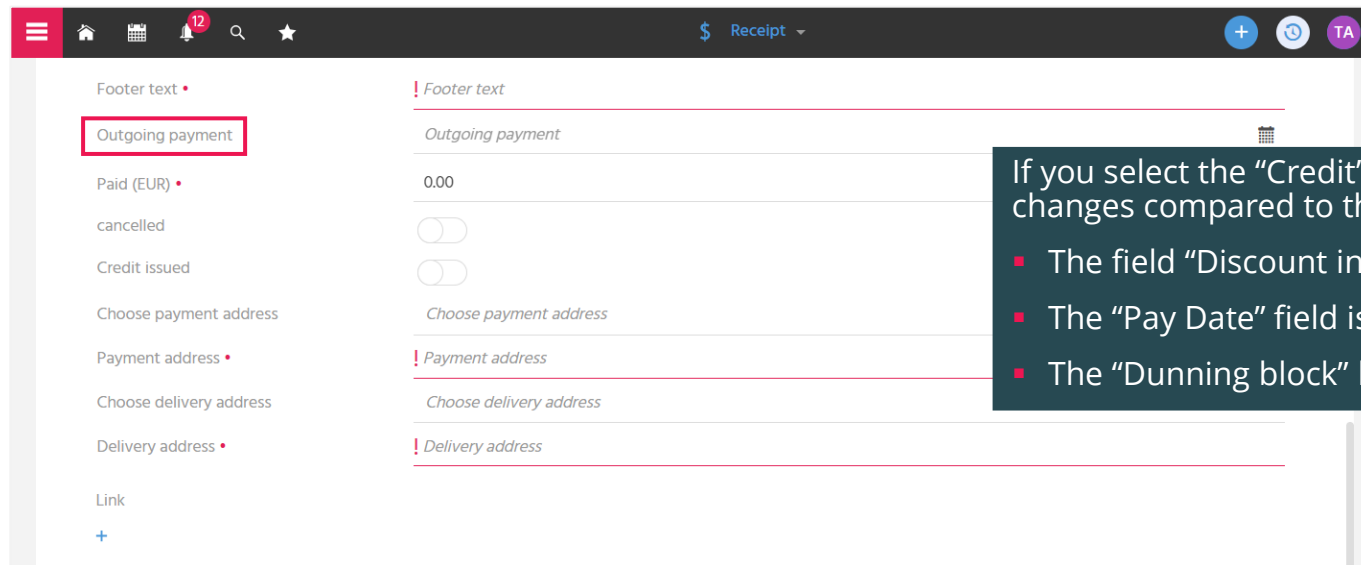
+

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

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

Receipt

Create receipt – receipt type „Credit“

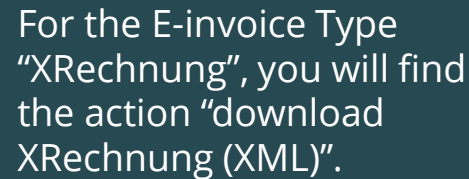
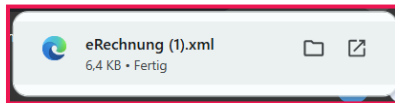


The screenshot shows the ADITO receipt creation interface. The top navigation bar includes a menu icon, home, calendar, notifications (12), search, and star icons. The title bar shows a currency symbol, 'Receipt', and buttons for adding (+), undo, and a 'TA' button. The left sidebar contains the following options: 'Footer text', 'Outgoing payment' (highlighted with a red box), 'Paid (EUR)', 'cancelled', 'Credit issued', 'Choose payment address', 'Payment address', 'Choose delivery address', 'Delivery address', and 'Link'. The main form area displays the following fields: 'Footer text' with a red error icon, 'Outgoing payment' with a calendar icon, 'Paid (EUR)' with the value '0.00', 'cancelled' and 'Credit issued' with toggle switches, 'Choose payment address', 'Payment address' with a red error icon, 'Choose delivery address', 'Delivery address' with a red error icon, and a 'Link' section with a plus icon.

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

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

Download XRechnung (XML)



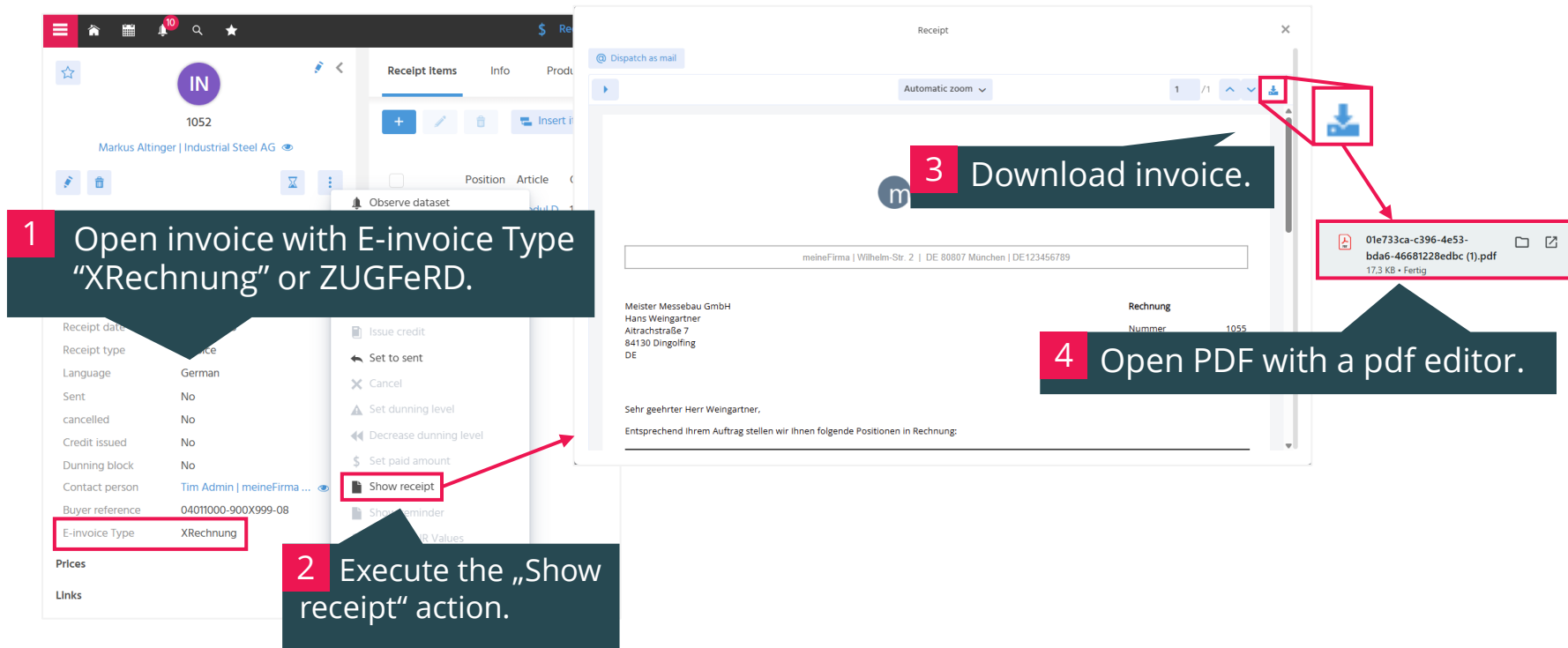
This XML file does not appear to have any style information associated with it. The document tree is shown below.

[illegible]

The TypeCode of invoices is "380".

Receipt

Open invoice as PDF including XML file



1 Open invoice with E-invoice Type "XRechnung" or ZUGFeRD.

2 Execute the „Show receipt“ action.

3 Download invoice.

4 Open PDF with a pdf editor.

meineFirma | Wilhelm-Str. 2 | DE 80807 München | DE123456789

Rechnung
Nummer 1055

Meister Messebau GmbH
Hans Weingartner
Altrachstraße 7
84130 Dingolfing
DE

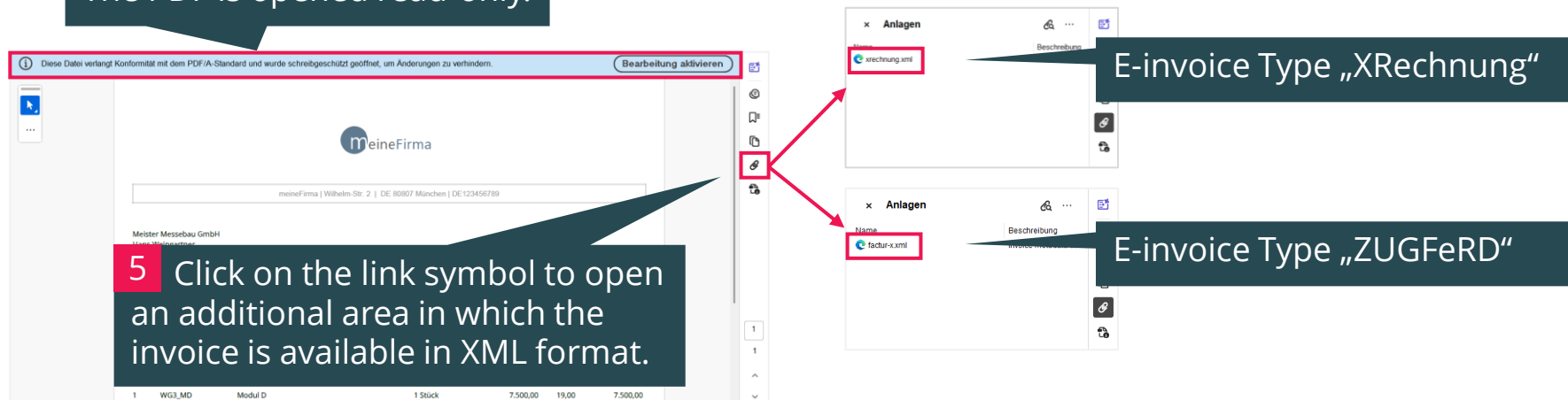
Sehr geehrter Herr Weingartner,
Entsprechend Ihrem Auftrag stellen wir Ihnen folgende Positionen in Rechnung:

01e733ca-c396-4e53-bda6-46681228edbc (1).pdf
17,3 KB • Fertig

Receipt

Open invoice as PDF including XML file

The PDF is opened read-only.



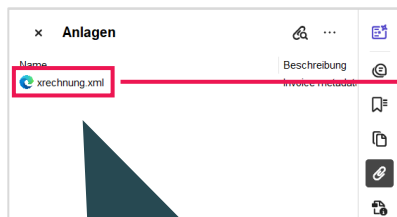
The screenshot shows the ADITO interface. At the top, a blue bar contains a warning icon and the text: "Diese Datei verlangt Konformität mit dem PDF/A-Standard und wurde schreibgeschützt geöffnet, um Änderungen zu verhindern." To the right of this bar is a button labeled "Bearbeitung aktivieren". Below the bar, the main content area shows a PDF viewer for "meineFirma". A dark blue callout box with a red "5" in a square contains the text: "Click on the link symbol to open an additional area in which the invoice is available in XML format." To the right of the PDF viewer, a sidebar shows a list of files. Two files are highlighted with red boxes: "xrechnung.xml" and "factur-x.xml". Red arrows point from the link icon in the PDF viewer's sidebar to these two files. To the right of the "xrechnung.xml" file is a dark blue callout box with the text: "E-invoice Type „XRechnung“". To the right of the "factur-x.xml" file is a dark blue callout box with the text: "E-invoice Type „ZUGFeRD“".



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

Receipt

Open invoice as PDF including XML file



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

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

```
<?xml version="1.0" encoding="UTF-8" standalone="yes"?>
<rsm:CrossIndustryInvoice xmlns:rsm="urn:un:unece:uncefact:data:standard:CrossIndustryInvoice:100" xmlns:xs="http://www.w3.org/2001/XMLSchema-instance" xmlns:udt="urn:un:unece:uncefact:data:standard:UnqualifiedDataType:100" xmlns:qdt="urn:un:unece:uncefact:data:standard:QualifiedDataType:100" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi:schemaLocation="urn:un:unece:uncefact:data:standard:CrossIndustryInvoice:100 urn:un:unece:uncefact:data:standard:CrossIndustryInvoice:100.xsd" >
  <!-- generated by: mustangproject.org vnull -->
  <rsm:ExchangedDocumentContext>
    <rsm:BusinessProcessSpecifiedDocumentContextParameter>
      <ram:ID>urn:fdc:peppol.eu:2017:poacc:billing:01:1.0</ram:ID>
    </ram:BusinessProcessSpecifiedDocumentContextParameter>
    <rsm:GuidelineSpecifiedDocumentContextParameter>
      <ram:ID>urn:cen.eu:en16931:2017#compliant#urn:xeinkauf.de:kosit:xrechnung_3</ram:ID>
    </ram:GuidelineSpecifiedDocumentContextParameter>
  </rsm:ExchangedDocumentContext>
  <rsm:ExchangedDocument>
    <ram:ID>1058</ram:ID>
    <ram:TypeCode>380</ram:TypeCode>
    <ram:IssueDateTime>
      <udt:DateTimeString format="102">20241114</udt:DateTimeString>
    </ram:IssueDateTime>
  </rsm:ExchangedDocument>
  <rsm:SupplyChainTradeTransaction>
    <ram:IncludedSupplyChainTradeLineItem>
      <ram:AssociatedDocumentLineDocument>
        <ram:LineID>1</ram:LineID>
        <ram:AssociatedDocumentLineDocument>
          <ram:Name>Standardprodukt 1</ram:Name>
          <ram:SpecifiedTradeProduct>
            <ram:NetPriceProductTradePrice>
              <ram:ChargeAmount>10000.0000</ram:ChargeAmount>
              <ram:BasisQuantity unitCode="C62">1.0000</ram:BasisQuantity>
            </ram:NetPriceProductTradePrice>
          </ram:SpecifiedTradeProduct>
          <ram:SpecifiedLineTradeDelivery>
            <ram:BilledQuantity unitCode="C62">1.0000</ram:BilledQuantity>
            <ram:SpecifiedLineTradeSettlement>
              <ram:ApplicableTradeTax>
                <ram:TypeCode>WAT</ram:TypeCode>
                <ram:CategoryCode>S</ram:CategoryCode>
                <ram:RateApplicablePercent>19.00</ram:RateApplicablePercent>
              </ram:ApplicableTradeTax>
            </ram:SpecifiedLineTradeSettlement>
          </ram:SpecifiedLineTradeDelivery>
        </ram:AssociatedDocumentLineDocument>
      </ram:IncludedSupplyChainTradeLineItem>
    </ram:SupplyChainTradeTransaction>
  </rsm:SupplyChainTradeTransaction>
</rsm:CrossIndustryInvoice>
```

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

```
<?xml version="1.0" encoding="UTF-8" standalone="yes"?>
<rsm:CrossIndustryInvoice xmlns:rsm="urn:un:unece:uncefact:data:standard:CrossIndustryInvoice:100" xmlns:xs="http://www.w3.org/2001/XMLSchema-instance" xmlns:udt="urn:un:unece:uncefact:data:standard:UnqualifiedDataType:100" xmlns:qdt="urn:un:unece:uncefact:data:standard:QualifiedDataType:100" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi:schemaLocation="urn:un:unece:uncefact:data:standard:CrossIndustryInvoice:100 urn:un:unece:uncefact:data:standard:CrossIndustryInvoice:100.xsd" >
  <!-- generated by: mustangproject.org vnull -->
  <rsm:ExchangedDocumentContext>
    <rsm:BusinessProcessSpecifiedDocumentContextParameter>
      <ram:ID>urn:fdc:peppol.eu:2017:poacc:billing:01:1.0</ram:ID>
    </ram:BusinessProcessSpecifiedDocumentContextParameter>
    <rsm:GuidelineSpecifiedDocumentContextParameter>
      <ram:ID>urn:cen.eu:en16931:2017#compliant#urn:xeinkauf.de:kosit:xrechnung_3</ram:ID>
    </ram:GuidelineSpecifiedDocumentContextParameter>
  </rsm:ExchangedDocumentContext>
  <rsm:ExchangedDocument>
    <ram:ID>1058</ram:ID>
    <ram:TypeCode>380</ram:TypeCode>
    <ram:IssueDateTime>
      <udt:DateTimeString format="102">20241114</udt:DateTimeString>
    </ram:IssueDateTime>
  </rsm:ExchangedDocument>
  <rsm:SupplyChainTradeTransaction>
    <ram:IncludedSupplyChainTradeLineItem>
      <ram:AssociatedDocumentLineDocument>
        <ram:LineID>1</ram:LineID>
        <ram:AssociatedDocumentLineDocument>
          <ram:Name>Standardprodukt 1</ram:Name>
          <ram:SpecifiedTradeProduct>
            <ram:NetPriceProductTradePrice>
              <ram:ChargeAmount>10000.0000</ram:ChargeAmount>
              <ram:BasisQuantity unitCode="C62">1.0000</ram:BasisQuantity>
            </ram:NetPriceProductTradePrice>
          </ram:SpecifiedTradeProduct>
          <ram:SpecifiedLineTradeDelivery>
            <ram:BilledQuantity unitCode="C62">1.0000</ram:BilledQuantity>
            <ram:SpecifiedLineTradeSettlement>
              <ram:ApplicableTradeTax>
                <ram:TypeCode>WAT</ram:TypeCode>
                <ram:CategoryCode>S</ram:CategoryCode>
                <ram:RateApplicablePercent>19.00</ram:RateApplicablePercent>
              </ram:ApplicableTradeTax>
            </ram:SpecifiedLineTradeSettlement>
          </ram:SpecifiedLineTradeDelivery>
        </ram:AssociatedDocumentLineDocument>
      </ram:IncludedSupplyChainTradeLineItem>
    </ram:SupplyChainTradeTransaction>
  </rsm:SupplyChainTradeTransaction>
</rsm:CrossIndustryInvoice>
```

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

Receipt

Difference xml „XRechnung“ and xml „ZUGFeRD“

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

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

```
<?xml version="1.0" encoding="UTF-8" ?>
<rsm:CrossIndustryInvoice xmlns:rsm="urn:un:unece:uncefact:data:standard:CrossIndustryInvoice:100" xmlns:xs="urn:oasis:names:specification:xml-schema-datatype:xsd"
  xmlns:udt="urn:un:unece:uncefact:data:standard:UnqualifiedDataType:100" xmlns:qdt="urn:un:unece:uncefact:data:standard:QualifiedDataType:100"
  xmlns:ds="urn:oasis:names:specification:xml-schema-datatype:100" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
  xsi:schemaLocation="urn:un:unece:uncefact:data:standard:CrossIndustryInvoice:100 urn:un:unece:uncefact:data:standard:CrossIndustryInvoice:100.xsd"
  <!-- generated by: mustangproject.org v2.15.0 -->
  <rsm:ExchangedDocumentContext>
    <ram:BusinessProcessSpecifiedDocumentContextParameter>
      <ram:ID>urn:fdc:peppol.eu:2017:poacc:billing:01:1.0</ram:ID>
    </ram:BusinessProcessSpecifiedDocumentContextParameter>
    <ram:GuidelineSpecifiedDocumentContextParameter>
      <ram:ID>urn:cen.eu:en16931:2017#compliant#urn:xeinkauf.de:kosit:xrechnung_3.0</ram:ID>
    </ram:GuidelineSpecifiedDocumentContextParameter>
  </rsm:ExchangedDocumentContext>
  <rsm:ExchangedDocument>
    <ram:ID>1051</ram:ID>
    <ram:TypeCode>380</ram:TypeCode>
    <ram:IssueDateTime>
      <udt:DateTimeString format="102">20250507</udt:DateTimeString>
    </ram:IssueDateTime>
  </rsm:ExchangedDocument>
  <rsm:SupplyChainTradeTransaction>
    <ram:IncludedSupplyChainTradeLineItem>
      <ram:AssociatedDocumentLineDocument>
        <ram:LineID>1</ram:LineID>
      </ram:AssociatedDocumentLineDocument>
      <ram:SpecifiedTradeProduct>
        <ram:Name>Standardprodukt 1</ram:Name>
        <ram:Description>Standard Stahlträger mit den Maßen 5m x 0,3m x 0,3m.</ram:Description>
      </ram:SpecifiedTradeProduct>
      <ram:SpecifiedLineTradeAgreement>
        <ram:NetPriceProductTradePrice>
          <ram:ChargeAmount>10000.0000</ram:ChargeAmount>
          <ram:BasisQuantity unitCode="C62">1.0000</ram:BasisQuantity>
        </ram:NetPriceProductTradePrice>
      </ram:SpecifiedLineTradeAgreement>
    </ram:IncludedSupplyChainTradeLineItem>
  </rsm:SupplyChainTradeTransaction>
</rsm:CrossIndustryInvoice>
```

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

Receipt

Send receipt by e-mail

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

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

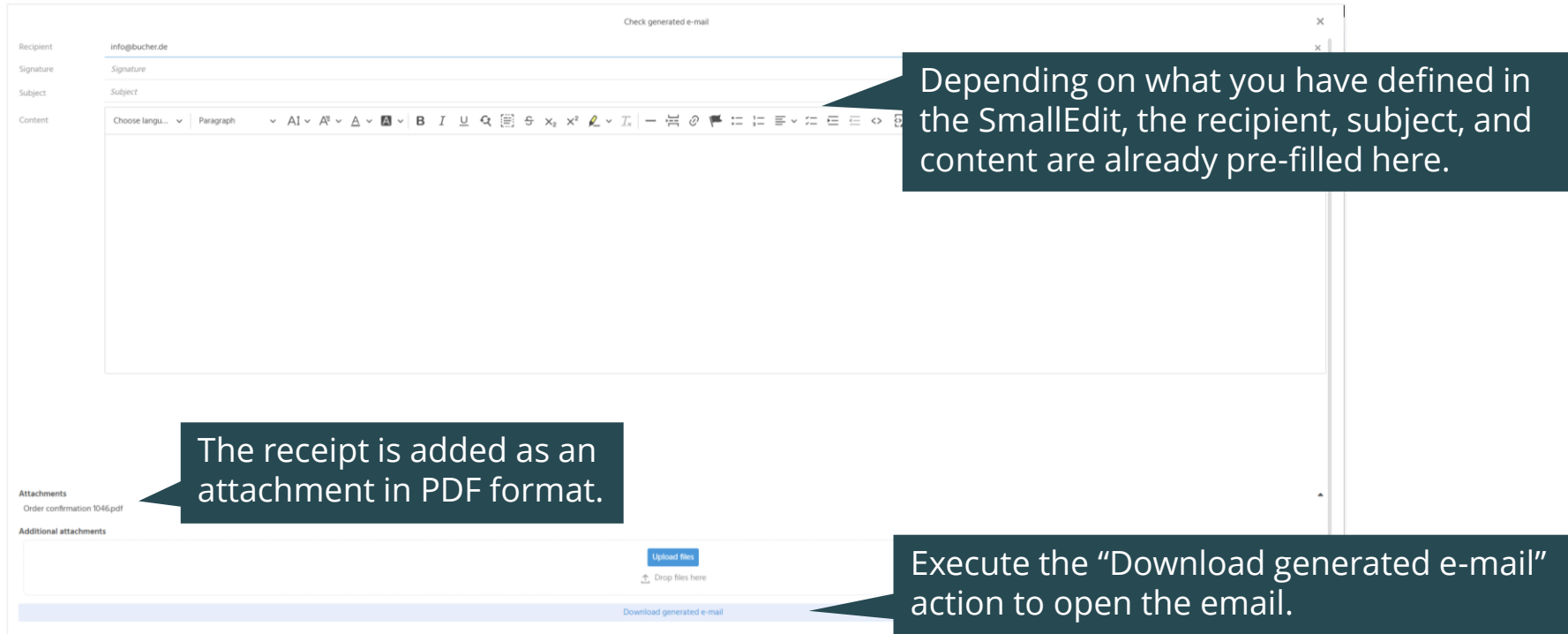
3 Select a recipient and a document template, enter the subject for the e-mail to be sent and click the "Generate mail" button.



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

Receipt

Send receipt by e-mail



Check generated e-mail

Recipient: info@bucher.de

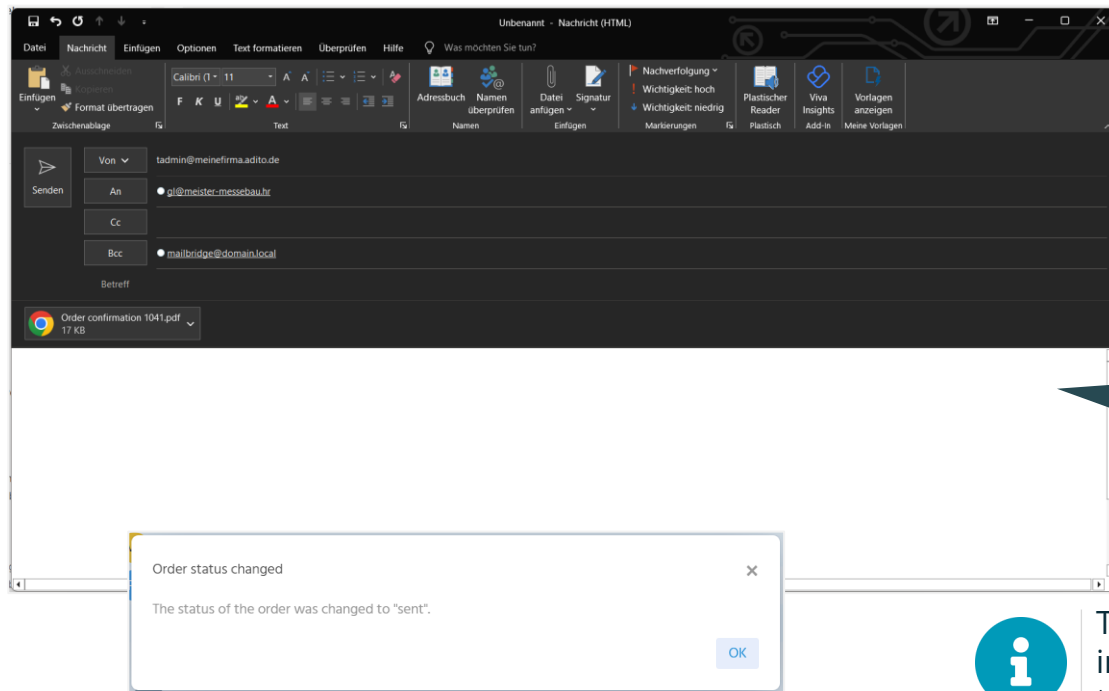
Signature: Signature

Subject: Subject

Content: Choose langu... Paragraph A1 A2 A3 A4 B I U Q X X² X³ X⁴ X⁵ X⁶ X⁷ X⁸ X⁹ X¹⁰ X¹¹ X¹² X¹³ X¹⁴ X¹⁵ X¹⁶ X¹⁷ X¹⁸ X¹⁹ X²⁰ X²¹ X²² X²³ X²⁴ X²⁵ X²⁶ X²⁷ X²⁸ X²⁹ X³⁰ X³¹ X³² X³³ X³⁴ X³⁵ X³⁶ X³⁷ X³⁸ X³⁹ X⁴⁰ X⁴¹ X⁴² X⁴³ X⁴⁴ X⁴⁵ X⁴⁶ X⁴⁷ X⁴⁸ X⁴⁹ X⁵⁰ X⁵¹ X⁵² X⁵³ X⁵⁴ X⁵⁵ X⁵⁶ X⁵⁷ X⁵⁸ X⁵⁹ X⁶⁰ X⁶¹ X⁶² X⁶³ X⁶⁴ X⁶⁵ X⁶⁶ X⁶⁷ X⁶⁸ X⁶⁹ X⁷⁰ X⁷¹ X⁷² X⁷³ X⁷⁴ X⁷⁵ X⁷⁶ X⁷⁷ X⁷⁸ X⁷⁹ X⁸⁰ X⁸¹ X⁸² X⁸³ X⁸⁴ X⁸⁵ X⁸⁶ X⁸⁷ X⁸⁸ X⁸⁹ X⁹⁰ X⁹¹ X⁹² X⁹³ X⁹⁴ X⁹⁵ X⁹⁶ X⁹⁷ X⁹⁸ X⁹⁹ X¹⁰⁰ X¹⁰¹ X¹⁰² X¹⁰³ X¹⁰⁴ X¹⁰⁵ X¹⁰⁶ X¹⁰⁷ X¹⁰⁸ X¹⁰⁹ X¹¹⁰ X¹¹¹ X¹¹² X¹¹³ X¹¹⁴ X¹¹⁵ X¹¹⁶ X¹¹⁷ X¹¹⁸ X¹¹⁹ X¹²⁰ X¹²¹ X¹²² X¹²³ X¹²⁴ X¹²⁵ X¹²⁶ X¹²⁷ X¹²⁸ X¹²⁹ X¹³⁰ X¹³¹ X¹³² X¹³³ X¹³⁴ X¹³⁵ X¹³⁶ X¹³⁷ X¹³⁸ X¹³⁹ X¹⁴⁰ X¹⁴¹ X¹⁴² X¹⁴³ X¹⁴⁴ X¹⁴⁵ X¹⁴⁶ X¹⁴⁷ X¹⁴⁸ X¹⁴⁹ X¹⁵⁰ X¹⁵¹ X¹⁵² X¹⁵³ X¹⁵⁴ X¹⁵⁵ X¹⁵⁶ X¹⁵⁷ X¹⁵⁸ X¹⁵⁹ X¹⁶⁰ X¹⁶¹ X¹⁶² X¹⁶³ X¹⁶⁴ X¹⁶⁵ X¹⁶⁶ X¹⁶⁷ X¹⁶⁸ X¹⁶⁹ X¹⁷⁰ X¹⁷¹ X¹⁷² X¹⁷³ X¹⁷⁴ X¹⁷⁵ X¹⁷⁶ X¹⁷⁷ X¹⁷⁸ X¹⁷⁹ X¹⁸⁰ X¹⁸¹ X¹⁸² X¹⁸³ X¹⁸⁴ X¹⁸⁵ X¹⁸⁶ X¹⁸⁷ X¹⁸⁸ X¹⁸⁹ X¹⁹⁰ X¹⁹¹ X¹⁹² X¹⁹³ X¹⁹⁴ X¹⁹⁵ X¹⁹⁶ X¹⁹⁷ X¹⁹⁸ X¹⁹⁹ X²⁰⁰ X²⁰¹ X²⁰² X²⁰³ X²⁰⁴ X²⁰⁵ X²⁰⁶ X²⁰⁷ X²⁰⁸ X²⁰⁹ X²¹⁰ X²¹¹ X²¹² X²¹³ X²¹⁴ X²¹⁵ X²¹⁶ 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X¹¹⁸⁰ X¹¹⁸¹ X¹¹⁸² X¹¹⁸³ X¹¹⁸⁴ X¹¹⁸⁵ X¹¹⁸⁶ X¹¹⁸⁷ X¹¹⁸⁸ X¹¹⁸⁹ X¹¹⁹⁰ X<

Receipt

Send receipt by e-mail



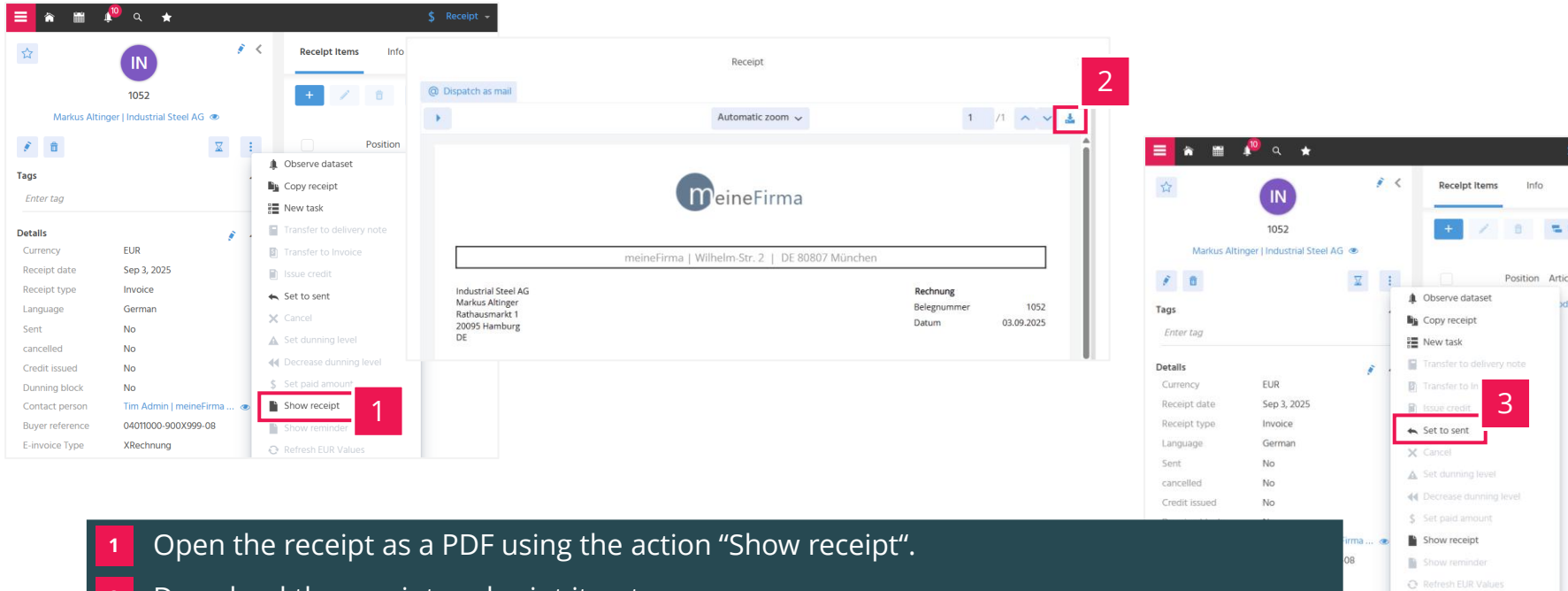
The email opens and you get the info that the status of the receipt has been set to "sent".



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

Receipt

Send receipt by post



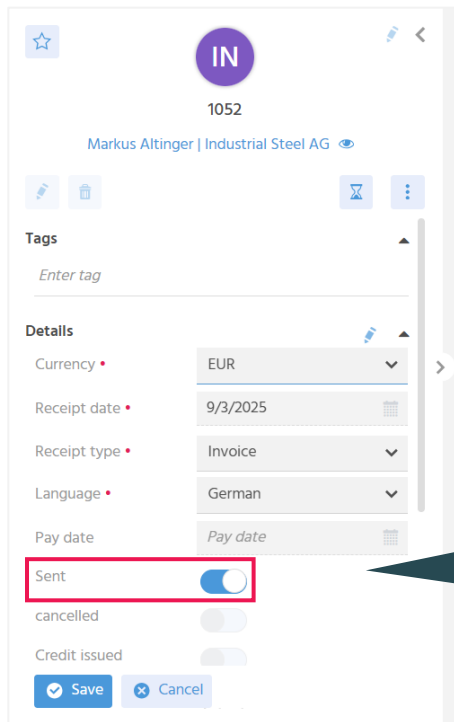
1 Open the receipt as a PDF using the action "Show receipt".

2 Download the receipt and print it out.

3 Set the status of the receipt to "sent" using the "Set to sent" action.

Receipt

Sent receipts

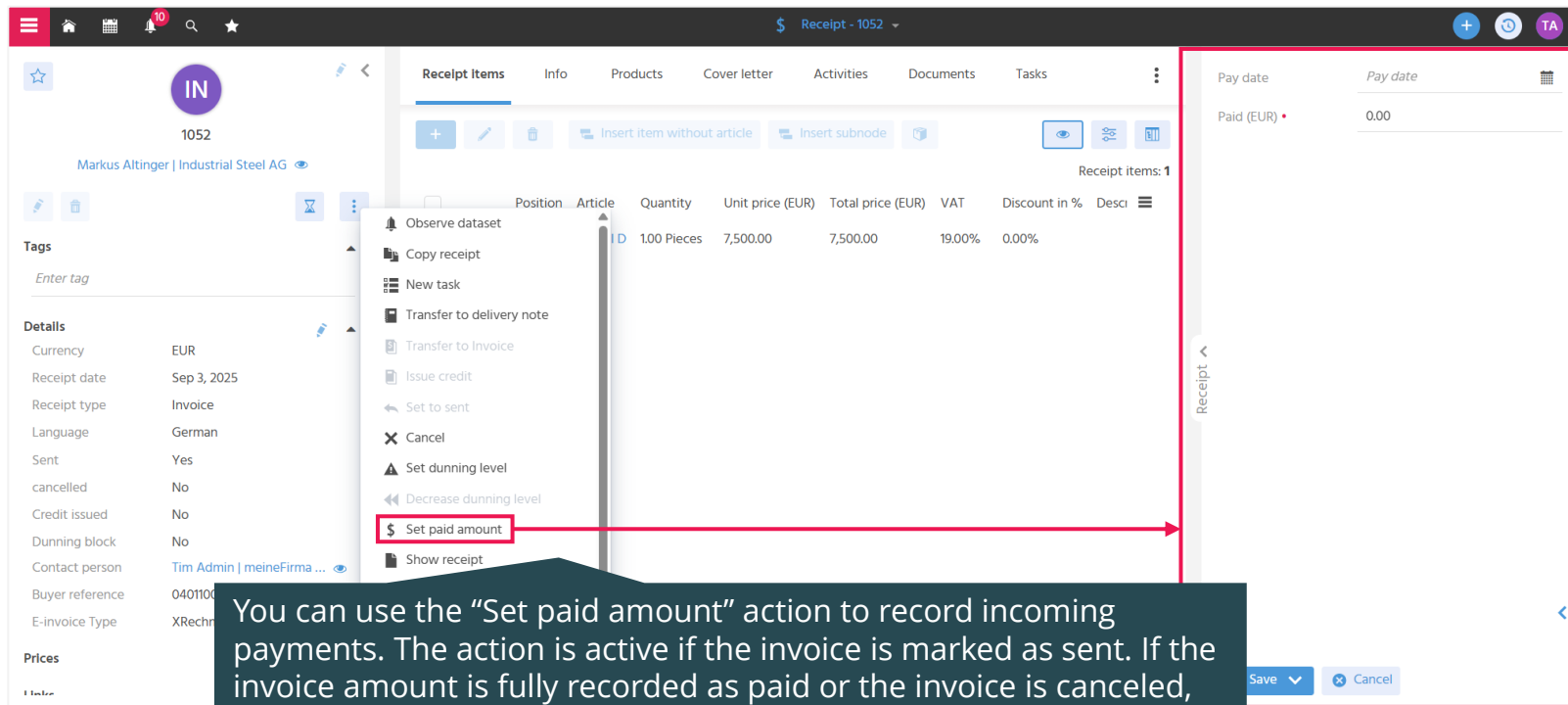


The screenshot shows a mobile application interface for managing receipts. At the top, there's a header with a star icon, a purple circle containing 'IN', and the number '1052'. Below this is the name 'Markus Altinger | Industrial Steel AG' with an eye icon. The main section is titled 'Tags' with a placeholder 'Enter tag'. Below that is a 'Details' section with several fields: 'Currency' (EUR), 'Receipt date' (9/3/2025), 'Receipt type' (Invoice), 'Language' (German), and 'Pay date' (Pay date). At the bottom of the details section, there's a 'Sent' toggle switch which is currently turned on (blue). Below the 'Sent' toggle are two more toggle switches: 'cancelled' and 'Credit issued', both of which are turned off (grey). At the very bottom are two buttons: 'Save' (blue) and 'Cancel' (grey).

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

Receipt

Set paid amount



The screenshot displays the ADITO Receipt interface for receipt 1052. The left sidebar shows details for Markus Altinger | Industrial Steel AG, including currency (EUR), receipt date (Sep 3, 2025), and receipt type (Invoice). The main area shows the 'Receipt Items' tab with a table of items. A context menu is open over the first item, listing various actions. The 'Set paid amount' action is highlighted with a red box and a red arrow pointing to the 'Paid (EUR)' field in the right sidebar, which currently shows 0.00. The right sidebar also includes fields for 'Pay date' and 'Pay date'.

Position	Article	Quantity	Unit price (EUR)	Total price (EUR)	VAT	Discount in %	Descr
1	D 1.00 Pieces	7,500.00	7,500.00	19.00%	0.00%		

Receipt items: 1

Pay date: Pay date

Paid (EUR): 0.00

Pay date: Pay date

Save Cancel

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

Receipt

Cancellation and credit note

The screenshot shows the 'Receipt Items' interface for invoice 1052. The 'Details' section on the left lists the following information:

Field	Value
Currency	EUR
Receipt date	Sep 3, 2025
Receipt type	Invoice
Language	German
Sent	Yes
cancelled	No
Credit issued	No
Dunning block	No
Contact person	Tim Admin meineFirma...
Buyer reference	0401000-900X999-08
E-invoice Type	XRechnung

The 'Actions' menu on the right is open, showing the following options:

- Observe dataset
- Copy receipt
- New task
- Transfer to delivery note
- Transfer to invoice
- Issue credit
- Set to sent
- Cancel** (highlighted with a red box)
- Decrease dunning level
- Set paid amount
- Show receipt
- Show reminder
- Refresh EUR Values
- Open admin view
- download XRechnung (XML)

A dark blue callout box with white text is positioned over the 'Cancel' button, stating: "As soon as an invoice has been sent, the 'Cancel' action becomes active."

Creating a credit note from an invoice is possible when

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

The screenshot shows the 'Receipt Items' interface for invoice 1052. The 'Details' section on the left lists the following information:

Field	Value
Currency	EUR
Receipt date	Sep 3, 2025
Receipt type	Invoice
Language	German
Pay date	Sep 3, 2025
Sent	Yes
cancelled	Yes
Credit issued	No
Dunning block	No
Contact person	Tim Admin meineFirma...
Buyer reference	0401000-900X999-08
E-invoice Type	XRechnung

The 'Actions' menu on the right is open, showing the following options:

- Observe dataset
- Copy receipt
- New task
- Transfer to delivery note
- Transfer to invoice
- Issue credit** (highlighted with a red box)
- Set to sent
- Decrease dunning level
- Set paid amount
- Show receipt
- Show reminder
- Refresh EUR Values
- Open admin view
- download XRechnung (XML)

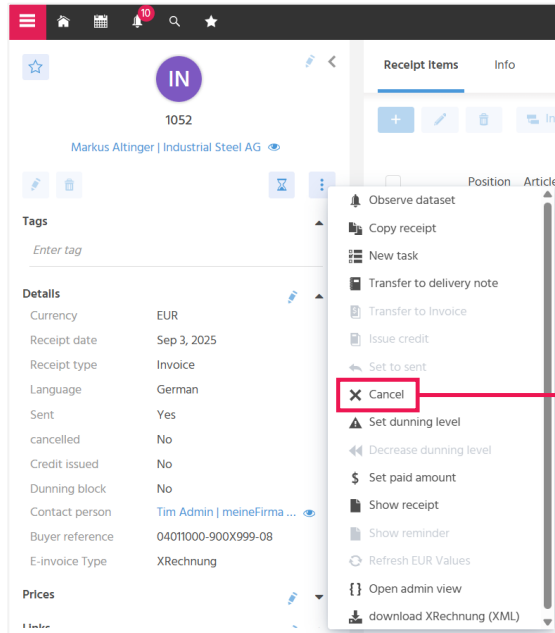
The 'Prices' section at the bottom of the interface shows the following information:

Field	Value
Total net (EUR)	7,500.00
Discount in %	0.00%
Discount in (EUR)	0.00
Discounted price net (EUR)	7,500.00
Total VAT (EUR)	1,425.00
Total gross (EUR)	8,925.00
Paid (EUR)	8,925.00

Red arrows indicate the flow of the process: one arrow points from the 'Sent' status in the details to the 'Issue credit' button in the actions menu, and another arrow points from the 'Paid (EUR)' value in the prices section to the 'Issue credit' button.

Receipt

Cancel XRechnung

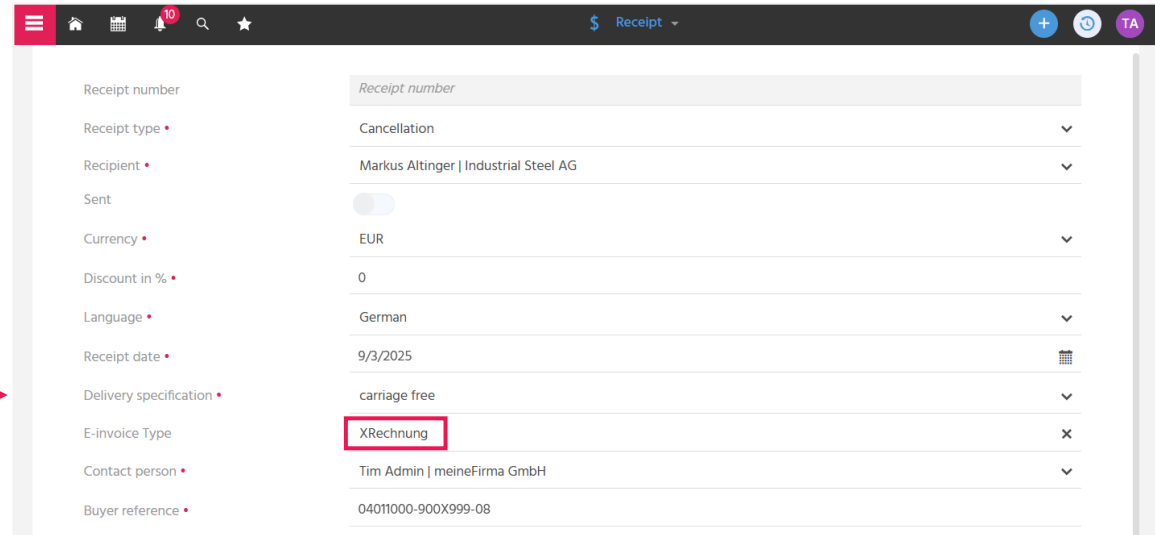


The screenshot shows the ADITO interface with a sidebar on the left and a main content area. The sidebar contains a 'Tags' section with a search bar and a 'Details' section with various fields. The main content area shows a 'Receipt Items' table with columns for 'Position' and 'Article'. A context menu is open over the table, listing various actions. The 'Cancel' option is highlighted with a red box, and a red arrow points from it to the 'E-invoice Type' field in the right-hand form.

Details	
Currency	EUR
Receipt date	Sep 3, 2025
Receipt type	Invoice
Language	German
Sent	Yes
cancelled	No
Credit issued	No
Dunning block	No
Contact person	Tim Admin meineFirma ...
Buyer reference	04011000-900X999-08
E-invoice Type	XRechnung

Receipt Items	Info
Position	Article

- Observe dataset
- Copy receipt
- New task
- Transfer to delivery note
- Transfer to Invoice
- Issue credit
- Set to sent
- Cancel**
- Set dunning level
- Decrease dunning level
- Set paid amount
- Show receipt
- Show reminder
- Refresh EUR Values
- Open admin view
- download XRechnung (XML)



The screenshot shows the ADITO interface with a sidebar on the left and a main content area. The sidebar contains a 'Tags' section with a search bar and a 'Details' section with various fields. The main content area shows a 'Receipt' form with fields for 'Receipt number', 'Receipt type', 'Recipient', 'Sent', 'Currency', 'Discount in %', 'Language', 'Receipt date', 'Delivery specification', 'E-invoice Type', 'Contact person', and 'Buyer reference'. The 'E-invoice Type' field is highlighted with a red box, and a red arrow points from it to the 'Cancel' option in the context menu of the left-hand form.

Receipt	
Receipt number	Receipt number
Receipt type	Cancellation
Recipient	Markus Altinger Industrial Steel AG
Sent	☐
Currency	EUR
Discount in %	0
Language	German
Receipt date	9/3/2025
Delivery specification	carriage free
E-invoice Type	XRechnung
Contact person	Tim Admin meineFirma GmbH
Buyer reference	04011000-900X999-08

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

Cancel XRechnung

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

1	WG3_MD	Modul D	-1 Stück	73.100,00	19,00	-73.100,00
1.1	WG3003-SL	Produkt SL3	-1 Stück	73.000,00	19,00	-73.000,00
1.1.1	WG3_MC-C	Modul C Comfort	-1 Stück	33.000,00	19,00	-33.000,00
1.1.2	WG3_MA-S	Modul A Standard	-1 Stück	10.000,00	19,00	-10.000,00
1.1.3	WG3_MB-S	Modul B Standard	-2 Stück	15.000,00	19,00	-30.000,00
1.2	S001	Serviceeinsatz	-1 Stunden	100,00	19,00	-100,00
2	WG1003	Standardprodukt 3	-1 Stück	171.547,50	19,00	-171.547,50
2.1	ET1002	Ersatzteil 1.002	-1 Stück	47,50	19,00	-47,50
2.2	WG3001-SL	Produkt SL1	-1 Stück	171.500,00	19,00	-171.500,00
2.2.1	WG3_MD	Modul D	-1 Stück	7.500,00	19,00	-7.500,00
2.2.2	WG3_MA-C	Modul A Comfort	-1 Stück	13.000,00	19,00	-13.000,00
2.2.3	WG3_MB-C	Modul B Comfort	-1 Stück	18.000,00	19,00	-18.000,00
2.2.4	WG3_MC-C	Modul C Comfort	-1 Stück	33.000,00	19,00	-33.000,00
2.2.5	WG3_MC-S	Modul C Standard	-2 Stück	30.000,00	19,00	-60.000,00
2.2.6	WG3_MA-S	Modul A Standard	-1 Stück	10.000,00	19,00	-10.000,00
2.2.7	WG3_MB-S	Modul B Standard	-2 Stück	15.000,00	19,00	-30.000,00
Summe netto				-244.647,50		
Rabatt 10%				-24.464,75		
zzgl Summe USt				-41.834,72		
Summe brutto				-262.017,47		

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

x Anlagen

Name	Beschreibung
xrechnung.xml	Invoice metadata

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

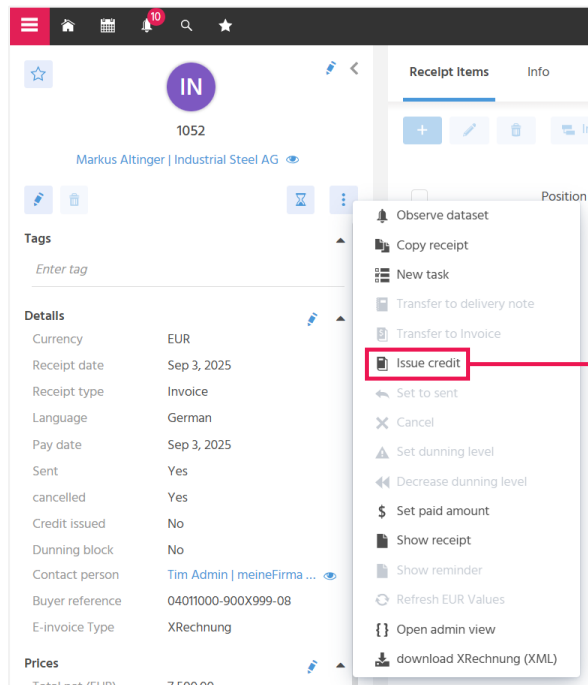
The TypeCode for the cancellation receipt is always "384".

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

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

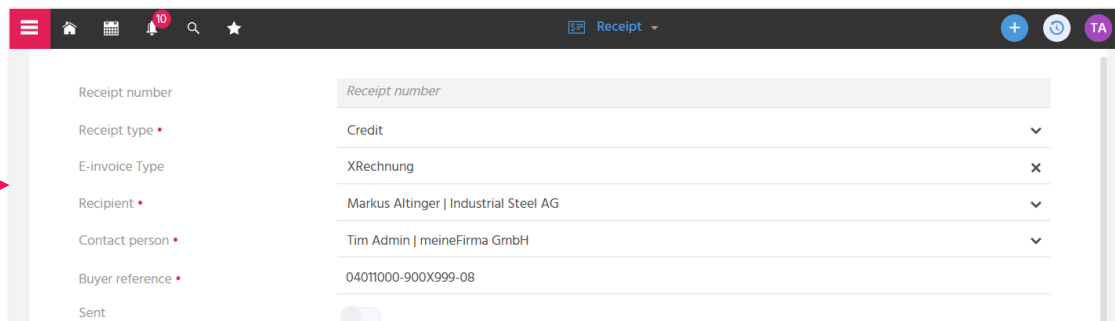
Receipt

Create credit note with E-invoice Type “XRechnung”



The screenshot shows the ADITO interface for creating a credit note. The left sidebar displays the company name 'Markus Altinger | Industrial Steel AG' and various details. The main area shows a dropdown menu with the 'Issue credit' option highlighted by a red box and a red arrow pointing to the right. The dropdown menu includes options like 'Observe dataset', 'Copy receipt', 'New task', 'Transfer to delivery note', 'Transfer to invoice', 'Set to sent', 'Cancel', 'Set dunning level', 'Decrease dunning level', 'Set paid amount', 'Show receipt', 'Show reminder', 'Refresh EUR Values', 'Open admin view', and 'download XRechnung (XML)'.

Details	Value
Currency	EUR
Receipt date	Sep 3, 2025
Receipt type	Invoice
Language	German
Pay date	Sep 3, 2025
Sent	Yes
cancelled	Yes
Credit issued	No
Dunning block	No
Contact person	Tim Admin meineFirma ...
Buyer reference	04011000-900X999-08
E-invoice Type	XRechnung



The screenshot shows the ADITO interface for creating a credit note. The form is titled 'Receipt' and contains the following fields:

Field	Value
Receipt number	Receipt number
Receipt type	Credit
E-invoice Type	XRechnung
Recipient	Markus Altinger Industrial Steel AG
Contact person	Tim Admin meineFirma GmbH
Buyer reference	04011000-900X999-08
Sent	☐

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

Receipt

Create credit note with E-invoice Type "XRechnung"

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

meineFirma

meineFirma | Wilhelm-Str. 2 | DE 80807 München | DE123456789

Industrial Steel AG
Markus Altinger
Rathausmarkt 1
20095 Hamburg
DE

Gutschrift
Nummer 1057
Datum 28.11.2024

Sehr geehrter Herr Altinger,
Wir schreiben Ihnen die nachfolgenden Positionen gut:

Pos	Artikelnummer	Artikelbezeichnung	Menge	Einzelpreis EUR	USt %	Summe EUR
1	1051	Gutschrift für Rechnung 1051	1 Stück	262.017,47	0,00	262.017,47
Summe netto						262.017,47
Summe brutto						262.017,47

Zahlungsbedingungen: 30 Tage netto
Lieferbedingung: frei Haus

Wir entschuldigen uns für evtl. Unannehmlichkeiten und stehen für Rückfragen gerne zur Verfügung.

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

Anlagen

Name: xrechnung.xml
Beschreibung: Invoice metadata

```
</rsm:ExchangedDocument>
  <rsm:ExchangedDocument>
    <ram:ID>1057</ram:ID>
    <ram:TypeCode>381</ram:TypeCode>
    <ram:IssueDateTime>
      <udt:DateTimeString format="102">20241128</udt:DateTimeString>
    </ram:IssueDateTime>
  </rsm:ExchangedDocument>
  <ram:SpecifiedTradeSettlementHeaderMonetarySummation>
    <ram:LineTotalAmount>262017.47</ram:LineTotalAmount>
    <ram:ChargeTotalAmount>0.00</ram:ChargeTotalAmount>
    <ram:AllowanceTotalAmount>0.00</ram:AllowanceTotalAmount>
    <ram:TaxBasisTotalAmount>262017.47</ram:TaxBasisTotalAmount>
    <ram:TaxTotalAmount currencyID="EUR">0.00</ram:TaxTotalAmount>
    <ram:GrandTotalAmount>262017.47</ram:GrandTotalAmount>
    <ram:TotalPrepaidAmount>0.00</ram:TotalPrepaidAmount>
    <ram:DuePayableAmount>262017.47</ram:DuePayableAmount>
  </ram:SpecifiedTradeSettlementHeaderMonetarySummation>
  <ram:InvoiceReferencedDocument>
```

The TypeCode for the credit receipt is always "381".

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

Excursus into the company

“Turnover” area

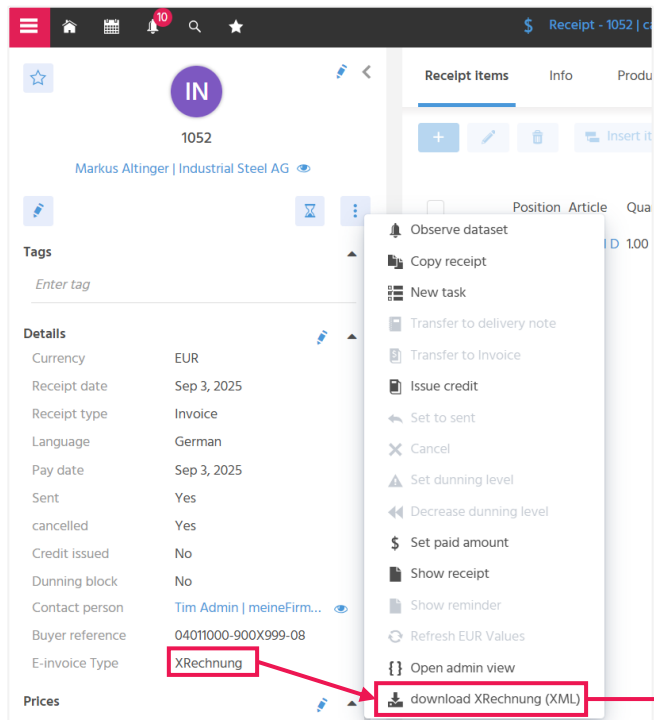
The screenshot shows the ADITO interface for a company profile. At the top, there's a navigation bar with icons for home, calendar, notifications, search, and favorites. Below this, the company name 'Industrial Steel AG' and 'Cust.-No.: 1234' are displayed. A sidebar on the left contains various sections: 'Tags', 'Communication', 'Addresses', 'Further Information', and 'Relevant Documents'. The 'Relevant Documents' section is expanded, showing a document titled 'Information.pdf'. Below this, a table titled 'Turnover' is displayed, showing 'Turnover Current' as 683,860.00 EUR and 'Turnover Last' as 430,950.00 EUR. A red box highlights the 'Turnover' table.

Turnover	
Turnover Current Business Year	683,860.00 EUR
Turnover Last Business Year	430,950.00 EUR

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

Receipt

VAT-ID



Receipt - 1052 | c

1052

Markus Altinger | Industrial Steel AG

Tags

Enter tag

Details

Currency	EUR
Receipt date	Sep 3, 2025
Receipt type	Invoice
Language	German
Pay date	Sep 3, 2025
Sent	Yes
cancelled	Yes
Credit issued	No
Dunning block	No
Contact person	Tim Admin meineFirm...
Buyer reference	04011000-900X999-08
E-invoice Type	XRechnung

Prices

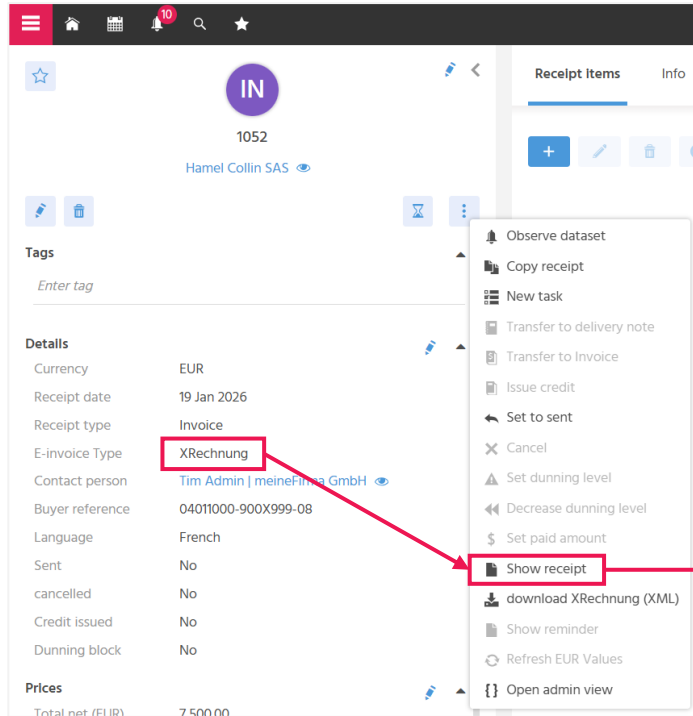
download XRechnung (XML)

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

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

Receipt

VAT-ID



Receipt Items Info

1052
Hamel Collin SAS

Tags
Enter tag

Details

Currency	EUR
Receipt date	19 Jan 2026
Receipt type	Invoice
E-invoice Type	XRechnung
Contact person	Tim Admin meineFinan GmbH
Buyer reference	04011000-900X999-08
Language	French
Sent	No
cancelled	No
Credit issued	No
Dunning block	No

Prices

Total net (FIIIR)	7 500.00
-------------------	----------

- Observe dataset
- Copy receipt
- New task
- Transfer to delivery note
- Transfer to Invoice
- Issue credit
- Set to sent
- Cancel
- Set dunning level
- Decrease dunning level
- Set paid amount
- Show receipt
- download XRechnung (XML)
- Show reminder
- Refresh EUR Values
- Open admin view

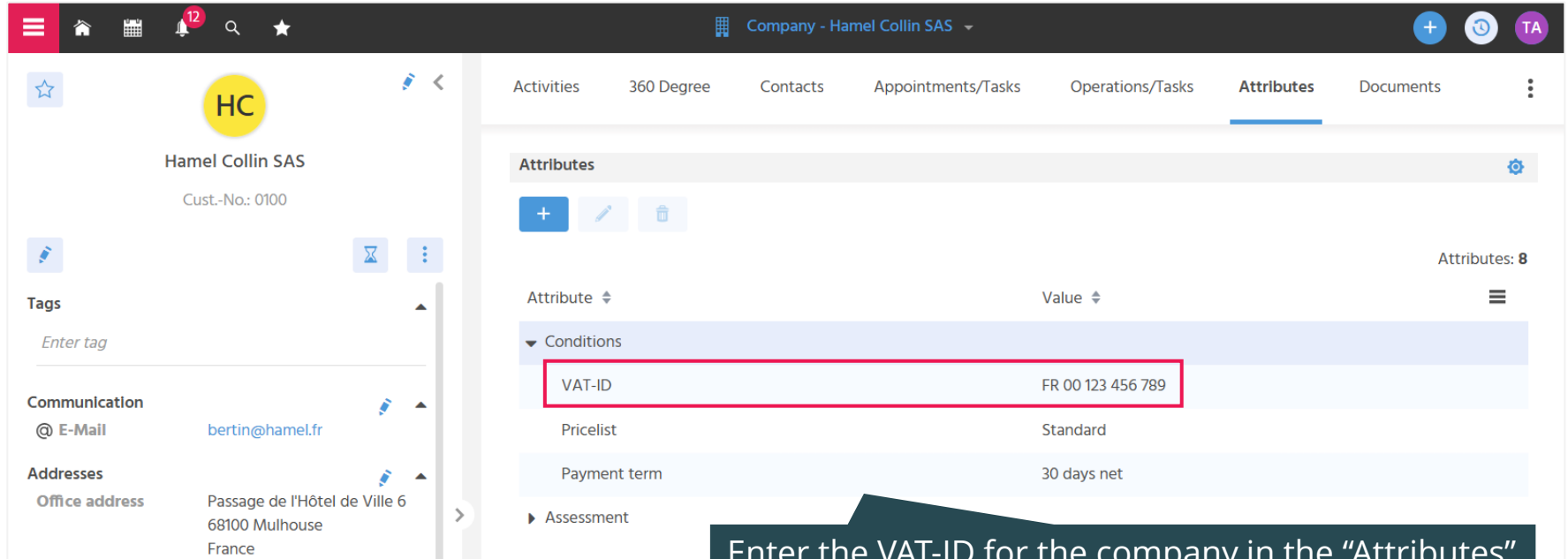
If the recipient does not have a VAT ID, the message below will be displayed.

One or more mandatory fields for E-invoices are missing:
-Recipient: VAT ID is missing

The E-invoice will therefore not be attached to the receipt. However, the receipt will still be opened.

Excursus into the company

VAT-ID

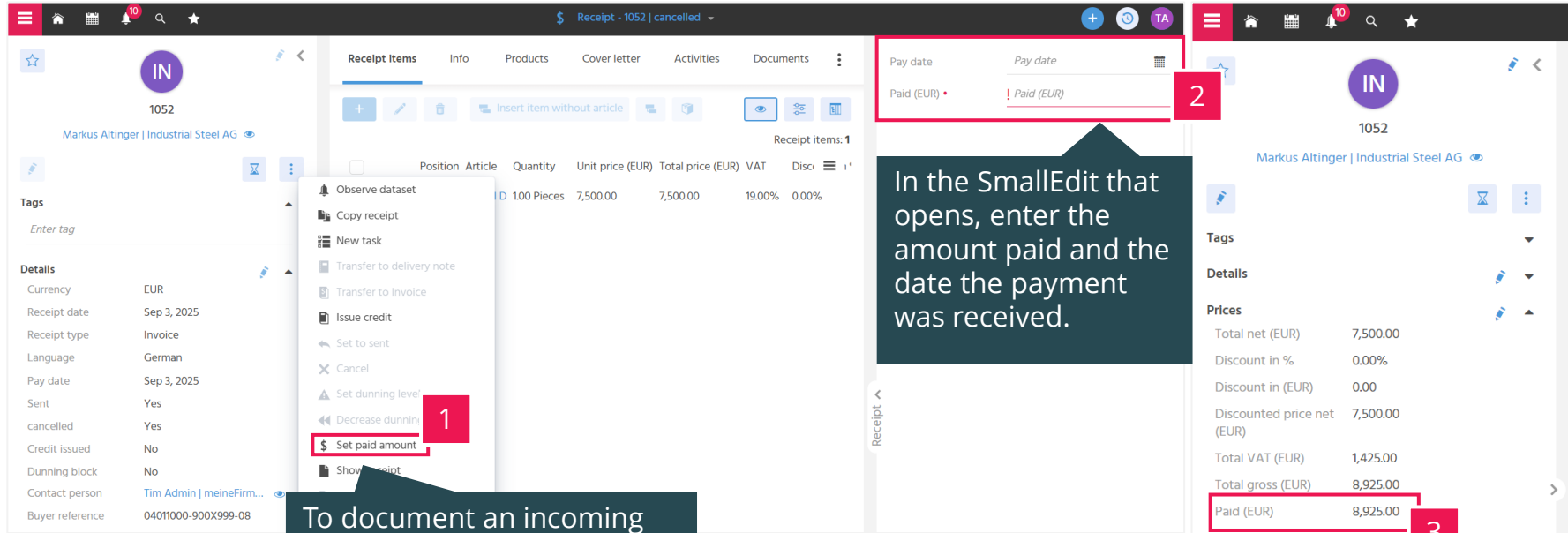


The screenshot displays the ADITO software interface for a company named 'Hamel Collin SAS'. The left sidebar shows the company profile with a yellow circular logo containing 'HC', the company name, and the customer number 'Cust.-No.: 0100'. Below this, there are sections for 'Tags', 'Communication' (with an email address 'bertin@hamel.fr'), and 'Addresses' (with an office address in Mulhouse, France). The main area is titled 'Company - Hamel Collin SAS' and features a navigation bar with tabs: 'Activities', '360 Degree', 'Contacts', 'Appointments/Tasks', 'Operations/Tasks', 'Attributes' (selected), and 'Documents'. The 'Attributes' tab is active, showing a table of attributes. The table has two columns: 'Attribute' and 'Value'. Under the 'Conditions' parent property, the 'VAT-ID' attribute is listed with the value 'FR 00 123 456 789', which is highlighted by a red rectangular box. Other attributes shown include 'Pricelist' with value 'Standard' and 'Payment term' with value '30 days net'. The bottom right corner of the interface contains a dark blue callout box with white text.

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

Incoming payments/dunning

Incoming payments



Receipt - 1052 | cancelled

Pay date

Paid (EUR) • ! Paid (EUR)

2

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

1

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

3

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

Position	Article	Quantity	Unit price (EUR)	Total price (EUR)	VAT	Disci
D	1.00 Pieces	7,500.00	7,500.00	19.00%	0.00%	

Receipt items: 1

Details

Currency: EUR

Receipt date: Sep 3, 2025

Receipt type: Invoice

Language: German

Pay date: Sep 3, 2025

Sent: Yes

cancelled: Yes

Credit issued: No

Dunning block: No

Contact person: Tim Admin | meineFirm...

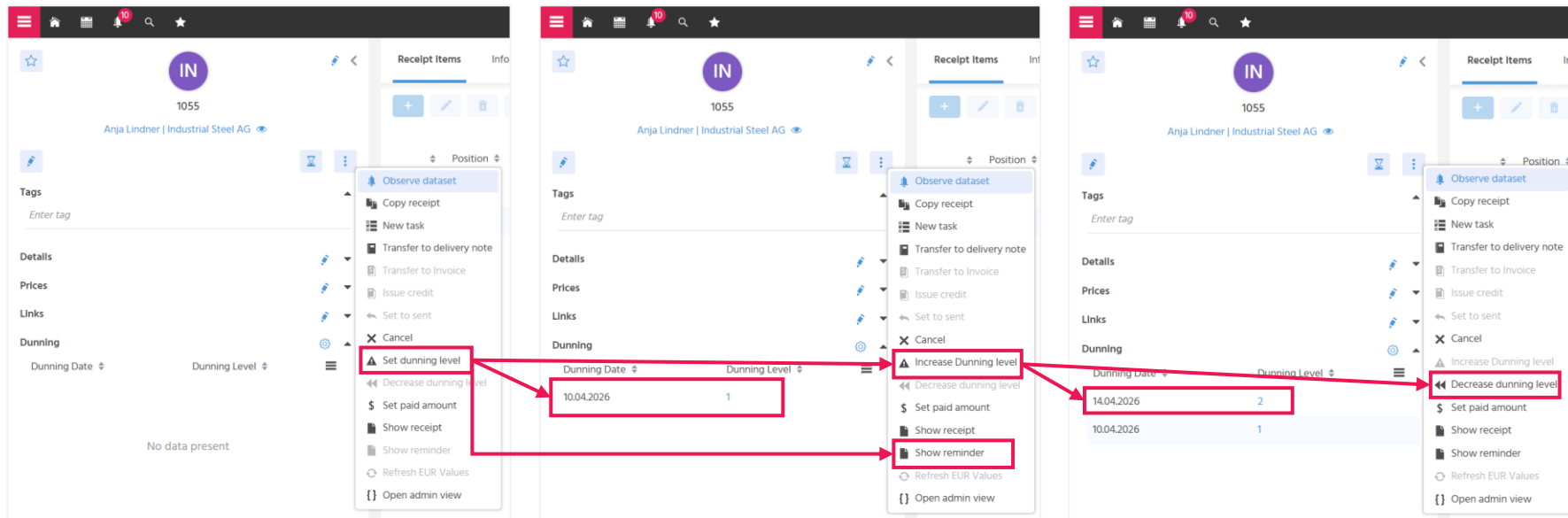
Buyer reference: 04011000-900X999-08

Prices

Total net (EUR)	7,500.00
Discount in %	0.00%
Discount in (EUR)	0.00
Discounted price net (EUR)	7,500.00
Total VAT (EUR)	1,425.00
Total gross (EUR)	8,925.00
Paid (EUR)	8,925.00

Dunning

Set, increase, decrease dunning levels manually - overview



The screenshots illustrate the manual adjustment of dunning levels for a receipt item (1055) belonging to Anja Lindner | Industrial Steel AG. The interface shows the 'Receipt Items' section with a list of items. The 'Dunning' section is expanded, showing the 'Dunning Date' and 'Dunning Level' for each item.

Screenshot 1: Set dunning level

- Menu: **Set dunning level**
- Item: 10.04.2026, Dunning Level: 1

Screenshot 2: Increase Dunning level

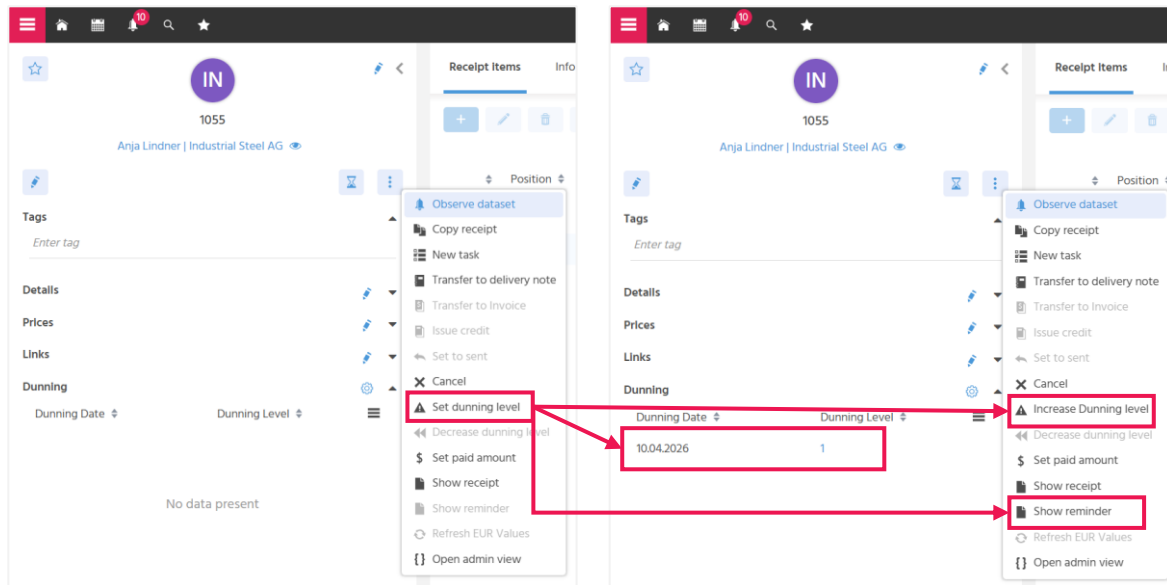
- Menu: **Increase Dunning level**
- Item: 14.04.2026, Dunning Level: 2

Screenshot 3: Decrease dunning level

- Menu: **Decrease dunning level**
- Item: 10.04.2026, Dunning Level: 1

Dunning

Set dunning



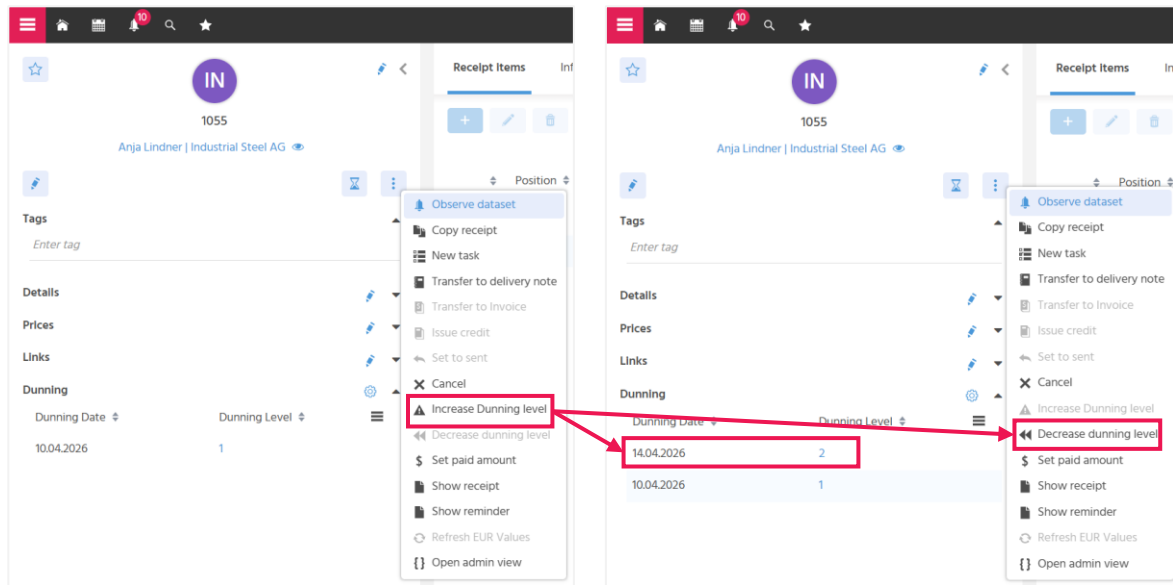
The “**Set dunning level**” action becomes **active** as soon as the **receipt is marked as “Sent”**. The action is **no longer active** if a **paid amount** is set that **matches the Total gross of the invoice**.

As soon as you execute the “Set dunning level” action,

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

Dunning

Increase, decrease dunning levels



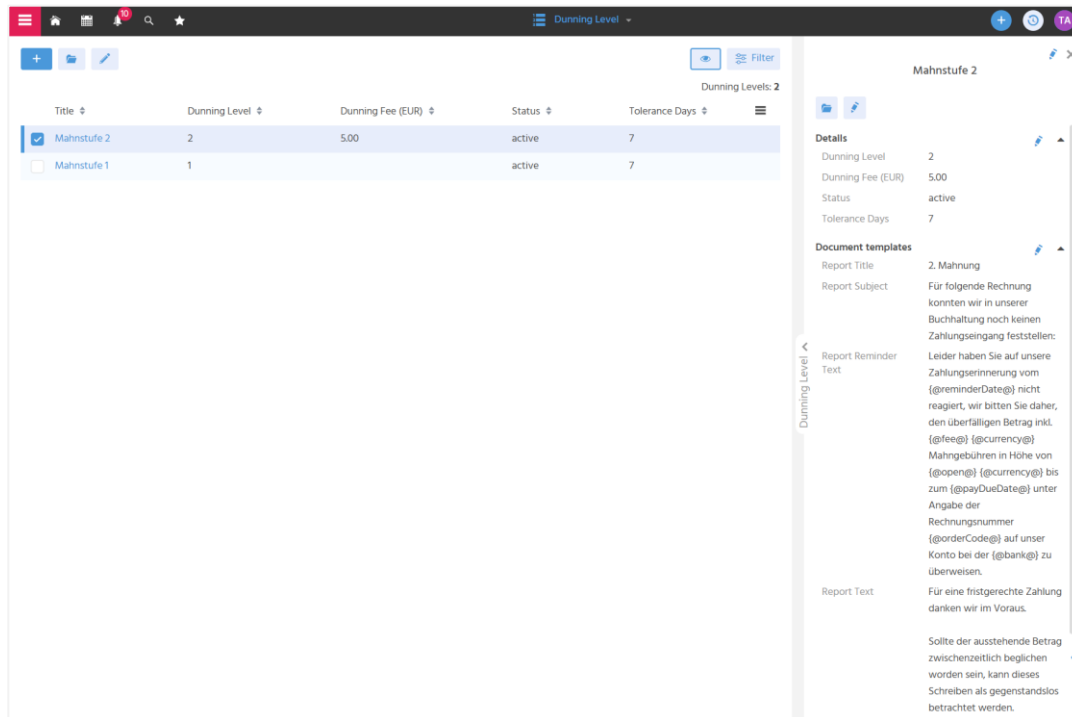
You can define **how many dunning levels** there should be in the Context **“Dunning level”** in the menu group **“Administration”**.

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

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

Excursus Administration

Context “Dunning level”



Title	Dunning Level	Dunning Fee (EUR)	Status	Tolerance Days
☒ Mahnstufe 2	2	5.00	active	7
☐ Mahnstufe 1	1	0.00	active	7

Mahnstufe 2 Details

Details

- Dunning Level: 2
- Dunning Fee (EUR): 5.00
- Status: active
- Tolerance Days: 7

Document templates

Report Title: 2. Mahnung

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

Report Reminder Text: Leider haben Sie auf unsere Zahlungserinnerung vom {@reminderDate@} nicht reagiert, wir bitten Sie daher, den überfälligen Betrag inkl. {@fee@} {@currency@} Mahngebühren in Höhe von {@open@} {@currency@} bis zum {@payDueDate@} unter Angabe der Rechnungsnummer {@orderCode@} auf unser Konto bei der {@bank@} zu überweisen.

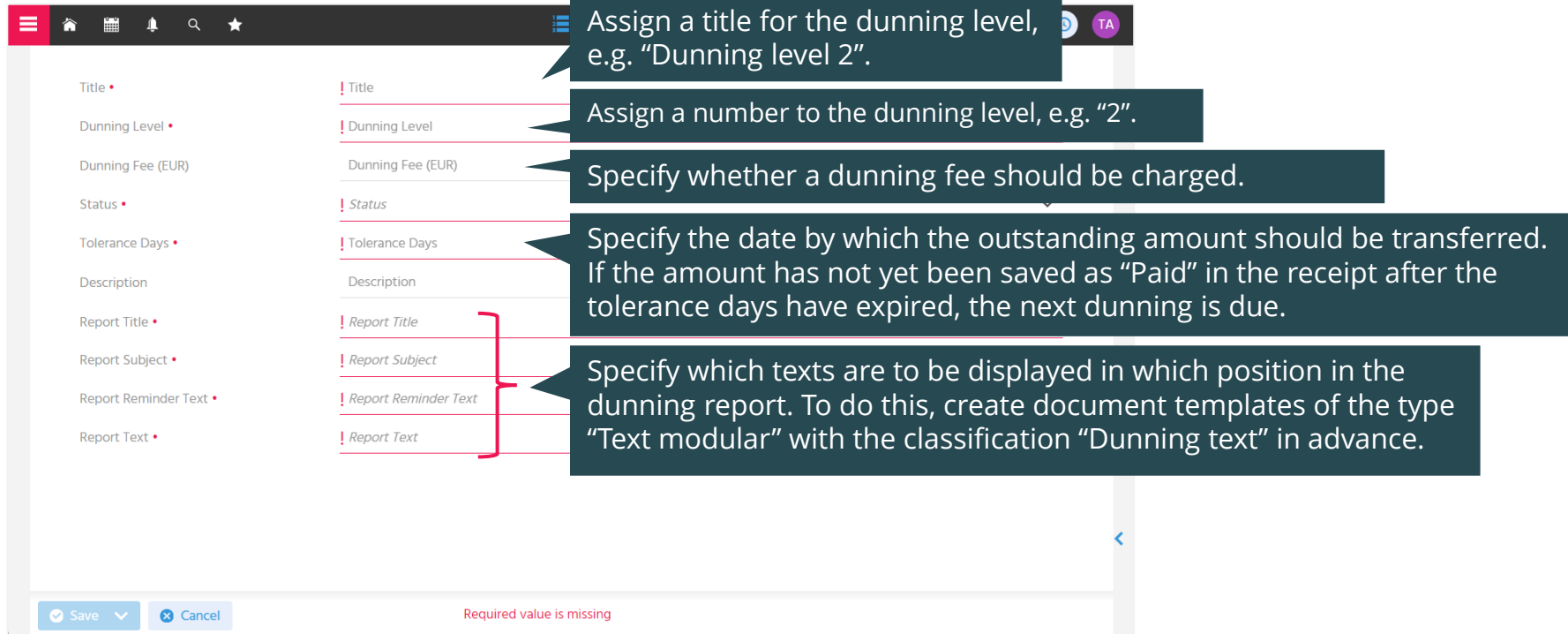
Report Text: Für eine fristgerechte Zahlung danken wir im Voraus.

Sollte der ausstehende Betrag zwischenzeitlich beglichen worden sein, kann dieses Schreiben als gegenstandslos betrachtet werden.

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

Excursus Administration

Context “Dunning level”



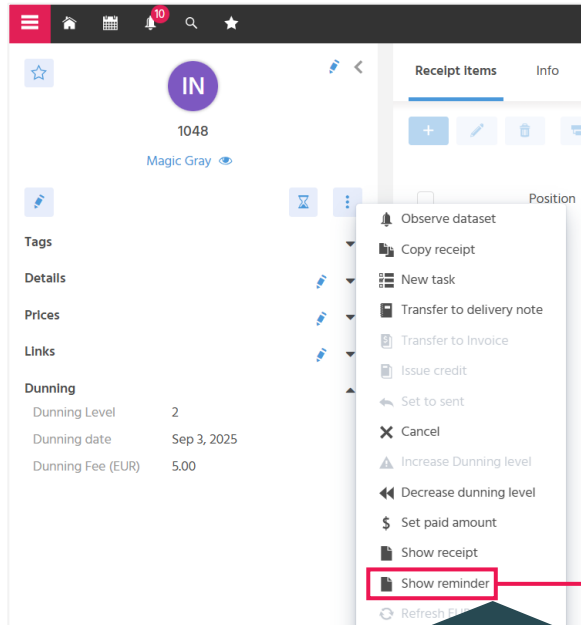
The screenshot shows the 'Dunning level' configuration form in the ADITO system. The form is divided into two columns. The left column contains labels for various fields, and the right column contains the input fields. Several fields are marked with a red exclamation mark, indicating they are required. Callout boxes provide additional context for these fields.

Field Label	Field Name	Requirement	Explanation
Title •	Title	Required	Assign a title for the dunning level, e.g. "Dunning level 2".
Dunning Level •	Dunning Level	Required	Assign a number to the dunning level, e.g. "2".
Dunning Fee (EUR)	Dunning Fee (EUR)	Optional	Specify whether a dunning fee should be charged.
Status •	Status	Required	
Tolerance Days •	Tolerance Days	Required	Specify the date by which the outstanding amount should be transferred. If the amount has not yet been saved as "Paid" in the receipt after the tolerance days have expired, the next dunning is due.
Description	Description	Optional	
Report Title •	Report Title	Required	Specify which texts are to be displayed in which position in the dunning report. To do this, create document templates of the type "Text modular" with the classification "Dunning text" in advance.
Report Subject •	Report Subject	Required	
Report Reminder Text •	Report Reminder Text	Required	
Report Text •	Report Text	Required	

At the bottom of the form, there are buttons for 'Save' and 'Cancel', and a red error message: 'Required value is missing'.

Dunning

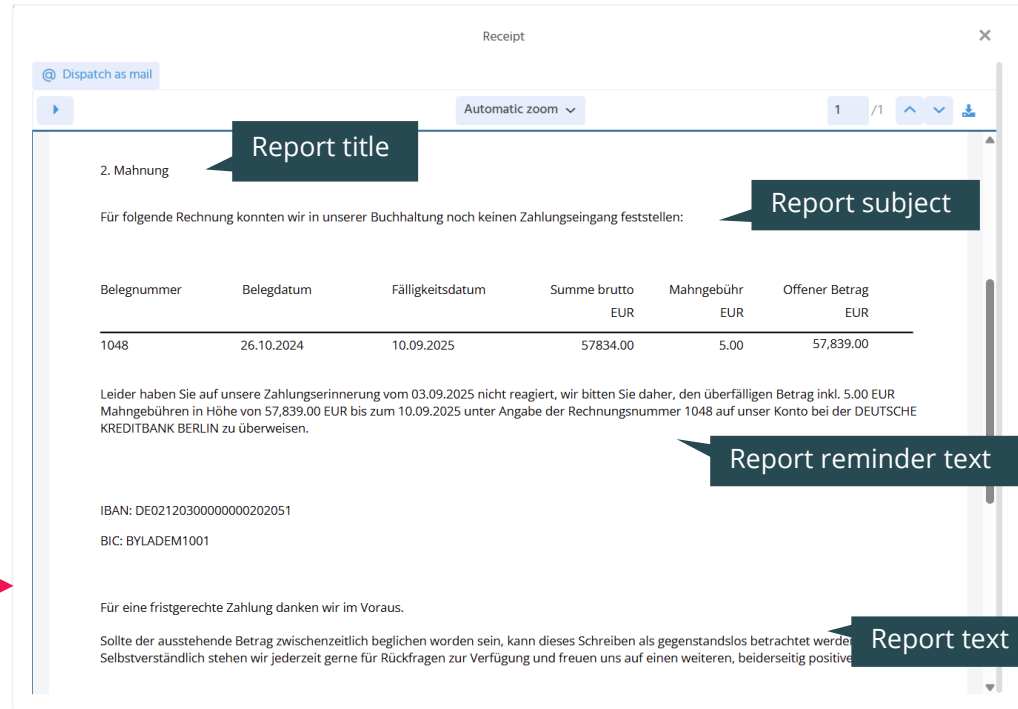
Show reminder



The screenshot shows the ADITO Dunning interface. On the left, a sidebar contains navigation options: Tags, Details, Prices, Links, and Dunning. The Dunning section is active, showing details for a dunning with ID 1048, level 2, date Sep 3, 2025, and fee of 5.00 EUR. A context menu is open over the 'Show reminder' action, which is highlighted with a red box. A red arrow points from this box to the right-hand screenshot.

- Observe dataset
- Copy receipt
- New task
- Transfer to delivery note
- Transfer to Invoice
- Issue credit
- Set to sent
- Cancel
- Increase Dunning level
- Decrease dunning level
- Set paid amount
- Show receipt
- Show reminder**
- Refresh

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



The screenshot shows the generated dunning reminder PDF. The document is titled '2. Mahnung' (2nd Reminder). It contains the following information:

- Report title:** 2. Mahnung
- Report subject:** Für folgende Rechnung konnten wir in unserer Buchhaltung noch keinen Zahlungseingang feststellen:
- Table:**

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

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

IBAN: DE0212030000000202051
BIC: BYLADEM1001

Für eine fristgerechte Zahlung danken wir im Voraus.

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

- Report reminder text:** Für folgende Rechnung konnten wir in unserer Buchhaltung noch keinen Zahlungseingang feststellen:
- Report text:** Sollte der ausstehende Betrag zwischenzeitlich beglichen worden sein, kann dieses Schreiben als gegenstandslos betrachtet werden.

Dunning

Send dunning

Receipt

Dispatch as mail

Automatic zoom

1 / 1

2. Mahnung

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

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

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IBAN: DE0212030000000202051
BIC: BYLADEM1001

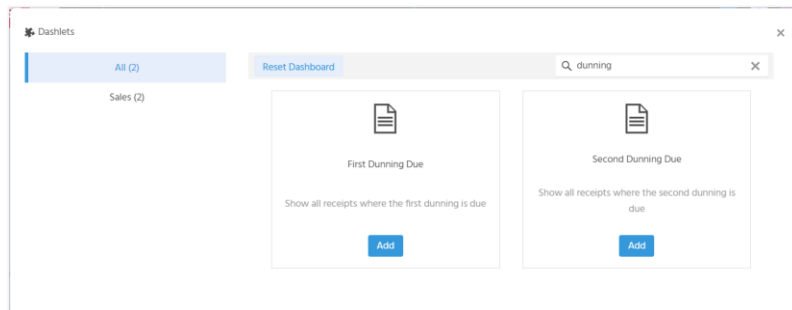
Für eine fristgerechte Zahlung danken wir im Voraus.

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

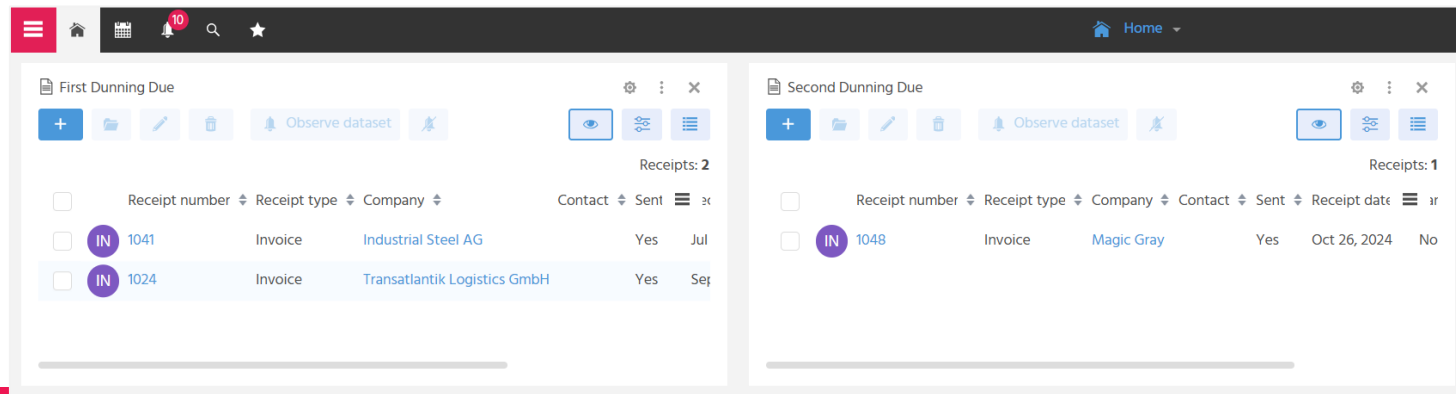
You can send the PDF as an e-mail or by post. The functionality is identical to sending receipts (slides "Send receipt by e-mail" and "Send receipt by post").

Dunning

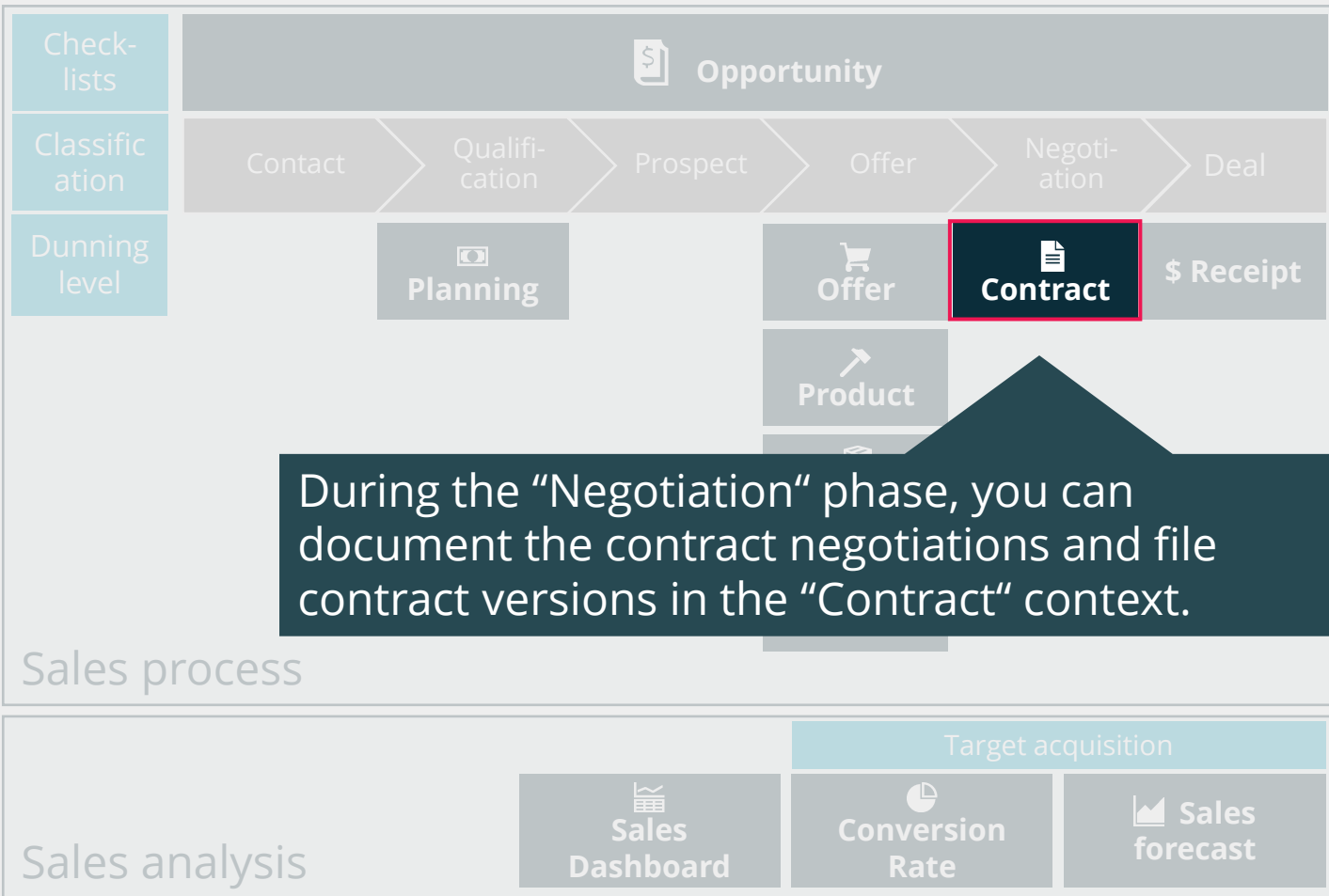
Dashlets



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



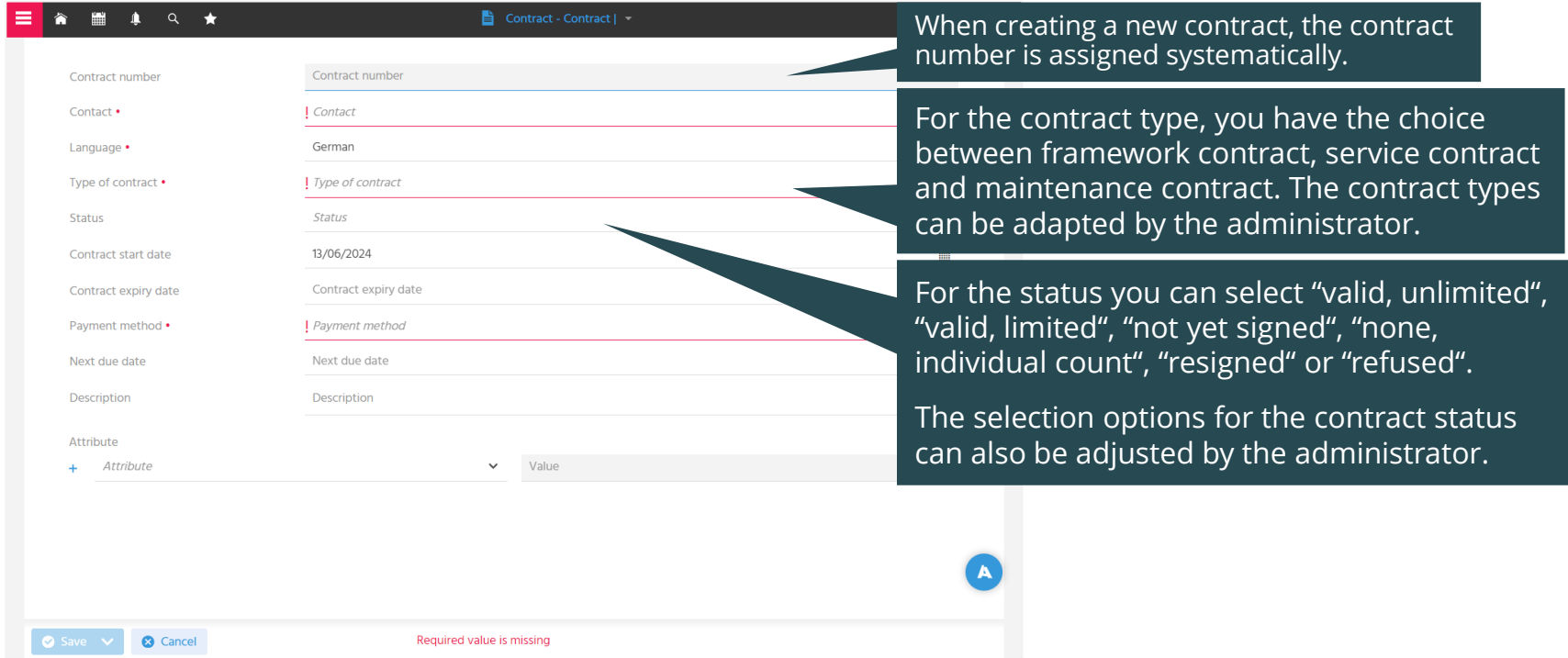
Contract



- To be created in advance by the administrator
- In use "daily" by end users

Contract

Documentation of the agreements



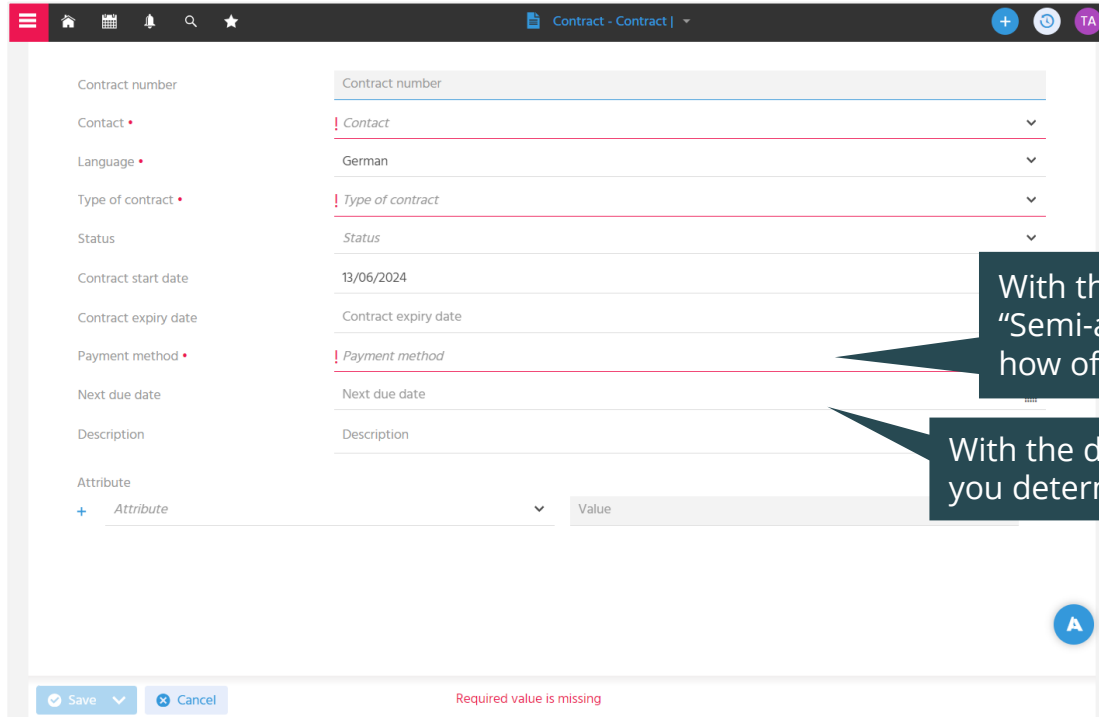
The screenshot shows the ADITO contract creation interface. The form includes the following fields:

- Contract number: A text field with a callout stating, "When creating a new contract, the contract number is assigned systematically."
- Contact: A dropdown menu with a red exclamation mark icon and a callout stating, "For the contract type, you have the choice between framework contract, service contract and maintenance contract. The contract types can be adapted by the administrator."
- Language: A dropdown menu with the value "German".
- Type of contract: A dropdown menu with a red exclamation mark icon and a callout stating, "For the status you can select 'valid, unlimited', 'valid, limited', 'not yet signed', 'none, individual count', 'resigned' or 'refused'."
- Status: A dropdown menu with the value "Status". A callout states, "The selection options for the contract status can also be adjusted by the administrator."
- Contract start date: A date field with the value "13/06/2024".
- Contract expiry date: A date field with the value "Contract expiry date".
- Payment method: A dropdown menu with a red exclamation mark icon and a callout stating, "For the status you can select 'valid, unlimited', 'valid, limited', 'not yet signed', 'none, individual count', 'resigned' or 'refused'."
- Next due date: A date field with the value "Next due date".
- Description: A text field with the value "Description".
- Attribute: A section with a "+" icon, a dropdown menu, and a "Value" 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. A blue circular icon with the letter "A" is located in the bottom right corner of the form area.

Contract

Documentation of the agreements



The screenshot shows the ADITO 'Contract' form. The form has a dark header bar with navigation icons and a title 'Contract - Contract |'. Below the header, the form is divided into two main sections: a left sidebar with labels and a right area with input fields. The labels in the sidebar are: Contract number, Contact, Language, Type of contract, Status, Contract start date, Contract expiry date, Payment method, Next due date, Description, and Attribute. The input fields on the right are: Contract number (text), Contact (dropdown with a red exclamation mark icon), Language (dropdown with 'German' selected), Type of contract (dropdown with a red exclamation mark icon), Status (dropdown), Contract start date (text with '13/06/2024' entered), Contract expiry date (text), Payment method (dropdown with a red exclamation mark icon), Next due date (text), Description (text), and Attribute (dropdown). At the bottom of the form, there are 'Save' and 'Cancel' buttons, and a red error message 'Required value is missing'.

Label	Value
Contract number	Contract number
Contact	! Contact
Language	German
Type of contract	! Type of contract
Status	Status
Contract start date	13/06/2024
Contract expiry date	Contract expiry date
Payment method	! Payment method
Next due date	Next due date
Description	Description
Attribute	+ Attribute

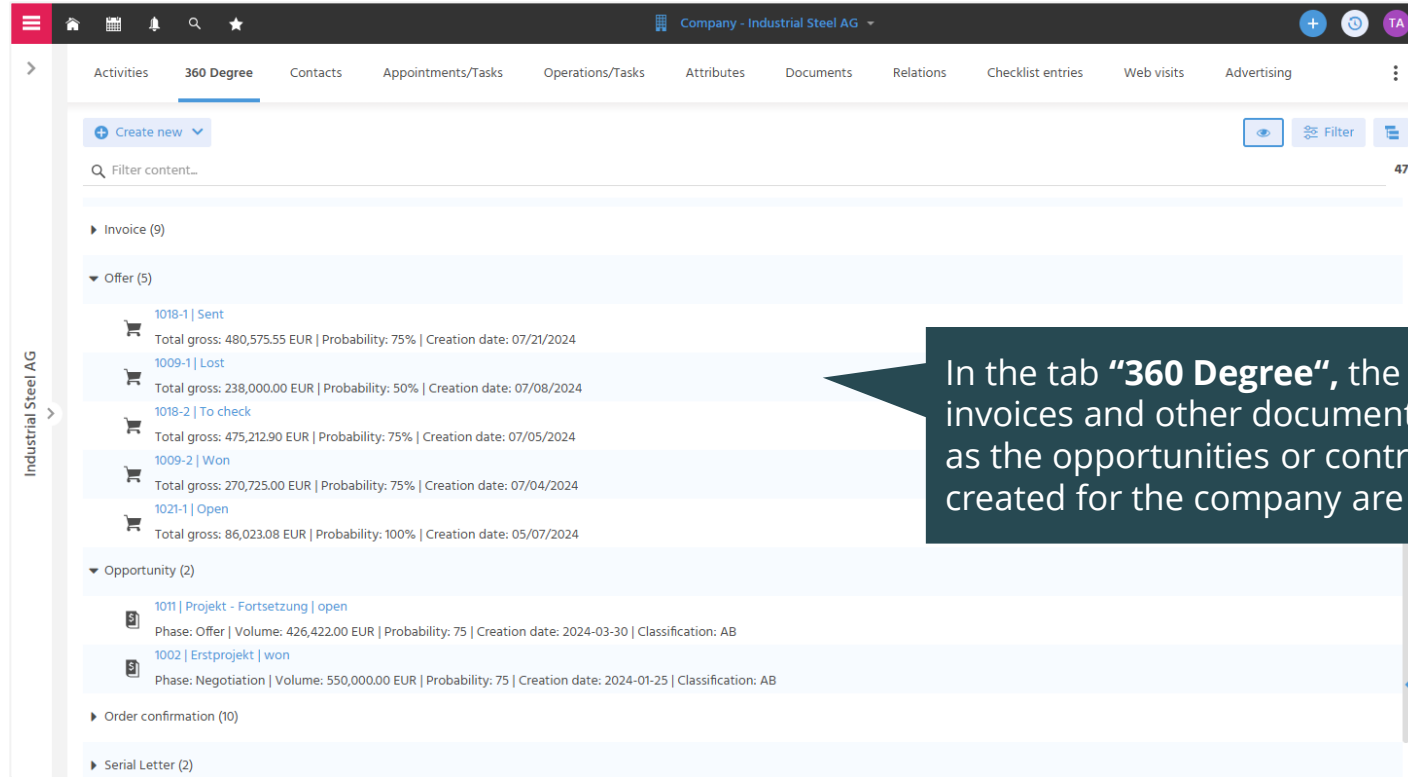
Required value is missing

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

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

Visibility of the sales process at the company

Tab "360 degrees"



Company - Industrial Steel AG

Activities **360 Degree** Contacts Appointments/Tasks Operations/Tasks Attributes Documents Relations Checklist entries Web visits Advertising

+ Create new

Filter content...

47

Invoice (9)

Offer (5)

- 1018-1 | Sent
Total gross: 480,575.55 EUR | Probability: 75% | Creation date: 07/21/2024
- 1009-1 | Lost
Total gross: 238,000.00 EUR | Probability: 50% | Creation date: 07/08/2024
- 1018-2 | To check
Total gross: 475,212.90 EUR | Probability: 75% | Creation date: 07/05/2024
- 1009-2 | Won
Total gross: 270,725.00 EUR | Probability: 75% | Creation date: 07/04/2024
- 1021-1 | Open
Total gross: 86,023.08 EUR | Probability: 100% | Creation date: 05/07/2024

Opportunity (2)

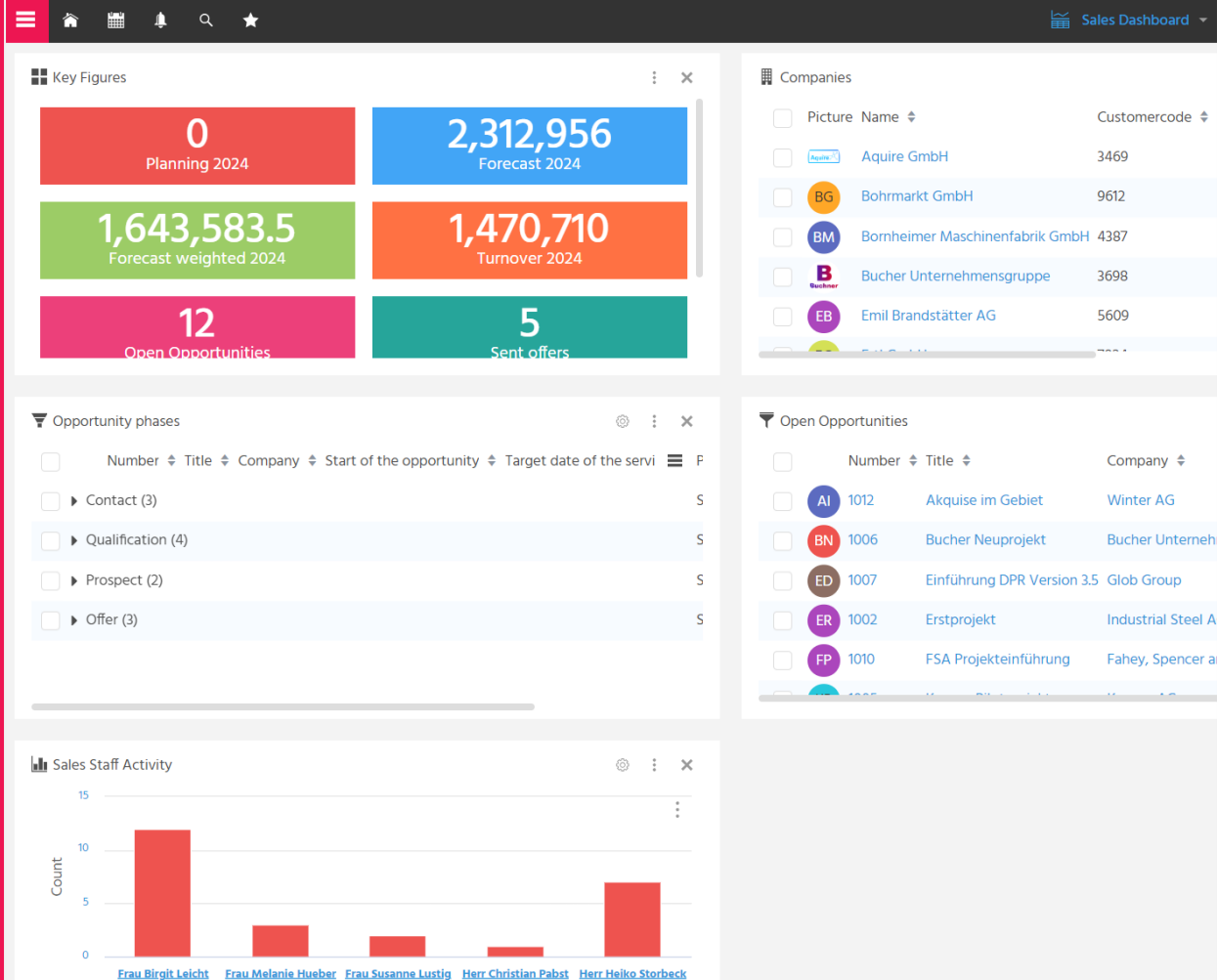
- 1011 | Projekt - Fortsetzung | open
Phase: Offer | Volume: 426,422.00 EUR | Probability: 75 | Creation date: 2024-03-30 | Classification: AB
- 1002 | Erstprojekt | won
Phase: Negotiation | Volume: 550,000.00 EUR | Probability: 75 | Creation date: 2024-01-25 | Classification: AB

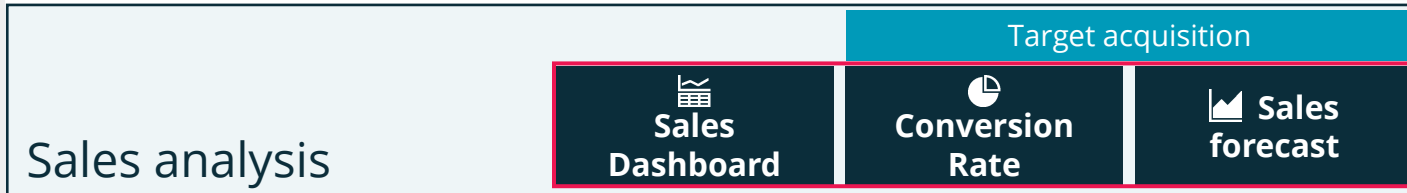
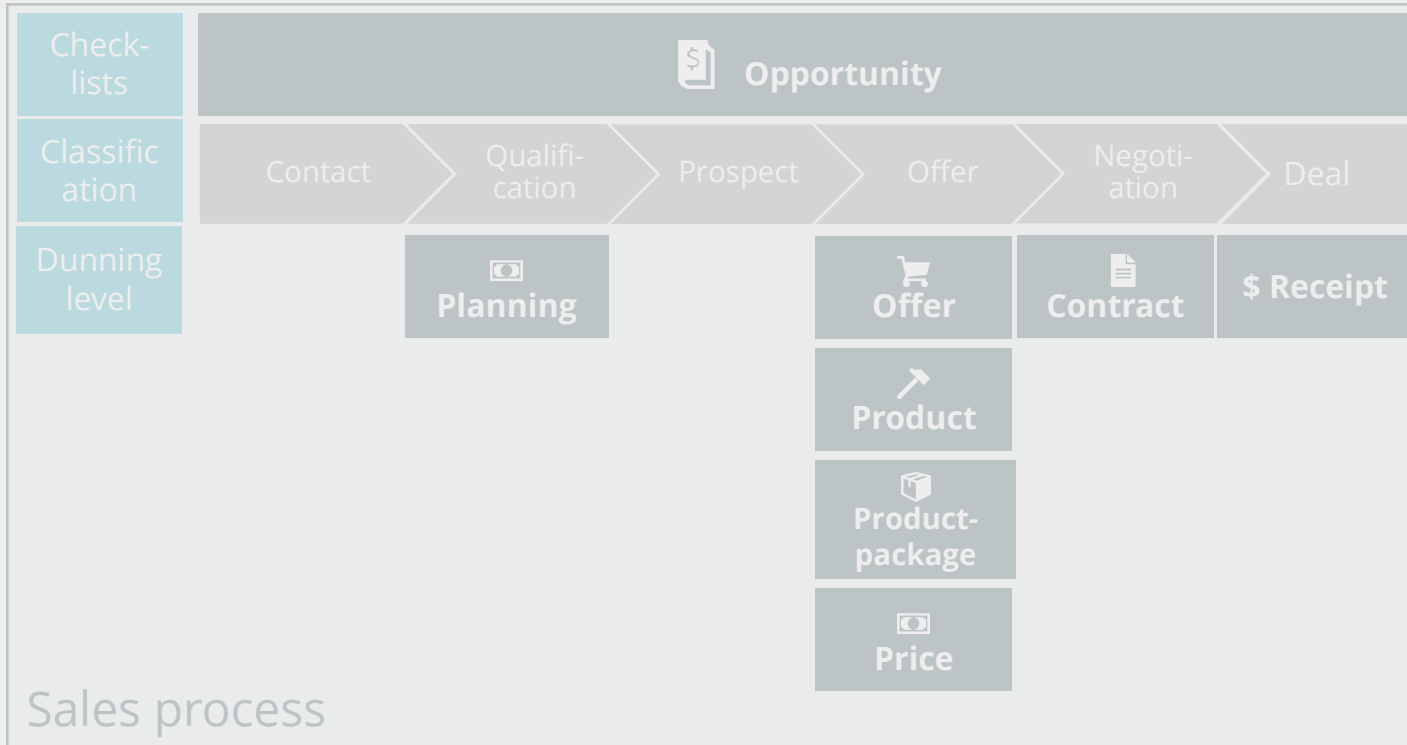
Order confirmation (10)

Serial Letter (2)

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

Sales analysis





-  To be created in advance by the administrator
-  In use "daily" by end users

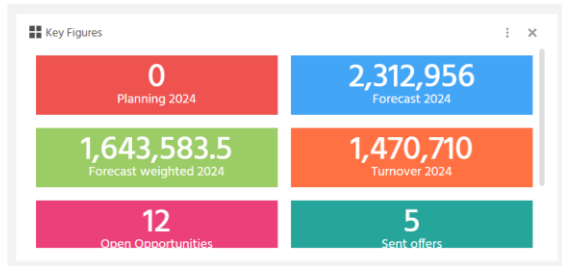
Sales Dashboard

Sales Dashboard

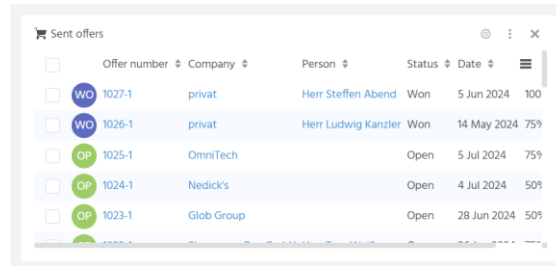
Dashlets

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

Key Figures

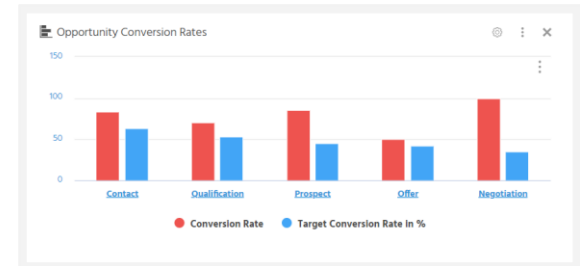


Filter views



	Offer number	Company	Person	Status	Date	
☐	WO 1027-1	privat	Herr Steffen Abend	Won	5 Jun 2024	100%
☐	WO 1026-1	privat	Herr Ludwig Kanzler	Won	14 May 2024	75%
☐	OP 1025-1	OmniTech		Open	5 Jul 2024	75%
☐	OP 1024-1	Nedick's		Open	4 Jul 2024	50%
☐	OP 1023-1	Glob Group		Open	28 Jun 2024	50%

Charts

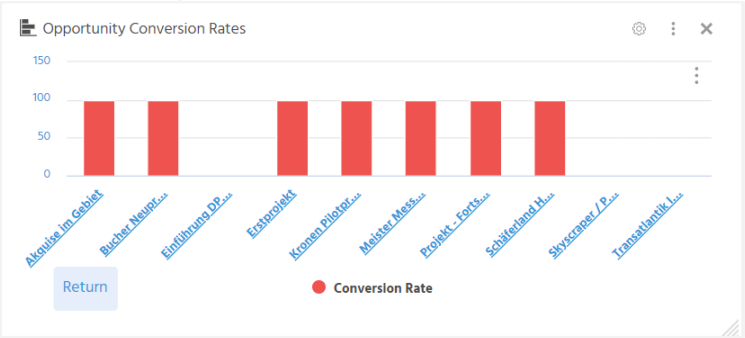


Sales Dashboard

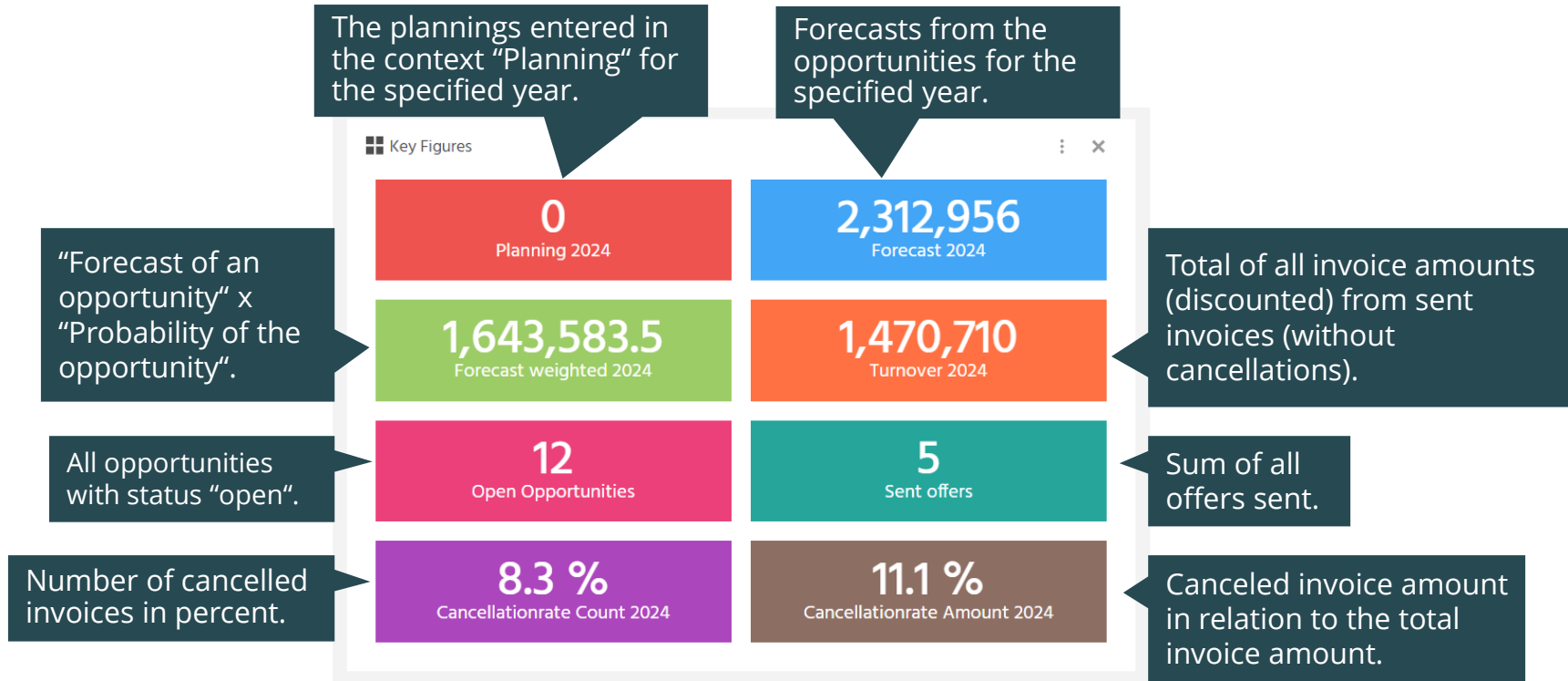
Interactive dashlet



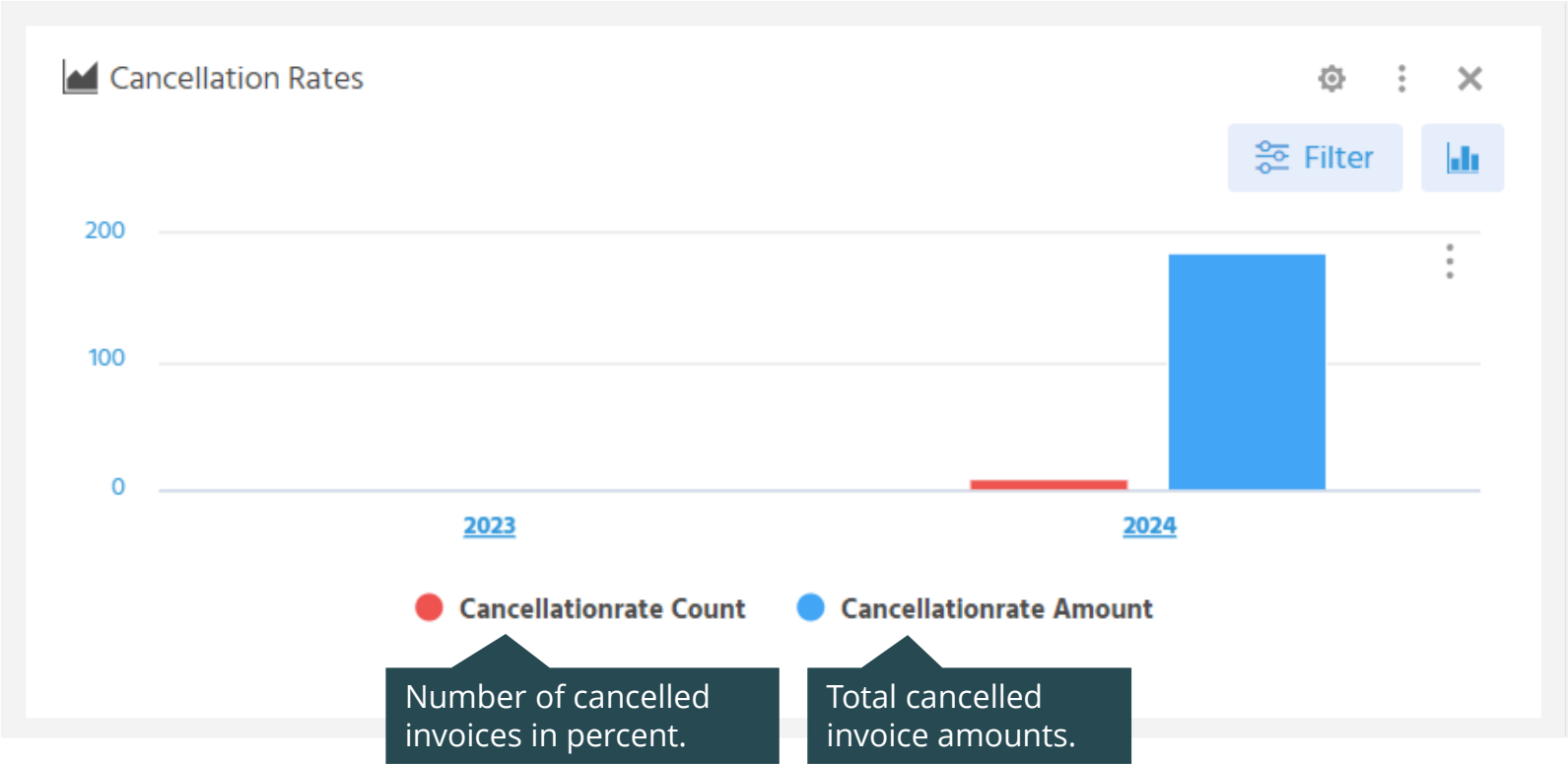
If you have selected several groupings in the filter, you can switch to the graphic of the underlying grouping in diagrams by clicking on a bar or a bar label.



Key figures dashlet



Dashlet cancellation rates



Conversion Rate

Conversion Rates



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

Upper area

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

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

Conversion Rate



Lower area

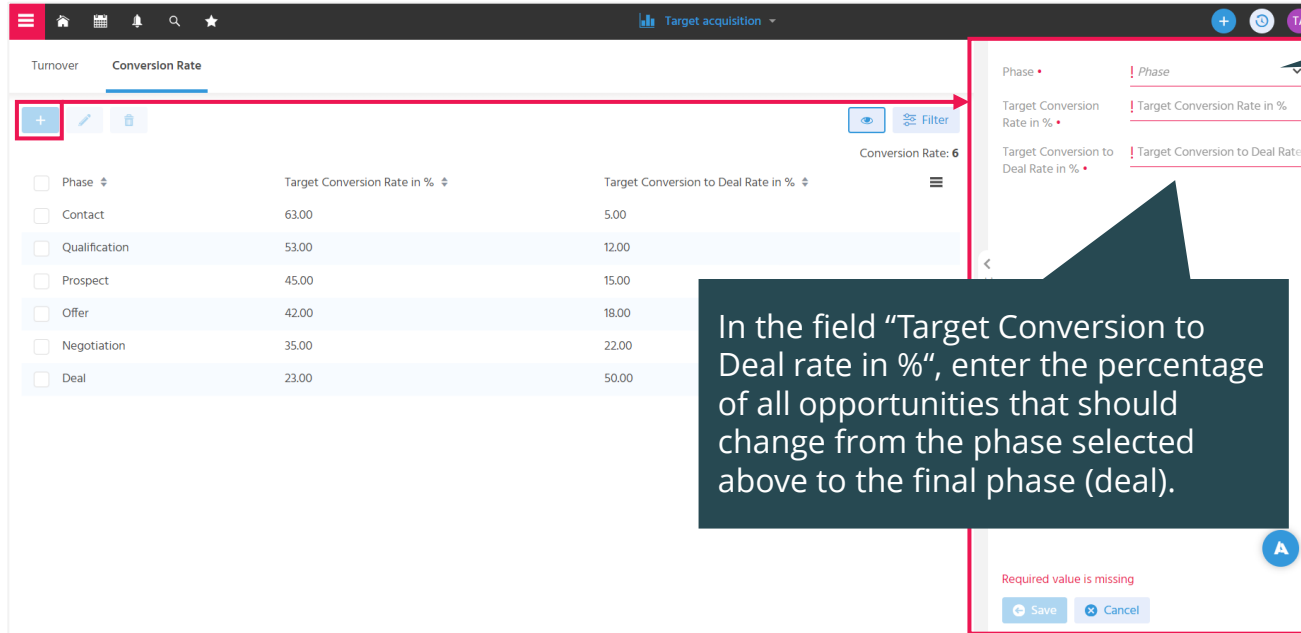
The **red bars** show how many projects from this phase have reached the Deal phase. The **blue bars** show how many projects from this phase are to reach the Deal phase.



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

Excursus into administration

Targeting Conversion Rate



Turnover Conversion Rate

Target acquisition

Conversion Rate: 6

Phase	Target Conversion Rate in %	Target Conversion to Deal Rate in %
Phase		
Contact	63.00	5.00
Qualification	53.00	12.00
Prospect	45.00	15.00
Offer	42.00	18.00
Negotiation	35.00	22.00
Deal	23.00	50.00

Phase

Target Conversion Rate in %

Target Conversion to Deal Rate in %

Required value is missing

Save Cancel

Choose a phase of the opportunity.

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

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

Turnover planning & forecast

Overview Turnover Planning and Forecast



Target turnover

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

Planning

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

Forecast

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

Confirmation Volume

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

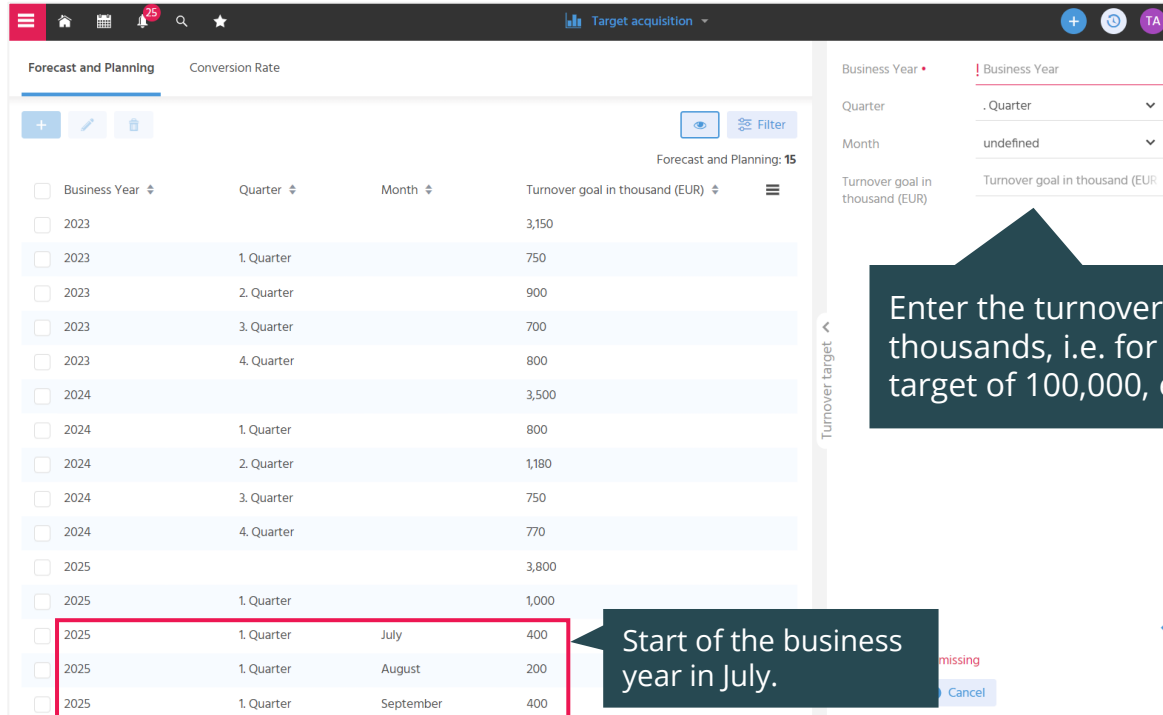
Turnover

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



Excursus into administration

Target turnover



Forecast and Planning

Conversion Rate

Forecast and Planning: 15

Business Year	Quarter	Month	Turnover goal in thousand (EUR)
2023			3,150
2023	1. Quarter		750
2023	2. Quarter		900
2023	3. Quarter		700
2023	4. Quarter		800
2024			3,500
2024	1. Quarter		800
2024	2. Quarter		1,180
2024	3. Quarter		750
2024	4. Quarter		770
2025			3,800
2025	1. Quarter		1,000
2025	1. Quarter	July	400
2025	1. Quarter	August	200
2025	1. Quarter	September	400

Turnover target

Business Year: Business Year

Quarter: . Quarter

Month: undefined

Turnover goal in thousand (EUR): Turnover goal in thousand (EUR)

missing

Cancel

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

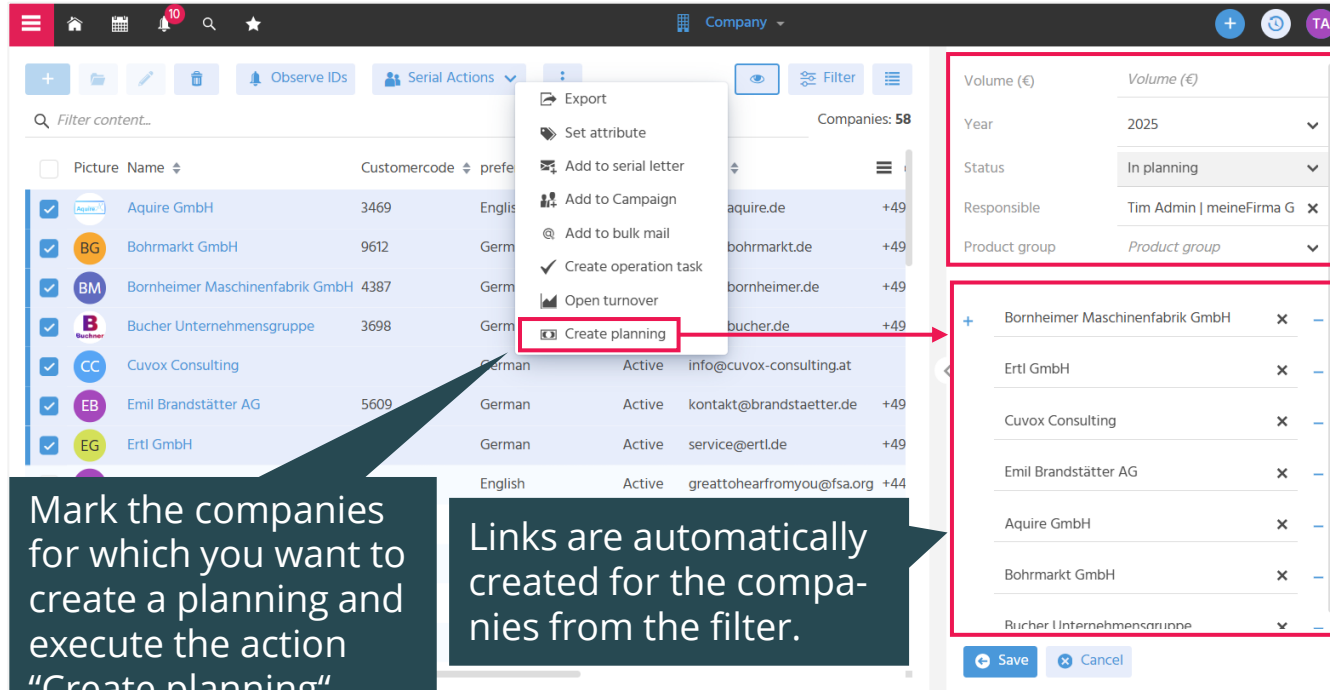
You can also set the quarter and month of the turnover goal.

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

Start of the business year in July.

Turnover planning

Create planning



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

Links are automatically created for the companies from the filter.

Volume (€) Volume (€)

Year	2025
Status	In planning
Responsible	Tim Admin meineFirma G
Product group	Product group

- Bornheimer Maschinenfabrik GmbH
- Ertl GmbH
- Cuvax Consulting
- Emil Brandstätter AG
- Aquire GmbH
- Bohrmarkt GmbH
- Bucher Unternehmensgruppe

Save Cancel

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

Turnover planning

Create planning

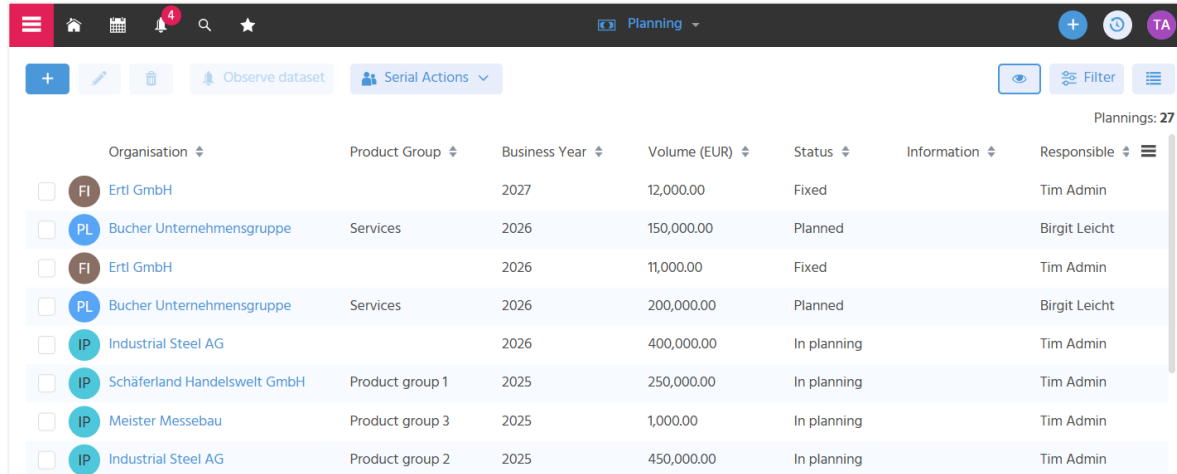
New created plan values						
Organisation	Product Group	Business Year	Volume (EUR)		Status	
IP Bohrmart GmbH		2025	- 1000	50,000.00	+ 1000	In planning
IP Emil Brandstätter AG		2025	- 1000	50,000.00	+ 1000	In planning
IP Bornheimer Maschinenfabrik GmbH		2025	- 1000	50,000.00	+ 1000	In planning
IP Bucher Unternehmensgruppe		2025	- 1000	50,000.00	+ 1000	In planning
IP Cuvox Consulting		2025	- 1000	50,000.00	+ 1000	In planning
IP ...		2025	- 1000	50,000.00	+ 1000	In planning

Unchanged plan values						
Organisation	Product Group	Business Year	Volume (EUR)		Status	Information
IP Ertl GmbH		2025	- 1000	4,000.00	+ 1000	In planning

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

Turnover planning

Context Planning



The screenshot shows the ADITO Planning context interface. At the top, there is a navigation bar with a hamburger menu, home, calendar, notifications (4), search, and star icons. The main header displays 'Planning' with a dropdown arrow and three circular icons: a plus sign, a refresh icon, and a user icon labeled 'TA'. Below the header, there is a toolbar with a plus icon, an edit icon, a trash icon, an 'Observe dataset' button, and a 'Serial Actions' dropdown menu. To the right of the toolbar are icons for eye, filter, and list views. The main content area is a table with the following columns: Organisation, Product Group, Business Year, Volume (EUR), Status, Information, and Responsible. The table contains 8 rows of data. Each row has a checkbox on the left and a circular icon with a status code (FI, PL, or IP) next to the Organisation name. The 'Plannings: 27' indicator is located at the top right of the table area.

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

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

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

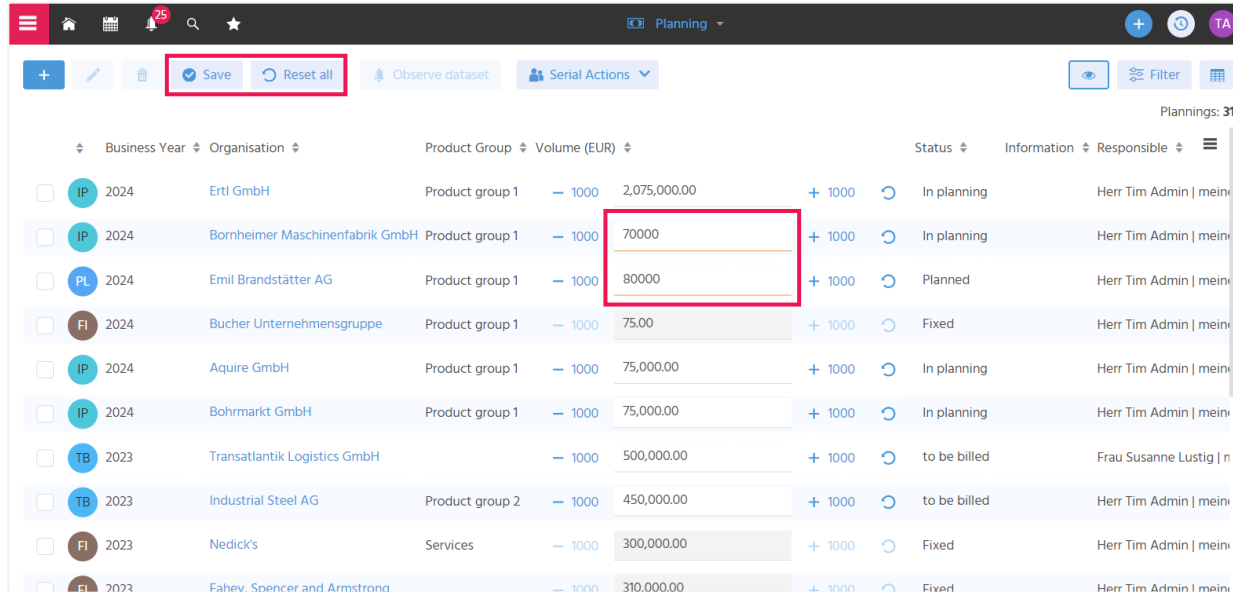
IP = In planning

PL = Planned

FI = Fixed

Turnover planning

Context Planning



The screenshot shows the ADITO Context Planning interface. A red box highlights the 'Save' and 'Reset all' buttons in the top toolbar. Below the toolbar, a table displays turnover planning data. The table has columns for Business Year, Organisation, Product Group, Volume (EUR), Status, Information, and Responsible. The 'Volume (EUR)' column is highlighted with a red box, and the 'Save' and 'Reset all' buttons are also highlighted with a red box.

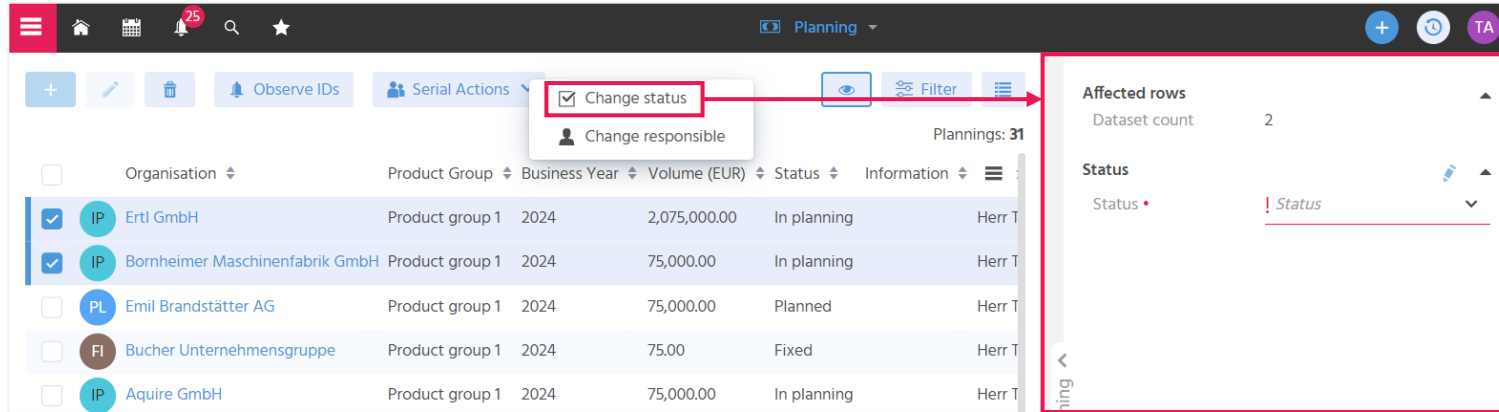
Business Year	Organisation	Product Group	Volume (EUR)	Status	Information	Responsible
2024	Ertl GmbH	Product group 1	2,075,000.00	In planning		Herr Tim Admin mein
2024	Bornheimer Maschinenfabrik GmbH	Product group 1	70000	In planning		Herr Tim Admin mein
2024	Emil Brandstätter AG	Product group 1	80000	Planned		Herr Tim Admin mein
2024	Bucher Unternehmensgruppe	Product group 1	75.00	Fixed		Herr Tim Admin mein
2024	Aquire GmbH	Product group 1	75,000.00	In planning		Herr Tim Admin mein
2024	Bohrmarkt GmbH	Product group 1	75,000.00	In planning		Herr Tim Admin mein
2023	Transatlantik Logistics GmbH		500,000.00	to be billed		Frau Susanne Lustig n
2023	Industrial Steel AG	Product group 2	450,000.00	to be billed		Herr Tim Admin mein
2023	Nedick's	Services	300,000.00	Fixed		Herr Tim Admin mein
2023	Fahev, Spencer and Armstrong		310,000.00	Fixed		Herr Tim Admin mein

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

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

Turnover planning

Series Action - Change Status



The screenshot shows the ADITO Planning interface. A table lists planning data with columns: Organisation, Product Group, Business Year, Volume (EUR), Status, and Information. Two rows are selected: 'Ertl GmbH' and 'Bornheimer Maschinenfabrik GmbH', both with a status of 'In planning'. A 'Serial Actions' menu is open, showing 'Change status' (checked) and 'Change responsible'. A red arrow points from the 'Change status' option to a side panel. The side panel, titled 'Affected rows', shows a 'Dataset count' of 2 and a 'Status' section with a red exclamation mark and the text 'Status'. Below the table, the text 'Plannings: 31' is visible.

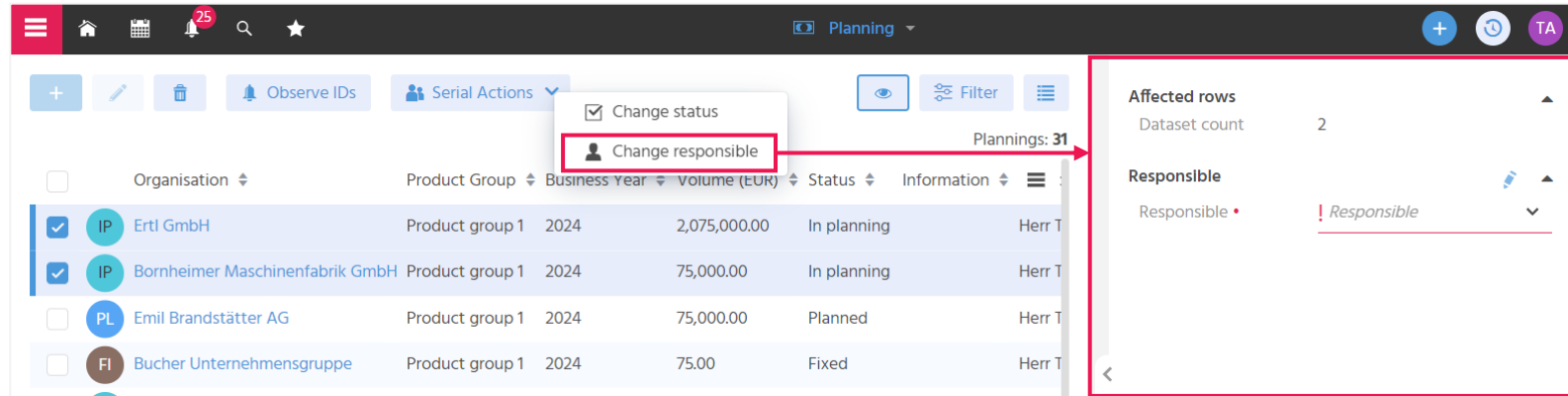
Organisation	Product Group	Business Year	Volume (EUR)	Status	Information
☒ IP Ertl GmbH	Product group 1	2024	2,075,000.00	In planning	Herr T
☒ IP Bornheimer Maschinenfabrik GmbH	Product group 1	2024	75,000.00	In planning	Herr T
☐ PL Emil Brandstätter AG	Product group 1	2024	75,000.00	Planned	Herr T
☐ FI Bucher Unternehmensgruppe	Product group 1	2024	75.00	Fixed	Herr T
☐ IP Aquire GmbH	Product group 1	2024	75,000.00	In planning	Herr T

Example:

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

Turnover planning

Series action - change responsible person



The screenshot shows the ADITO Planning interface. A table lists planning entries with columns for Organisation, Product Group, Business Year, Volume (tEUR), Status, and Information. Two entries are highlighted: 'Ertl GmbH' and 'Bornheimer Maschinenfabrik GmbH', both with a status of 'In planning'. A context menu is open over the 'Bornheimer Maschinenfabrik GmbH' entry, showing options 'Change status' and 'Change responsible'. The 'Change responsible' option is selected, and a red arrow points from it to a sidebar panel. The sidebar panel, titled 'Affected rows', shows a 'Dataset count' of 2. Below this, the 'Responsible' section shows a red exclamation mark and the text 'Responsible', indicating a change or warning.

Organisation	Product Group	Business Year	Volume (tEUR)	Status	Information
IP Ertl GmbH	Product group 1	2024	2,075,000.00	In planning	Herr T
IP Bornheimer Maschinenfabrik GmbH	Product group 1	2024	75,000.00	In planning	Herr T
PL Emil Brandstätter AG	Product group 1	2024	75,000.00	Planned	Herr T
FI Bucher Unternehmensgruppe	Product group 1	2024	75.00	Fixed	Herr T

Example 1:

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

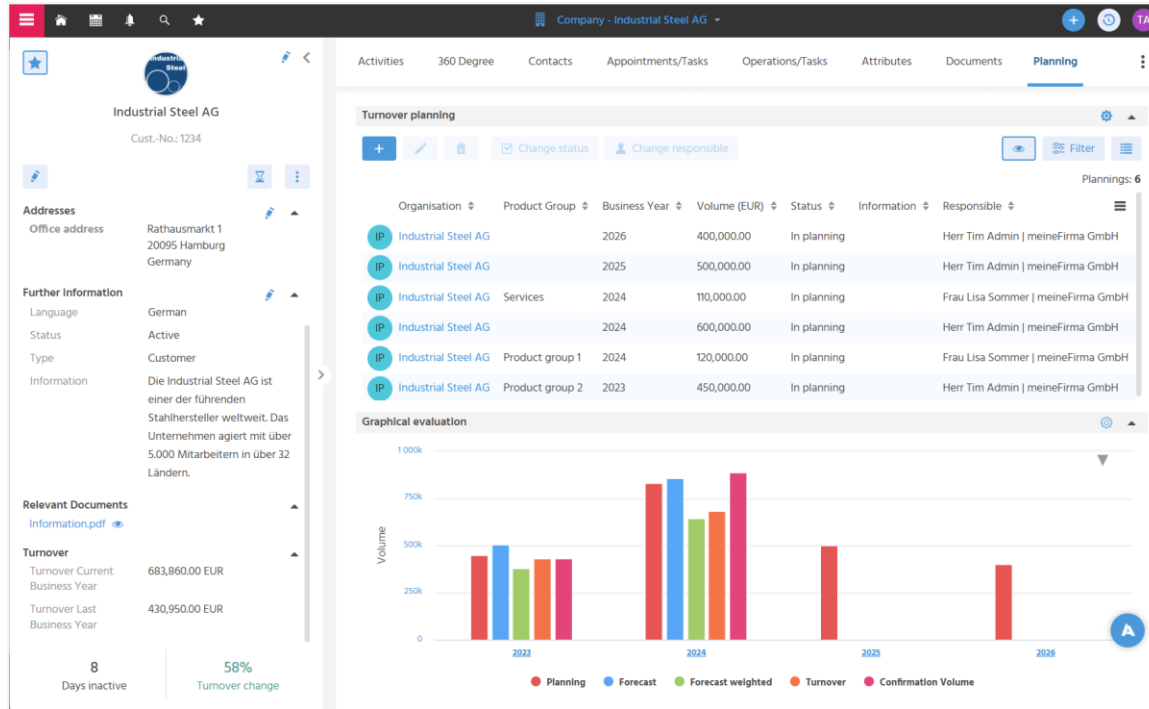
Example 2:

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

Planning in the company



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



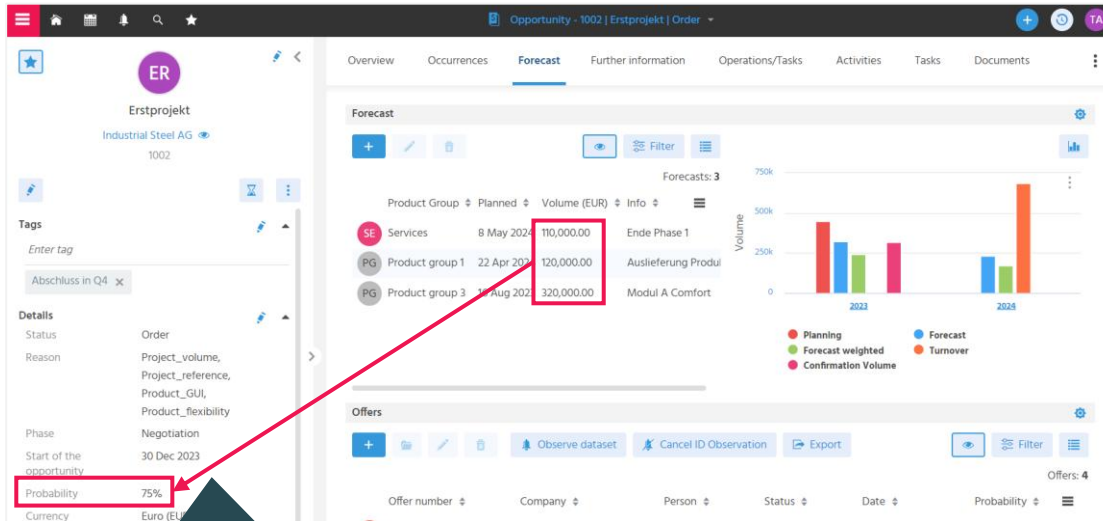
The following figures are used for the graph at company level:

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



Forecast

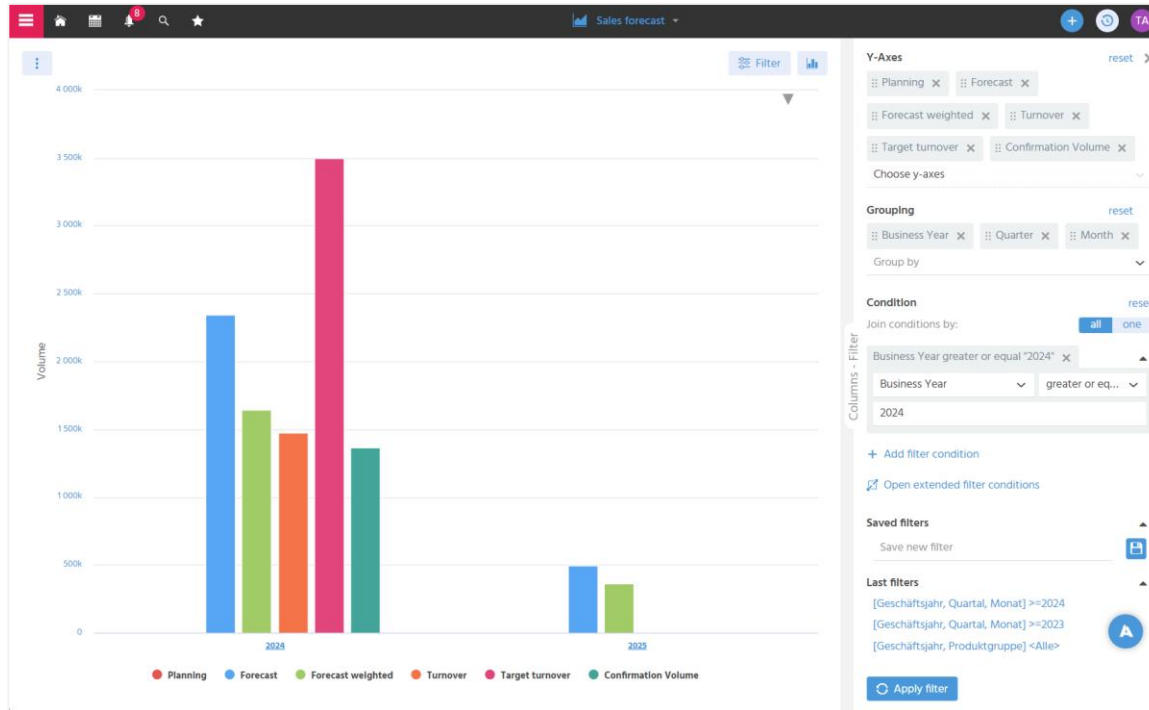
Excursus into the Opportunity



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

Forecast weighted =
the sum of the individual forecast
values multiplied by the probability.

Sales forecast



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

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



Sales forecast from company filter



The screenshot shows the ADITO interface with a list of companies. A context menu is open over the company 'Fahey, Spencer and Armstrong'. The menu options are: Export, Set attribute, Add to serial letter, Add to Campaign, Add to bulk mail, Create operation task, Open turnover (highlighted with a red box), and Create planning. The company list includes columns for Picture, Name, Customercode, Language, Phone, and Address. The company 'Fahey, Spencer and Armstrong' is selected, and its details are visible in the background.

Picture	Name	Customercode	Language	Phone	Address
	Fahey, Spencer and Armstrong	1793	English	+44 20 3245 1844	69 New Street - GB B2 4DU Birmingham
	Firmengruppe Matthias Bogen	4567	German	+49 421 98650	Pfeilstraße 7 - DE 28217 Bremen
	Fischer AG	1018	German	+49 6472 35000	Brenneckestraße 100 - DE 39116 Magdeburg
	Glob Group	1212	English	+44 20 1432 3000	32-40 Blackfriars Road - GB SE1 8NW London
	Grobbe-Werk GmbH	4758	German	+49 841 32510	Regensburger Straße 65 - DE 85055 Ingolstadt
	Hamel Collin SAS	0100	French		Passage de l'Hôtel de Ville 6 - FR 68100 Mulhouse
	Hochbau Berger	8364	German	+49 16800536	Hauptstraße 39 - DE 10827 Berlin
	Holzurm Maschinen GmbH	5690	German	+49 511 2098765	Isernhagener Straße 64 - DE 30163 Hannover
	Horn Schramm AG & Co. OHG	0200	German		Basler Straße 143 - DE 79539 Lörrach
	Industrial Steel AG	1234	German	+49 40 63520	Rathausmarkt 1 - DE 20095 Hamburg
	International Kältetechnik AG	6983	German	+49 871 65320	Müller-Armack-Straße 5 - DE 84034 Landshut
	JPM Touristik GmbH	4545	German	+49 8743 5690	Landshuter Straße 3 - DE 84144 Geisenhausen

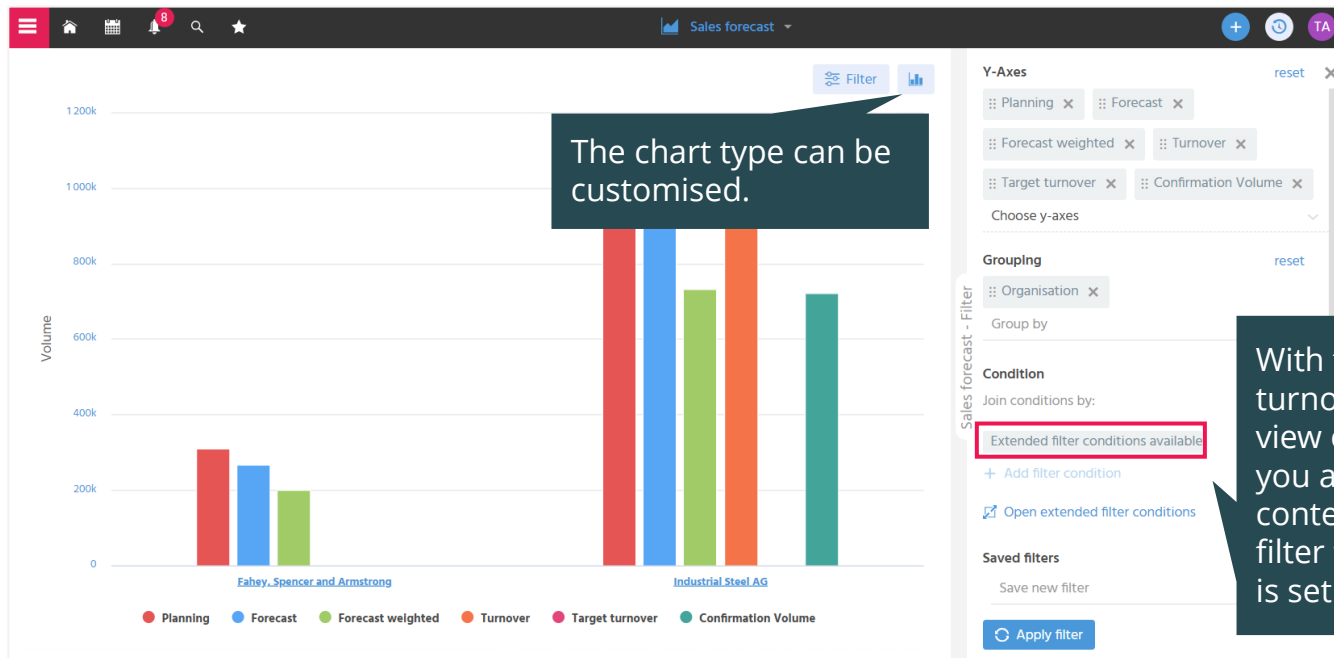
When you execute the series action "Open turnover", the context "Sales forecast" opens automatically. The selected companies are then already preset in the filter.



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



Turnover forecast



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



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

Order confirmation

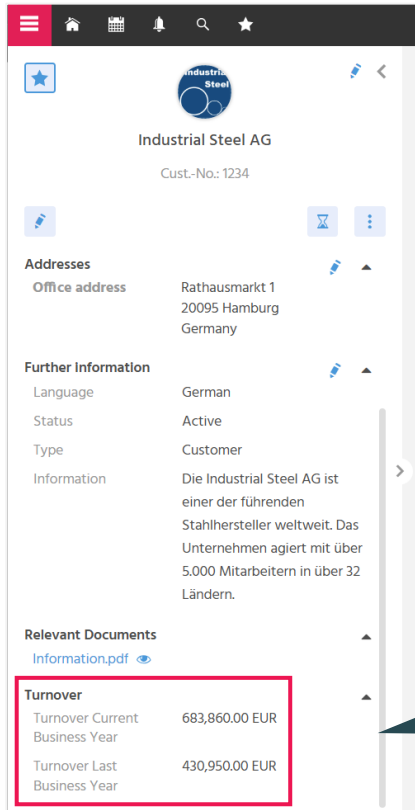
Receipt							
Receipts: 44							
	Receipt number	Company	Contact	Sent	Receipt date	cancelled	Total net (EUR)
☐	Invoice (21)						1,925,160.00
☐	Order confirmation (15)						2,167,957.50
☐	OC 1050	Meister Messebau		No	19 Jan 2026	No	0.00
☐	OC 1049	privat	Ludwig Kanzler	Yes	18 Jun 2025	No	12,547.50
☐	OC 1047	Bucher Unternehmensgruppe		Yes	29 May 2025	No	640,000.00
☐	OC 1046	Bucher Unternehmensgruppe		No	1 Nov 2025	No	0.00
☐	OC 1045	Glob Group	Cameron Doyle	No	8 Jul 2025	No	90,250.00
☐	OC 1042	Industrial Steel AG		Yes	17 Apr 2025	No	366,860.00
☐	OC 1040	Industrial Steel AG		Yes	10 Jan 2025	No	317,000.00
☐	OC 1039	Industrial Steel AG		No	6 Oct 2024	No	73,000.00
☐	OC 1038	Industrial Steel AG		Yes	7 Jul 2025	No	223,000.00
☐	OC 1034	Meister Messebau GmbH	Gertraud Weingartner	No	5 Sept 2025	No	10,600.00
☐	OC 1031	Meister Messebau GmbH		Yes	24 May 2025	No	3,750.00
☐	OC 1006	Industrial Steel AG		Yes	10 May 2024	No	107,737.50
☐	OC 1004	Industrial Steel AG		Yes	6 Feb 2024	No	107,737.50
☐	OC 1002	Industrial Steel AG		Yes	8 Nov 2023	No	107,737.50
☐	OC 1000	Industrial Steel AG		Yes	25 Aug 2023	No	107,737.50

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

Turnover



Turnover



Industrial Steel AG
Cust.-No.: 1234

Addresses
Office address: Rathausmarkt 1
20095 Hamburg
Germany

Further Information
Language: German
Status: Active
Type: Customer
Information: Die Industrial Steel AG ist einer der führenden Stahlhersteller weltweit. Das Unternehmen agiert mit über 5.000 Mitarbeitern in über 32 Ländern.

Relevant Documents
[Information.pdf](#)

Turnover
Turnover Current Business Year: 683,860.00 EUR
Turnover Last Business Year: 430,950.00 EUR

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

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Einzigartige Beziehungen