

Premium Edition



CAS <sup>globe icon</sup> genesisWorld

Functions in the Premium Edition



# Overview of

## Premium Edition functions



You will have access to these functions when you upgrade to the Premium Edition.

### Function:

### Function description:

#### Primary links

Figure: Hierarchical relationships with help from primary links

Primary links are used to set data records in relational hierarchies. Using mandatory links you can ensure that all users maintain their data consistently in the system. In open data records, the parent elements are displayed clearly.



#### Tree view

Graphical depiction of hierarchical relationships

Primary linked data is prepared visually and displayed via the integrated tree view. Thus, users can see at a glance, what projects involved specific address data records and what activities have been completed for each of the individual projects.



#### Link search

Searching for data records with regard to linked data records

With the help of the link search, users can include information from the linked data records in their filter conditions. So for example, it is possible to find prospects with no linked opportunity and no linked visit with a mouse click.



#### Two phase input assistance

Supports processes/workflows including dynamic tab display or mandatory fields depending on values

Users now benefit from improved support when carrying out workflows and processes thanks to the two-phase input assistance of Type/Status. Depending on the type selected, users can, for example: set a status, define or register mandatory fields depending on the values selected and display or hide dynamically.



#### Selection tree input assistance

Input assistance in tree structures

With input assistance options you can select the properties via a hierarchy tree. You can define available options such as whether checkbox lists or just single selections are possible and whether specific nodes of the input-assistance help tree can be selected.





## Function:

## Function description:

### Relationship structure

Graphic display of relationship structures with help from parent-subsiary relationships

Relationship structures are prepared visually and displayed clearly and transparently. With the help of group structure, users see the structure of their customers' relations. These structures analyze the parent-subsiary links that are stored in the system.



### Heatmap

Geographical display of addresses on digital maps

Heatmaps display addresses with the help of so-called temperature scales on digital maps.



### Displaying values on maps

Displaying address data record field values on digital maps

This powerful feature enables users to display the number of addresses on a digital map, and also other attributes, for example, the sum or maximum of other indicators saved in address data records.



### Mobility

Mobile access and data replication

With the Mobility module users have access to: replication, CAS SmartDesign, apps and also bidirectional Mobile sync. Users can download free apps for the iPhone, iPad, Android, BlackBerry or the Windows tablet and use them to access data stored in CAS genesisWorld.



### Automatically update of last contact field

The last contact fields are automatically updated based on the interaction with address or projects

Users can see when the last activity took place in the address or project data record directly. For this purpose, the primary-linked activity and the date are analyzed, the contact person and the contact type (for example telephone) are stored in the address or project data record.



### Project status

You can view the status of a project at a glance through the new project status field (RAG red, yellow, green smiley faces) this is a visualization of the project progress.



### Automatic number assignment

when creating new data records

When creating a new data record, the automatic number assignment function issues a formatable consecutive number to each data record.

