

Your CRM for SMEs

Fascinatingly simple



Customer Centricity  
CERTIFIED

CAS <sup>globe icon</sup> genesisWorld

Summary of functions



# 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 functions, 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.



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) are smart digital assistants that are supposed to enhance the user's intelligence with artificial intelligence and provide comprehensible suggestions for informed decision making instead of letting the AI make the decision on its own.



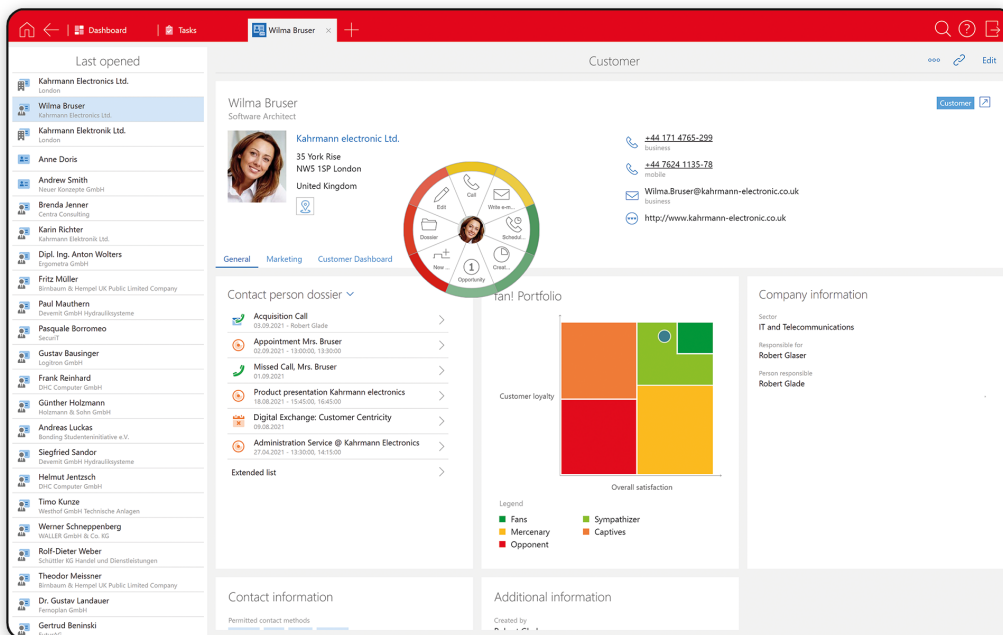
# CAS genesisWorld for your daily business

## Smart. Flexible. Efficient.

The key to successful communication with your customers and business partners is a central and up-to-date customer dossier with 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.

Appointments, tasks, or projects are transparent, organizing them interdepartmentally is child's play. Automated processes and repeating tasks ensure that your employees can concentrate on what's important – your customers.



◀ You can access all contact information at a glance.

## Professional contact 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 an individual contact, company or organization, or as a contact person 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.
CAS CardScanner <sup>MA</sup>	Create new contacts by taking a photograph of their business card 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 a contact data record. A wizard supports you in resolving duplicates by helping you to merge redundant addresses and any linked information.
Merging duplicates <sup>M</sup>	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, for example, Unternehmensverzeichnis.org. 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 contact 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 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.
Contact identities <sup>D</sup>	Link different identities or roles of one natural person.
Contact categorization	Custom categorization options into A/B/C customers, leads, partners, or suppliers.
Access and editing rights	Customize contacts access and editing rights with three options (public, user-sensitive, private) to assure data protection.
Deactivating addresses <sup>D, W</sup>	Deactivate addresses, for example, when a contact person leaves the company.



## 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, whereby personal data can be processed in a legally compliant manner.

Forming corporate groups <sup>D</sup>	Link companies via parent/child relationships to provide graphical views of corporate group structures.
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 contact formats.

Filter functions <sup>D, W</sup>	Targeted searching and filtering of addresses according to selected criteria.
Distribution lists	Group addresses in distribution lists for targeted communications.
Map view & heatmaps	Georeferencing and map visualizations of selected addresses thanks to embedded maps from OpenStreetMap and the graphical display of selected addresses in the form of heatmaps.
Social Media Integration <sup>D</sup>	Integrate contact data from social media including Facebook, Xing, Twitter, and blogs, complying with the latest data protection laws.
Contacts synchronization <sup>M</sup>	Synchronize contacts unidirectionally and bidirectionally with Microsoft Exchange.
Data synchronization with mobile devices	Uni- and bidirectional data synchronization with mobile devices.

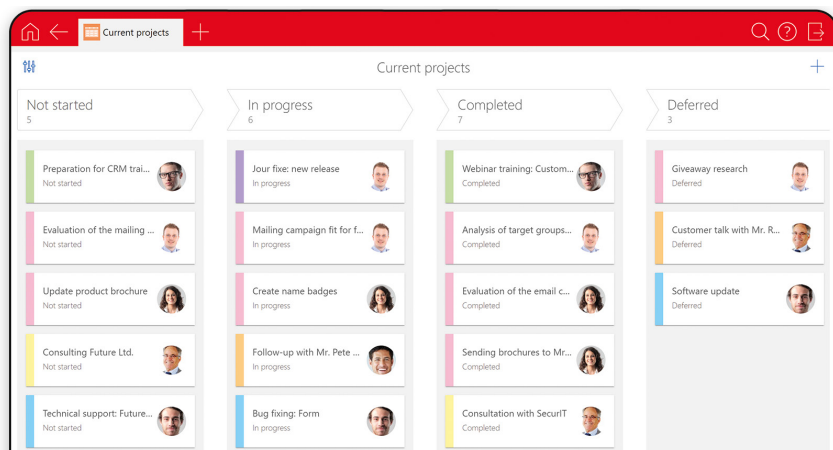
## Intelligent document management

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.
Open the file to edit or read it	In a suitable application, files can be opened in write mode to edit documents, or in write-protected, read-only mode.
Document lock	Displays the user who is currently working on a document to avoid overlapping editing.
Versioning <sup>D</sup>	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 are 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	Forward documents swiftly by 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 a contact or a scheduled appointment.
DMS integration <sup>M</sup>	Flexibly integrate external document management and archiving systems.
Signing PDF documents <sup>MA</sup>	Sign PDF documents in the mobile app (only for iOS and Android). 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 <sup>D, W</sup>	Display of information from two linked data sets in one list view (for more comprehensive information).
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 <sup>W</sup>	Transparent process mapping on an agile Kanban board.
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 and color classification	You can prioritize using the A, B or C system which includes color highlighting for the faster visual categorization of data records which uses color coding for specific values, for example, priorities.
Editing duration and status	Planning of the processing duration in estimated, target, and actual as well as display of the processing status as progress status and in percent.
Task scheduling	Schedule a task by using follow-up tasks.
Reminder functions <sup>D</sup>	Automatic reminders for task deadlines.
Moving tasks	Tasks are automatically moved to a new deadline if not completed.
Data synchronization with mobile devices	Uni- and bidirectional synchronization with mobile devices.



◀ With the board view, you create the ideal framework for collaborative work.

## Smart communication

### E-mails

XRM e-mail <sup>D</sup>	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 contacts	Directly send e-mails from within the address data record.
Links	Automatic linking of e-mails with the associated contact and additional data record types.
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 <sup>D</sup>	Optional use of the integrated CAS genesisWorld e-mail clients.



Online/offline mode <sup>D</sup>	Online and offline access to e-mails in the CAS genesisWorld e-mail client.
Integration of external e-mail clients	CAS genesisWorld supports all e-mail clients which use IMAP4. This includes all the usual solutions such as: Microsoft Outlook, Gmail, Thunderbird, or HCL Notes.
Outlook Sidebar	Important information from CAS genesisWorld is available directly through the CAS genesisWorld Sidebar in Microsoft Outlook. 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.
S/MIME encryption <sup>D</sup>	Read, send and archive S/MIME encrypted e-mails regardless of your system and system-wide for true end-to-end encryption.
Rules for e-mails <sup>D</sup>	Set up rules for the automated moving or archiving of e-mails to predefined folders.
Archiving	Archive individual e-mails in the contact dossier or using templates which automatically set the correct links and participants independent of the e-mail client or hardware that is used, for example, tablet PCs.
Salutations & signatures <sup>D</sup>	Use predefined salutations, global settings and individual signatures.
Out-of-office wizard <sup>D</sup>	Define out-of-office messages with the help of a wizard.
Spell check <sup>D</sup>	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 contact details are displayed. Additionally, any relevant caller information such as their address data record or call memo (CTI) are displayed before the call is picked up.
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 contact, such as the caller, or the start, end and duration of the call.
Call notes	Allows you to document call contents by means of 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 within the contact data record.
Supported telephone providers	All telephone systems which support TAPI, such as Swyx.

## First-class time management

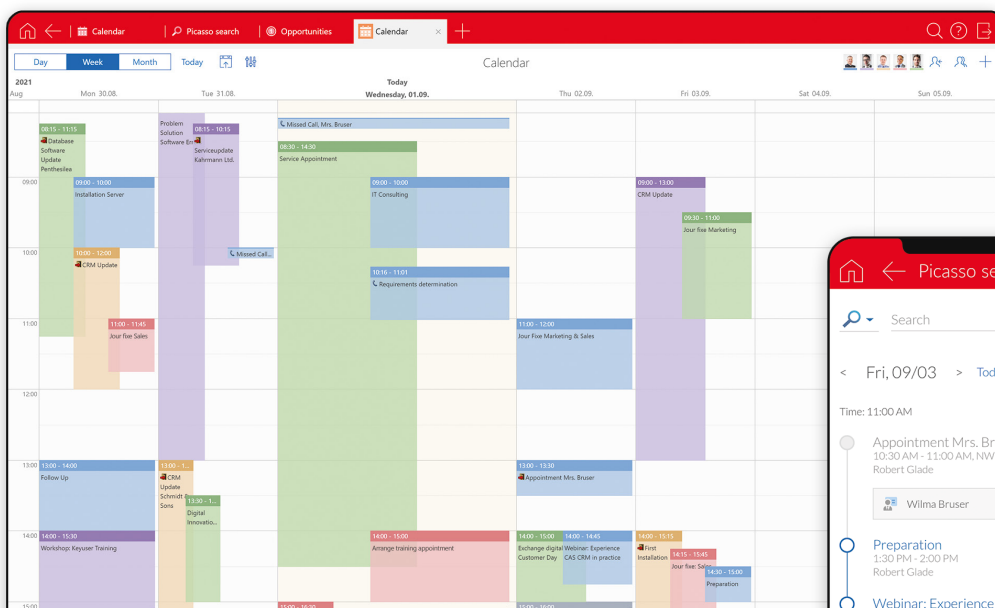
### Calendar

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 <sup>W, MA</sup>	Customize calendar views and display them as app tiles for a quick overview, for example, create a holiday view.

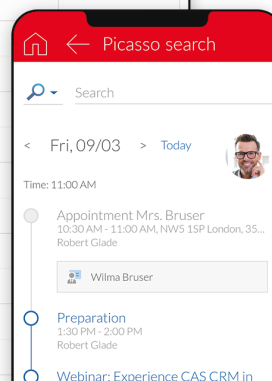
Shared calendar view	View other users' calendars.
Access rights	Allow special viewing rights for other users to check for free or blocked time slots.
Day/week/month view	Display schedules in day, week, or month views.
Holiday calendar & public holidays	Enter, display, and plan for holidays and public holidays.

## Appointments

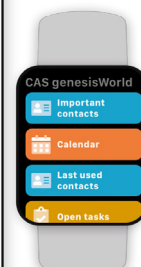
Private and confidential appointments	Mark appointments as private or confidential. Private appointments can only be viewed by the participants themselves. Confidential appointments can only be viewed by authorized users.
Public appointments	Mark appointments as public, i.e. accessible by all colleagues.
Online meetings	Appointments marked as online meetings in CAS genesisWorld are automatically transferred to MS Teams and can be opened directly.
Access to third-party appointments	View third-party appointments not involving yourself. This requires the appropriate rights assignment.
All-day events	Activate the "All-day event" option when an event is scheduled for the entire day.
"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.
Delegate appointments	Create appointments for third parties.
Overlap-free appointment planning	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 <sup>D</sup>	Create recurring appointments on a daily, weekly, monthly or yearly basis.
Rescheduling	Move scheduled appointments easily by drag and drop.
Automatic rescheduling <sup>D</sup>	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.



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.



As of now, you can access your CRM/XRM on your smartwatch anytime.



Reminder functions <sup>D</sup>	Individually set reminders for the respective participants.
Links	Link appointments with all relevant data records, for example, documents, addresses, and projects.
Data synchronization with Microsoft solutions <sup>M</sup>	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 a contact data record, such as archived e-mails, appointments, documents, or opportunities.
Customer dashboard <sup>M</sup>	Provides you with an optimized view as a quick indicator of current status and key customer details.
Radial menu <sup>W, MA</sup>	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 data records, such as customers, competitors, and main contact persons within an opportunity.
Selective display of linked information	Comprehensive filter options for the selective display of data related to a customer, for example, open opportunities.
User-specific configuration	Users only have access to the data which is relevant to them.
Comprehensive offline functionalities <sup>MA</sup>	Access to CRM data and CRM functions in offline mode.
ERP integration <sup>M</sup>	Flexibly integrate ERP systems to synchronize receipts and products. This ensures full transparency in the dossier across quotes, invoices, reminders, or open invoices.

## Search data systematically

Picasso search <sup>W, MA</sup>	Intelligent wizard using AI algorithms which provides you with a quick overview and suggestions for current events.
CAS 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 contact 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 based on 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 were not yet followed up.

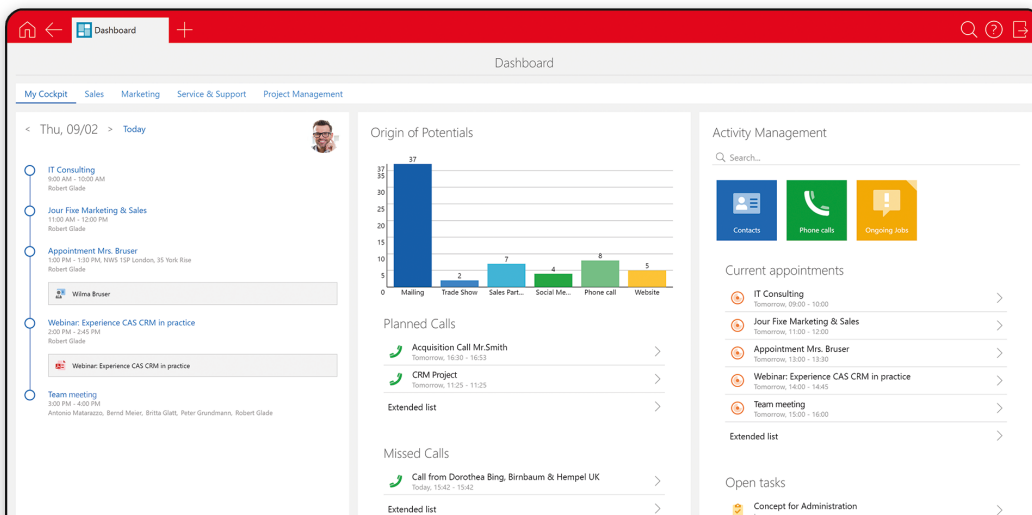
Complex search queries	Complex search queries through filter conditions, bracketing rules, "and/or" conditions, and "greater than/less than/equal to/contains" conditions.
App search <sup>W</sup>	Search for apps in the app overview.

## Intuitive workflow support: Notification and action service

Custom notifications	Freely definable rules for automatic notifications, for example, for documents 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 set up new data records when a new customer account is opened.
Smart Actions <sup>W</sup>	Change multiple data records at once ad hoc or with a saved action. Moreover, create new data records quickly and comfortably, for example, new tasks for opportunities.
Execution period	Specify an execution period for each rule, such as a day or to be completed within a given time window.
Questionnaires & surveys <sup>M</sup>	Automatically send questionnaires using the notification and action service, for example, satisfaction studies.

## Create reports. 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 <sup>M</sup>	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>D</sup>	Group data interactively in lists.



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

Exporting results <sup>D, M</sup>	There are a number of 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.

## Internal communications: Intranet & Company Portal <sup>M</sup>

Company information	Display different categories, such as corporate divisions.
Notice board and newsgroups	Exchange information on a variety of 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 modules, such as "My appointments today", a news ticker, personal favorites, or notifications.
Phone list	Access the phone number list of employees with search functions and direct access to the 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 linked information, for example, employees, appointments, documents, or tasks.

Contact 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. Using automatically generated reports, your management team will enjoy the benefits of a powerful decision-making tool in realtime and a 360° view of all the performance indicators of the company.

## 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 <sup>M</sup>	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 <sup>M</sup>	Display indicators in value tables that can be grouped on different levels, or in graph form.
Analyses via pivot tables <sup>M</sup>	Display structured complex, multidimensional evaluation reports in pivot tables.
Preview	Report preview for checking and correction if required.
Analysis intervals and automatic sending <sup>D</sup>	Analyses in specified time intervals, including automatic sending of a weekly report on Fridays to a specific group of people.



◀ The report module with drill-down functions provides a 360° view of all the important key figures in your company.

# CAS genesisWorld for sales

## Recognize potential. Increase productivity.

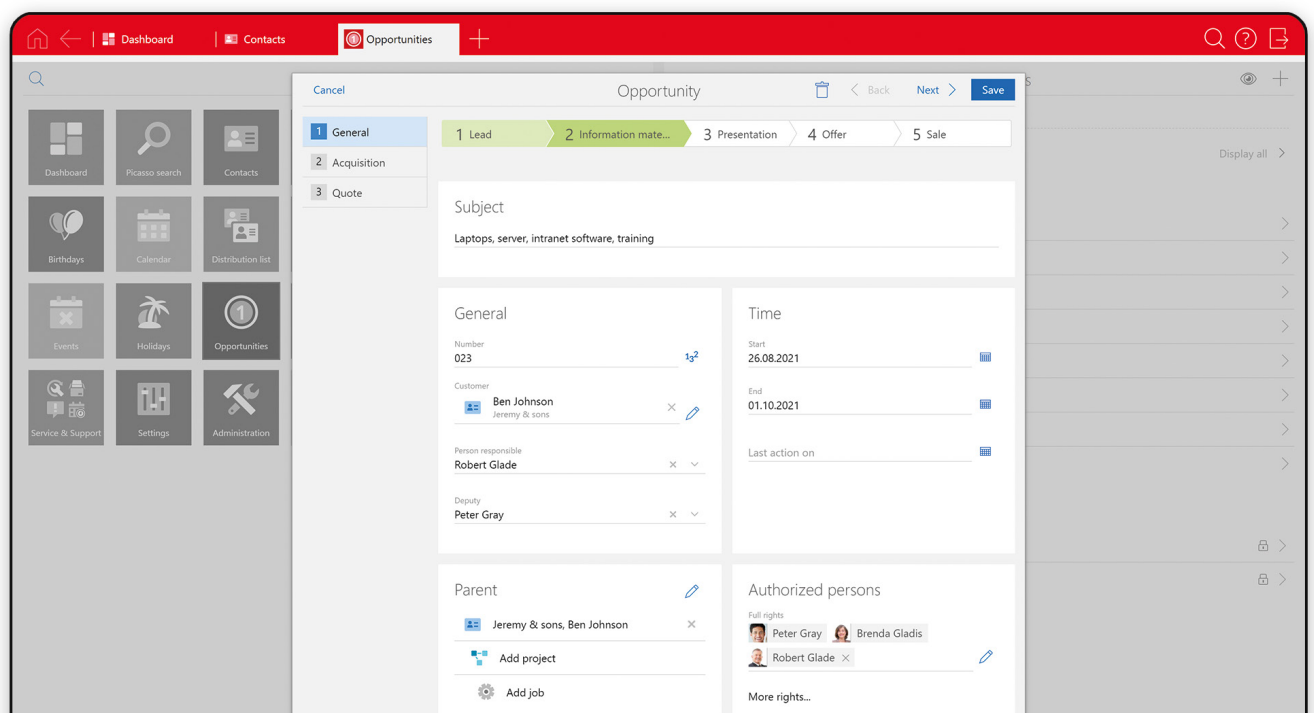
Customers have their own special wishes and requirements each of which represents individual business potential for your sales. With CAS genesisWorld, you segment your customers and keep an eye, for example, on opportunities from the first contact to closing using the graphical progress indicator – this 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.

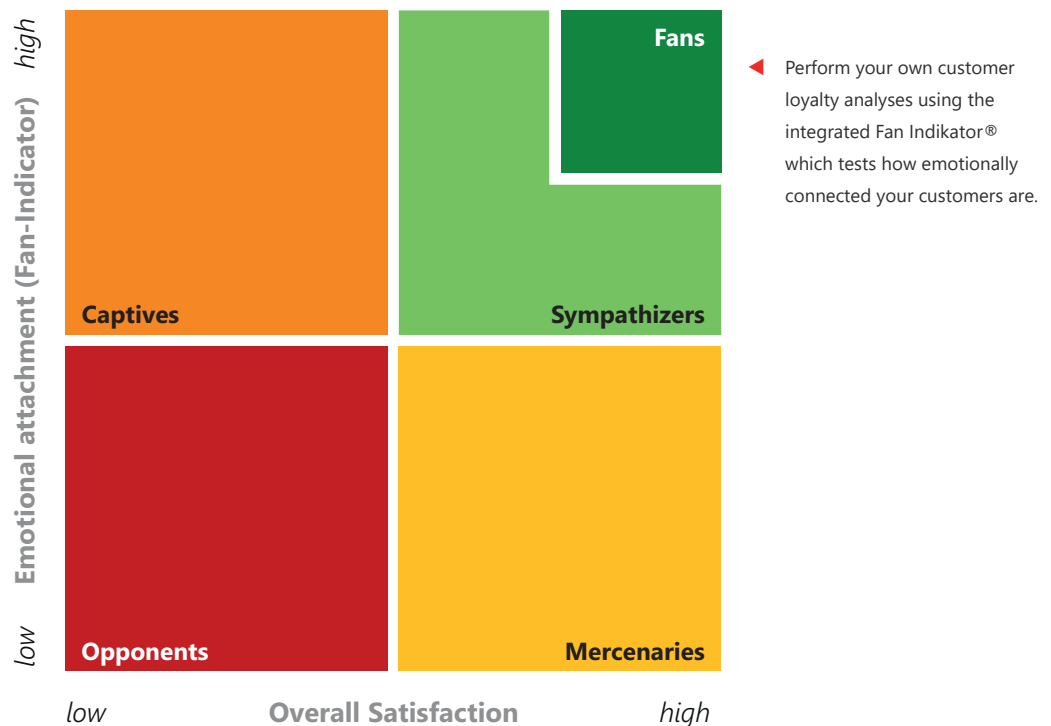
## Manage and optimize sales processes

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 contact qualification with the option to convert the lead into a sales opportunity.
Opportunities	Display the entire sales process: from lead acquisition, to offer phase, to completion, and after sales service.
Graphical input help <sup>W</sup>	Visualization of input help options in the form of colored, horizontal bars to display, for example, the phases of an opportunity.

- ▼ Using the graphic progress indicator, you can visualize the processing phases at a glance.



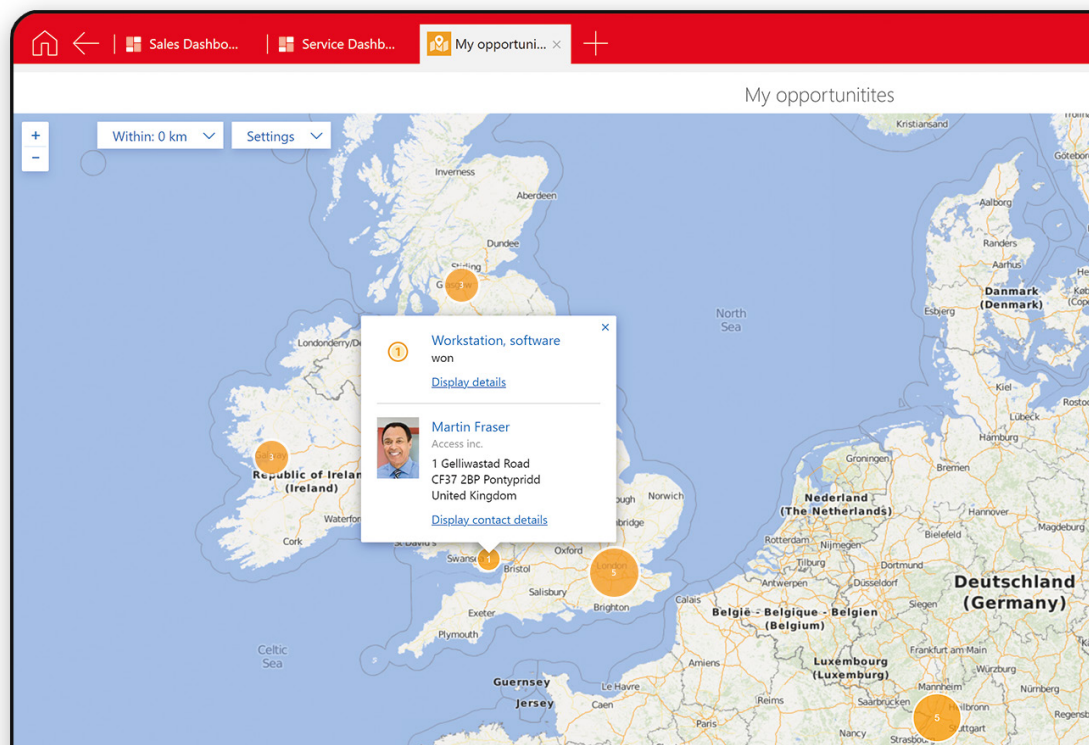
Forecasts	Enjoy the benefits of various analysis options for opportunities, for example, you can analyze by sales area or sales person.
Contribution margins	Support for calculating contribution margins of opportunities.
Interactive sales pipeline <sup>D, M</sup>	Utilize interactive display variants for your sales pipeline and filter by initial contact, available quotes, or contract conclusion.
Systematic sales <sup>D, M</sup>	Define sales processes supported by criteria catalogs and specific views, for example, the sales pipeline.
Definition of sales phases <sup>D, M</sup>	Define sales phases, for example, "Next activity" which displays planned, upcoming activities, such as phone calls, appointments, or callbacks.
Support for sales hierarchies <sup>D, M</sup>	Freely define up to three sales hierarchies, for example, according to geographical or personnel aspects.
Mapping of sales structures <sup>D, M</sup>	Expand sales opportunities to include hierarchical mapping of sales structures and methods, such as the definition of activities and milestones.
Mapping of sales areas <sup>D, M</sup>	Hierarchically map sales territories with up to three breakdown levels, for example, Europe, Germany, and Southern Germany.
Reporting <sup>M</sup>	Create reports based on the the complete data set, such as the evaluation of all sales opportunities created in recent quarters.
Measuring customer loyalty and clustering	Determining customer loyalty using the Fan Indikator®. 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 <sup>D, M</sup>	Analysis option to identify the most profitable customers and prospects as well as to forecast turnover.
Closing probability <sup>M</sup>	Analysis of potential using automatic calculation of the closing probability.





Competitor and contact weighting <sup>D, M</sup>	Create competitor analysis based on weighting and assessment of competitors and contact persons.
Creating quotes and other documentation <sup>M</sup>	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	The chance to record optional items in quotes supports you in your quote generation process.
Price and discount lists <sup>M</sup>	Price and discount lists for products enable you to set individual customer prices.
Product configurator <sup>M</sup>	Configure sales products and create quotes based on available product variants, components, and prices.
Product variants <sup>M</sup>	Ensure the compatibility of product components by using and applying (technical) rules.
Product catalogs <sup>MA</sup>	Display products in catalog form using pictures and descriptions to create an easy and comfortable quote generation process.
Creating receipts <sup>D, M</sup>	Create different receipt types, for example, offers, orders, invoices, or credit notes from addresses, opportunities, or projects.
Proximity search	Display and select addresses in a defined area.
Geomarketing <sup>M</sup>	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 <sup>M</sup>	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 the individual communication phases, use simple filter functions to select suitable recipients, define specific follow-up actions and conduct targeted, multi-phase campaigns through the different communications channels.

In this way, 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.

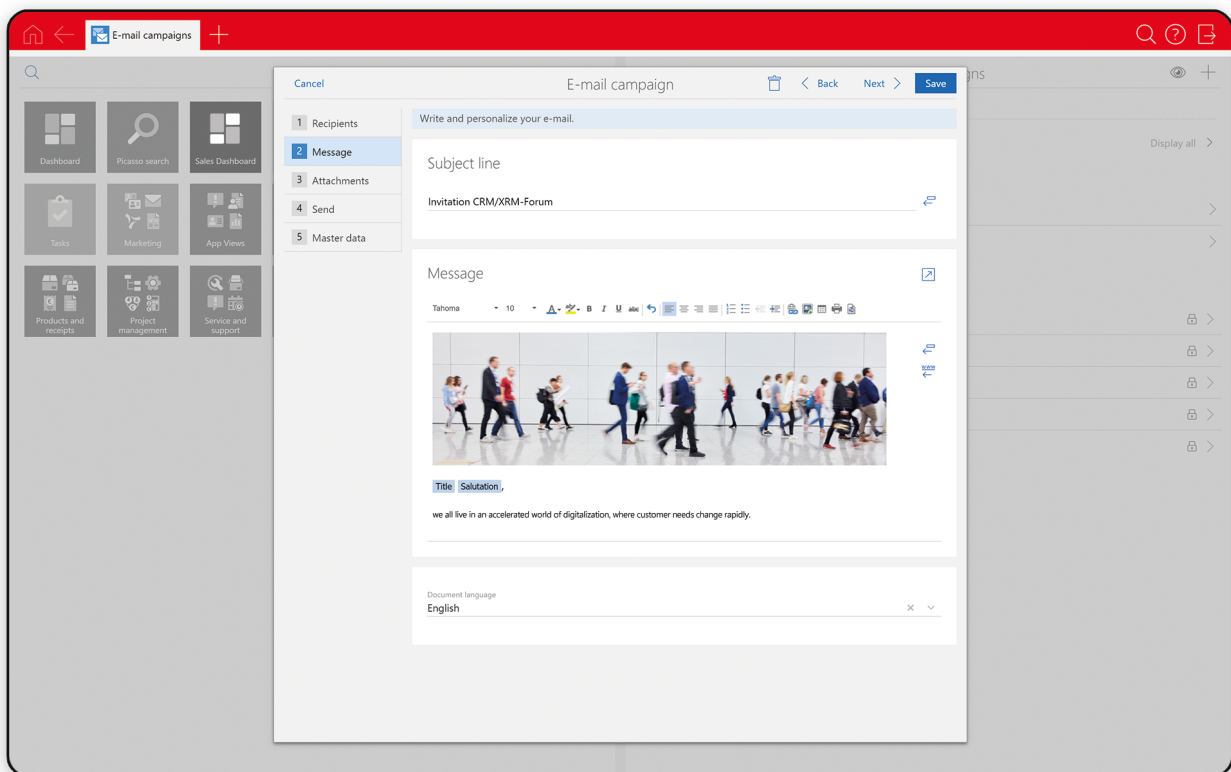
## Personalized content. Target-group-specific marketing campaigns.

Target group selection and distribution lists	Combine specific target groups in distribution lists based on the central contacts 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.
Communication templates	Use predefined or customized templates for mass communications.
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 <sup>D, M</sup>	Manage, execute, and evaluate multi-phase campaigns through various communication channels using the graphical campaign designer.
Campaign status <sup>M</sup>	Indicates the status and progress of a campaign, such as "scheduled", "active", or "complete".
Campaign documentation <sup>D, M</sup>	Archive all information within the campaign, including targeted addresses, sent e-mail campaigns, phone calls, and related documents.
Budget planning <sup>D, M</sup>	Draw up a budget for each campaign. Record costs and turnover of completed actions and media resources deployed.
Handling incorrect addresses and bounces <sup>D, M</sup>	Identify incorrect addresses in a campaign to improve data quality.
Analysis <sup>M</sup>	E-mail campaign analysis taking into account the marketing budgets used to measure success.
Event management <sup>M</sup>	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 <sup>M</sup>	In questionnaires and surveys, you can embed websites and multimedia content, for example, videos.

# Professional e-mail marketing for your individual relationship management <sup>M</sup>

No programming skills required to send personalized e-mail campaigns	Create and personalize e-mail campaigns in HTML format – no programming knowledge necessary – available for selected 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 your 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.
Administration of subscriptions and unsubscriptions	Log newsletter subscriptions and unsubscriptions to update future e-mail campaigns.
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 wildcards.



# CAS genesisWorld for project management and service Professional planning. Successful implementation.

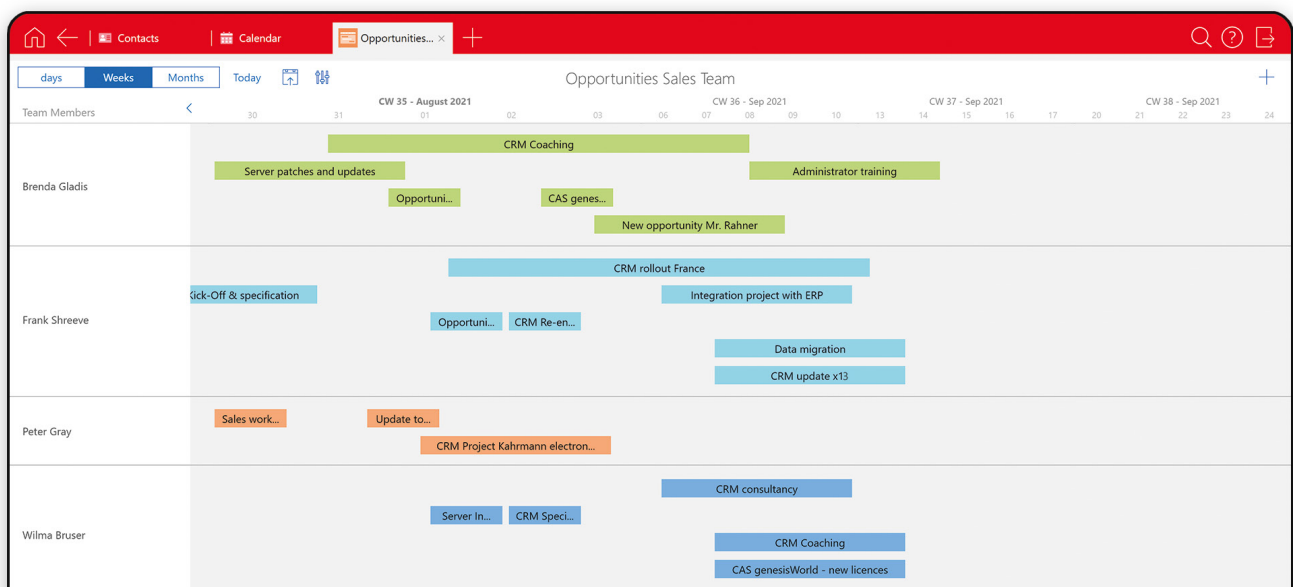
With CAS genesisWorld, your employees can work within an effective process and control system: they plan and structure their projects purposefully from the start by taking goals, milestones and risks, as well as tasks, resources, budgets, costs, and times into account. The project status, ad-hoc analyses,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

respond to specific questions and manage customer expectations much 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.

After a quick look in the customer or project dossier before or during a telephone call, your service staff can

▼ 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 <sup>M</sup>	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 <sup>D, M</sup>	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 <sup>M</sup>	Manage payroll costs, employee skills, and keep an overview of the workload and availability of your employees.
Recording working times and expenses <sup>M</sup>	Record times at customer, project, and job level as well as expenses with integrated functions for receipts, per-diem costs, and travel costs.
Project controlling <sup>M</sup>	Evaluate all time records, expenses, and third-party services, and then cross check them with the budget plans.

## Service & Support <sup>M</sup>

Logging support requests	Log 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 the first contact through to problem solving using appointment scheduling, the allocation of responsibilities, and priority or delegation functions with the help of 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 <sup>D</sup>	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 <sup>D</sup>	Map complex, company-wide workflows for comprehensive ticket logging and processing.
E-mail templates	Create and access e-mail fields from the ticket and its links.
Standard 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 or for service agreement data records.

# Customizing CAS genesisWorld to suit your requirements

## Individual designs. Flexible customization.

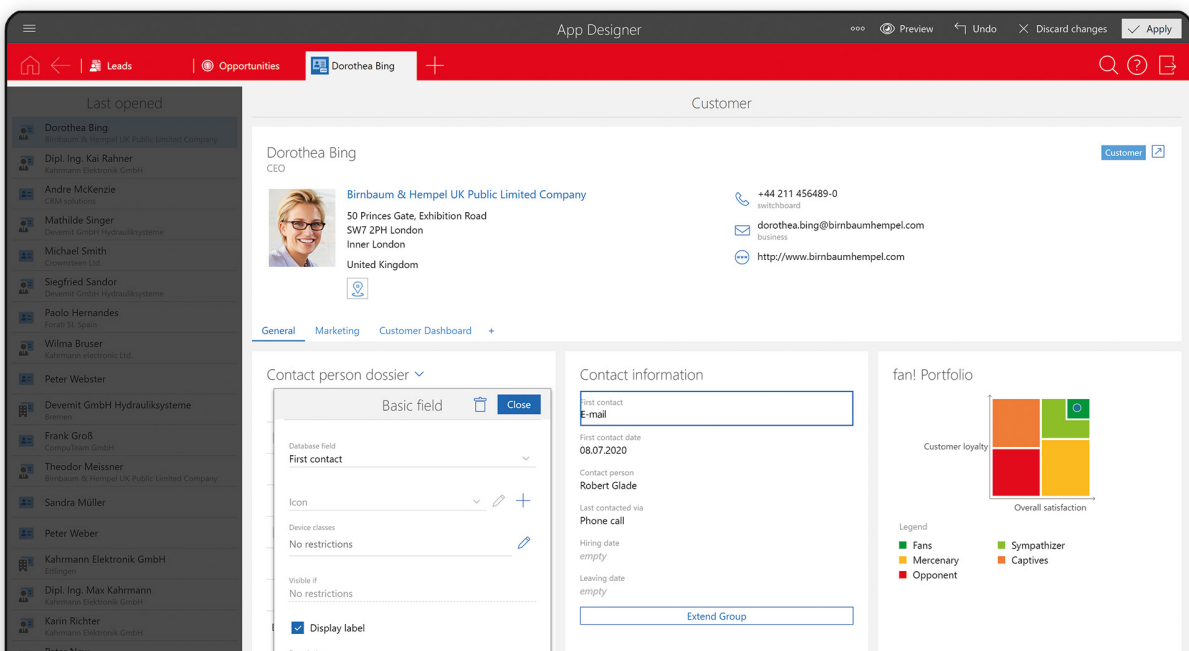
Regardless of your company's requirements – your CRM/ XRM solution CAS genesisWorld can adapt flexibly to your needs. Users, CRM managers, or administrators can design their business relations and processes in

CAS genesisWorld using custom interfaces, input help options, and central templates to fit their company. And best of all: there are no hidden costs.

## Administration and customization

App Designer <sup>W</sup>	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 <sup>W, M</sup>	Enhance apps for company-specific indicators, calculations, and processes with the App Designer Scripting (JavaScript).
Perform customizations without programming knowledge and independent of your location	Create and manage central, company-wide regulations 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.

- ▼ Enhance the displayed information, elements, and charts of existing apps – no programming skills required.





Central or individual navigators	Individual and central navigators for individual employees, business units, or departments, which include folders and views in a tree structure.
Personalized dashboard <sup>D</sup>	Customize personalized dashboards to display all relevant information.
Filter views	Create and save custom data filters in views for quick access.
Personalization of interfaces <sup>M</sup>	Use wide-ranging options for designing company-specific data record types in the Desktop Client. Available options include creating additional tabs, additional fields, automatic calculation functions with formula fields, or free placement of linked information.
Dynamic formula fields <sup>M</sup>	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	Customize your input help options with many characteristics, such as multilingual, user- or group-specific, hierarchical, single, or multiple selection options.
Centralized user defaults	Specify filters, groups, or access rights according to default rules, such as for team calendars, and at user level.
Personal user accounts for employees	Automatically set up user accounts for newly recruited employees with personalized rights and settings.
Data protection	Protect yourself from unauthorized access to data or functions, such as unauthorized data export.
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 contact format.
Integration of third-party applications <sup>M</sup>	Share and synchronize data with any third-party applications in CAS genesisWorld.

## Expand CAS genesisWorld with connections and interfaces

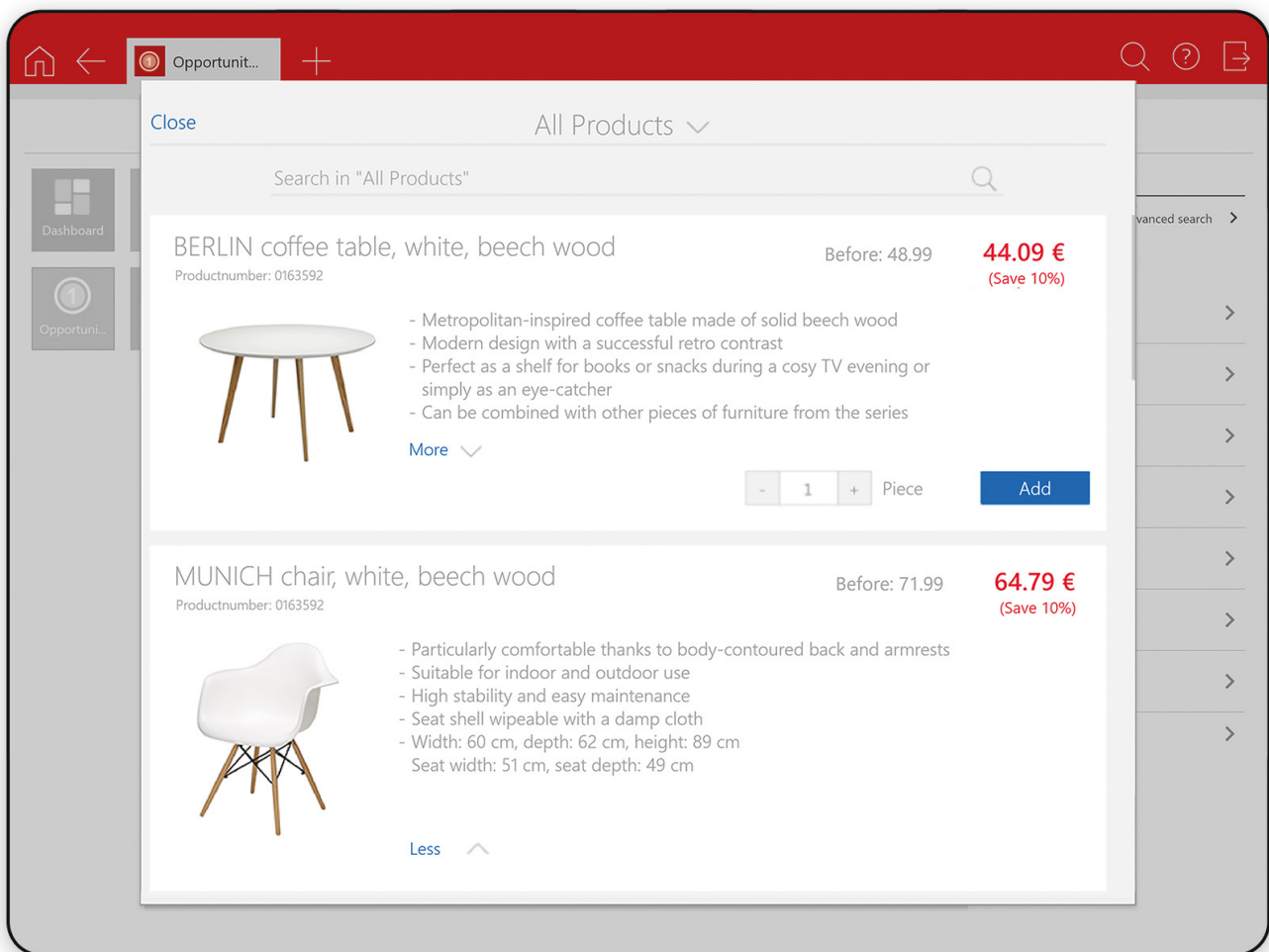
### Microsoft Exchange with Microsoft Outlook

Microsoft Outlook as default e-mail client	Optionally, use Microsoft Outlook as an e-mail client for CAS genesisWorld.
Microsoft Outlook Add-In	Using the Microsoft Outlook Add-In, directly access CAS genesisWorld information from Microsoft Outlook. CRM data on your conversation partner is displayed automatically as well as the customer dossier. The integration is available to both Microsoft Windows and Mac users.
Shared contacts and appointment synchronization <sup>M</sup>	Synchronize contacts and appointments between Microsoft Exchange and CAS genesisWorld.

## Integration into Enterprise Resource Planning (ERP)<sup>M</sup>

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 contacts and project data in both the ERP system and CAS genesisWorld with automatic data synchronization.
Automatic contact linking	Link contacts 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 is now 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 450 employees on the Campus and at the CAS App Center develop innovative CRM/XRM solutions for successful businesses from various sectors.

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

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

Over 32,000 companies, including global market leaders, such as Daimler, Airbus, Fraunhofer and MS Motorservice International, work with our solutions and rely on our expertise.



Customer voices:  
[www.cas-crm.com/references](http://www.cas-crm.com/references)

### CAS Software AG

- Owner-managed business
- Over 500,000 enthusiastic users in more than 40 countries
- One of Europe's leading suppliers of CRM solutions with a clear focus on the small and medium-sized enterprises (SME) market
- 200 certified sales and solution partners
- Investment in innovation per year: 25% of turnover
- Multi-award winning solutions

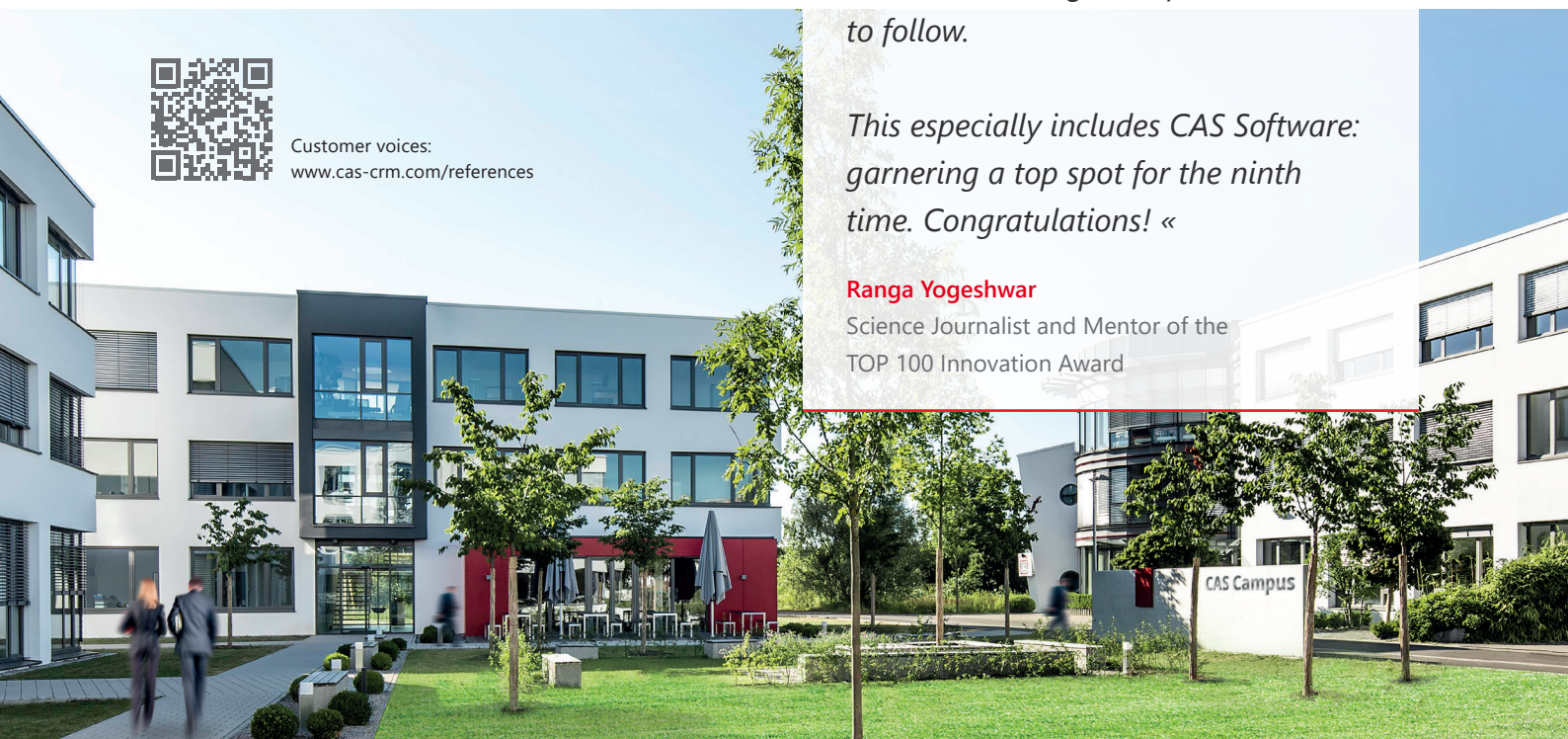


» TOP 100 is about showcasing and honoring companies who are brave enough to reinvent themselves, develop something new, companies that become a shining example for others to follow.

*This especially includes CAS Software: garnering a top spot for the ninth time. Congratulations! «*

**Ranga Yogeshwar**

Science Journalist and Mentor of the TOP 100 Innovation Award





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