X15

**CRM + AIA® for SMEs**

**Fascinating simplicity**



Dossier
Contacts
Calendar
30
Projects
Opportunities
1
Documents
Tasks
Phone calls

**CAS genesisWorld**

Summary of functions

CAS SOFTWARE

# The first CRM + AIA® solution for SMEs: CAS genesisWorld

How can prospects and customers be sustainably and emotionally inspired in our digitalized world? Individual solutions, first-class service, and personalized communication are the keys to success for customer-centric companies. CAS genesisWorld is your intelligent and digital assistant designed to support you along the way in your relationship and information management with its smart functions and automatic processes so that you can make informed decisions and strengthen your customers' loyalty.

With their indispensable basic building blocks, individual modules, and numerous integrations and extensions, CAS genesisWorld provides you the flexibility necessary to contribute to your company's success with unique services and proactive decision-making. The modular structure also gives you the opportunity to customize your CRM to your specific needs – for customer-centric relationship management, inspiring customer experiences, and sustainable business relationships. At the same time, data protection always comes first. 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).

Additional product information:

The following functions apply when using the CAS genesisWorld Premium Edition, unless otherwise indicated (M). Selected functions which require a specific CAS genesisWorld client are also indicated as such by the following abbreviations: (D, W, MA). Subject to changes, errors and omissions expected.

ⓘ Augmented Intelligence Assistants (AIA® in short) are smart wizards that support informed decision making with comprehensible suggestions.

# CAS genesisWorld for your daily business
# Smart. Flexible. Efficient.

The key to successful communication with your customers and business partners is a central and up-to-date customer dossier and a 360° view of all contact information.

With CAS genesisWorld, you can get all the contact information you need centrally and at a glance. This increases the efficiency of your company and your teams while ensuring exciting customer experiences thanks to targeted and customer-focused interactions both on- and offline.

You organize appointments, tasks, or group projects across teams and departments in no time. Intelligently networked SmartTags support you in your individual relationship management: you can quickly and easily add these Smart-Tags to contact data records and adjust them to meet any customer-specific changes. Automated processes and repeating tasks ensure that your team can concentrate on what's important – your customers.

## Professional address management

| | |
|---|---|
| Any Relationship Management (xRM) | Record any addresses of customers, companies, suppliers, employees, etc. to keep an overview of relevant contact data and make it accessible to any user. |
| Recording addresses | Record addresses as individual contacts, companies or organizations, or contact persons of a company or organization with the corresponding image of the contact person or company logo. |
| Address Wizard | Intelligent and simplified address capture from e-mail signatures, web pages, and documents using copy and paste and predefined selection values. |
| Export/import in vCard format | Export and import addresses in vCard format. |
| Scanning business cards | Create new contacts by taking a photograph of their business card, scanning a QR code, or scanning an NFC tag with your mobile device. Thanks to OCR recognition and the Address Wizard, the business card is analyzed, interpreted, and then stored in CAS genesisWorld. |
| Duplicate check | An automatic duplicate check is performed when entering or changing an address data record. A wizard supports you in resolving duplicates by helping you to merge redundant addresses and any linked information. |
| Merging duplicates [M] | Duplicate checks and duplicate merging across your complete contact data stock. |
| Qualifying addresses | Addresses are checked, corrected, and enriched by comparing them with address service provider reference databases. In addition, addresses are updated and company data is enriched using, for example, credit information, balance sheets, or industry codes. Under certain circumstances, additional qualification costs may apply. |
| Consistency check | Automatically check address data for consistency, for example, whether the postal code matches the location or the values of the IBAN and BIC bank details match. |
| Address autocomplete | Address fields, such as City/Town, District, and Federal state, are automatically completed for more than 40 European countries after the Postal code has been entered. |
| Assigning contact persons | Easy assignment of contact persons to companies including a reassignment option, whereby they can simply be moved from company A, to company B. There is also an automatic transfer option for any company data stored in the contact person's data record. |

| | |
|---|---|
| Address identities | Link different identities or roles of one natural person. |
| Address categorization | Custom categorization options into A/B/C customers, leads, partners, or suppliers. |
| Access and editing rights | Customize address access and editing rights with three options (public, user-sensitive, private) to assure data protection. |
| Address deactivation | Deactivate addresses, for example, when a contact person leaves the company. |
| Forming corporate groups [D] | Link companies with hierarchical relationships to create a graphical view of the corporate group structure. |
| Contact method | Set permitted and preferred contact methods, for example, e-mail, phone, or conventional post for correspondence in compliance with the law. |
| Supplementary and mandatory fields | Enter and maintain additional information with supplementary and mandatory fields, for example, "First contact" or "Interested in" complying with data protection requirements. |
| Unicode and address formats | Correctly display international character sets and addresses in address formats. |
| Filter functions [D, W] | Targeted searching and filtering of addresses according to selected criteria. |
| Distribution list | Group addresses in distribution lists for targeted communications. |
| Map displays | Georeferencing and map visualizations of selected addresses thanks to embedded maps from OpenStreetMap and graphical displays of select addresses. |
| Social Media Integration [D] | Integrate contact data from social media including Facebook, Xing, Twitter, and blogs, complying with the latest data protection laws. |
| Address synchronization [M] | Synchronize addresses unidirectionally and bidirectionally with Microsoft Exchange. |
| Data synchronization with mobile devices | Uni- and bidirectional data synchronization with mobile devices. |

## ⓘ Meets the strictest data security requirements

CAS genesisWorld supports you in both the implementation of the European Data Protection Regulation (EU-GDPR) and in general data protection in your company. A multi-level rights system regulates the individual access rights for each employee and for each individual data record. Moreover, you increase the security of your user account using the 2-factor authentication. Thus, you ensure that your data is protected from third parties and that personal data is processed complying with data protection regulations.

# Intelligent document management

| | |
|---|---|
| Various document formats | Manage documents in any format, such as PDF, images, Microsoft Office, or CAD files. |
| Document categorization | Assign documents to categories, such as quote, minutes, or report. |
| Opening files in editing or read mode | In a suitable application, files can be opened in editing mode to edit documents or in the write-protected, read-only mode. |
| Document lock | Displays the user who is currently working on a document to avoid overlapping editing. |

| | |
|---|---|
| Versioning | Save the previous document versions using a detailed comment function. |
| Templates in corporate design | Standardized and personalized templates can be used to quickly compose letters and e-mails which conform to corporate design. This includes access to favorite document templates. |
| Personalized recurring communications | Compose and send customized form letters and e-mail campaigns using field variables, mail merge fields, and attachments. |
| Image import | Store images such as photographs as new documents. In addition, simultaneously upload multiple photos as archive documents from the gallery of your mobile device. |
| Microsoft Office integration | Flexible integration for creating and editing documents directly in Microsoft Office. |
| Sending documents | Quickly share documents via e-mail. |
| Archiving | Archive any documents in the central Document Archive using the drag and drop function. |
| Linking | Link documents with any data record, such as an address or a scheduled appointment. |
| DMS integration [M] | Flexibly integrate external document management and archiving systems. |
| Signing PDF documents [MA] | Sign PDF documents in the mobile app. This is not a qualified signature according to eIDAS (European electronic IDentification, Authentication and trust Services). |

# Transparent task management

| | |
|---|---|
| Tasks | Manage all ongoing or completed tasks, classified as single, repeating, or team tasks. |
| List overview | Display tasks in a customizable list format with any sort order, for example, by Subject, Priority, or Deadline. |
| Combined lists [W,D] | Display information from two linked data records in this list view for direct comparison. |
| Delegation of tasks & responsibilities | Create tasks for other employees and define a person responsible for processing the created task. |
| Notification service | Notify others of newly created tasks, changed tasks, or the receipt of delegated tasks. |
| Board view [W] | Transparent process mapping on an agile Kanban board, including the display of swimlanes. |
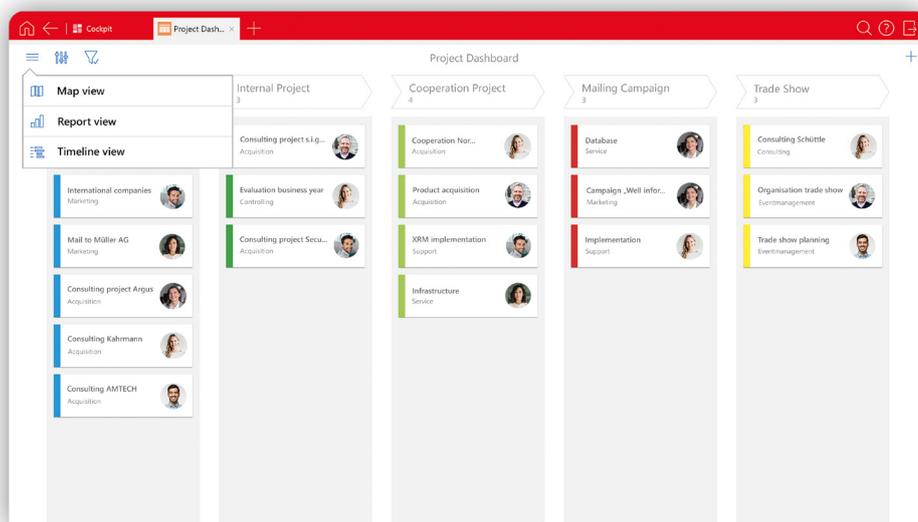


◄ With the board view, you create the ideal framework for collaborative teamwork.

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| Input help | Two-stage input help in the form of task "Type" (e.g. "Support") and "Status" (e.g. "In progress") with dynamic mandatory field definitions. |
| Priorities & color classification [D] | You can prioritize using the A, B, or C system, including color highlighting for faster visual categorization of data records that uses color coding for specific values, for example, priorities. |
| Editing duration and status | Plan the processing duration in estimated, target, and actual, and display the processing status as a progress bar and in percent. |
| Task scheduling | Schedule a task by using follow-up tasks. |
| Reminder functions | Automatic reminders for task deadlines. |
| Moving tasks | Tasks are automatically moved to a new deadline if not completed. |
| Synchronizing data with mobile devices | Uni- and bidirectional synchronization with mobile devices. |

# Smart communication

| | |
|---|---|
| Social media | Integrate contact data from social media including Facebook, Xing, Twitter, and blogs, complying with the latest data protection laws. |

## E-mails

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|---|---|
| xRM e-mail [D] | Create and personalize e-mails taking into account relevant information from various sources, for example, events, sales opportunities, telephone calls, or enquiries. |
| Sending from within addresses | Directly send e-mails from within address data records. |
| Rules for e-mails [D] | Set up rules for the automated moving or archiving of e-mails to predefined folders. |
| Archiving and linking | Archive individual e-mails in contact dossiers and automatically link corresponding addresses, participants, and other data record types – independent of the used e-mail client or hardware. |
| Sending and archiving e-mail campaigns | Direct and delayed sending of e-mail campaigns including automatic archiving of the sent e-mail campaigns in the recipient dossier. |
| Send status | Display your current progress when sending e-mail campaigns. |
| In-house e-mail client [D] | Best utilize the integrated CAS genesisWorld e-mail clients while online or offline. |
| S/MIME encryption [D] | Read, send, and archive S/MIME encrypted e-mails regardless of your system and system-wide for true end-to-end encryption. |
| Integration of external e-mail clients | CAS genesisWorld supports all e-mail clients that use IMAP4. These include all the usual solutions, such as: Microsoft Outlook, Gmail, Thunderbird, or HCL Notes. |
| Outlook Sidebar | Important information from CAS genesisWorld is available directly in Microsoft Outlook through the CAS genesisWorld Sidebar. Thus, you can select recipients and attach CAS genesisWorld data records to e-mails using the Outlook Sidebar. Furthermore, you can archive e-mails and attachments using the drag and drop functions. You can immediately answer archived e-mails from the sidebar. |
| Salutations & signatures [D] | Use predefined salutations, global settings and individual signatures. |
| Out-of-office wizard [D] | Define out-of-office messages with the help of a wizard. |
| Spell check [D] | Check spelling automatically. |

## Telephony

| | |
|---|---|
| Phone call documentation | Automatic documentation of incoming and outgoing calls. |
| Caller ID | Incoming calls are identified, and the caller's name and address are displayed. Additionally, any relevant caller information, such as their address data record or call memo (CTI), is displayed before the call is picked up. With the Deeplink search, you can transfer search parameters via the URL. Thus, you can identify contacts with a specific phone number. |
| Call logging | Phone call data records are automatically created including information on time, duration, conversation partner, and call status such as held or missed phone call. |
| Automatic data updates | Automatically update key data in the address, such as the caller, or the start, end, and duration of the call. |
| Call notes | Document call contents using telephony notes and automatic linking of the call notes to the conversation participants. |
| Scheduled phone calls | Schedule phone calls as a dedicated data record and view them in your calendar. |
| Speed dial | Speed dial directly from the address form. The usual callto/tel. options are available. |
| Supported telephone providers | All telephone systems which support TAPI. |

# First-class time management

## Calendar

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|---|---|
| Creating appointments | Easily create appointments directly in the calendar and automatically include the relevant participants. |
| Personal calendar | Personal calendar with public, confidential, and private appointments. |
| Team calendar | Display multiple users in one calendar to provide a quick overview of free time slots. |
| Resource calendars | Display resources, such as meeting rooms, company vehicles, or projection equipment. |
| Calendar views | Customize calendar views and display them as app tiles or views for a quick overview, for example, create a holiday view. |
| Shared calendar view | View other users' calendars. |
| Access rights | Allow special viewing rights for other users to check for free or blocked time slots. |
| Day/week/month view | Display schedules in day, week, or month views. |
| Holiday calendar & public holidays | Enter, display, and plan for holidays and public holidays. |

## Appointments

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|---|---|
| Private and confidential appointments | Mark appointments as private or confidential. Private appointments can only be viewed by the participants themselves. Confidential appointments can only be viewed by authorized users. |
| Public appointments | Mark appointments as public, i.e. accessible by all colleagues. |
| Online meetings | Appointments marked as online meetings in CAS genesisWorld are automatically created in MS Teams and can be opened directly. |
| Access to third-party appointments | View third-party appointments not involving yourself. This requires the appropriate access rights. |
| All-day events | Activate the "All-day event" option when an event is scheduled for the entire day. |
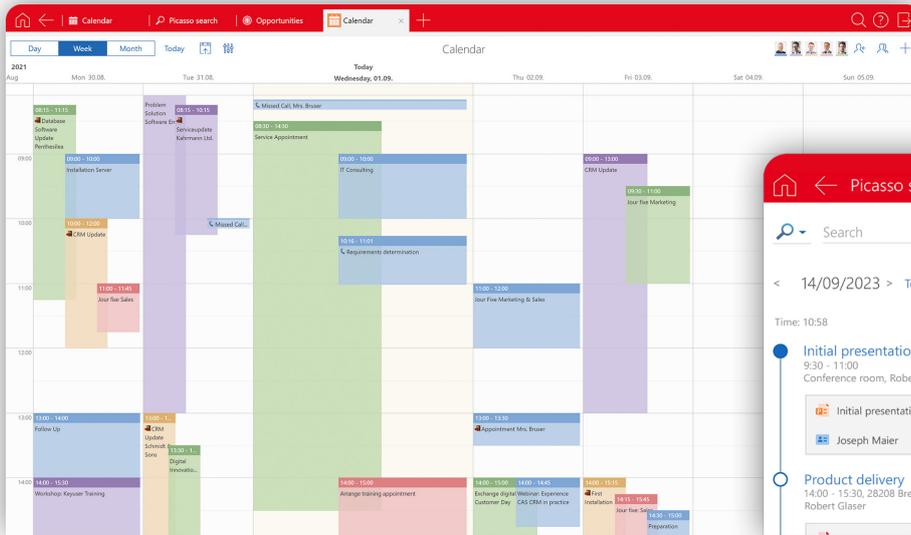
◀ Choose flexibly between different calendar views, for example, your own or the team calendar.
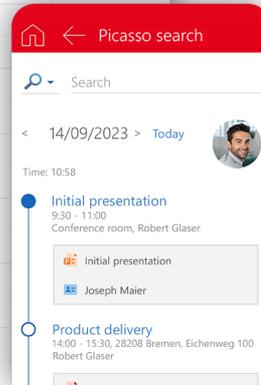
◀ The Picasso search shows relevant information in advance, before you have to actively search for it.

| "Out-of-office" appointments | Mark appointments as "out-of-office". |
|---|---|
| Appointments with iCalendar support | Invite external participants to a shared appointment or react to external appointment invitations from, for example, customers. |
| Delegating appointments | Create or invite to appointments in the name of other users – even when inviting external participants. |
| Schedule appointments without overlaps | By displaying the availability of users or resources, for example, meeting rooms or pool cars, it is much easier to plan appointments without overlaps. |
| Recurring appointments ᴰ | Create recurring appointments on a daily, weekly, monthly or yearly basis. |
| Rescheduling | Move scheduled appointments easily by drag and drop. |
| Automatic rescheduling ᴰ | Automatically reschedule recurring appointments in case of conflicts with weekends or public holidays. |
| Notification service | Notifications are sent out before recurring appointments expire, when creating new or editing existing appointments, or when appointments are deleted. |
| Push notifications | Individually set reminders for the respective participants. You can receive these automatic reminders for appointments, tasks, and phone calls on your smartphone via mobile push notifications. |
| Links | Link appointments with all relevant data records, for example, documents, addresses, and projects. |
| Data synchronization with Microsoft solutions ᴹ | Schedule synchronization runs with Microsoft Exchange/Microsoft Outlook. |
| Data synchronization with mobile devices | Uni- and bidirectional synchronization with mobile devices. |

# Get a 360° view of your customer

| Customer dossier | Structured and chronological display of all entries for an address data record, such as appointments, documents, or opportunities. Additionally, display link lists, for example, to include archived e-mails or opportunities in the dossier. |
|---|---|
| Customer dashboard ᴹ | Get an optimized view providing a quick indicator of current status and key customer details. |

| | |
|---|---|
| Customer relationship assistant [W] | Extensive business metric widgets and reference values indicate customer-specific developments, changes, and the current relationship status for the ideal 360° overview of your customers. |
| SmartTags | Dynamic SmartTags let you tag and filter your data according to specific criteria. This way, you can i. a. enrich and structure your contacts with additional information. If you want, you can use these SmartTags for all, even your custom data record types. |
| Radial menu [W, MA] | Quickly access further actions for data records via the radial menu. |
| Semantic meaning of links | Define relationships between data records using links to display a semantic meaning between, for example, customers, competitors, and decision-makers within an opportunity. |
| User-specific configuration | Users only have access to the data relevant to them. |
| Comprehensive offline functionalities [MA] | Access to CRM data and CRM functions in offline mode. |
| ERP integration | Flexibly integrate ERP systems to synchronize receipts and products. This ensures full transparency in the dossier across quotes, invoices, reminders, or open invoices. |

With customizable business metric widgets, you can create your custom customer relationship wizard as the ideal basis for consultations at eye level.
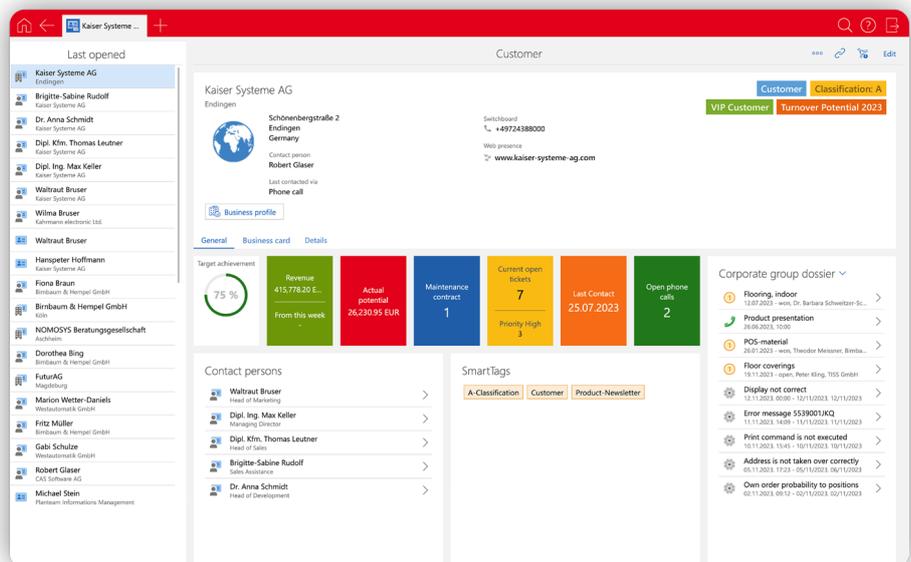


# Search data systematically

| | |
|---|---|
| Picasso search [W, MA] | Intelligent wizard using AI algorithms which provides you with a quick overview and suggestions for current events. |
| SmartSearch | Intelligent live search with personalized hit list, sorted by relevance. |
| Global search | Search in all data record types, such as addresses, documents, appointments, or archived e-mails. |
| Phonetic search | Simplify address searching based on phonetic similarities, for example, searching for "Thomson" will also deliver results for "Thomas" and "Thomsen". |
| Searching in the dossier | Search dossier entries according to specific provisions, for example, search only the "Subject" fields in the dossier view. |
| Search and filter options including linked information | Run a detailed search by including all desired attributes of a data record and additionally linked information, for example, all customers with open opportunities who have not yet received a follow-up. |

| | |
|---|---|
| Complex search queries | Complex search queries through filter conditions, bracketing rules, "and/or" conditions, and "greater than/less than/equal to/contains" conditions. |
| App search [W] | Search for apps in the app overview. |

## Intuitive workflow support: notification and action services

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| Custom notifications | Freely definable rules for automatic notifications, for example, in case of document or address changes. |
| Linking notifications via primary links | Automatically archive notifications including the setting of primary links. |
| Workflow support | Automatically trigger follow-up actions in response to an initial action, for example, generate a welcome e-mail or create new data records when a new customer account is opened. |
| More actions | Change multiple data records at once with an ad hoc or saved action. Moreover, create new data records quickly and comfortably, for example, new tasks for opportunities. |
| Webhooks | Easily connect communication and information channels as well as IoT devices with CAS genesisWorld using defined webhooks. |
| Execution period | Specify an execution period for each rule, such as on a specific day or within a given time window. |
| Questionnaires & surveys [M] | Automatically send questionnaires using the notification and action service, for example, satisfaction studies. |



◀ Configure your dashboard for quick access to all relevant information.

◀ Your CRM/XRM is always on your wrist on your smartwatch

## Gain an overview. Measure success.

| | |
|---|---|
| Company-wide & data-specific dashboard views | Define company-wide dashboard views for an overview of all relevant data and define how you wish to display the current data record including any linked information. |
| Customer and project dashboards [M] | Comprehensive and structured overview of defined, customer-specific or project-specific data, such as turnover, customer complaints, or deployed products. |

| | |
|---|---|
| Predefined report templates | Access report templates for presenting an overview of data as a PDF file. |
| Defining custom report templates <sup>D, M</sup> | Define your own report templates to clearly display data. |
| Grouping data <sup>M</sup> | Group data interactively in lists. |
| Exporting results <sup>M</sup> | There are several options at your disposal for exporting data results for further editing, or to present the data in other systems, such as Microsoft Access or Business Intelligence Tools. |
| Exporting data in text format | Export data in text format (CSV) for further editing in third-party programs. |
| Sending | Time-delayed or automatic sending of reports to a defined group of recipients. |
| Archiving <sup>M</sup> | Archive analyses directly in the document archive and respective dossier. |
| Crystal Reports <sup>M</sup> | Crystal Reports integration. |

# Communication platform for employees and customers: intranet & company portal <sup>M</sup>

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|---|---|
| Company information | Display different categories, such as business units. |
| Notice board and discussion forums | Exchange information at various levels: company-wide, departmental, group- or project-specific interchange. |
| Competency search | Search for employees with specific competencies or skills. |
| Employee picture gallery | Display an employee gallery with details of your employees skills and competencies. |
| Mapping of processes and workflows | Map your processes to enable quick data handling, for example, by implementing automated task creations when an IT support request is submitted. |
| Personal start page | Set up a personal start page with elements, such as "My appointments today", a news ticker, personal favorites, or notifications. |
| Phone list | Access a list of employee phone numbers, including a search function and direct access to any employee's personal page. |
| Corporate and department schedules | Access shared calendars of other departments or the entire company. |
| Birthday lists | Birthday lists with active notifications on the start page. |
| Knowledge and information database | Structured filing of key documents and information including easy search and access options. |
| Organization chart | Overview of corporate hierarchy with a direct contact option. |
| Holiday administration | Submit holiday requests, have them approved by the relevant manager, and manage your holidays. |
| Holiday calendars and lists | Display an overview of taken, approved, refused, and scheduled holidays. |
| Absence management | Manage absences, with overview and evaluation options. |
| Online forms | Access online forms, such as improvement suggestions. Create custom online forms using an integrated form designer. |
| Checklists | Integrated and customizable checklists for the planning and preparation of, for example, trade fairs or business trips. |
| Appointment calendar | Personal calendar with overlap warnings for appointment conflicts. |

| | |
|---|---|
| Team calendar | Access shared calendars of other employees and groups. |
| Resource calendar and resource management | Access to the shared resources calendar and management of resources, such as meeting rooms or company cars. |
| Project overview | Project homepage with relevant information, for example, the linked employees, appointments, documents, or tasks. |
| Address management | Manage companies, contact persons, and individual contacts. |
| Document management | Structured filing and publishing of any document type. |
| Overall dossier | Group key documents relating to a project in one dossier. |
| Task management | Manage your own tasks and delegate to others. |
| Automatic notifications | Receive notifications of important new developments or changes, such as "New appointment" or "Delegated task". |

# CAS genesisWorld for management
# Maximum transparency. Smart visualization.

CAS genesisWorld offers your management team a reliable overview of customer profitability, efficiency, or sales forecasts in the dashboard. Using automatically generated reports, your management team can enjoy the benefits of a powerful decision-making tool in real-time and a 360° view of all the performance indicators of the company. You can access this scope of functions already in the Premium Edition.

## Detailed reports and forecasts

| | |
|---|---|
| Evaluations and reports | Automatically create up-to-date reports of any kind and display them as, for example, PDF documents. |
| Analyses across data records [M] | Generate complex, multidimensional evaluation reports across any data record types, including linked data records. |
| Templates and display formats | Create context-dependent templates as well as well-structured display formats for reports, for example, in the form of tables, graphics, or charts. |
| Report views [M] | Display indicators in value tables that can be grouped on different levels, or in graph form. |
| Analyses via pivot tables [M] | Display structured complex, multidimensional evaluation reports in pivot tables. |
| Preview | Report preview for checking and correction if required. |
| Analysis intervals and automatic sending [D] | Analyses in specified time intervals, including automatic sending of a weekly report on Fridays to a specific group of people. |

# CAS genesisWorld for sales
# Recognize potential. Increase productivity.

Customers have their own special wishes and requirements each of which represents individual business potential for your sales. With CAS genesisWorld, you segment your customers and keep an eye, for example, on opportunities from the first contact to closing using the graphical progress indicator – this means, you can make the most of any potential for success. In this way, your sales team can recommend the right product at the right time, as well as engage in up- and cross-selling, which all helps to increase both the speed and volume of selling. CAS genesisWorld helps you to make your whole sales process more transparent and efficient for successful lead generation.

## Manage and optimize sales processes

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|---|---|
| Customer dossier | Archive all correspondence with a customer and related documents in the respective customer dossier. |
| Leads | Used to quickly enter data when making contact with a prospective customer; followed by address qualification with the option to convert the lead into a sales opportunity. You can adopt contact data directly into the CRM system by scanning business cards. |
| Opportunities | Display the entire sales process: from lead acquisition to offer phase to completion and after-sales service. |
| Graphical input help [W] | Visualization of input help options in the form of colored, horizontal bars to display, for example, the phases of an opportunity. |
| Forecasts | Enjoy the benefits of various analysis options for opportunities, for example, you can analyze by sales area or sales person. |

▼  Using the graphic progress bar, you can visualize the editing phases of a data record type at a glance.

| | |
|---|---|
| Contribution margins | Support for calculating contribution margins of opportunities. |
| Interactive sales pipeline [D, M] | Utilize interactive display variants for your sales pipeline and filter by initial contact, available quotes, or contract conclusion. |
| Systematic sales [D, M] | Define sales processes supported by criteria catalogs and specific views, for example, the sales pipeline. |
| Definition of sales phases [D, M] | Define sales phases, for example, "Next activity" which displays planned, upcoming activities, such as phone calls, appointments, or callbacks. |
| Opportunity wizard [W] | You can create, for example, your own opportunity wizard for guided data recording from lead creation to successful completion using custom graphical input helps and progress bars. |
| Support for sales hierarchies [D, M] | Freely define up to three sales hierarchies, for example, according to geographical or personnel aspects. |
| Mapping of sales structures [D, M] | Expand opportunities to include a hierarchical mapping of sales structures and methods, such as the definition of activities and milestones. |
| Mapping of sales areas [D, M] | Hierarchically map sales territories with up to three breakdown levels, for example, Europe, Germany, and Southern Germany. |
| Reporting [M] | Create reports based on the complete data set, such as an evaluation of all sales opportunities created in recent quarters. |
| Measuring customer loyalty and clustering | Determining customer loyalty using the Fan Indicator®. Query overall customer satisfaction and segmentation of your customers by categorizing their loyalty or emotional connection into five groups based on a scientific approach. |
| Strengths and weaknesses analysis [D, M] | Analysis option to identify the most profitable customers and prospects as well as to forecast turnover. |
| Closing probability [M] | Assess the potential of opportunities by automatically calculating the closing probability. |

▼ Analyze how emotionally connected your customers are using the integrated Fan Indicator®.



The Fan Portfolio® | Source: 2HMforum., www.forum-mainz.de

| | |
|---|---|
| Weighting of competitors and contact persons [D, M] | Create competitor analysis based on weighting and assessment of competitors and contact persons. |
| Creating quotes and quote documentation [M] | Comfortably create quotes, including information on options, alternative products, prices, and discounts. Subsequently, generate an overall quote document containing a cover letter, detailed information on the product, or financing options. |
| Optional items | You can enter optional items, which simplifies creating quotes. |
| Price and discount lists | Price and discount lists for products enable you to set individual customer prices. |
| Product configurator [M] | Configure sales products and create quotes based on available product variants, components, and prices. |
| Product variants [M] | Ensure the compatibility of product components by using and applying (technical) rules. |
| Product catalogs [MA] | Display products in catalog form using pictures and descriptions to create an easy and comfortable quote generation process. |
| Receipt creation | Create different receipt types, for example, offers, orders, invoices, or credit notes from addresses, opportunities, or projects. |
| Easy Invoice [M] | Create and manage receipts, such as quotes, invoices, and credit notes, without needing an additional ERP system. In the desktop client, Easy Invoice helps you to create electronic invoices according to the XRechnungen 2.0 standard. |
| Proximity search | Display and select addresses in a defined area. |
| Geomarketing [M] | Display all data record types, for example, all open opportunities in maps as a heatmap. |
| Notification and action service | Send customizable notifications, for example, notify the internal sales support when members of your sales force update the customer dossier. |
| ERP interface | ERP systems integration which grants access to addresses, invoices, delivery notes, or quotes directly from CAS genesisWorld without changing application. |

Display all data record types on a map, for example, all open opportunities.
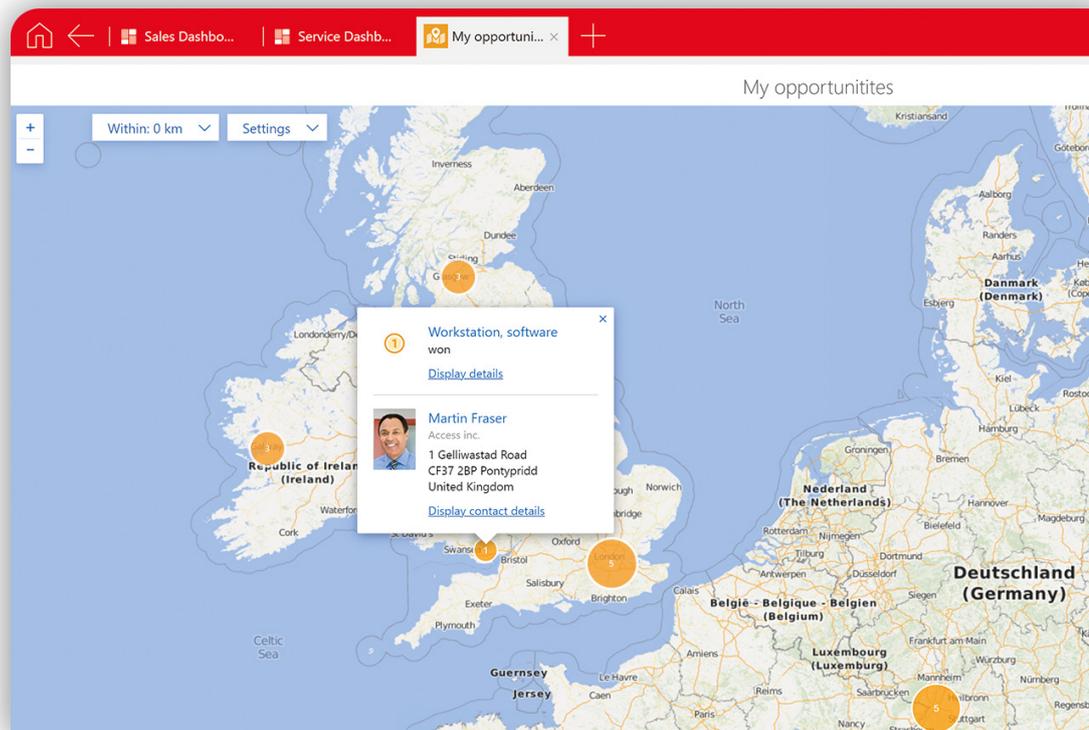
# CAS genesisWorld for marketing
# Inform your prospects. Impress your customers.

Accurate targeting is critical to successful marketing. CAS genesisWorld supports your planning activities and communication: you define individual communication phases, use simple filter functions, such as SmartTags, to select suitable recipients, define specific follow-up actions, and conduct targeted, multi-phase campaigns through the different communication channels.

Thus, you can keep track of the costs and successes of your marketing activities. Both the recipients' reactions and potentials are recorded, and new leads are forwarded directly to the sales team.

## Personalized content. Target-group-specific marketing campaigns.

| | |
|---|---|
| Target group selection and distribution lists | Combine specific target groups in distribution lists based on the central address database applying various search and filter functions. |
| Permitted and preferred contact methods | Automatic compliance with the allowed and preferred method of communication before making contact/sending out e-mail campaigns, in order to comply with data protection regulations. |
| Personalized mass communications | HTML templates for personalized mass communication via e-mails or letters. |
| Integrated e-mail campaigns | The light-weight e-mail campaign wizard has comprehensive options to help you select target groups and create personalized communications. |
| Multi-phase e-mail campaigns [D, M] | Manage, execute, and evaluate multi-phase campaigns through various communication channels using the graphical campaign designer. |
| Campaign status [M] | Indicates the status and progress of a campaign, such as "scheduled", "active", or "complete". |
| Campaign documentation [D, M] | Archive all information within the campaign, including targeted addresses, sent e-mail campaigns, phone calls, and related documents. |
| Budget planning [D, M] | Draw up a budget for each campaign. Record costs and turnover of completed actions and media resources deployed. |
| Handling incorrect addresses and bounces [D, M] | Identify incorrect addresses in a campaign to improve data quality. |
| Analysis [M] | E-mail campaign analysis taking into account the marketing budgets used to measure success. |
| Event management [M] | Event planning with facility management, organization of invitations, and analysis options. Other functions include: participation restriction, participant registration by personalized e-mail campaigns, and registration links, letters, or online registrations. |
| Multimedia questionnaires [M] | In questionnaires and surveys, you can embed websites and multimedia content, for example, videos. |

# Professional e-mail marketing for your individual relationship management [M]

| | |
|---|---|
| No programming skills are required to send personalized e-mails or newsletters | Create and personalize e-mail campaigns in HTML format – no programming knowledge necessary – available for select customer groups. Inxmail and Evalanche integration for powerful e-mail and permission marketing with wide-ranging ad-hoc analysis tools for follow-up campaigns. |
| Quality check | Improve communications quality, for example, by checking for faulty links, sending test e-mails, and defining a release process for your e-mail campaigns. |
| Address check before sending | Check for incorrect e-mail addresses or subscription cancellations from the corresponding distribution list when transferring distribution lists from CAS genesisWorld to Inxmail Professional or Evalanche. |
| Managing subscriptions and unsubscriptions | Manage newsletter subscriptions and unsubscriptions to take them into account in any future e-mail campaigns. |
| Automatic archiving | Sent e-mail campaigns are automatically archived in CAS genesisWorld and linked with the corresponding recipients. |
| Success evaluation | In Inxmail and Evalanche, you can access comprehensive evaluations covering opening, click, or unsubscription rates, and display the success of an e-mail campaign. |

▼ Compose and personalize e-mail campaigns with ease using placeholders.
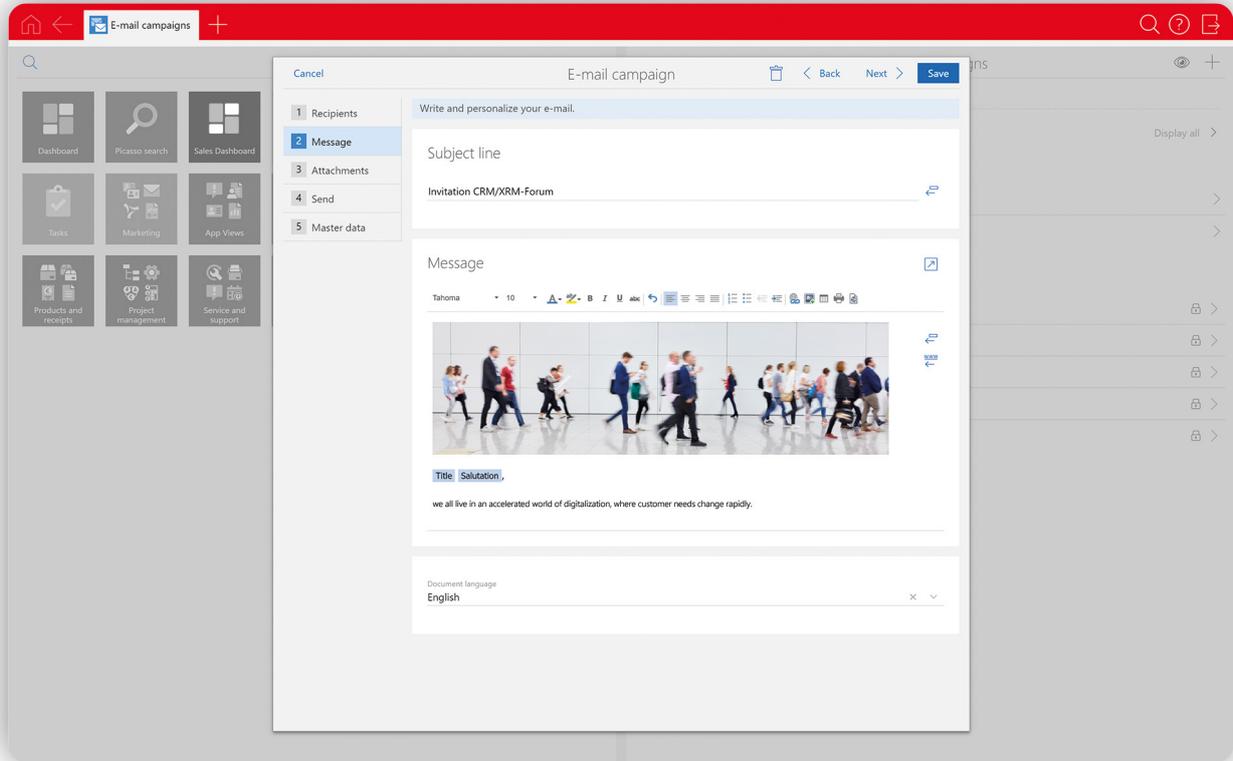
# CAS genesisWorld for project management and service Professional planning. Successful implementation.

With CAS genesisWorld, your employees can work within an effective process and control system: they plan and structure their projects purposefully from the start by taking risks, milestones, and goals, as well as tasks, resources, budgets, costs, and times into account. The project status, ad-hoc analyses, and an early warning system allow you to keep your projects well on track at all times.

After a quick look at the customer or project dossier before or during a telephone call, your service staff can accurately respond to questions and manage customer expectations more effectively.

Your service requests can be processed quickly and forwarded systematically to exactly the right person. Thereby, you can provide individual customer service and convincing service experiences.

▼ The graphical timeline view provides the perfect overview of your team planning.



## Project management

| Project overview | Display an overview of all project-related data, for example, appointments, tasks, documents, and call notes. |
|---|---|
| Status overview | Display pending, ongoing, and critical projects or milestones as well as an indication of overall status based on a traffic light code (green, yellow, red). |
| Timeline view ᴹ | Structured, chronological overview of data in relation to a timeline. |
| Primary links | Assign related data to projects or addresses using hierarchical links. |

| | |
|---|---|
| Individual project plans [D, M] | Create project plans for various purposes, for example, customer projects, product development, or trade fair preparations. Those plans can include predecessor/successor dependencies, as well as the assignment of responsible persons and material resources. |
| Resource planning [M] | Manage payroll costs, employee skills, and keep an overview of the workload and availability of your employees. |
| Recording working times and expenses [M] | Record times at the customer-, project-, and job level. Additionally, record expenses with integrated functions for receipts, per-diem costs, and travel costs. |
| Project controlling [M] | Analyze all time records, expenses, and third-party services and then cross reference them with budget plans. |

# Service and support [M]

| | |
|---|---|
| Recording support requests | Record support requests using different channels. Rule-based internal and external notifications, such as when new requests are received. |
| Processing service requests | Process service requests from initial contact to solution finding with scheduling, assigning responsibilities, priorities, or deputies using trouble ticket pools. |
| Calculation of service costs | Automatically or manually record times of service costs and precisely allocate service claims for each customer – belatedly or in the background. |
| Team planning | Plan appointments for internal employees with ease, for example, targeted service calls or multi-day business trips. |
| FAQ management [D] | Display all processed trouble tickets in an FAQ database. Publish selected FAQ documents to an online portal. |
| Service portal | Service portal which provides an overview of all requests, online entries, and an FAQ search. Customers can create new support tickets and view the processing status of submitted tickets. |
| Support entitlement | Get information on support-approved product versions and persons entitled to create support tickets. Incorporate details of companies or individual contacts who have been blocked from receiving support. |
| Service Level Agreements (SLAs) | Contractually ensure the performance characteristics, for example, scope, response times, processing time, documentation of product deployment, and maintenance billing. |
| Support for communication channels | Link support requests to existing communication channels such as e-mail, phone, and service portals. |
| Ticket management [D] | Map complex, company-wide workflows for comprehensive ticket recording and processing. |
| E-mail templates | Create and access e-mail fields from the ticket and its links. |
| Default notifications | Send notifications to the ticket submitter and processor when requests are received and processed, or when data records are changed. |
| E-mail accounts for support | Support tickets are automatically created or updated when an e-mail is received. Support accounts can directly be assigned to the appropriate teams so that created tickets can be edited by the responsible persons. |
| Product uses | Record product uses if required directly from within contact data records or for service agreement data records. |

# Customizing CAS genesisWorld to suit your requirements
## Individual designs. Flexible customization.

Regardless of your company's requirements CAS genesisWorld can adapt flexibly to your needs. Without any development efforts, users, CRM managers, or administrators can customize interfaces, create custom input help options, and thus efficiently map their company-specific business relationships and processes.

With customizable templates for e-mail campaigns to customers, consistent opportunities for new customers, and documents or tickets, you can accelerate your communication and support consistent data management.

## Administration and customization

| | |
|---|---|
| App Designer [W] | You can customize your user interfaces without any programming knowledge. Using drag and drop, you can expand and extend displayed information, elements, fields, and charts of existing apps as well as create new custom apps. |
| App Designer scripting [W] | Enhance apps with company-specific indicators, calculations, and processes using the App Designer scripting functions (JavaScript). |
| Update security for interface customizations [W] | Using the version comparison, you can compare any update changes and then deliberately adopt all desired elements. Thus, you can ensure that your custom data record forms are not automatically reset to the default after updates. |
| Implement customizations without programming knowledge and independent of your location | Create and manage central, company-wide presets at all your locations by using the administration user interface in the Management Console – without any scripting or programming knowledge. |
| Customizing the data structure | Include special business requirements in your customizations, for example, create new fields, define multilingual input and selection help options, or create views. |
| Central & personal navigators | Individual and central navigators for individual employees, business units, or departments, which include folders and views in a tree structure. |
| Personalized dashboard [D] | Customize personalized dashboards to display all relevant information. |
| Central & personal views | Create and save central or personal filter views for quick access. For an ideal working environment, you can define your favorite start apps, which are then displayed immediately after logon. You can centrally define interfaces and dashboards based on roles and target groups. |
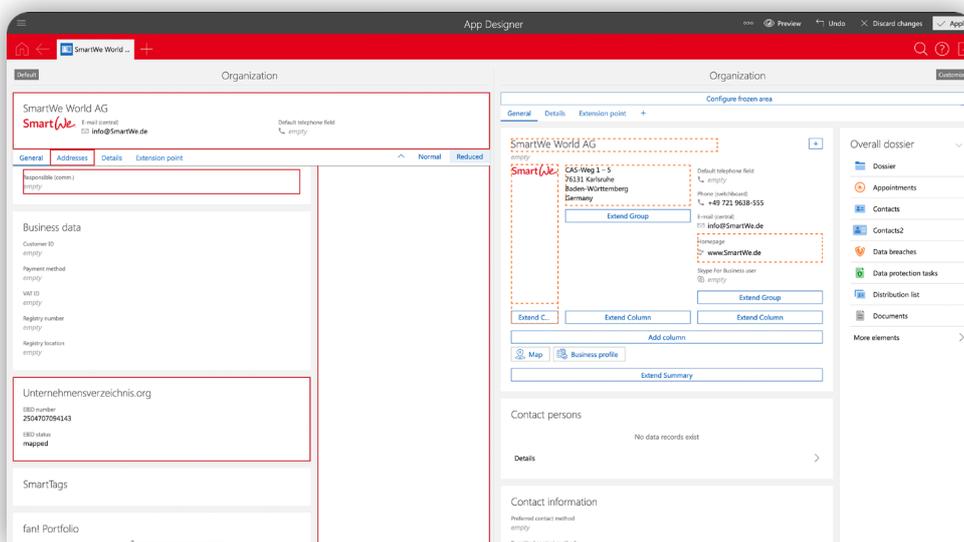


You can compare any update changes with previous states using the version comparison, and you can deliberately adopt all desired elements.

| | |
|---|---|
| Personalization of interfaces | Use wide-ranging customization options to adjust data record types, such as adding new tabs, placing new fields, adding automatic calculations using formula fields, or freely placing linked information. |
| Dynamic formula fields | Based on already entered data, you can control the display type or the amount of displayed information. In addition, you can execute mathematical calculations and save the results. |
| Input help options | Customize your input help options with many characteristics, such as multilingual, user- or group-specific, hierarchical, single, or multiple selection, or including values from linked data records. |
| Centralized user defaults | Specify filters, groups, or access rights according to central presets, for example, for team calendars or specific users. |
| Individual user accounts for employees | Automatically set up user accounts for newly recruited employees with personalized rights and settings. |
| Data protection | Any data or functions are protected from unwanted access, such as unauthorized data exports. Optionally, you can extend the access protection using further identity providers (based on the OAuth2 standard), for example, Microsoft Azure Active Directory via OpenID Connect. |
| SecureLogin – CAS & SmartWe app | 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). |
| System messages | Display system messages after logon, for example, to announce maintenance windows. |

# Benefit from technical flexibility

| | |
|---|---|
| Automatic software distribution | Install CAS genesisWorld, software updates, add-ins, and modules using the automatic software distribution function. |
| Optimum server load distribution | Automatically distribute load to manage optimum capacity utilization of multiple CAS genesisWorld Application Servers. |
| Maintenance center | Manage your database intelligently by using new data clean up functions which you can define manually. |
| Multitenancy | Access different databases. |
| Unicode and address formats | Correct display of international characters and display of postal address data in the matching address format. |
| Integration of third-party applications via OpenSync | Share and synchronize data with any third-party applications in CAS genesisWorld. |

# Expand CAS genesisWorld with connections and interfaces

## Microsoft integrations

| | |
|---|---|
| Microsoft Outlook as default e-mail client | Optionally, you can use Microsoft Outlook as an e-mail client for CAS genesisWorld. |
| Microsoft Outlook add-in | Using the add-in, you can directly access CAS genesisWorld information in Microsoft Outlook. Moreover, you can use the SmartSearch to perform extensive searches in Microsoft Outlook. You can also review whether e-mails have already been archived in the CRM system. The integration is available to both Microsoft Windows and Mac users. |

| Shared address stock and appointment synchronization [M] | Synchronize addresses and appointments between Microsoft Exchange and CAS genesisWorld. |
| --- | --- |
| Microsoft Teams [W] | Organize and start online meetings directly from CAS genesisWorld. Moreover, you can also start Teams calls or chats directly from within the address data record in the CRM system. You can also open the matching contact for incoming Teams calls in CAS genesisWorld Web. |

## Integration of Enterprise Ressource Planning (ERP)

| Automatic data synchronization | Synchronize data from CAS genesisWorld with ERP data, for example, information on receipts, open items, purchased products, or delivery blocks. |
| --- | --- |
| Bidirectional data synchronization | Enter and edit address and project data in both the ERP system and CAS genesisWorld with automatic data synchronization. |
| Automatic address linking | Link addresses to products and receipts, and display additional information from the ERP system for comprehensive reporting. |
| Product catalogs | Display product groups and products as HTML pages in catalogs with select features and graphics including user-friendly export options. |

▼ Present your portfolio during a customer visit using the product catalog.
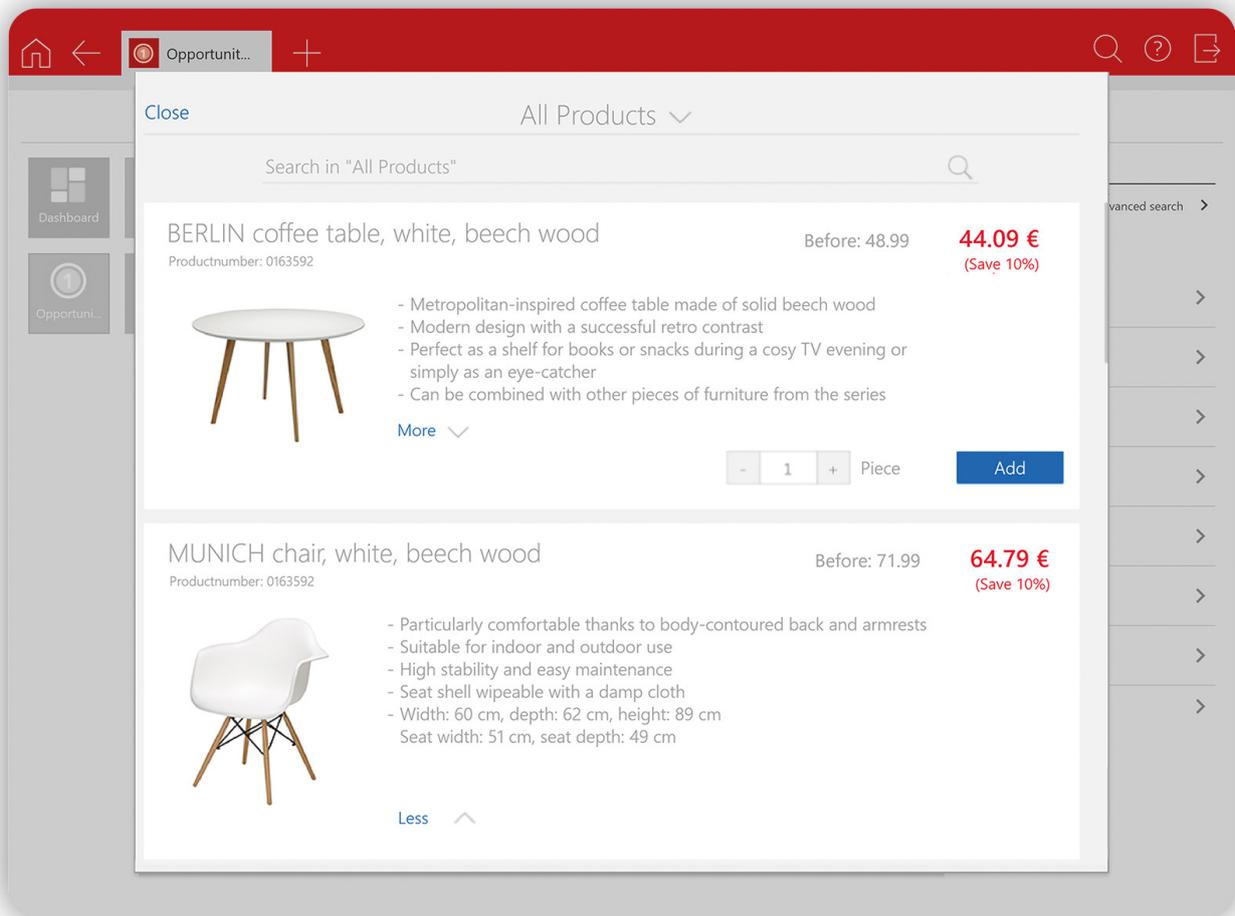
# CAS Software AG
## Forming relationships. Inspiring people.

## Your partner for a long-term cooperation

CAS Software AG was founded in 1986 and has since been, and still is, managed by the co-founder Martin Hubschneider (CEO). The 6,500 square meter CAS Campus offers space for ideas and room for further growth. More than 470 employees develop innovative CRM+AIA® solutions for successful companies from various sectors here and in the CAS App Center.

Find out what our team and CAS solutions can do for you. Become part of a community of Customer Centricity Companies with a sustainable future!

### Leading companies place their trust in the „Made by CAS Software" label

Over 34,000 companies, including global market leaders, such as Daimler, Airbus, Fraunhofer and MSI, work with our solutions and rely on our expertise.

## CAS Software AG

- Owner-managed business

- Over 520,000 enthusiastic users in more than 40 countries

- German market leader for CRM in the small and midsize business sector

- 200 certified sales and solution partners

- Investment in innovation per year: 25% of turnover

- Multi-award winning solutions

**99**

*» TOP 100 is about showcasing and honoring companies who are brave enough to reinvent themselves, develop something new, companies that become a shining example for others to follow. This applies to CAS Software in particular. «*

**Ranga Yogeshwar**
Science Journalist and Mentor of the TOP 100 Innovation Award

Customer voices:
cas-software.com/references/

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