

New in version x3



CAS **genesisWorld**

New functions in version x3

Multiple capabilities with intelligent extensions and new functions

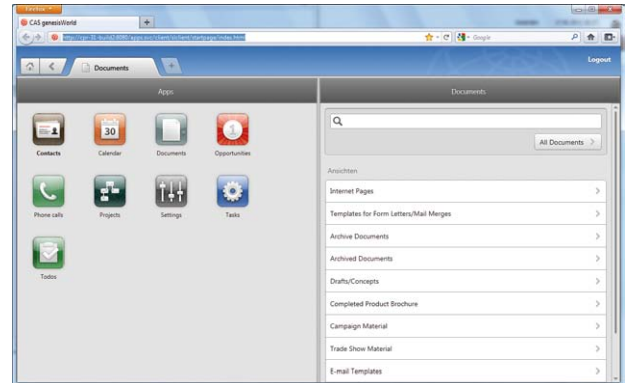
With new well-engineered modules and intelligent integrations, CAS genesisWorld Version x3 offers you many more functions and possibilities: the integration of social networks has expanded the capabilities of relationship management. In addition, the Survey module allows products and services to be optimized by using online surveys. We have further developed the smartphone and tablet PC solutions for mobile customer management, which now makes customer management just as comfortable on the move as in the office. By consequently further developing the core functions, we want to make your work easier and more comfortable. As the leading CRM provider for small and medium-sized enterprises, we listen to our customers' needs to continually improve our products: We are once again delighted to be able to implement many new customer wishes into the new x3 version.

Mobile sync – offline data access for almost all smartphones

Mobile work is booming! And that is why CAS CRM offers solutions for all market-relevant platforms: whether iOS, Android, Windows Mobile/Windows Phone or Symbian – with Mobile sync, your employees now have access to all the important CRM data and appointments, on the move and offline, and on all types of current mobile devices. With the option to bidirectionally synchronize addresses, tasks and appointments, you can now both receive and edit data changes while on the move. What is more, incoming calls are recognized and displayed on the mobile device. As a result, your data is always right up-to-date.



Mobile CRM for iPad shows, amongst other things, all of your current appointments, linked addresses and your contact history.



CAS genesisWorld Smart access – the new smart client for browsers and tablet PCs.

Mobile CRM for iPhone and Android – the mobile 360° customer view

Mobile CRM for iPhone can do even more. You can now add or remove colleagues from an appointment online with the new improved participant handling. In the shared calendar you can view colleagues' appointments as well as resources and groups. Other touch operations allow even more ease of use, like for example, the wiping action in the dashboard that allows you to turn pages, or to get rid of unwanted content. Once you have downloaded the app, you can try it immediately with the demo-system.

Just as with the iPhone app, the new Mobile CRM for Android clearly shows all of your appointments for the current day, as well as any linked addresses. The Android app captures new addresses quickly and various lists help you to structure the addresses and to highlight the important customers and colleagues. All the data records of the customer dossier are chronologically displayed. You can now access them directly and in real time, which gives you a 360° view of all your customers. You can quickly check colleagues' calendars or the availability of meeting rooms, and new appointments can be created quickly. We have now made route planning even easier as you can sit back and call up addresses in a map view.

Data is also available offline on smartphones when used together with Mobile sync, or other mobile devices, and incoming calls are instantly identified.

Mobile CRM for BlackBerry – flexible customer care for more competitive advantage

With the Mobile CRM for BlackBerry module, it does not matter where you are, whether at head office, on the go, or in your home office – you can always provide competent and focused customer care. In the new x3 version, the comprehensive range of functions has been further expanded: you can now access projects while on the go, view your missed calls, and also display any addresses in a map of your choice (either Google or BlackBerry maps). Moreover, you can now periodically export addresses, tasks and appointments, even with an optional notes field if you wish; furthermore, the copy and paste function is available for notes fields, from a notes field you can make calls and go directly to Web addresses.

CAS genesisWorld Smart access – the smart client for tablet PCs and browsers

The new CAS genesisWorld Smart access client offers even more application capabilities with modern, state-of-the-art operating concepts: you can comfortably edit contacts or appointments either by using a mouse or by touch. Client functionality is complemented by reading access to complete customer dossiers, as well as optimized document display. CAS genesisWorld Smart access makes contact management particularly attractive for tablet PCs and in browsers. The new future proof client has a completely new design with a user-friendly interface and an intuitive look and feel. In addition, it is highly modular and can be easily enhanced for future use cases as well as being able to work on various devices and display sizes. A prime example of this is the new Mobile CRM for iPad.

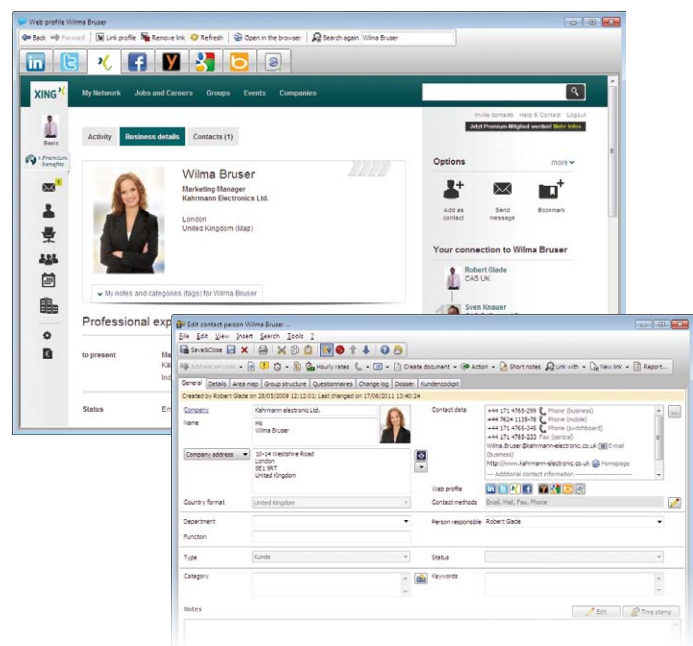
Mobile CRM for iPad – mobile work with comfortable touch operation

Mobile CRM for iPad offers new possibilities for using CAS genesisWorld. The bigger screen size, when compared to the iPhone, opens up a whole new area of application and use scenarios: The iPad app starts easily with the dashboard that displays actual appointments and linked addresses, as well as the associated contact history. Office documents or pdf files from the customer dossier can be viewed on the iPad while on the go. You can contact customers or colleagues immediately by e-mail. You can view the calendars of selected colleagues and choose how you want to view selected, individual appointments, for example, in the week calendar view, or alternatively, in the list view.

Supplementary contact information through integrated social media

A highlight of version x3 is the integration of social networks: With this feature, additional channels have been integrated into the customer communication process and you can include sources of information such as facebook, Xing, Twitter or blogs in your relation management. You can access social networks at central points using personal information, for example, addresses, phone calls or e-mails. All it takes is one click on the relevant social media icon to open a window in which the information from the social network can be displayed. In this way, you can access additional information quickly and at the touch of a button, for example, the contact information for an unknown sender of an e-mail that you received. You can research the sender in the social network before you further process their e-mail.

We have carefully considered data protection issues as your personal logon allows real-time access; this means that synchronization or data saving can be dropped – in this way data security is guaranteed. Access rights for the social media connection are assigned and managed at the administrative level.



Find out more about your contact – using a secure and privacy protected work environment.

Smart customer care: Modules with fully developed functions

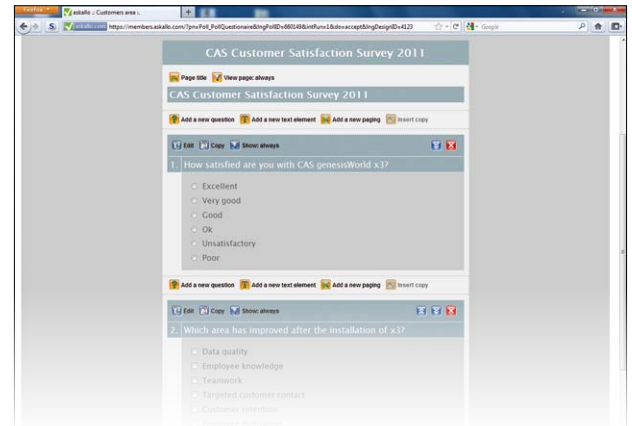
Find out whether your service is on-track and well-received – with the Survey online module

With the Survey online module in CAS genesisWorld, conducting an online survey is simplicity itself – surveys are directly available in the module and can be used immediately. You can use this feature to easily determine, for example, whether or not a delivery has reached a customer on time; whether a new customer is pleased with their new product; whether or not your customer's address data is up-to-date; or whether your customer is pleased with the performance of your hotline support.

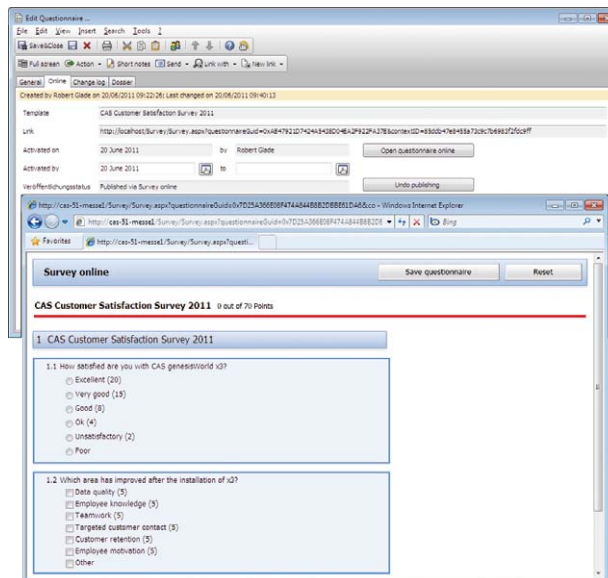
With the Survey module in CAS genesisWorld, producing a suitable survey and sending it out to your customers by e-mail is easy and quick. Customers are sent an e-mail containing a link to the online survey; they can then follow the link and submit their responses in an uncomplicated manner. As soon as your customers have saved their responses, you will find the results in CAS genesisWorld where they can be further processed and detailed analyses made. This is an effortless way in which you can establish whether or not the services you have provided are well received by your customer, or whether you need to make some improvements.

Customer surveys and market analyses with the Survey online module and askallo

If you want to save yourself the trouble of running your own Web server for online surveys, and you would still like to conduct an anonymous survey, or complex customer or partner surveys, then you may want to make use of the existing infrastructure provided by askallo, the professional survey service providers. Just select the relevant contacts you want to use for the survey in CAS genesisWorld using the typical, sophisticated selection functions and directly transfer the data to askallo. Any additional phases of the survey, for example, sending out invitational e-mails, are taken care of by askallo in the online portal. If you wish, you can also have automatic reminder e-mails sent out to those survey participants who have not replied within a set timeperiod. Finally, you can easily analyze the results of the askallo survey in detail and then use the results in CAS genesisWorld to further improve and optimize customer care.



Comprehensive analysis functions deliver a detailed evaluation of customer data.



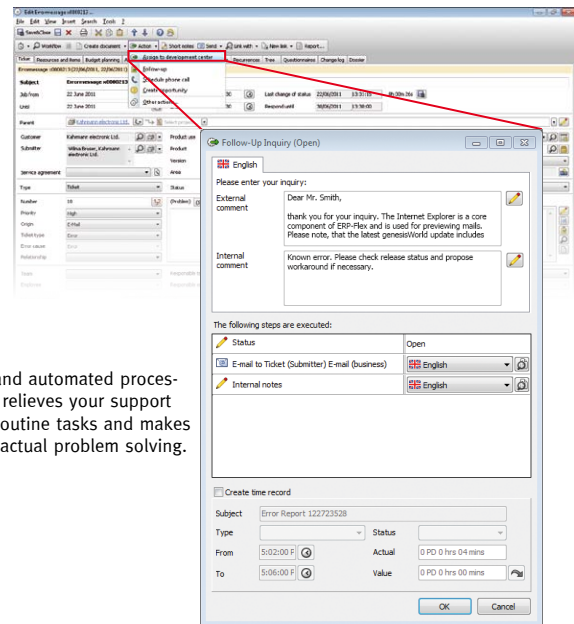
Customer surveys using online questionnaires help you to assess and optimize customer satisfaction.

The Helpdesk module – convenient service management

Do you recognize any of these support situations? Pressed for time, forgotten entries and logs, unclear processes or new employee training taking too long. Ticket actions are designed to make your work easier by combining one or more work procedures. All of the process steps related to the Helpdesk process are emulated through actions, from the receipt of a new ticket, to internal assignment, to the completion of a job. Individual work procedures can be initiated at the touch of a button, for example, updating field values, creating automatic notes for customers, or internal documentation, and/or internal and external e-mail notifications.

When executing a ticket action, all of the predefined steps are displayed in an action overview. Texts that have to be sent by e-mail or entered into notes can be checked in a preview and, if you wish, changed.

Support work is automated using ticket actions, this saves time and reduces stress. Yet transparency is maintained as the individual work procedures can be displayed as required. Due to simplified processing the sources of error are reduced and the service quality can be improved. New employees can be trained quicker, support enquiries can be processed more efficiently. Workload and costs sink.



Tickets and automated processing – it relieves your support staff of routine tasks and makes time for actual problem solving.

More transparency with the Report module

The Report module enables precise analyses and allows for the necessary data transparency, so that decision-making can be improved even more. In CAS genesisWorld x3, the Report module initially offers calculations based upon existing data and establishes itself as a business intelligence tool. What are the support costs for a customer? What share of total turnover is a customer project worth? Which sales area brings the most turnover? The Report module uses pre-calculated and calculated fields to carry out the various calculations. The result is displayed as its own field in the report and can also be integrated into further calculations. Calculated fields are used to compute or analyze all types of results. These can be numbers, Boolean values or texts. Also dependencies and conditions can be included in the analysis, as well as classical mathematical calculations such as, for example, quotas – as in what share of total turnover a customer project represents. Even forecasts can be easily modeled. If you are expecting an increase in turnover of 30%, you merely have to create a calculated field and multiply the existing turnover by 1.3, then subtract the current turnover, which instantly gives you the difference in turnover to year-end.

Also new in version x3 is the ability to combine join-queries with logical AND or OR parameters. In this way, for example, you can find out which customers bought a certain product (data record type1), OR, which customers represent a sales opportunity (data record type2). Furthermore, you can analyze the change log with the last field changes. In this way, for example, you can filter all of the addresses, which in the last month have gone from being "leads" to "customers" – so that you can congratulate them all on becoming customers.



Customize data according to your requirements with the Form & Database Designer – easy and individual

With the Form & Database Designer you can customize CAS genesisWorld flexibly according to your requirements and wishes. In tabs and sections, each column can be given a multi-lingual title. By using a multi-lingual text element, additional information can be included anywhere in masks. You can set the number of columns in a mask to as many as you would like. Line spacing can be reduced to maintain a more compact layout. Moreover, the number of lines used for link fields can be adjusted, so that longer link texts can be displayed.

Formulas have also found their way into the new x3 version of CAS genesisWorld. The new formula field element has now been inserted into a mask, as with the other elements. A formula field can be used to produce and display various results, for example, number values, Boolean values or texts, which can be saved in a data record field. Formulas can also be used to control the background color of fields and link fields, so that important elements can be highlighted. Furthermore, you can lock fields for editing or you can completely hide fields depending on a predefined formula. And finally, another new formula function allows users to use a formula to dynamically determine the input assistance option of a field. When editing a data record mask, any of its fields can be used in a formula. In addition,

	Status	Chance	Total	Relative amount
Database Software	won	99%	10,500.00	10,290.00
Contract	won	43%	2,400.00	1,032.00
Review	won	68%	1,200.00	816.00
Office Software	open	72%	6,300.00	4,536.00
Business Software	won	45%	3,600.00	1,620.00
Contract	lost	68%	900.00	612.00
Groundwork	open	66%	2,800.00	1,804.00
			27,700.00	20,430.00

Budget
 Marketing: 2,500,00 € Campaigns: 1,800,00 €

Revenue / Costs
 Revenue: 27,700,00 € Costs: 12,500,00 €

With the Form & Database Designer, you can integrate calculation fields wherever you like.

the fields of all those data records with a cardinality of 1:n can also be used. We have designed some new settings into this new version that allow for more convenient operation, such as history and drop-down lists for the link fields, and some extra formatting options for the field displays. The following small example helps to explain this function: If you choose the service contract field in a ticket, you are presented with a drop-down list, which displays all of the service contracts linked to the customer you have selected. If a customer is not linked, then a service contract cannot be selected, and if the customer has been deactivated, then their allocation to a service contract will be cancelled.

Smart innovations: Making work easier with CAS genesisWorld x3

Automatically edit and archive e-mails – even while on the go

As of now you can monitor IMAP folders. For this reason, it is now possible to automatically archive an e-mail with predefined links by simply dragging it from the inbox and dropping it in a monitored folder.

The key advantage: as of now, users can file important e-mails in the CRM system in a structured manner using different e-mail clients and also mobile devices.

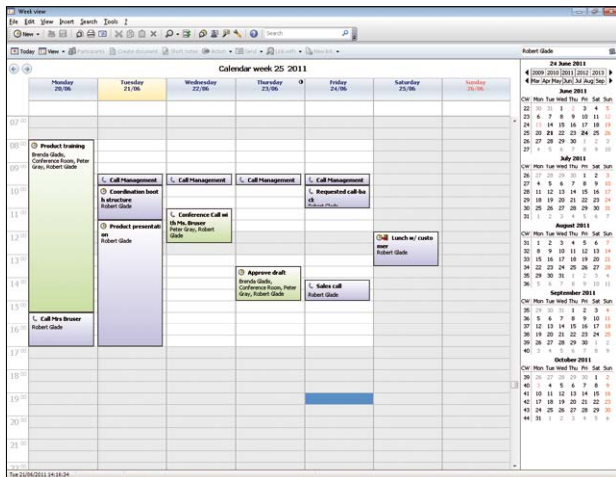


Your contact person is changing companies – no problem in x3

Your contact person is changing companies, no problem. In x3 you can conveniently either directly re-allocate them to their new company entry, or if you prefer, duplicate their entry; also any links associated with them can be duplicated and, if you wish, you can automatically deactivate their original entry in your contacts list.

Telephone calls entered in the calendar complete appointment scheduling

You can display phone calls in the calendar. This allows you to make settings that take appointment overlaps and holidays into consideration.



The calendar view displays both appointments and planned phone calls.

Using individual reminders

Appointment reminders can either be acknowledged individually by participants, or postponed.

Maintaining order – with the automatic number generation

In version x3, you can now activate automatic number generation for all data record types for which there is a corresponding database field – this helps maintain order and provides you with a good overview.

We would like to thank all of our customers and partners for their feedback, suggestions and ideas, which have helped us to produce this new version x3. There now follows an extract of some of these suggestions and ideas that we have implemented in the CAS genesisWorld version x3:

- Mobile CRM on all current smartphones
- Integration of social networks
- Display the address photo in e-mails
- Participant invitation in free appointment search
- Phone calls shown in the calendar
- Improved handling of deactivated users in the team calendar
- Participants can edit reminders individually
- The Type and Status fields are now multilingual
- Expansion of pre-defined country formats under address
- With test and presentation licenses, it is now possible to unlock the modules singly in the Management Console
- Automatic number generation for each data record
- The number of addresses included in the distribution list is now displayed
- In Inxmail distribution lists, you have three new options available to you on the Inxmail tab with which you can determine which addresses are to be used in the distribution list
- With the duplicate check in Omikron, addresses in the dialogue can be opened with a double click – the view format is editable
- Over actions, users can determine which participants are to be removed from data records
- Calculated fields in Report
- Formula fields and their conditional display and editing

