

CRM + AIA[®] – the foundation
of your smart company

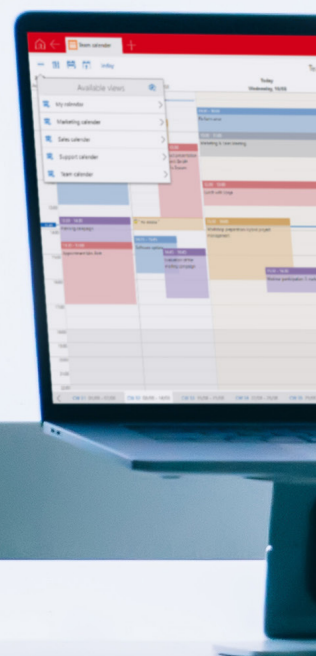
CAS **genesisWorld**

Highlights of the new version



CRM + AIA[®]:

inspiring, future-proof, hybrid usable



Strengthen the sustainability of your company with CAS genesisWorld x14: with the new version, you can create consistent and transparent processes and establish a first-class customer relationship management. Thus, you can sustainably position your company on the market.

The CRM + AIA® solution that has won multiple awards ideally supports you in your daily tasks, processes, and direct customer contact as a central corporate memory and the platform for the future.

You can look forward to a smartly networked 360° view of your customer relationships and enjoy the efficient support of intelligent assistants (AIA®).

From beginners to CRM experts: from day one on, you can count on CAS genesisWorld x14 to optimize your processes and save valuable resources.

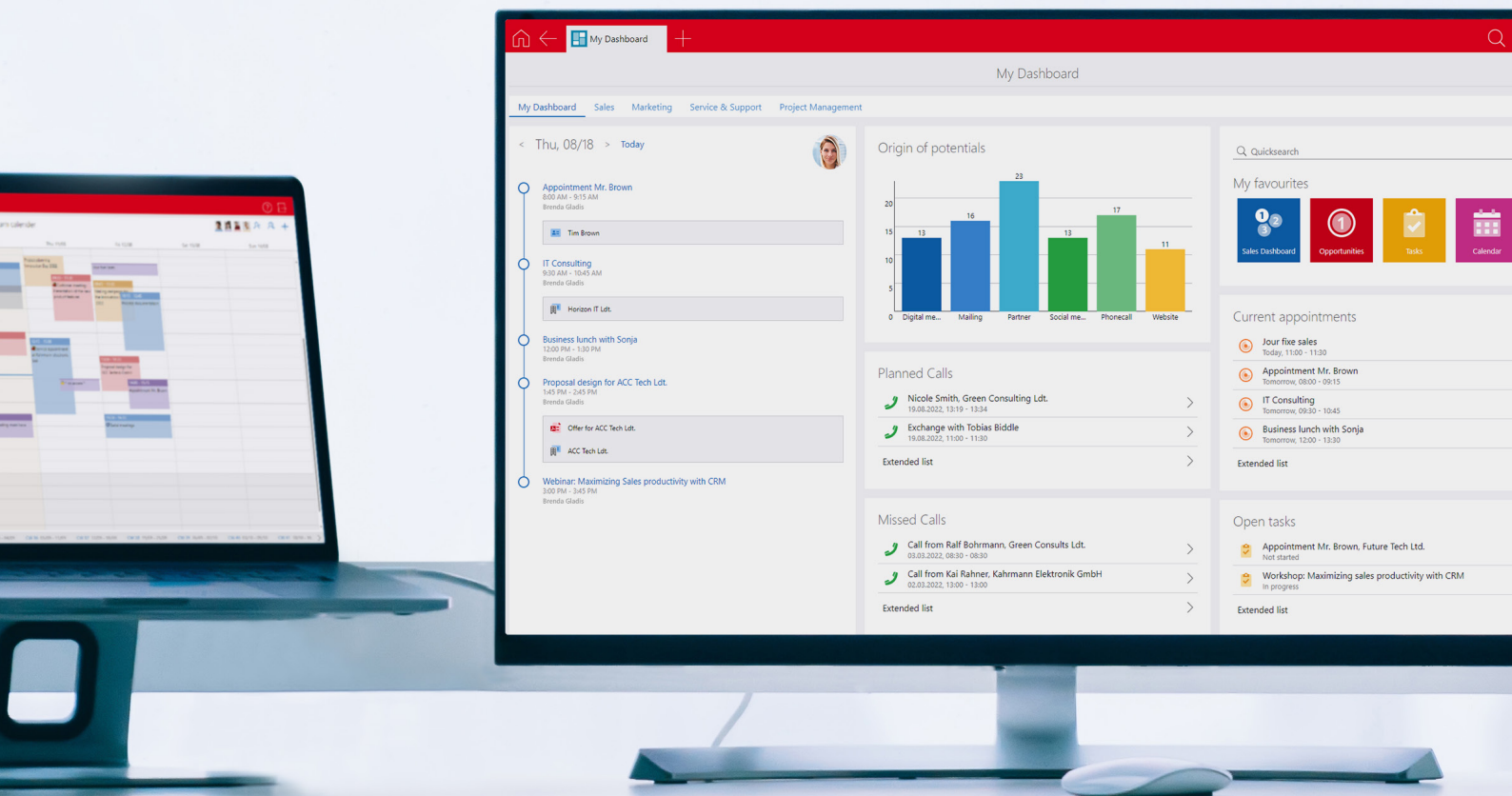
No matter where your team works, or whether they use the web client, desktop client, or mobile app – all employees can always access the relevant information, and it's fascinatingly easy to do so.

Every company operates differently, that's why we offer you complete freedom: pay per use or purchase, install the system in your own company, your private data center, or the cloud – it's your choice. Your digital sovereignty and the protection of your sensitive company data are the CAS Software's top priority. Certified with the "fair.digital" quality seal and honored as "Software Made & Hosted in Germany", CAS genesisWorld stands for seamless data security.

The adaptability of CRM + AIA® solutions not only helps you to model your current processes but also to create the workflows of the future.

Thus, you can use CAS genesisWorld x14 to establish a strong foundation for distinctive and unique customer experiences as well as the long-term success of your company.

- ▼ With CAS genesisWorld x14, you always keep an overview of all relevant information on your platform for the future.



Welcome to the hybrid working world

In a hybrid working world, you can benefit from the ideal preconditions provided by CAS genesisWorld x14 and unite all information and processes surrounding your customer relationships in one transparent solution for all departments.

Whether you're working in the office, from home, or while on customer visits: you can access and work on all relevant information in one central location. Your appointments, customer relation history, opportunities, projects, documents, tasks, correspondence, events, and so on are no longer strewn across different systems such as, Excel lists, e-mail folders, stored in the head of different colleagues, or hand-written notes.

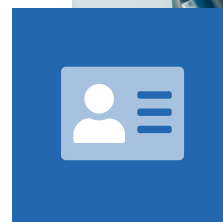
Instead, you create a customer-centric platform that works for the entire company by jointly using the system. Individual bits of information are linked and thus create a network of valuable knowledge. With this basis, your

employees can focus on custom and personal communication anywhere and anytime, thus, exciting customers with competent counseling at eye level.

Work – however and wherever you like

The CRM + AIA® solution adapts to your work environment and provides maximum mobility. You can work on your laptop, smartphone, tablet, or now even on your Mac with an Apple M1 processor. What's special: the SmartDesign® technology ensures a consistent look & feel across all devices.

The offline interaction history ensures that you have access to your important data even if you're offline. If desired, you can even edit the data without an internet connection. Your changes are automatically synchronized.



Moreover, you can access various data record types while offline in your calendar using the appointment dossier. Thereby, you can always stay best informed.

Seamless integration

Make sure to position yourself for the future in a sustainable and adaptive way. With CAS genesisWorld x14, you create a Customer Data Platform with consistent processes that ease your daily routines.

The CAS framework OpenSync enables you to seamlessly integrate any third-party solution. Thus, you can resolve data silos in your existing system landscape and establish a consistent flow of information.

Using the available interfaces, you can quickly and easily access, for example, data from Inxmail, Evalanche, or existing ERP solutions, enriching the 360° view with more information.

Furthermore, the Outlook Add-In for both Microsoft Windows and Mac is available with your Microsoft 365 Office account. Here, you can use the convenient CAS CRM Outlook embedded client to access the customer data and interactions history anytime and search for more information while processing your e-mails. You can also quickly and easily archive new e-mails in CAS genesisWorld.

Connected and informed

Webhooks ease communication across systems and accelerate interactions by notifying users and complementing existing notification services. For example, you can automate the air conditioning unit of a meeting room and only activate it shortly before an appointment to sustainably lower energy consumption.



Ideal support anytime

Your smart CRM

The intelligent assistants in CAS genesisWorld help you and your employees to make the right decisions. The Augmented Intelligence Assistants (AIA®) are available to you immediately without any additional costs and support you in your daily routines. The AI-based algorithms always act transparently and perfectly prepare the basis for your informed decisions.



According to the motto "Finding instead of searching", the **Picasso search (1)** suggests all relevant activities, documents, projects, contacts, and many more based on your individual user behavior.



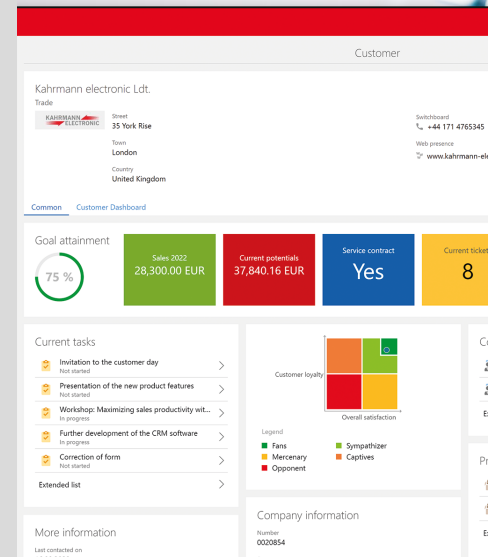
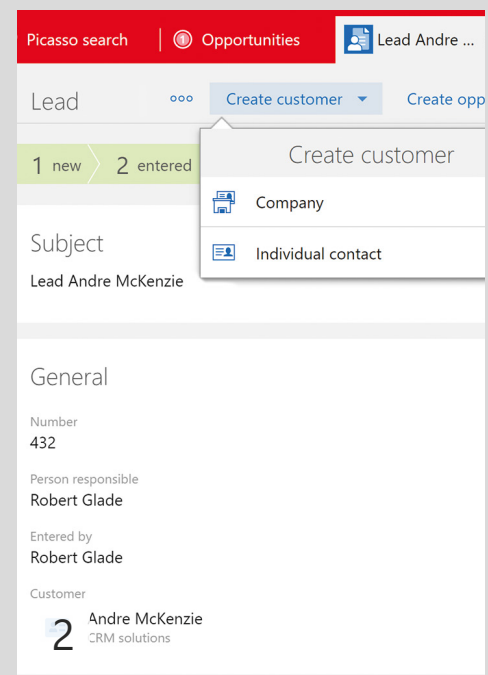
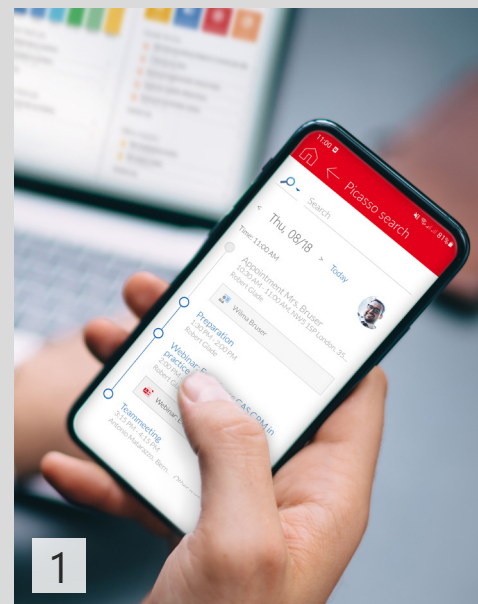
The **Opportunity wizard (2)** supports you from the lead to the won opportunity: guided by the wizard, you record the first contact with a few clicks and can focus on the personal exchange. Thus, you convert promising leads into opportunities and can immediately create the required quote documents.

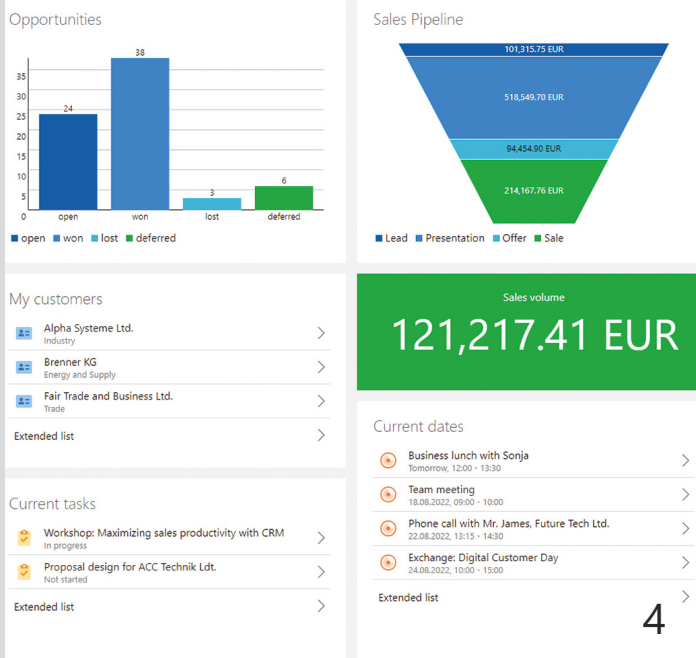


With the **Customer relationship wizard (3)**, you put customer-specific developments, changes, and the current status of your customer relationships into focus. The transparent data is the ideal basis for competent consultation at eye level and even stronger customer loyalty (as of fall 2022).

Create **SmartActions** for your recurring process steps. You can execute these actions by clicking a data record or entire lists. Thereby, you can, for example, enrich new leads during and after a trade fair with more information in just one step.

Using the **dynamic filter**, you are always on top of your appointment planning: you can move all projects, corresponding tasks and appointments by a defined period in relation to the initial date if required. With one click, you save yourself valuable time in replanning and can focus on the project instead.





Adaptive and even more flexible

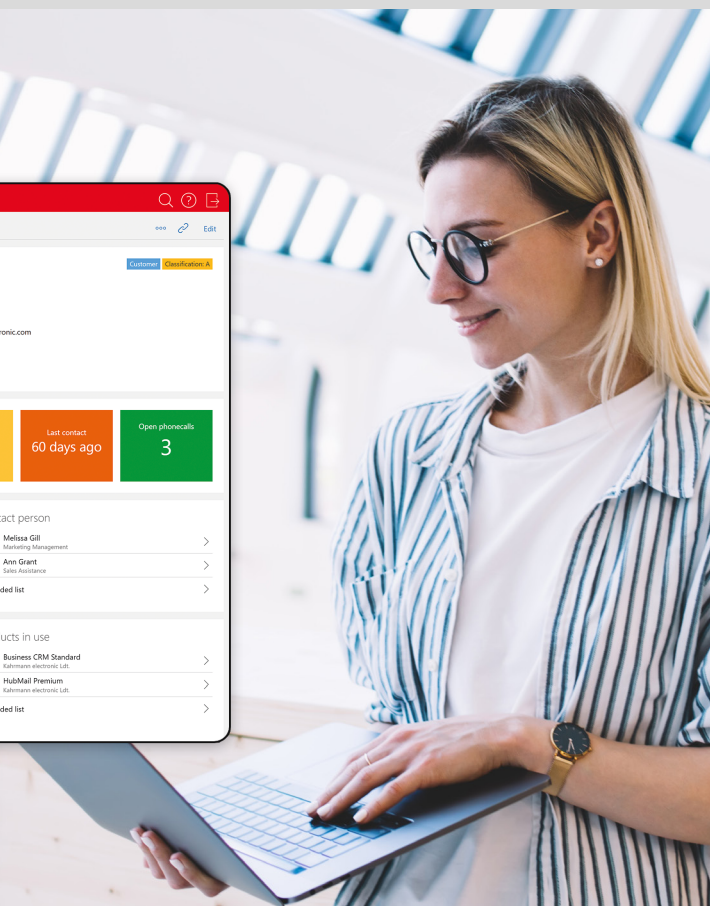
With CAS genesisWorld, you decide which data are relevant for you and your team. You can quickly and easily customize the interface, create role-based dashboards, and provide data directly using app views.

Highlight important changes to opportunities in the **Sales dashboard (4)**. Extensive scripting capabilities support you in automating the highlighting of important information, creating role-specific dashboards, creating data record forms with values relevant in your company, and defining automated processes.

With CAS genesisWorld x14, you provide customized apps and information and, thus, create the ideal work environment. The scripting settings and customizations made with the App Designer are update-proof and are available in the CAS genesisWorld SmartDesign® clients.

Always at the right place

You can now place the popular **Business metric widgets (5)** anywhere they are required and practical on any dashboards, forms, or wizards. This way, you gain an even quicker and more transparent overview of all relevant information and ease your decision making.



Succeeding together has never been this easy

Boundless cooperation

With CAS genesisWorld x14, team planning and project management is easier than ever: using the integrated, Kanban-style board view, you always keep an overview of your teams and the status of current tasks. With the structured visualization of tasks, jobs, and other activities, you create the ideal basis for collaborative teamwork.

Online meetings are established as part of our working life and are the precondition for efficient teamwork across spatial distances. With CAS genesisWorld, you plan and start online meetings via Microsoft Teams directly in the CRM + AIA® solution.

Is your team active in different countries? The internationalization proceeds. We now offer Polish language interfaces besides the 11 other available languages. To increase

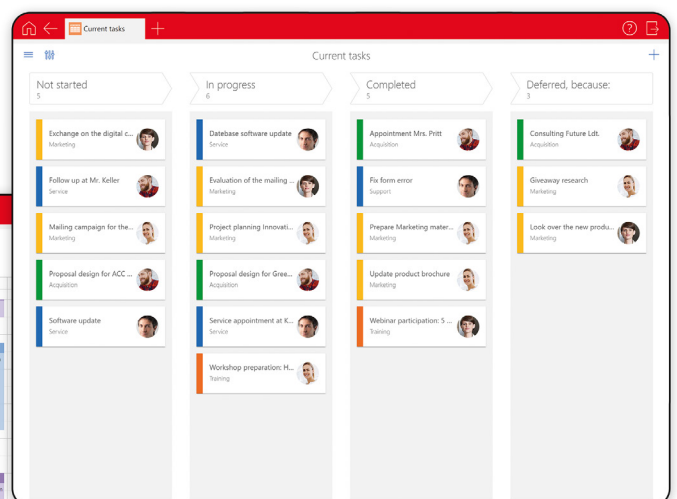
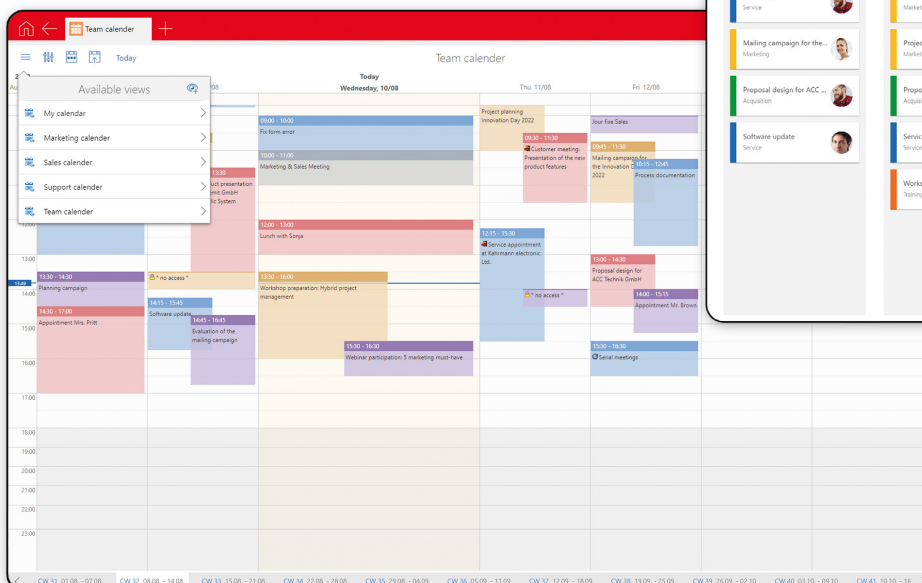
accessibility, we have optimized the responsivity, keyboard usability, screen reader support, and interface contrast.

Custom calendars for each team

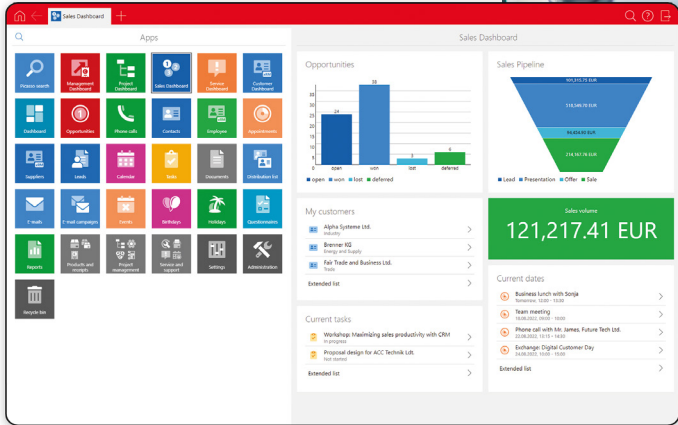
Each team requires custom views that display all important activities. Finding a good timeslot for a meeting with the entire team can be complicated and time-consuming.

Become a planning expert using the calendar views and appointment search, and always keep an overview of all your activities. Create the calendars of your teams as views and save the calendar views as apps. Thus, you can always access them with one click.

- ▼ With the team calendar, you increase transparency and provide an overview of the daily collaboration.



- ▲ The tasks of your team are displayed clearly and in a structured view.



A dashboard for all purposes

Dashboards are the central element of your CRM: with CAS genesisWorld, you can create custom dashboards for different user groups with, for example, different jumping off points to the most important apps.

Thereby, your sales employees can easily access the most important business metrics, opportunities, or projects. You can open important apps, such as your calendar, leads, or contacts, directly from the dashboard without navigating to the app overview.

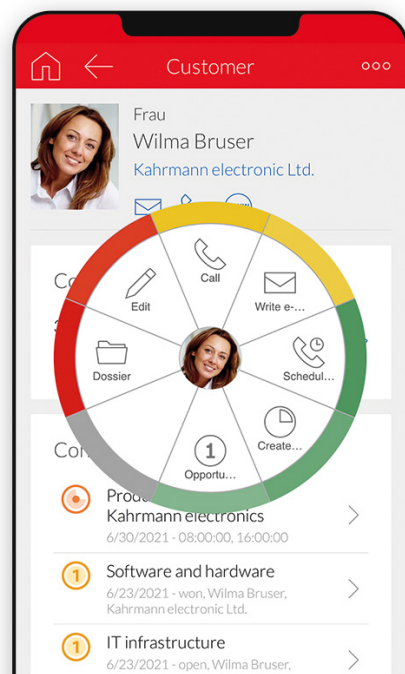
- ▲ Dashboards display the most important apps and business metrics in a compact overview depending on the role of the user.

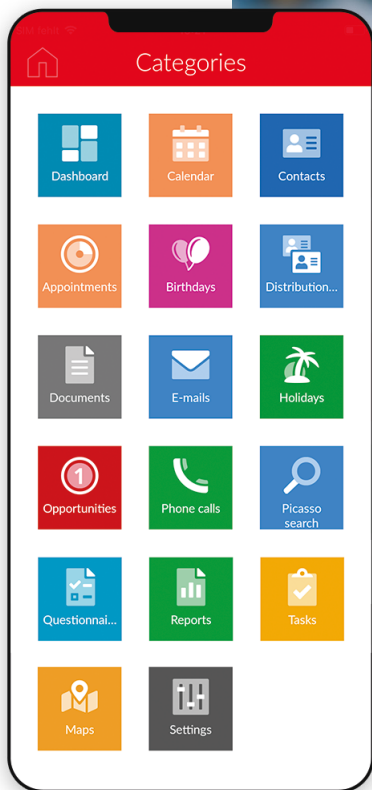
Create lively and efficient processes

The provided views and predefined workflows enable your employees consistent and uniform processes. At the same time, you can access the most important information for each data record at a glance while on the go.

Once a relationship has been established, interacting with your contacts correctly becomes essential. With the mobile caller ID function, the available contacts from your iOS device are directly displayed by name as soon as a customer calls you. Thus, you always react confidently and can correctly greet your conversation partners even if they call unexpectedly.

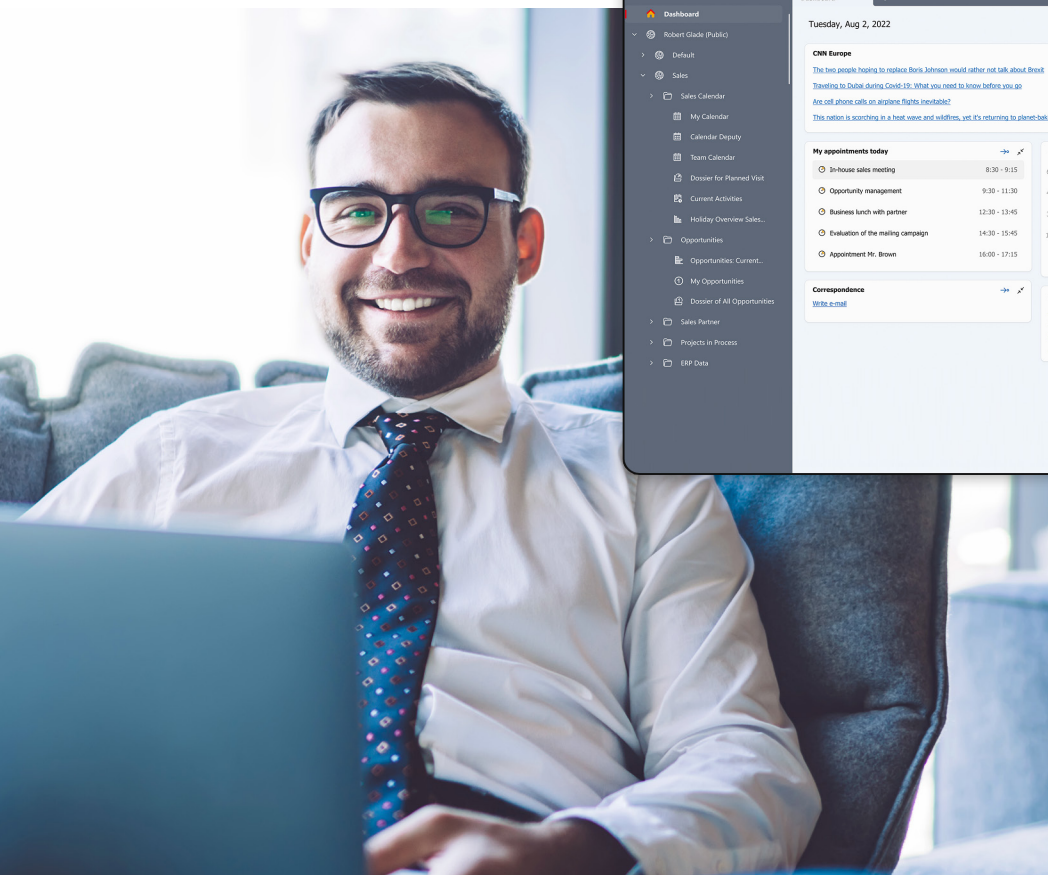
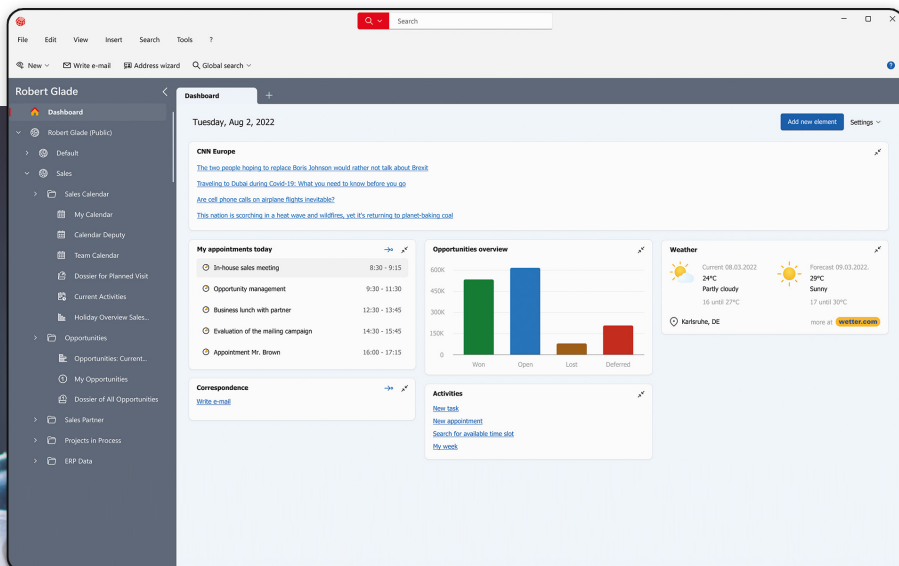
The SmartDesign® technology also ensures a consistent look & feel on mobile devices.





Lay the foundation of your smart company with CRM + AIA®: achieve strong customer relationships, healthy growth, and sustainable company success.

▼ With CAS genesisWorld x14, the desktop client shines in a new design.



Even more highlights

Your digital sovereignty – your security

With CAS genesisWorld, you don't have to compromise when it comes to data protection and complying with the EU-GDPR. Certified with the "fair.digital" seal of approval and awarded "Software Made & Hosted in Germany", the CRM + AIA® solution stands for seamless data security that ensures your digital sovereignty. A rights system protects your sensitive customer data from unauthorized access and ensures that you meet the requirements for both legally compliant and data protection-compliant processes.



You can secure access to your data using the CAS authentication server. The server offers token-based logon according to the industry security standards OAuth 2.0 and OpenID Connect.

Thus, you yourself can directly manage logons via a browser or mobile device. Thereby, you ensure the protection of your logon data. The integrated 2-factor authentication provides additional logon protection.

A fresh and exciting new look

Do you mainly work in the office with the desktop or web client? Then start your structured daily routines with the desktop client in a new design. Thanks to its optimized interfaces, you can use CAS genesisWorld more efficiently and intuitively.

Experience digital freedom

From individual access rights to the integration of third-party systems to your operating model. Whether you want to deploy your CRM as a cloud-based solution or on-premise, buy it or rent it, or work in the office or while on the go – the CRM solution fits your individual requirements and company structure. You always have the choice and can decide which approach best fits your needs.



You can find more information on these and other highlights of CAS genesisWorld x14 at: www.cas-crm.com





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