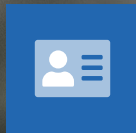X15

Successful relationships for your future-oriented company

CAS genesisWorld

Highlights of the new version

CAS SOFTWARE

CRM + AIA® for your sustainable success

The secret to a successful company are thriving relation-ships - with your customers, prospects, employees, part-ners, or suppliers. With CAS genesisWorld x15, you move your business relationships into focus at any point in time. Numerous innovative and intelligent functions with which you can develop your full potential and positively shape your company's future await you in the new version.

Consistent and transparent processes support you com-pany-wide to create more efficient work processes and excite your customers with unique customer experiences. For example, you can extend your contact information using the new and clever connected SmartTags. Thus, you can even better align your communication with the cus-tomer's requirements.

Further highlights of the new version include: intelligent assistants (AIA®) for time-saving processes, smart func-tions such as XRM e-mails for customer-focused commu-nications, as well as 2-factor authentication functions for improved data security.

The CAS-made framework OpenSync, the modern web services, intuitive scripting functions, and the App Designer offer even more possibilities to flexibly custo-mize CAS genesisWorld to fit your needs.

Whether you use CAS genesisWorld to manage your existing customers or to win new customers: with the new version, you can elevate your customer relationships to a new level according to the Customer Centricity mission statement. Lay the foundation for successful fan relation-ships that strengthen your company's sustainability and promote sustainable growth.

▼ Use the dashboard to start your day informed and to see important business metrics at a glance.

Create exciting customer experiences

Successful companies that are prepared for the future rely on long-term, partner-like customer relationships. But what does successful customer management look like in practice? The customer is at the center of all activities and always feels well looked after. With the CRM + AIA® solution CAS genesisWorld x15, you lay the foundation for a central database that enables you to do just that: intelligent, consistent, and customer-focused processes for an exciting Customer Journey, more productivity, and more transparency.

For daily navigation

A customer spontaneously calls you and wants to schedule a consultation: with the caller ID function, the corresponding **customer dashboard** opens automatically and displays all business metrics and reference values. You can quickly access the digital dossier at a glance and thus are quickly informed about the communication that has occurred up to now, key contracts and agreements, or other relevant information. With the dashboard, you keep an overview of all values and stay best prepared even when delegating tasks. The transparent data basis ensures you are always well-informed and can provide useful information anytime.

You can adjust your dashboard using customizable **business metric widgets**. This way, you can immediately access knowledge on current tickets, turnover goals, or all previous customer contacts.

Your personal assistants

CAS genesisWorld x15 helps you to create, extend, and manage successful relationships, i. a. with **Augmented Intelligence Assistants (AIA®).** These smart assistants are available to you during the entire Customer Journey along all touchpoints and automatically guide you through all steps of the processes. Thus, you can quickly and concisely record all details you need to create the ideal consultation and support services for your customers and prospects.

Keep an eye on each situation of your individual relationships: the **customer relationship wizard** indicates all customer-specific changes using detailed reference values, for example, the turnover development compared to the last year. This way, you can stay up-to-date on the current relationship status and tickets while transparently tracing any developments.

Moreover, the integrated fan principle by 2HMforum. supports your excellent relationship management. With the fan portfolio, you can segment your target groups according to their loyalty and service satisfaction. Thus, you can effectively increase the fan quota of your company.

▼ With the customer relationship wizard, you can keep an overview of all customer-specific changes to the current state of your relationship.
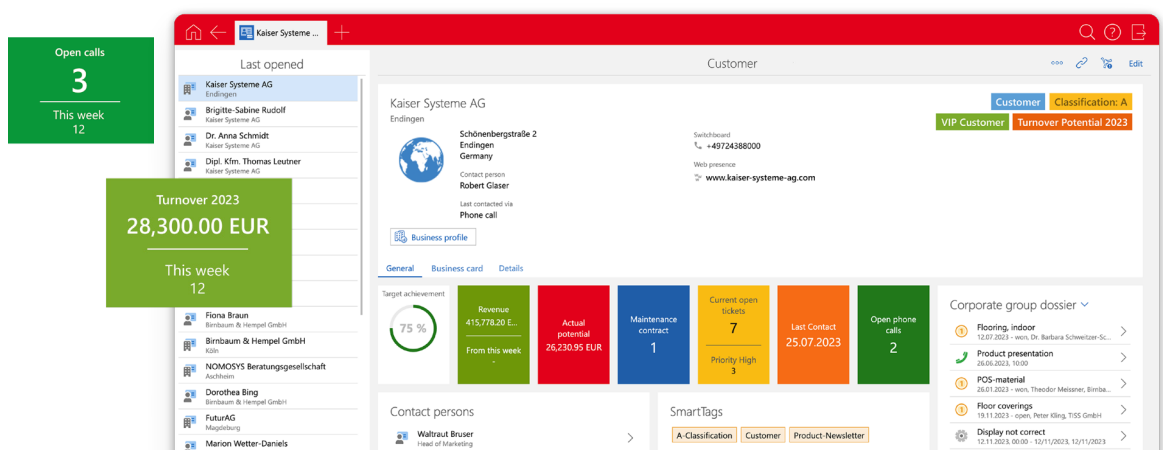
▼ Using the new SmartTags, you can filter for desired data records in no time.
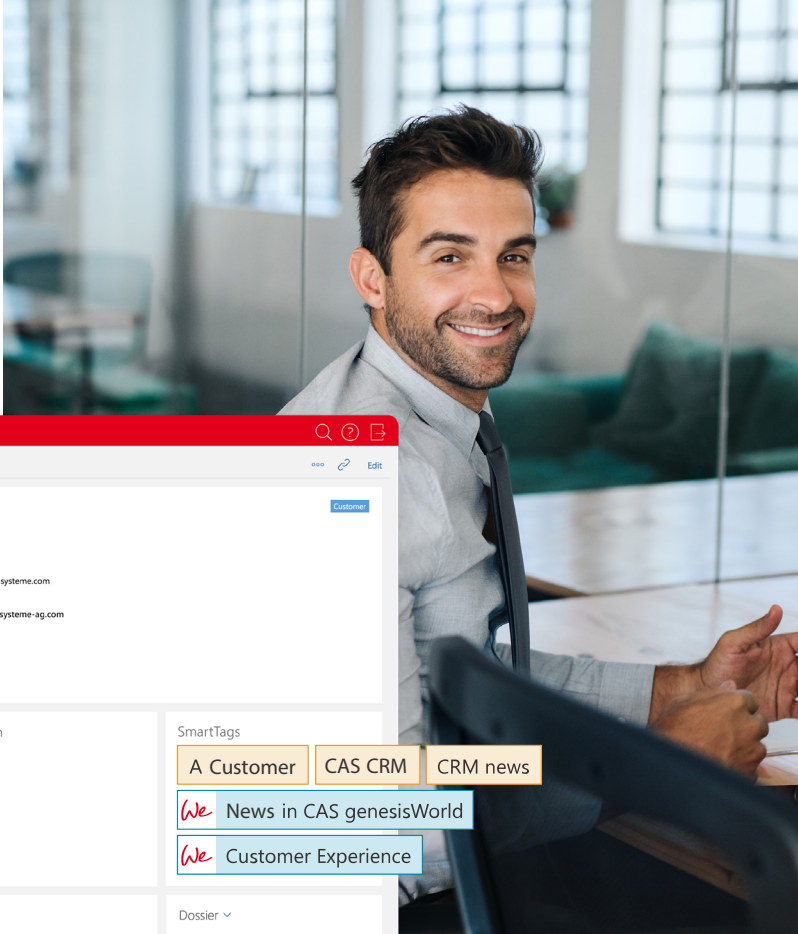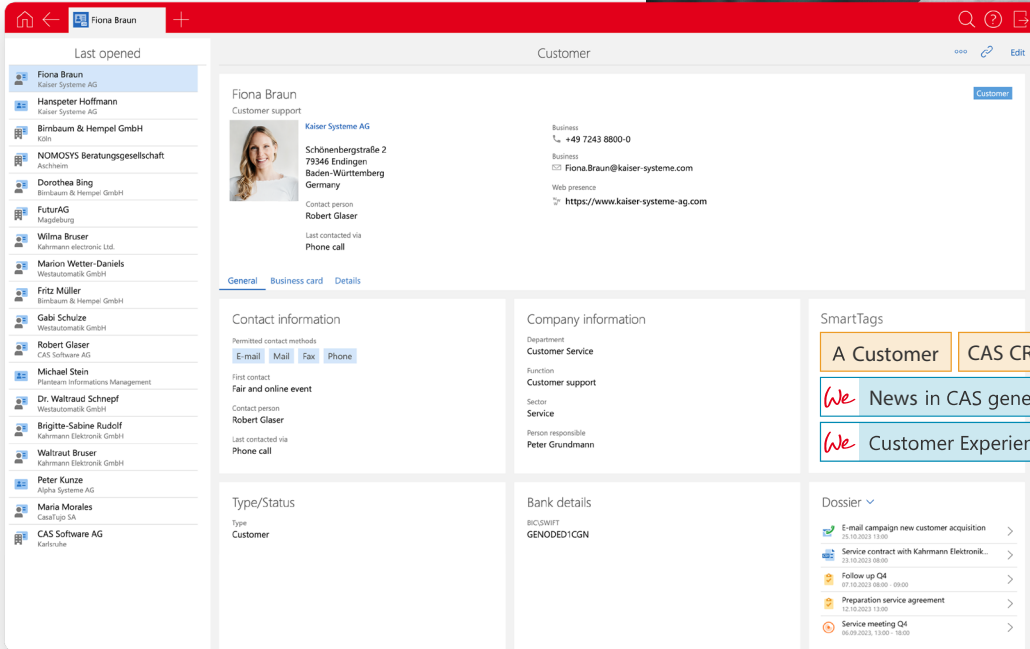
Smartly informed with SmartTags

The new **SmartTags** offer you completely new options to tag and filter your data according to specific criteria. This way, you can i. a. enrich and structure your contacts with additional information.

You set these dynamic SmartTags in the respective contact and can adjust them continuously according to any changes to the customer relationship. Thereby you can, for example, immediately identify the products and newsletters the customer is interested in or to which distribution list the contact has been added. After the customer has successfully completed the opt-in process, you can add the corresponding SmartTags to the contact. Thus, you also comply with the EU-GDPR framework.

Customizable templates always available

Accelerate your communication and processes using templates for e-mail campaigns to your customer base, consistent opportunities for potential customers, and documents as well as tickets.

With CAS genesisWorld, you can quickly create custom templates for consistent data management and efficient processes.
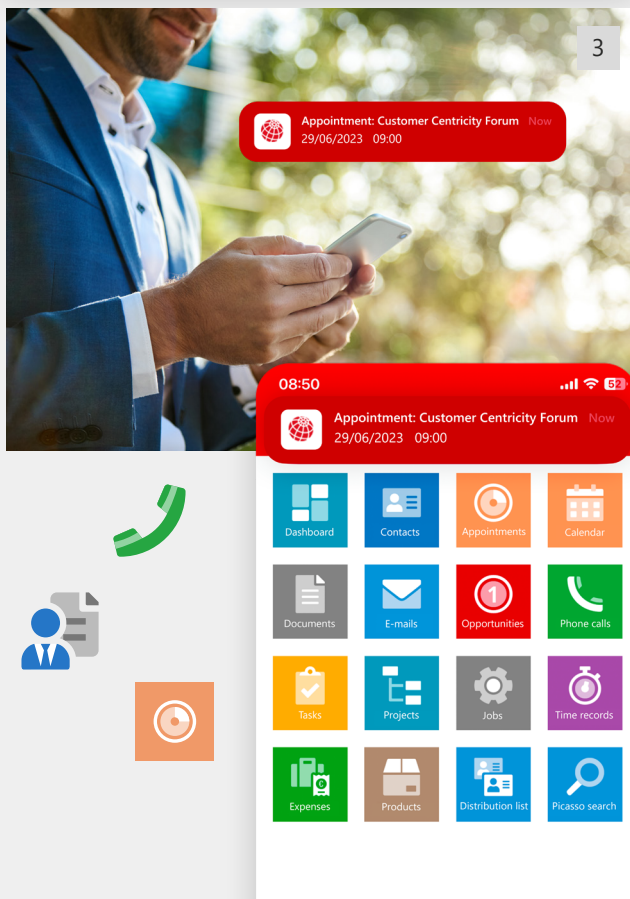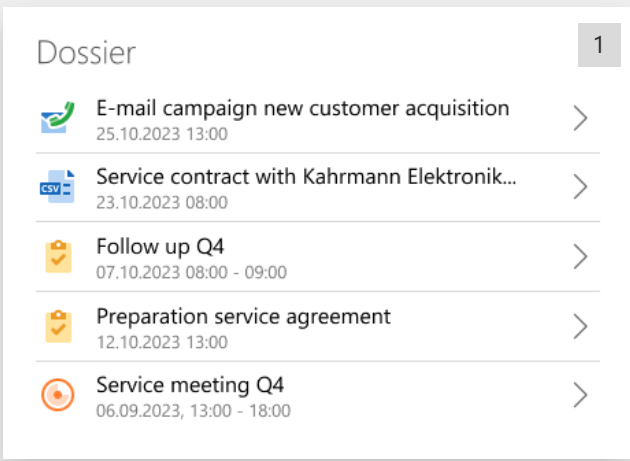
360° overview of all information

All interactions with the customer are automatically linked and displayed in a transparent and structured manner in the **digital dossier (1)**. As of now, you can easily link documents with the address dossier using drag and drop. When you open the dossier, you can now filter more closely by data record types, such as contacts, tasks, or appointments.

The resulting 360° overview of appointments, documents, e-mails, opportunities, tickets, and the entire contact history supports your team in a customer-focused approach. The bundled knowledge about the customer is clearly structured and centrally available to the whole company.

Productive after logon

Create your ideal working environment in CAS genesisWorld and have the best start to your day with your custom start view. With the new version, you can define your favorite **start apps (2)** that are immediately opened after logging on. You can centrally define interfaces and dashboards and customize them based on roles and target groups to stay informed.

Ready anytime

With CAS genesisWorld x15, you can access important data in the field. To best prepare you for field service, you can simply record and edit new data records while on the go. For example, you can create a visit report while on location or let your customer digitally sign a quote. Whether you work with a laptop, tablet, or smartphone – the new version flexibly adapts to your working environment. The consistent look & feel on all devices ensures seamless work.

Never miss an appointment again: the new **mobile push notification function (3)** automatically informs you about your activities. This way, you receive reminders of your next appointment on your smartphone and in CAS genesisWorld.

6

Identifying opportunities, utilizing potentials

Companies distinguish themselves from their competition via personal and emotional relationships. Excited customers remain loyal and express recommendations. This way, you can initiate follow-up purchases and win new long-term customers. CAS genesisWorld x15 is also the perfect tool to accelerate sales closures and increase your turnover.

Successfully win opportunities

The integrated **opportunity wizard** guides you from winning the lead to the successful sale. You can directly transform your leads into opportunities. The lead data, such as linked contacts and subjects, are directly adopted in the corresponding fields in the opportunity.

What's particularly useful: with customizable graphical input helps and progress bars, you can indicate exactly the information you need to best advise your customers and prospects. You can, for example, review the previous communication in the archived e-mails or find important notes in the Notes field.

Targeted lead management

With the new version, you can even better record leads while on the go. For example, you can scan digital business cards via QR codes or NFC tags and directly create the contact in your CRM. Furthermore, you can create your own digital business card and choose anytime which contact information you want to share with others.

▼ Easily share your contact information with others using the digital business card.

①

▼ The opportunity wizard guides you step-by-step through each phase of your sales process.

Sound decision-making tool

With the customizable **sales dashboard**, you can keep an overview of all opportunities in CAS genesisWorld x15. Thus, you can accelerate sales closures and discover new potentials. Reports, sales reports, and probability calculations provide valuable metrics that enable you to create realistic plans and make the right decisions.

▲ The optional Merlin CPQ integration eases the creation of complex quotes.

Secure processes through ideal workflows

With the CRM + AIA® solution CAS genesisWorld x15, you can transparently model your entire sales process and automatically trigger follow-up actions. For example, you can let the system automatically send welcome e-mails when a new customer is won or a new data record is created.

Using predefined **webhooks**, the sales team can e.g. be notified in a Microsoft Teams chat as soon as, for example, something changes in an opportunity. This way, you can always stay informed when new information is entered or the probability of closure changes.

Smart supplementation with Merlin CPQ

To best utilize opportunities, quickly creating quotes is essential. Through the optional integration of the Merlin CPQ solution, you can immediately see which quotes or product combinations are feasible.

With the seamless integration, the combination of CAS genesisWorld and Merlin CPQ ensures error-free configuration and saves time during your entire sales process when working with variant-rich products and services. The system always displays the correct prices and quotes are directly available in the opportunity.

Learn more about Merlin CPQ

| Record contacts | Win opportunities | Start implementing | A continuous process of improvement |
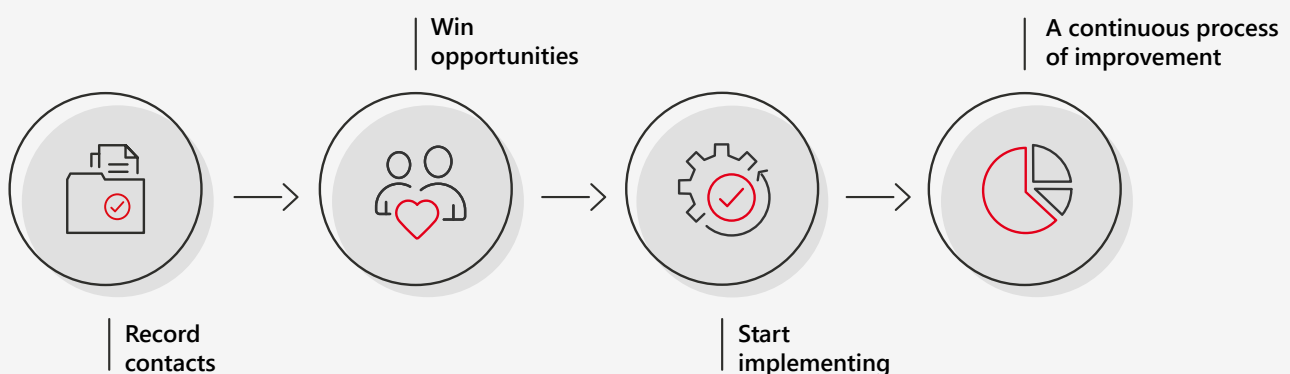
Targeted communication

How can you target prospects, customers, and partners using the correct channels? CAS genesisWorld x15 supports your targeted marketing campaigns. You can create personalized activities for exceptional customer relationships.

Personalized e-mails at the push of a button

New to the CAS genesisWorld web client: as of now, you can create personalized messages in which values from different linked sources, such as events, registrations, and opportunities, are used using the **XRM e-mails**. Using the e-mail campaign wizard, you can enrich your e-mails with complex information from the different data record types. Thus, you can create targeted contents and send them to customers, prospects, and partners.

Efficient event management

With CAS genesisWorld x15, you can quickly and easily plan and organize events. If participants register for an event via a registration form, the entered information is recorded in the CRM system and can then be accessed by your employees. No further effort or data management is required. You can quickly create necessary documents, such as lists of participants for admission control or name tags, with the push of a button.

Are you talking to a customer while on the go? Directly register them for an event using the Events app in CAS genesisWorld. Efficiently create recurring process steps as **actions**. With only a few clicks, you can assign SmartTags, initiate tasks for follow-up actions, and now also release actions for other team members.

Completely integrated

With CAS genesisWorld x15, you can extend your system landscape with various business tools. The CAS-made framework OpenSync enables you to create universal integrations for third-party systems. The provided interfaces enable you to create any synchronization solution.

You can use the integrations, for example, to access data from Inxmail, Evalanche, ELO, or any existing ERP and DMS solutions in CAS genesisWorld. With the integration of Microsoft Office solutions, such as Microsoft Outlook and Teams, you can ensure a seamless flow of information in each project. Moreover, you can flexibly integrate more CAS Software solutions, such as SmartMaps and Merlin CPQ. In the Premium Edition, OpenSync, Web Services, and webhooks are integrated free of charge so that you can even further customize and link your data for the 360° overview.

Ideal project management

Whether customer projects or joint tasks in the team: CAS genesisWorld x15 offers a variety of new functions to efficiently plan and implement projects. All newly created tickets, e-mails, or documents are already smartly linked with the project. To accelerate your teamwork even further, you can now also share custom views with team members or groups.

Easy teamwork

You can keep a graphical overview of all relevant information using agile board views, the Microsoft Teams channel, and the team calendar. Thus, you can ensure consistent teamwork, and all involved parties can view information relevant to the successful run and outcome of the project in the start view. The integrated overview quickly and intuitively informs about the available tasks and the current project status.

Business metrics at a glance

With CAS genesisWorld x15, you can access business metrics and analyses for effective project controlling at the push of a button. Using the dashboard of your CRM solution, you can directly open the respective **report view** and thus gain a tabular overview or various chart views of the invested working times. You can interactively and flexibly select and filter for individual working times. You can also set up that time records and expenses are recorded centrally for project accounting purposes.

Transparency throughout each project phase

Organize your resources and create more transparency: with the new version, you can add **resource information** to your planning view. In the project planning view, you can now also manually enter working times per interval. This provides the ideal basis for balanced resource planning for the entire team.

Defining individual access rights

Especially when working in cross-company project groups, you need to be able to manage access rights centrally. With CAS genesisWorld x15, you can limit or extend access to data records so that any project team member has access to the knowledge they require for seamless teamwork in the project.

▲ Perfectly plan and organize your projects, including available resources.

▼ Agile board views create transparency about the tasks assigned to the team.
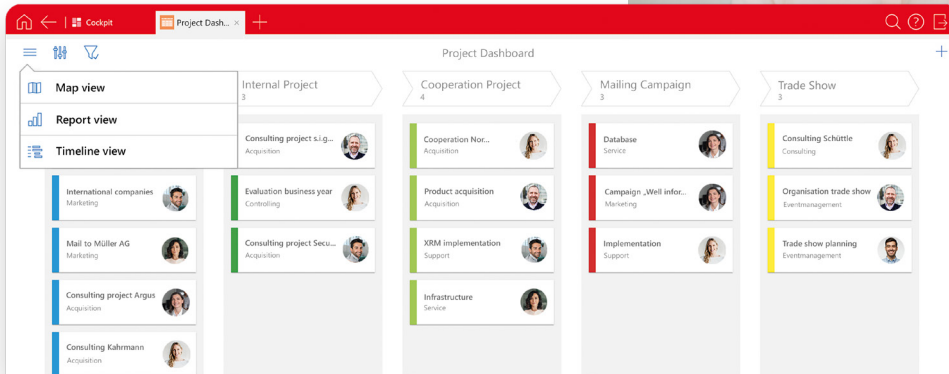
# Celebrating milestones with webhooks

Celebrate your successes! **Webhooks** are the ideal extension of the existing notification services and support you in easing communication and interaction across the entire system.

For example, team members are automatically notified via the Microsoft Teams channel as soon as a milestone is reached or an opportunity is won.

Knowledge can be accessed quickly and comfortably

The **Picasso search** is now also available in the add-ins with its practical functions. Based on your individual user behavior, the AI-based search helps you find any relevant information anytime.

What's especially useful: you can view the customer dossier already while processing your e-mails in Microsoft Outlook. Additionally, you can search for more relevant information and quickly and easily archive e-mails using drag and drop. As of now, you can also reply to archived e-mails in the sidebar without having to search for them in the inbox.
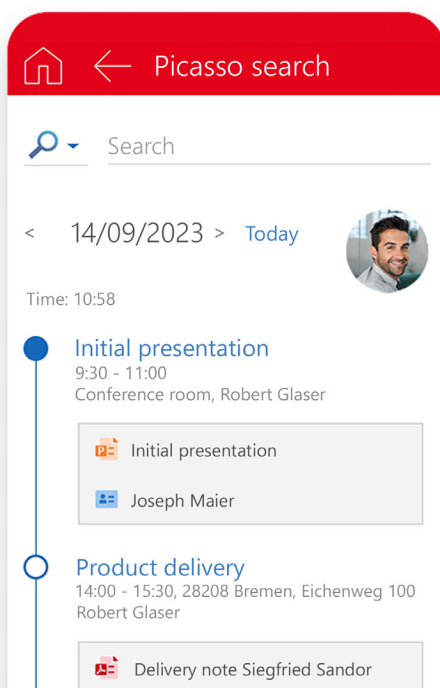
◄ The Picasso search directly provides you with all the important information based on your user behavior – no research necessary.

As a smart CRM solution, CAS genesisWorld x15 helps your Service & Support department with an integrated ticket system to quickly and individually process requests. With the new version, you create even more efficient support processes and organize product uses, service and maintenance contracts, reclamations, and requests centrally and transparently.

Consistently up-to-date

Create the ideal dashboard for your service team and transparently model your processes. With lists that display current service requests and tickets that update automatically and periodically, you always stay up-to-date. Using escalation management, you can accelerate the rule-based ticket handover as well as the assignment of the respective processing person.

Use action services to automatically create follow-up tasks, tickets, or other data records for quick and easy communication with the customer.

Soundly prepared for any request

Especially if you work in the Service & Support department, CAS genesisWorld x15 helps to record, assign, classify, prioritize, and process requests. Furthermore, your service team can always access relevant customer information during field service – whether online or offline. You can easily record working times and costs while on location or let the customer sign an invoice digitally. You can then automatically and promptly send any documents to the respective customer.

Transparency in real time

With product- and customer-specific real-time analyses, you can improve your processes and products and create the ideal operational planning. Surveys help you to stay informed about customer satisfaction and where to optimize to improve.

Moreover, you can define update intervals via widgets so that the values are regularly updated. Thus, for example, callback lists always contain the current tickets. This way, your customer service fulfills the highest quality standards, and your actions always remain efficient, quick, and powerful.
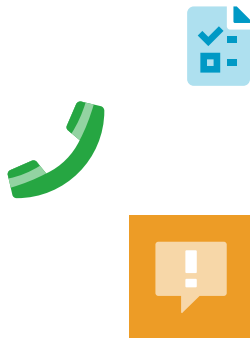
▼ In CAS genesisWorld x15, you can customize your dashboard to fit your respective role in the company.
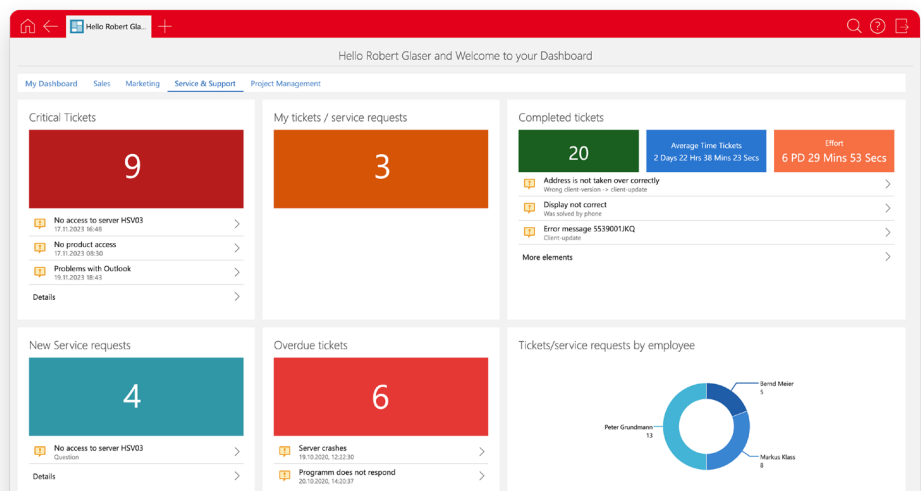
From professionals for professionals

Founded in 1986, CAS Software AG is now the leading manufacturer of CRM + AIA® solutions for small and medium-sized enterprises (SMEs). More than 470 employees develop innovative solutions for successful companies from various sectors on the 6,500 m² campus. More than 520,000 users in 34,000 companies use CAS Software solutions daily, including world market leaders such as Daimler, Airbus, Fraunhofer, and MSI.

CAS Software AG has received several awards and prizes for its innovative product range and commitment to SMEs, including TOP 100 Innovator of the Year® 2022 and Germany's Most Innovative SME 2023 in the ranking of WirtschaftsWoche. Furthermore, the company won the German Design Award 2018, and the "Great Place to Work" seal for the exceptional corporate culture on the CAS Campus.

Your solution, your choice

Whether you want to buy or rent CAS genesisWorld, whether you want to host on premise in your company, in your private cloud, or a public cloud – you can always select the operating and financing model that fits your requirements.

Moreover, you can customize your CRM solution to fit your company's requirements using the different CAS genesisWorld modules. Alternatively, you can switch to the Platinum Suite which includes all modules.

Customizable apps

Using the **App Designer** or **Scripting** functions, you can easily customize the interfaces and fields of your CRM solution – no programming skills required. As the administrator, you can manage the settings centrally for your company. At the same time, you decide which functions of a new update you want to include in your CRM system.

Digitally independent

The new version extensively ensures your digital independence. CAS genesisWorld is software that is digitally fair and "made and hosted in Germany". This means, your data are safe from unauthorized access by third parties. This security is now further supported by 2-factor authentication.

Complying with the EU-GDPR, the **"SecureLogin - CAS & SmartWe" authenticator app** is available to you to ensure a secure logon with 2-factor authentication (2FA). The open and modern OAuth2 standard is the basis for this authentication. Moreover, you can always review which devices are currently in use.

You can find these and other highlights of the new version at: www.cas-crm.com

CAS CRM
A SmartCompany of CAS Software AG

CAS Software AG
CAS-Weg 1 - 5
76131 Karlsruhe
Germany

Phone: +49 721 9638-188
E-mail: crm@cas.de
www.cas-crm.com

Software
Bundesverband
IT-Mittelstand
Made in Germany

100%
Service
Quality
Future

Software
Hosted in
Germany
Bundesverband
IT-Mittelstand e.V.
www.bitmi.de

fair.digital

CAS SOFTWARE