

**Your CRM.**

**Fascinatingly simple.**

Summary of functions



**Customer Centricity**  
CERTIFIED

**CAS genesisWorld**

xRM and CRM for small and medium-sized enterprises

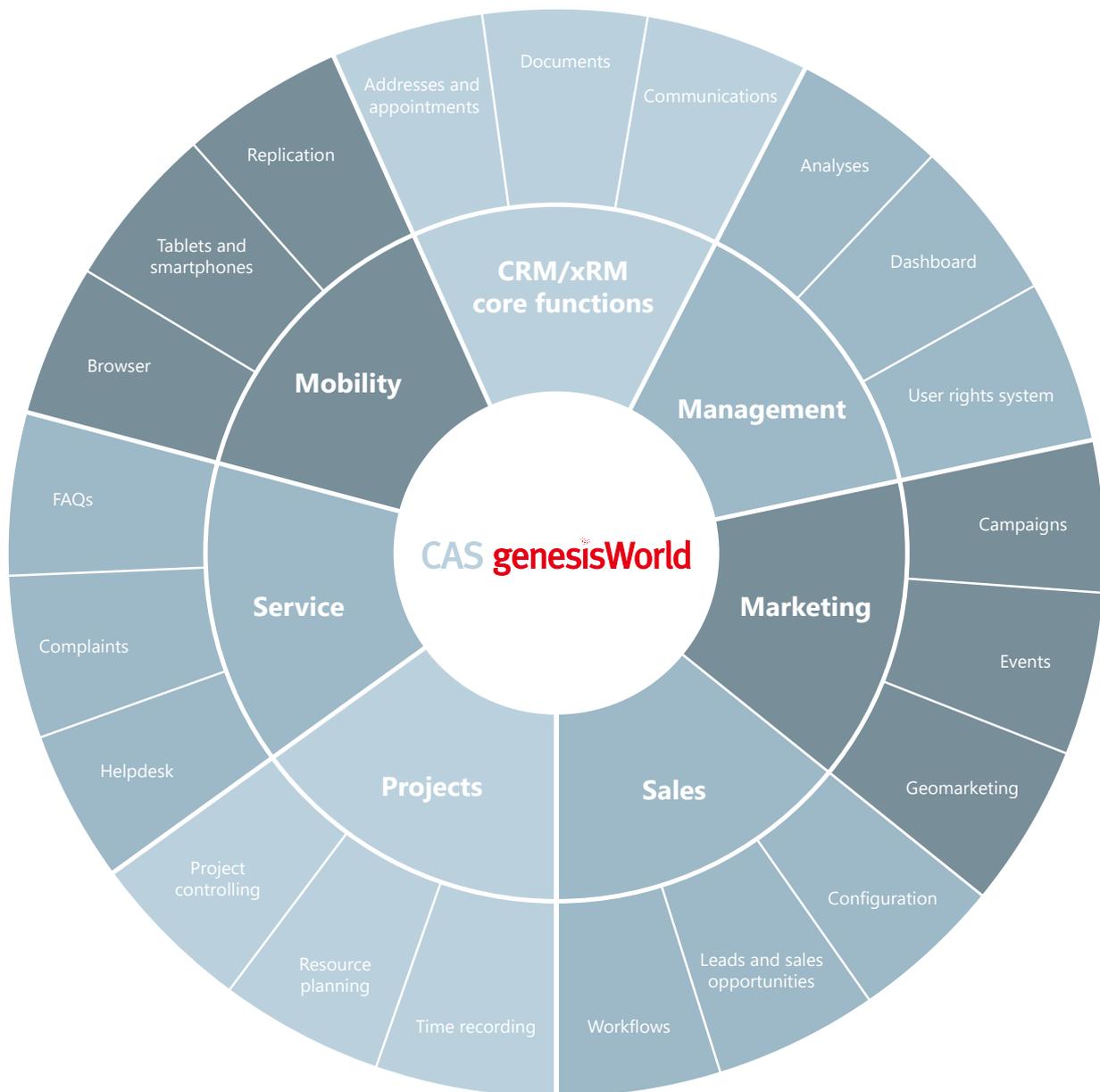


# The leading German CRM & xRM solution for SMEs: CAS genesisWorld

CAS genesisWorld supports all your relationship and information management with advanced, wide-ranging functionalities. CAS genesisWorld Desktop, as well as CAS genesisWorld Web and CAS genesisWorld Mobile Apps for working while on the go offer numerous modules, connections and add-ons to give you the necessary flexibility in your work. The Standard edition (S) provides essential basic modules for successful CRM for small and

medium-sized enterprises while the Premium edition (P) adds more functionality to map complex business processes. Individual additional modules (A) help you to flexibly adapt CAS genesisWorld and its functionality to your industry-specific needs, guaranteeing relationship management tailored closely to your business.

Additional product information:



# CAS genesisWorld Desktop

## Functions for all corporate divisions

### Manage and record addresses

Centralized address management	Save any type of address in one central database, for example, to record information about companies, customers or sales.	S
Company contacts	Enter addresses as companies/organizations.	S
Contact person	Enter addresses as contact persons of a company/organization.	S
Assigning contact persons	Easily assign contact persons to a company with the option to transfer from company A to company B if the person moves job.	S
Synchronized field values	Automatically transfer central address data from a company to contact persons.	S
Addresses with photos	Include photos of contact persons or a company logo.	S
Address categorization	Custom categorization options, includes categories such as A/B/C customer, lead, partner or supplier.	S
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.	S
Input assistance	Easily enter addresses based on predefined defaults.	S
Filter functions	Targeted searching and filtering of addresses by any address criteria according to your needs.	S
Link search	Search for data records based on linked data.	P
Permitted contact method	Define permitted contact methods, such as e-mail, phone, or conventional post for correspondence.	S
Preferred contact method	Set the preferred contact method such as e-mail, phone or conventional post for correspondence.	S
Address wizard	Easily enter addresses from e-mail signatures, websites and documents by using copy and paste.	S
Consistency check	Automatically check address data for consistency, for example, that the postal code matches the location or that the IBAN/BIC bank details are correct.	S
Address autocomplete	Autocomplete address information based on postal code, for example, autocomplete city, state or district after entering a postal code, this function is available for more than 40 European countries.	S
Address deactivation	Deactivate addresses, for example, when a contact person leaves the company.	S

LDAP integration	Access addresses from CAS genesisWorld via LDAP in Microsoft Exchange.	S
Address synchronization	Synchronize addresses unidirectionally and bidirectionally with Microsoft Exchange.	A
Data synchronization with mobile devices	Synchronize data unidirectionally with mobile devices.	S
Data synchronization with mobile devices	Synchronize data bidirectionally with mobile devices.	P
Export/import in vCard format	Export and import addresses in vCard format.	S
Social media integration	Integrate contact data from social media including Facebook, Xing, Twitter and blogs, complying with the latest data protection laws.	S
Duplicate check	The system automatically checks duplicate addresses when entering and editing a data record.	S
Duplicate merging	A wizard helps you to merge redundant addresses and any linked information.	S
Duplicate cleansing	Complete a duplicate check across all address data.	A
Company formation	Interlink companies through parent/subsidiary relationships to provide graphical views of corporate group structures.	P
Mapping and routing	Display a company, delivery or private address on a map and plan a route to it.	S
Map view	Georeference and visualize selected addresses based on embedded OpenStreetMap data.	S
Proximity search	Select addresses in a defined radius.	S
Heatmaps	View selected addresses graphically in the form of heatmaps.	P
Distribution list	Grouping addresses in marketing lists for targeted communications.	S

Configure your custom dashboard to quickly access all relevant data. ▶



Support for sales territories	Assign addresses to sales territories and manage access via a detailed rights system.	S
Unicode and address formats	Correctly display international character sets and addresses in address formats.	S
Access and editing rights	Customize address access and editing rights using the following three options (public, user-sensitive, private) to ensure data protection.	S
Address identities	Connect different identities or roles of one natural person.	S

## Enjoy a 360° view of your customer information

Customer dossier	Display all entries related to an address clearly and chronologically, for example, archived e-mails, appointments, documents or opportunities.	S
Customer dashboard	Provides you with an optimized view as a quick indicator of current status and key customer details.	A
Semantic significance of links	Assign relationships between data records based on defined values, such as links between customers, competitors and key contacts within an opportunity.	S
Selective display of linked information	Use various filter options for the selective presentation of linked data relating to a customer, such as pending opportunities.	S
Search and filter options	Detailed data searches include all the data record attributes you wish to search for.	S
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 have not yet received a follow up call.	P
User-specific configuration	Access data only relevant to you or the respective user.	S

## Search data systematically

CAS SmartSearch	Intelligent live search with personalized hit list, sorted by relevance.	S
Global search	Search in all data record types, for example, addresses, documents, appointments or archived e-mails.	S
Search and filter options	Include all required attributes of a data record when making a detailed data search.	S
Phonetic search	Easily search addresses by phonetic similarities, for example, searching for "Johnson" returns hits for "Jonson" and "Jonnsen".	S
Complex search queries	Enter complex search queries based on filter conditions, bracketing rules, "and/or" conditions and "greater than/less than/equal to" conditions.	S
Search and filter options based on linked data	Run a detailed search by including all the desired attributes of a data record and any additional linked information, for example, all customers with open opportunities who have not yet received a followed up call.	P
Searching in the dossier	Browse dossier entries based on specific rules, such as the "Subject" field in the dossier view.	S

## Manage documents and personalize your communication

### Documents

Extensive document management	Manage documents in any format such as PDF, images, Microsoft Office or CAD files.	S
Microsoft Office interface	Work with a flexible interface to create and edit documents directly in Microsoft Office.	S
Default templates	Use default templates such as letters, faxes and e-mails for faster mass communications.	S
Customized templates in the corporate design	Customize templates including letters, faxes and e-mails for faster communication processes which conform to corporate design rules.	S
Personalized Form letters and mailings	Compose and send customized form letters, faxes and e-mail campaigns with field variables, mail merge fields and attachments.	S
Save as favorites	Save frequently-used document templates as favorites.	S
International address formats	Support with country-specific address formats in form letters.	S
Versioning	Save previous document versions and add comments using the detailed comment function.	S
Archiving	Easily archive external files via drag and drop.	S
Open the file to edit or read it	Open files in write mode for editing documents or in write-protected read-only mode.	S
Document lock	Display the user currently working on a document to avoid overlapping editing.	S
Document categorization	Assign documents to categories, such as quote, minutes or report.	S
Full-text	Use the full-text search to find information across documents.	S
Linking	Link documents with any data record, such as an address or a scheduled appointment.	S
DMS integration	Flexibly integrate external document management and archiving systems.	A
ERP connection	Flexibly integrate ERP systems to synchronize documents, products and addresses.	A

### E-mails

Integration with external e-mail clients	Integrate into external e-mail clients such as Microsoft Outlook, Thunderbird or Lotus Notes for archiving e-mails.	S
Internal e-mail client	Optionally, use the e-mail client integrated into CAS genesisWorld.	S
Online/offline mode	Online and offline access to e-mails in the CAS genesisWorld e-mail client.	S
Send status	Display the current progress when sending e-mail campaigns.	S
Archiving	Enjoy customized e-mail archiving or use templates to automatically configure the appropriate links and participants.	S
E-mail rules	Set up rules for the automated moving or archiving of e-mails to predefined folders.	S
Linking	Automatically link e-mails to associated addresses and additional data record types.	S
Send from within addresses	Directly send e-mails from within the address data record.	S
Delayed delivery	Time-delayed sending of e-mail campaigns.	S

Server archiving	Archive e-mails independently of the e-mail client used or the hardware (such as tablets).	S
Support for international character sets	Correct representation of character sets of all languages in all fields.	S
Signatures	Set global and individual signatures.	S
Salutation	Use predefined forms of salutation.	S
Spell check	Check spelling automatically.	S
Out-of-office assistant	Define out-of-office messages with the help of a wizard.	S
xRM e-mail	Create and personalize e-mails including important information from different sources, for example, events, opportunities, phone calls or requests.	S

## Telephony

Call recognition	Identify incoming calls by name and address, automatically opening the address view or call memo (CTI).	S
Speed dial	Speed dial directly from the address screen (CTI).	S
Caller information	Display relevant information about the caller before answering the call (CTI).	S
Automatic data update	Automatically update key data in the address such as the calling party, or the start, end and duration of the call (CTI).	S
Call logging	Generate call logs and missed-call lists (CTI).	S
Call notes	Document call content in a note.	S
Automatic linking	Automatically link the call notes to the person calling/being called.	S
Scheduled phone calls	Schedule phone calls as a dedicated data record and view in your calendar.	S
Supported telephone providers	All telephone systems which support TAPI or the VoIP systems such as Skype for Business and Swyx.	S

## Notification and action services

Custom notifications	Freely define rules for automatic notifications, such as in the event of a document being changed.	S
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.	S
Execution period	Specify an execution period for each rule, such as a day, or to be completed within a given time window.	S
Linking notifications as primary links	Automatically archive notifications including setting the primary link.	P
Notifications on change of address	Receive notifications of address changes with archiving of the notification.	S
Also includes link types	Include different link types in the notification and action service.	A
Questionnaires	Send questionnaires automatically (e.g. satisfaction studies) via the notification and action service.	S

## Intranet and company portal

Company information	Display different categories, such as corporate divisions.	A
Employee picture gallery	Display an employee gallery with details of their skills and competencies.	A
Notice board and discussion forums	Exchange information at a variety of levels: Company wide, departmental, group- or project-specific interchange.	A
Mapping of processes and workflows	Display of processes for quick handling, such as automated creation of a task when submitting an IT support request.	A
Personal start page	Set up a personal start page with modules such as "My appointments today", a news ticker, personal favorites, or notifications.	A
Phone list	Access the phone number list of employees with search functions and direct access to the employee's personal page.	A
Competency search	Search for employees with specific competencies or skills.	A
Company and department schedules	Access shared calendars of other departments or of the entire company.	A
Birthday lists	Birthday lists with active notification on start page.	A
Knowledge and information database	Structured filing of key documents and information including easy search and access options.	A
Organization chart	Overview of corporate hierarchy with a direct contact option.	A
Holiday administration	Submit holiday requests, have them approved by the relevant manager and manage your holidays.	A
Holiday calendar and lists	Display an overview of taken, approved, refused and scheduled holidays.	A
Absence management	Manage absences, with overview and evaluation options.	A
Online forms	Access online forms, for example, improvement suggestions, and create custom online forms using an integrated form designer.	A
Checklists	Integrated and customizable checklists for planning and preparation, for example, for trade fairs or business trips.	A
Calendar	Personal calendar with overlap warnings for appointment conflicts.	A
Team calendar	Access shared calendars of other employees and groups.	A
Resources calendars	Access shared resources calendars.	A
Resource management	Manage resources, for example, meeting rooms or company vehicles.	A
Overall dossier	Group key documents relating to a project in one dossier.	A
Project overview	Project home page with linked information including employees, appointments, documents and tasks.	A
Task management	Manage your own tasks and delegate to others.	A
Document management	File and publish any type of document with a clear structure.	A
Address management	Manage companies, contact persons and individual contacts.	A
Automatic notifications	Receive notifications of important new developments or changes such as "New appointment" or "Delegated task".	A

## View calendar and schedule appointments

### Calendar

Personal calendar	Personal calendar with public, confidential and personal forward planning.	S
Team calendar	Display multiple users in one calendar to provide a quick overview of free time slots.	S
Holiday calendar	Enter and display holiday times.	S
Shared calendar view	View other users' calendars.	S
Day/week/month view	Display schedules in day, week or month views.	S
Resources calendars	Display resources such as meeting rooms, company vehicles or projection equipment.	S
Public holidays	Display and plan for public holidays.	S
Jobs	Display jobs such as project phases, phone calls and holidays in the calendar.	S
Create appointments	Easily create appointments directly in the diary and automatically include the relevant participants.	S
Access rights	Allow special viewing rights in free or blocked time slots.	S
Task	Display current tasks in the diary.	S

### Appointments

Public appointments	Mark appointments as public, i.e. accessible by all colleagues.	S
Full access to third-party appointments	View third-party appointments not involving yourself. This requires the appropriate rights assignment.	S
Personal appointments	Mark appointments as personal. Personal appointments can only be viewed by the person concerned.	S
Confidential appointments	Mark appointments as confidential. Confidential meetings can only be viewed by authorized users.	S
"Out-of-office" appointments	Mark appointments as "out-of-office".	S
All-day events	Choose the "All-day" option when an event is scheduled for the entire day.	S
Recurring appointments	Create recurring appointments on a daily, weekly, monthly or yearly basis.	S
Automatic rescheduling	Automatically postpone recurring appointments in case of conflicts with weekends or public holidays.	S
Notification service	Receive notifications shortly before recurring appointments are due to expire, when creating new appointments and when editing or deleting existing appointments.	S
Alarm function	Individually set alarms for you or respective participants.	S
Overlap warnings	Receive an overlap warning if participants or resources were booked twice, for example, overhead projector or pool car.	S
Rescheduling	Move scheduled appointments easily by drag and drop.	S
Finding free time slots	Find free time slots for one or more participants while also considering the time, place, duration, required resources and possible overlaps.	S

Delegate appointments	Create appointments for third parties.	S
Planner chart	Clearly display multi-day schedules, for example, for business trips, trade fairs or vacations in bar-chart form.	S
Links	Link appointments with all relevant data records, such as documents, addresses or projects.	S
Appointments with iCalendar support	Invite external participants to a shared appointment and respond to external invitations to appointments from customers.	S
Data synchronization with Microsoft solutions	Schedule synchronization with Microsoft Exchange/Microsoft Outlook.	A
Data synchronization with mobile devices	Synchronize unidirectionally with mobile devices.	S
Synchronizing with mobile devices	Synchronize bidirectionally with mobile devices.	P
Live access to appointments	Access appointments in real time via mobile devices.	P

## Schedule and delegate tasks

Tasks	Manage all ongoing or completed tasks, classified as single, repeating or team tasks.	S
List overview	Display tasks in customizable list form with any sort order, for example, by subject, priority or deadline.	S
Assignment of responsibilities	Designate a person responsible for the created task.	S
Input assistance	Two-stage input assistance in the form of task "Type" (e.g. "Support") and "Status" (e.g. "In progress") with dynamic mandatory field definitions.	P
Moving tasks	Automatically move the task to a new deadline if not completed.	S
Task scheduling	Schedule a task by using follow-up tasks.	S
Alarm function	Automatically alarm at task deadline.	S
Task delegation	Create tasks for other colleagues, with tracking.	S
Notification service	Receive notifications about newly created tasks or on receipt of a delegated task.	S
Prioritization	Prioritize tasks as A, B or C.	S
Duration of processing	Plan the time to complete the task, with estimate, target and actual.	S
Completion status	Display completion status as a progress bar and a percentage value.	S
Data synchronization with mobile devices	Synchronize unidirectionally with mobile devices.	S
Data synchronization with mobile devices	Synchronize bidirectionally with mobile devices.	P
Workflow support	Automatically generate tasks in response to defined events.	S

## Evaluate data with reports and create forecasts

Predefined report templates	Access report templates for presenting an overview of data as a PDF file.	S
Company-wide dashboard views	Define company-wide dashboard views to provide an overview of all relevant data.	S
Record-specific dashboard views	Display all the relevant data from the current data record including any linked information.	S

Export data in text format	Export data in CSV format for further editing in third-party programs.	S
Grouping data	Group data interactively in lists.	S
Define custom report templates	Define additional report templates for presenting an overview of data.	A
Report views	Display indicators in value tables which can include different group levels, or in graph form.	A
Reporting across data records	Generate complex, multidimensional evaluation reports across a number of data record types, including linked data records.	A
Scheduled reports	Generate reports based on existing report templates at defined intervals with automatic delivery.	S
Customer dashboard	Display customer-specific overview of defined data including sales figures, claims and products sold.	A
Project dashboard	Display project-specific overview of defined data including sales figures, claims and products sold.	A
Presentation as pivot table	Display an aggregated view of values using pivot tables with option to display values as sum, minimum, maximum or average.	A
Crystal Reports	Integrate into Crystal Reports.	A
Archiving	Archive reports directly in the document archive.	A
Sales pipeline	Graphically allocate forecast sales to individual phases of the selling process.	A
Forecast	Use wide-ranging options for evaluating sales opportunities, such as by territory or sales executive.	A
Export results for further processing	Use numerous options to export data results for further editing or to present the data in other systems such as Microsoft Access or Business Intelligence Tools.	A

## Define data structures

### Administration and customization

Customization without programming skills	Create and administer centralized, corporate rules on the Management Console via user interfaces with no programming or scripting languages.	S
Customizing the data structure	Include special business requirements such as creating new fields, input and selection assistant options, or views.	S
Interface extensibility	Place up to ten additional fields per data record type on the interface.	S
Personalization of interfaces	Use wide-ranging options for designing company-specific data record types in the Desktop client such as additional tabs, creation of additional fields, automatic calculation with formula fields or free placement of linked information.	A
Color classification in lists	Color is used to highlight specific values such as priorities, this makes it easier to comprehend data records at a glance.	S
Personal data record types	Create personal, company-specific data record types, equivalent to the native data record types such as tasks.	A
Multilingual labeling	Generate multilingual input assistance options and field names.	S
Dynamic formula fields	Work with result fields for mathematical calculations or texts, dynamic control of input aids.	A
Centralized user defaults	Specify filters, groups or access rights according to default rules, such as for team calendars, and at user level.	S

Personal user accounts for employees	Automatically set up user accounts for newly recruited employees with personalized rights and settings.	S
Data protection	Protect yourself from unauthorized access to data such as unauthorized data export.	S
System messages	Display system messages after logon, for example, for announcing maintenance windows.	S

## User-specific settings

Custom dashboard	Users can personalize their start page.	S
Personalized navigator	Custom navigators for individual employees with folders and other views in a tree structure.	S
Filter views	Create and save custom data filters in views for quick access.	S
Centralized navigator	Create centralized navigators for corporate divisions or departments with folders and other views in a tree structure.	S

## Benefit from technical flexibility

Automatic software distribution	Install CAS genesisWorld, software updates, add-ins and modules using the automatic software distribution function.	S
Multitenancy	Access different databases.	S
Maintenance center	Manage your database intelligently by using new data clean up functions which you can define manually.	S
Optimum server load distribution	Automatically distribute load to manage optimum capacity utilization of multiple CAS genesisWorld application servers.	S
LDAP integration	Access addresses from CAS genesisWorld via LDAP in Microsoft Exchange.	S
Unicode and address formats	Correctly display international character sets and addresses in matching address formats.	S
Time zone ability	Display international activities such as scheduled appointments, tasks, vacations and phone calls in the day and week view of the relevant time zone.	A
Primary links	Directly assign all project data to addresses with hierarchical links.	P
Integration of third-party applications	Share and synchronize data with any third-party applications in CAS genesisWorld.	A

## Expand CAS genesisWorld with connections and interfaces

### Integration with Microsoft Exchange and Microsoft Outlook

Microsoft Outlook as a default e-mail client	Optionally, use Microsoft Outlook as an e-mail client for CAS genesisWorld.	S
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.	S
E-mail archiving	Manually or automatically archive e-mails as a scheduled appointment, task, document or e-mail.	S

E-mail linking	Automatically link e-mails to recipients' and/or senders' addresses.	S
LDAP integration	Access addresses from CAS genesisWorld via LDAP in Microsoft Exchange.	S
Shared address stock	Synchronize addresses between Microsoft Exchange and CAS genesisWorld.	A
Appointment synchronization	Synchronize schedules between Microsoft Exchange and CAS genesisWorld.	A

## Integration with ERP (Enterprise Resource Planning)

Automatic data synchronization	Synchronize data from CAS genesisWorld with ERP data, such as posting documents, open items, purchased products or delivery blocks.	A
Bidirectional data synchronization	Enter and edit address and project data in both the ERP system and CAS genesisWorld with automatic synchronization.	A
Automatic address linking	Link addresses to products and posting documents and display additional information from the ERP system for comprehensive reporting.	A
Product catalogs	Present product groups and single products as HTML pages in catalogs with selected features and graphics with user-friendly export options.	A

## Data quality and enrichment

Duplicate cleansing	Make a duplicate check across the complete address database, followed by duplicate cleansing.	A
Address checking	Verify correct postal address data, and other.	S
Identifying and correcting risk addresses *	Check for incorrect addresses and optional correction or enhancement of addresses with address service providers.	S

## Professional e-mail marketing

No programming skills are required to send personalized e-mail campaigns	No programming skills are required to compose and personalize e-mail campaigns in HTML format, valid for selected customer groups with Inxmail Professional.	A
Personalized xRM e-mail campaigns	Create personalized e-mails campaigns which include specific information from different sources, for example, events, opportunities, phone calls or requests.	S
Quality check	Improve your quality, for example, by checking links for errors, test mailing and defining a release procedure before sending e-mail campaigns.	A
Address check before sending	Check correct e-mail address and check for possible removal of the address from the associated distribution list when transferring mailing lists from CAS genesisWorld to Inxmail Professional.	A
Managing subscriptions	Log newsletter subscriptions and cancellations to update future e-mail campaigns.	A
Success evaluation	Create comprehensive evaluations covering opening, click or cancelation rates, and display of the success of an e-mail campaign.	A
Automatic archiving	Archive sent e-mail campaigns in the recipients' dossiers.	A

\* Under certain circumstances, additional qualification costs may apply.

## Management functions

### Easily create reports

Evaluations and reports	Automatically compile all kinds of up-to-date reports.	S
Templates and display formats	Create context-specific templates. User-friendly display formats for reports, included as table, graph and diagram form.	S
Preview	Report preview for checking and correction if required.	S
Reporting intervals	Create reports at predetermined intervals.	S
Automatic sending	Delayed sending, including automatic issue of a weekly report to a defined group of people.	S
Pivot table reports	Display structured complex, multidimensional evaluation reports in pivot tables.	A

### Monitor data changes and define workflows

Data monitoring	Define notification rules in response to any changes in the database.	S
E-mail notification	Subscribe to e-mail notifications when data records and links are created or changed, or at defined intervals.	S
Triggering individual actions	Define rules for individual actions relating to specific data records in case of changes or if deadlines are missed.	S

## Sales functions

### Manage and optimize sales processes

Customer dossier	Archive all documents and correspondence with a customer in the relevant customer dossier.	S
Lead	Use a specific data record type to quickly enter data when making contact with a prospective customer; subsequent address qualification with the facility to convert it into a sales opportunity.	A
Opportunities	Map the entire sales process (lead acquisition, offer phase, completion and after sales).	S
Systematic sales	Define sales processes, criteria catalogs and the mapping of the entire sales process, for example, with the help of a sales pipeline.	A
Sales hierarchy support	Freely define up to three sales hierarchies, for example, according to geographical or personnel aspects.	A
Mapping of sales structures	Expand sales opportunities to include hierarchical mapping of sales structures and methods, such as definition of activities and milestones.	A
Mapping of sales areas	Hierarchically map sales territories with up to three breakdown levels, for example, Europe, Germany and Southern Germany.	A
Proximity search	Display and select addresses in a defined area.	S
Definition of sales phases	Define sales phases, for example, with "Next activity", indicating immediate actions such as a phone call, meeting appointment or call-back.	A
Quote configurator	Automatically generate quotes including prices and discounts.	A

Quote documentation	Draw up and document a complete quote, with covering letter, detailed product information or proposals for financing.	A
Optional items	Enter optional offer items when creating quotes.	P
Product configurator	Configure products based on the recorded product variants, components and prices.	A
Product variants	Ensure combinability of product components by logging (technical) rules.	A
Creation of receipts	Create document types such as offers, orders, invoices or credit notes from addresses, opportunities or projects.	A
Definition of criteria catalogs	Create freely definable criteria catalogs, for example to evaluate leads.	A
Interactive sales pipeline	Interactively display the sales pipeline with display variants and filtering by initial contact, quote, contract.	A
Probability of winning	Rate potentials based on automatic calculation of the probability of winning.	A
Strengths and weaknesses analysis	Analysis option to identify the most profitable customers and leads and to predict sales.	A
Competitor and contact weighting	Create competitor analysis based on weighting and assessment of competitors and contacts.	A
Price and discount lists	Generate price and discount lists for products.	A
Contribution margins	Support for calculating contribution margins of opportunities.	S
Geomarketing	Presentation of all data record types, for example, all pending sales opportunities, as heatmaps.	A
Notification and action service	Customize notifications, for example, a notification is sent to the internal sales team if the field staff updates a customer document.	S
ERP interface	Integrate into ERP systems and access invoices, delivery notes or quotes directly from CAS genesisWorld without switching application.	A
Address synchronization	Automatically synchronize addresses between CRM and ERP applications.	A
Search and filter options	Use search and filter options across all fields, manage product items, competitors and contact persons, and so on.	S
Reporting	Create reports based on the complete data set, such as evaluation of all sales opportunities created in recent quarters.	A
Measuring emotional customer loyalty	Identify customer loyalty via the fan!-Indikator® and query the overall satisfaction of customers.	P
Customer clusters	Categorize customers into five groups depending on their emotional loyalty using "forum's!" scientific principles.	P
Simple receipt creation without ERP	Enter documents such as offers, invoices or credit notes for addresses, opportunities and projects.	A
Optional items	Enter optional offer items when creating quotes.	P
Search and filter options	Search and filter options, for example, across all fields, administration of product items, competitors and contact persons.	P

## Marketing functions

### Plan, execute and evaluate campaigns

Target group selection and distribution list	Combine specific target groups in distribution lists based on the central address database applying wide-ranging search and filter functions.	S
Link search	Search addresses including linked data records to enhance target group accuracy.	P
Permitted and preferred contact method	Automatic compliance with the allowed and preferred method of communication before making contact/sending out mailing campaigns, in order to comply with data protection regulations.	S
Personalized communications	HTML templates and campaign wizard for personalized communications by e-mail, letter, fax and phone.	S
Communications templates	Use predefined or customized templates for mass communications.	S
E-mail campaigns and newsletters	Integrate into Inxmail for powerful e-mail and permission marketing with wide-ranging ad-hoc report evaluation options for follow-up campaigns.	A
Multi-phase campaigns	Manage, execute and evaluate multi-phase campaigns through various communication channels using the graphical campaign designer.	A
Campaign status	Depiction of the status and progress of a campaign, such as "scheduled", "active", "complete".	A
Campaign documentation	Archive all information within the campaign, including targeted addresses, sent e-mail campaigns, phone calls, and related documents.	A
Documentation of customer response	Document pending or received customer responses within the campaign or directly in the data record window of the address or phone call concerned.	A
Budget planning	Draw up a budget for each campaign. Record costs and turnover of completed actions and media resources deployed.	A
Handling of incorrect addresses and bounces	Identify incorrect addresses in a campaign to improve data quality.	A
Evaluation	Evaluate e-mail campaigns based on the assigned marketing budget in order to measure their success.	A
Event management	Event planning with facility management, organization of invitations, and evaluation. Restrictions on the number of participants possible; registration via personalized e-mail campaigns and logon link.	A

## Project management and service functions

### Project planning

Project overview	Display all data belonging to a project such as appointments, tasks, documents and caller logs.	S
Status overview	Display pending, ongoing and critical projects or milestones and indication of overall status based on a traffic light code (green, yellow, red).	P

Custom project plans	Create project plans for customer projects, product development, trade fair preparations and so on, with predecessor-successor dependencies and assignment of responsibilities and material resources.	A
Resource planning	Plan the effort of employees, skills management and overview of the workload and availability.	A
Recording of time and expenses	Record times at customer, project and job level as well as expenses with integrated functions for vouchers, per-diem costs and travel costs.	A
Quote and order management	Compile quotes from the product catalog and ERP data at the click of a mouse.	A
Project controlling	Evaluate all time records, expenses and third-party services, and then cross check them with the budget plans.	A
Microsoft Project interface	Integrate Microsoft Project and Open Workbench.	A

## Optimize service and support

Logging support requests	Log support requests using different channels. Rules-based internal and external notifications, such as when new requests are received.	A
Processing support requests	Process service requests from initial contact through to solution finding: with scheduling, assignment of responsibilities, priorities or delegation using trouble ticket pools.	A
Calculation of service costs	Automatically or manually record times of service costs and exact allocation of service claims for each customer – subsequently or in the background.	A
FAQ management	Display all processed trouble tickets in a FAQs database. Publish selected FAQ documents on an online portal.	A
Service portal	Support portal with overview of all requests, online entries and FAQ search. Customers can create new support tickets and view the processing status of submitted tickets.	A
Support entitlement	Get information on support-approved product versions and persons entitled to create support tickets. Incorporate details of support blocks on companies or individual contacts.	A
Service Level Agreements (SLAs)	Ensure the contractual service delivery, for example, scope, response times, processing time, documentation of product deployment and maintenance billing.	A
Support to communication channels	Link support requests to existing communication channels such as e-mail, phone and service portal.	A
Ticket management	Map complex, company-wide workflows for comprehensive ticket logging and processing.	A
E-mail templates	Create and access e-mail fields from the ticket and its link.	A
Standard notifications	Send notifications to ticket submitter and processor when requests are received and processed or when data records are changed.	A
E-mail accounts for support	Set up an e-mail account as support account in the Helpdesk module to be able to trigger the automatic creation of a ticket in CAS genesisWorld when archiving an e-mail. Support accounts can be assigned to teams so that created tickets can be edited by different persons.	A

### Manage and record addresses

Centralized address management	Store any type of address in one central database, for example, to record information about companies, customers or sales.	P
Company contacts	Enter addresses as companies/organizations.	P
Contacts	Display and enter contacts.	P
Contact person	Enter addresses as contact persons of a company/organization.	P
Synchronized field values	Automatically transfer central address data from a company to contact persons.	P
Addresses with photos	Insert photos of contact persons or a company logo.	P
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.	P
Input assistance	Assisted address input based on predefined defaults.	P
Filter functions	Search and filter addresses by any address criteria according to your needs.	P
Permitted contact method	Define permitted contact methods, such as e-mail, phone, or conventional post for correspondence which conforms to data protection.	P
Preferred contact method	Set the preferred contact method such as e-mail, phone or conventional post for correspondence.	P
Address wizard	Easily enter addresses from e-mail signatures, websites and documents with copy and paste.	P
Consistency check	Automatically check address data for consistency, for example, postal code matching location or IBAN/BIC.	P
Address autocomplete	Automatic completion of address fields, for example, after entering the postal code the town or city is entered automatically, states and districts are stored in the software for more than 40 European countries.	P
Address synchronization	Synchronize addresses unidirectionally and bidirectionally with Microsoft Exchange.	A
Duplicate check	Check duplicate addresses automatically while entering data or changing the data record.	P
Area map	Display addresses on a map.	P
Map view	Integrate OpenStreetMap maps to easily georeference and visualize selected addresses in the map.	P
Access and editing rights	Customize address access and editing rights with three options (public, user-sensitive, private) to assure data protection.	P
Embed Social Media information *	Display information from social media such as news, tweets and press articles.	P

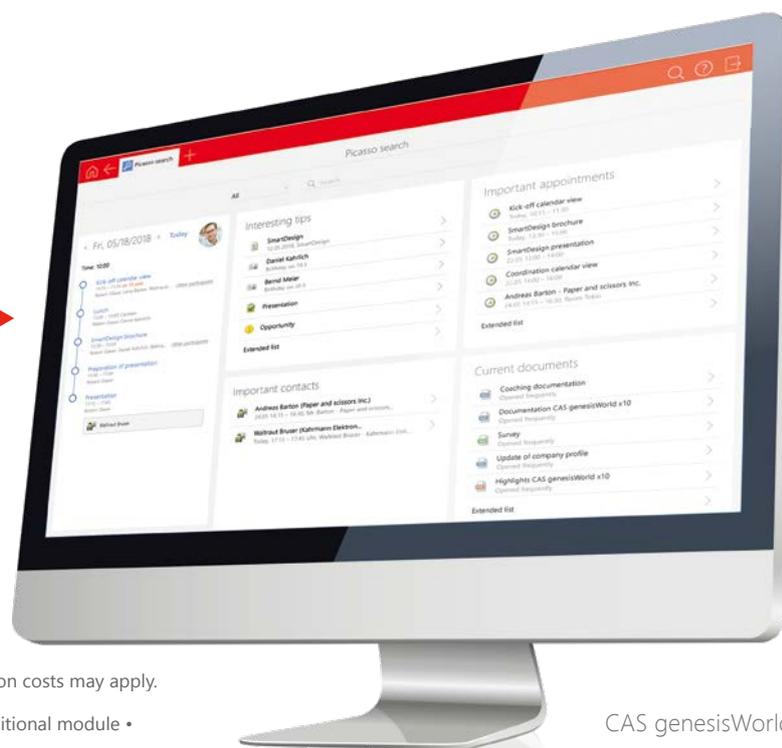
## Get a 360° view of your customer

Customer dossier	Display all entries related to an address clearly and chronological, for example, archived e-mails, appointments, documents or opportunities.	P
Semantic meaning of links	Assign relationships between data records based on defined values, such as links between customers, competitors and key contacts within a lead.	P
Dashboard	Get an overview of current information.	P
Centralized navigator	Display defined views and lists.	P
Individual views	Creating and saving custom views	P

## Search data systematically

Picasso search	Intelligent assistants using AI algorithms provide you with a quick overview and suggestions for your current events.	P
CAS SmartSearch	Intelligent live search with personalized hit list, sorted by relevance.	P
Global search	Search in all data record types, for example, addresses, documents, appointments or archived e-mails.	P
Detailed search	Include all required attributes of a data record when making a detailed data search.	P
Phonetic search	Easily search addresses by phonetic similarities, for example, searching for "Johnson" returns hits for "Jonson" and "Jonnsen".	P
Complex search queries	Make complex search queries using filter conditions, bracket rules, "And/Or" conditions and "Greater/Less/Equal" conditions.	S
Radial menu	Quickly access further actions for data records via the radial menu.	P
Clear and well-structured information	Display (team) calendars and appointments with linked addresses. Structure your address stock with list views, for example, listing by A, B and C customers.	P
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 were not yet followed up.	P
Searching in the dossier	Search the dossier entries by different requirements, for example, in the "Subject" field of the dossier view.	P

The Picasso search shows relevant information in advance, before you have to actively search for it.



\* Under certain circumstances, additional qualification costs may apply.

S = Standard edition, P = Premium edition, A = Additional module •

Subject to error and change without notice.

## Manage documents and personalize your communication

---

### Documents

Varied documents	Structured and chronological display of all entries for an address data record, for example, archived e-mails, appointments, documents or sales opportunities.	P
Microsoft Office interface	Work with a flexible interface to create and edit documents directly in Microsoft Office.	P
Default templates	Use default templates including letters and faxes for mass communications.	P
Custom templates in corporate design	Custom templates for mass communications such as letters and faxes which conform to corporate design.	P
Personalized form letters and e-mail campaigns	Compose and send customized form letters, faxes and e-mail campaigns with field variables, mail merge fields and attachments.	P
International address formats	Support for country-specific address formats in form letters.	P
Open a file to edit or read it	Open files in write mode to edit them or in write-protected read mode.	P
Document lock	Display the user currently working on a document to avoid overlapping editing.	P
Document categorization	Assign documents to categories, such as quote, minutes or report.	P
Full-text	Use the full-text search to find information across documents.	P
Linking	Link documents with any data record, such as an address or a scheduled appointment.	P
DMS integration	Flexibly integrate external document management and archiving systems.	A
ERP connection	Flexibly integrate ERP systems to synchronize documents, products and addresses.	A

### E-mails and telephony

Integration into external e-mail clients	E-mail archiving via an integration to external e-mail clients such as Microsoft Outlook, Thunderbird or Lotus notes.	P
Send from within addresses	Directly send e-mails from within the address data record.	P
Server archiving	Archive e-mails independently of the e-mail client used or the hardware (such as tablets).	P
E-mail access	Access archived e-mails.	P
Support for international character sets	Correct representation of character sets of all languages in all fields.	P
Form letters and mailings	Create personalized form letters and e-mail campaigns easily from address lists using document templates.	P
Call	Speed dial directly from within the address data record.	P
Scheduled phone calls	Use a specific data record to plan phone calls.	P
Supported telephone providers	All telephone systems which support TAPI or the VoIP systems such as Skype for Business and Swyx.	S

## Notification and action services

Custom notifications	Customize rules for automatic notifications, such as in the event of a document being changed.	P
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.	P
Execution period	Specify an execution period for each rule, such as a day, or to be completed within a given time window.	P
Linking notifications as primary links	Automatic archiving of notifications including setting primary links.	P
Notification of changes of address	Receive notifications of address changes with archiving of the notification.	P
Including link types	Include different link types in the notification and action service.	P

## View calendars and schedule appointments

### Calendar

Personal calendar	Personal calendar with public, confidential and personal forward planning.	P
Team calendar	Display multiple users in one calendar to provide a quick overview of free time slots.	P
Holiday calendar	Enter and display holiday times.	P
Public holidays	Display and plan for public holidays.	P
Shared calendar view	View other users' calendars.	P
Day/week/month view	Display schedules in day, week or month views.	P
Create appointments	Easily create appointments directly in the calendar and automatically include the relevant participants.	P
Appointments with iCalendar support	Invite external participants to a shared appointment or react to external appointment invitations from, for example, customers.	P
Access rights	Allow special viewing rights in free or blocked time slots.	P

### Appointments

Public appointments	Mark appointments as public, i.e. accessible by all colleagues.	P
Full access to third-party appointments	View third-party appointments not involving yourself. This requires the appropriate rights assignment.	P
Personal appointments	Mark appointments as personal. Personal appointments can only be viewed by the person concerned.	P
Confidential appointments	Mark appointments as confidential. Confidential meetings can only be viewed by authorized users.	P
"Out-of-office" appointments	Mark appointments as "out-of-office".	P
Appointments with iCalendar support	Invite external participants to a shared appointment or react to external appointment invitations.	P
Resources calendars	Display resources such as meeting rooms, company vehicles or projection equipment.	P

All-day events	Choose the "All-day event" option when an event is scheduled for the entire day.	P
Notification service	Receive notifications shortly before recurring appointments are due to expire, when creating new appointments and when editing or deleting existing appointments.	P
Rescheduling	Move scheduled appointments easily by drag and drop.	P
Delegate appointments	Create appointments for third parties.	P
Links	Link appointments with all relevant data records, such as documents, addresses or projects.	P

## Schedule and delegate tasks

Tasks	Manage all ongoing or completed tasks classified as single, repeating or team tasks.	P
List overview	Display tasks in list form with any sort order, such as by keyword, priority or deadline.	P
Assignment of responsibilities	Designate a person responsible for the created task.	P
Input assistance	Two-stage input assistance in the form of task "Type" (e.g. "Support") and "Status" (e.g. "In progress") with dynamic mandatory field definitions.	P
Moving tasks	Automatically move the task to a new deadline if not completed.	P
Task scheduling	Schedule a task by using follow-up tasks.	P
Task delegation	Create tasks for other colleagues, with tracking.	P
Notification service	Receive notifications of newly created tasks or on receipt of a delegated task.	P
Prioritization	Prioritize tasks as A, B or C.	P
Duration of processing	Plan the time to complete the task, with estimate, target and actual.	P
Completion status	Display completion status as a progress bar and a percentage value.	P
Workflow support	Automatically generate tasks in response to defined events.	P

## Evaluate data with reports and create forecasts

Predefined report templates	Access report templates for presenting an overview of data as a PDF file.	P
Report views	Display indicators in value tables which can include different group levels, or in graph form.	A
Scheduled reports	Generate reports based on existing report templates at defined intervals with automatic delivery.	P
PDF reports	Generate PDF reports with live indicators and graphic charts.	A

## Define data structures

App Designer	Enhance existing apps without programming knowledge with information, elements and charts via drag and drop or build custom apps.	P
App Designer Scripting	Enhance apps for company-specific calculations and processes with the App Designer Scripting.	A

## Expand CAS genesisWorld with connections and interfaces

---

### Integration with Microsoft Exchange and Microsoft Outlook

Archiving attachments	Manually archive attachments as documents using the Outlook add-in.	P
E-mail linking	Automatically link e-mails to recipients' and/or senders' addresses.	P
Appointment synchronization	Synchronize schedules between Microsoft Exchange and CAS genesisWorld.	A

### Work with add-ins and interfaces

Automatic data synchronization	Synchronize data from CAS genesisWorld with ERP data, such as posting documents, open items, purchased products or delivery blocks.	A
ERP connection	Access to, for example, receipts, quotes and invoices.	A
Questionnaires	Display and edit questionnaires.	A
Area map	Display addresses on a map.	P

## Management functions

---

Evaluations and reports	Automatically compile all kinds of up-to-date reports.	P
Automatic sending	Time-triggered sending, for example, automatic weekly report scheduled to always be sent on a Friday.	P
Predefined report templates	Access report templates for presenting an overview of data as a PDF file.	P
Scheduled reports	Generate reports based on existing report templates at defined intervals with automatic delivery.	P
Report and report views	Display aggregated key performance indicators.	A
PDF reports	Generate PDF reports with live indicators and graphic charts.	A

## Sales functions

---

### Manage and optimize sales processes

Customer dossier	Archive all documents and correspondence with a customer in the relevant customer dossier.	P
Opportunities	Map the entire sales process (lead acquisition, offer phase, completion and after sales).	P
Quote documentation	Draw up and document a complete quote, with covering letter, detailed product information or proposals for financing.	A
Probability of winning	Assess potentials based on percentage values of the probability of winning.	A
Price and discount lists	Include price and discount lists for offer calculations.	A
Contribution margins	Support for calculating contribution margins of opportunities.	P
Notification and action service	Send notifications, for example, to internal sales support when field sales updates the customer dossier.	P
ERP interface	Integrate into ERP systems. Access your invoices, delivery notes and quotes without changing apps.	A
Address synchronization	Automatically synchronize addresses between CRM and ERP applications.	A

Reporting	Create reports based on the complete data set, such as evaluation of all sales opportunities created in recent quarters.	A
Easy access to documents without ERP	Display documents such as offers, invoices or credit notes for addresses, opportunities and projects.	A
Product items in opportunities	Assign products and product groups to an opportunity.	P
Optional items	Enter optional offer items when creating quotes.	S
Search and filter options	Use search and filter options via all fields, administer product items, search competitors and contact persons and so on.	P
Measuring emotional customer loyalty	Identify customer loyalty via the fan!-Indikator® and query the overall satisfaction of customers.	P
Customer clusters	Categorize customers in five groups depending on their emotional loyalty.	P

## Marketing functions

Permitted and preferred contact method	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.	P
Personalized communications	Use templates for personalized communications by letter.	P
Communications templates	Use predefined or customized templates for mass communications.	P
Event management	Event planning including room management, organizing invitations and analysis.	A

## Project management and service

### Project planning

Project overview	Display an overview of all data belonging to a project such as appointments, tasks, documents and caller logs.	P
Status overview	Display an overview of pending, ongoing and critical projects or milestones and indication of overall status based on a traffic light code (green, yellow, red).	P
Resource planning	Managing employees and work time, capabilities management plus an overview of workload and available resources.	A
Recording of time and expenses	Record times on the customer, project and procedure level. Record expenses with integrated functions for receipts, daily subsistence and travel costs.	A
Delegate	Define a person responsible for a task.	P
Completion status	Display task completion status as a progress bar or a percentage.	P
External services	Register and edit external services within a project.	P

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



Predefined report templates	Access report templates for presenting an overview of data as a PDF file.	P
Scheduled reports	Generate reports based on existing report templates at defined intervals with automatic delivery.	P
Report and report views	Display aggregated KPIs in interactive tables and diagrams.	A
PDF reports	Generate PDF reports with live indicators and graphic charts.	A

## Optimize service and support

Logging support requests	Log support requests using different channels. Rules-based internal and external notifications, such as when new requests are received.	A
Processing support requests	Process service requests from initial contact through to resolution: by scheduling, assigning responsibilities and priorities or delegation using trouble ticket pools.	A
Service agreements	Create and edit service agreements with the option to create these directly from contacts.	A
Product usage	Enter product uses, also directly from contacts or for service agreements.	A
Tickets	Quickly edit tickets with the smart search function and a clearly structured view. Creating tickets directly in contacts, phone calls or e-mails.	A
Time recording	Enter times for ticket editing and display in a separate time record calendar.	A
Standard notifications	Notify ticket submitter and processor when requests are received and processed or when data records are changed.	A

## CAS genesisWorld for mobile apps

### Functions for all corporate divisions

## Manage and record addresses

Centralized address management	Store any type of address in one central database, for example, to record information about companies, customers or sales.	P
Company contacts	Enter addresses as a contact person of a company/organization.	P
Contact person	Display and enter contacts.	P
Assigning contact persons	Easily assign contact persons to a company.	P
Synchronized field values	Automatically transfer central address data from a company to contact persons.	P
Addresses with photos	Insert photos of contact persons or a company logo.	P
Address categorization	Custom categorization options, including as A/B/C customer, lead, partner or supplier.	P
Input assistance	Assisted address input based on predefined defaults.	P
LDAP integration	Access addresses from CAS genesisWorld via LDAP in Microsoft Exchange.	P
Address synchronization	Synchronize addresses unidirectionally and bidirectionally with Microsoft Exchange.	A
Synchronizing data with mobile devices	Synchronize data unidirectionally with mobile devices.	S
Synchronizing data with mobile devices	Synchronize data bidirectionally with mobile devices.	P

Mapping and routing	Display a company, delivery or private address on a map and plan a route to it.	P
Map view	Georeference and visualize selected addresses based on embedded OpenStreetMap data.	P
Geomarketing	Presentation of all data record types, for example, all pending sales opportunities, as heatmaps.	P
Proximity search	Display addresses within a defined area.	P
Heatmaps	View selected addresses graphically in the form of a heatmap.	P
CAS CardScanner	Create new contacts by taking a photograph of their business card using your mobile device and you also have the option of archiving the pictures you took as a document.	S
Automatic processes for appointment locations	Primary-linked appointments, which are scheduled out of house, and which have been linked to an address are automatically added to the Location field of the company address for the primary-linked contact.	S

## Get a 360° view of your customer

Customer dossier	Display all entries related to an address clearly and chronological, for example, archived e-mails, appointments, documents or opportunities.	P
Dashboard	Display a custom dashboard with daily information.	P
Filter queries	Filter the dossier to display only specific data record types.	P

## Search data systematically

CAS SmartSearch	Intelligent live search with personalized hit list, sorted by relevance.	P
Search options	Search for data taking into account all the required attributes of a data record.	P
Radial menu	Quickly access further actions for data records via the radial menu.	P
Clearer well-structured information	List views to structure the address stock according to defined filter conditions, for example, listing by A, B and C customers.	P

## Manage documents and personalize your communication

### Documents

Preview for documents	Quick view of document content directly from the app.	P
Transfer of documents	Display documents in third-party apps, for example, presentations in Microsoft PowerPoint.	P
Sending documents	Forward documents swiftly by e-mail.	P
Image import	Store images such as photos as a new document. Upload multiple photos from your mobile device's gallery and archive them in CAS genesisWorld.	P

You can clearly display ► sales potential on maps.



## E-mails and telephony

Server archiving	Archive e-mails independently of the e-mail client used or the hardware (such as tablets).	P
E-mail access	Access archived e-mails via the dossier.	P
Call recognition	Identify incoming calls on your mobile device by name, company and phone number.	P
Speed dial	Speed dial directly from within the address data record.	P
Phone call documentation	Automatically document out going calls.	P
Call memo	Document call content in a memo.	P
Telephone appointment	Create and edit phone calls and call memos with different statuses.	P
Phone calls in the calendar	Displaying phone calls in the calendar.	P

## Notification and action services

Custom notifications	Freely definable rules for automatic notifications such as document changes.	P
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.	P
Linking notifications as primary links	Automatically archive notifications including setting the primary link.	P
Notification of changes of address	Receive notifications of address changes with archiving of the notification.	P
Including link types	Include different link types in the notification and action service.	P

## View calendar and schedule appointments

### Calendar

Personal calendar	Personal calendar with public, confidential and private appointments.	P
Team calendar	Display multiple users in one calendar providing a quick overview of free time slots.	P
Holiday calendar	Enter and display holiday times.	P
Shared calendar view	View other users' calendars.	P
Daily and weekly views	Display appointments in day or week views.	P
Appointments, holidays, phone calls	Graphical display of appointments, holidays and phone calls.	P
Resources calendars	Display resources such as meeting rooms, company vehicles or projection equipment directly in the calendar.	P
Public holidays	Display and plan for public holidays.	P
Create appointments	Easily create appointments directly in the calendar and automatically include the relevant participants.	P
Access rights	Allow special viewing rights in free or blocked time slots.	P

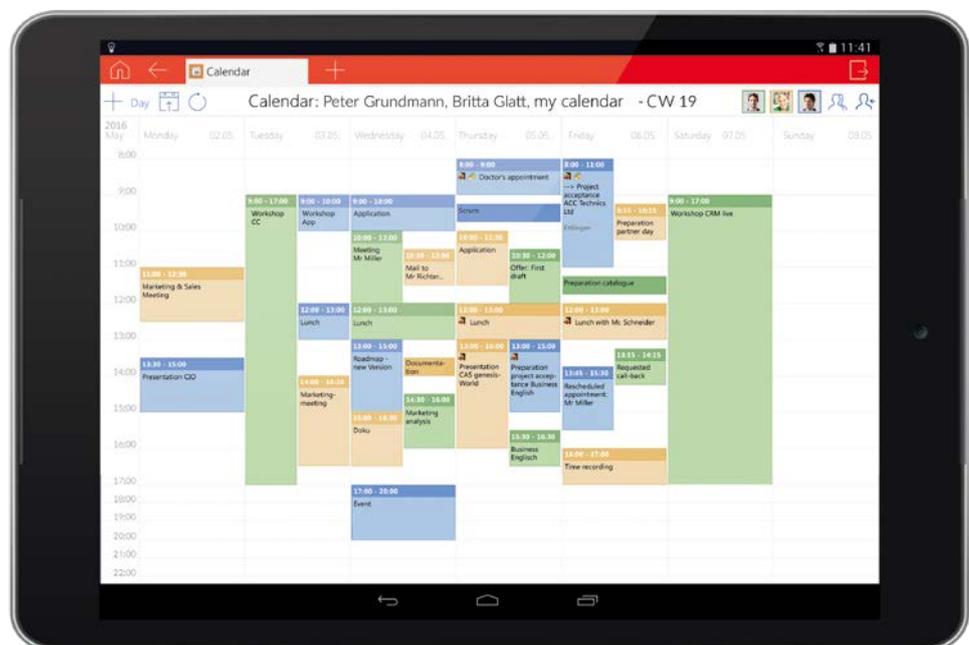
## Appointments

Public appointments	Display appointments as public, i.e. accessible by all colleagues.	P
Full access to third-party appointments	View third-party appointments not involving yourself. This requires the appropriate rights assignment.	P
Personal appointments	Mark appointments as personal. Personal appointments can only be viewed by the person concerned.	P
Confidential appointments	Mark appointments as confidential. Confidential meetings can only be viewed by authorized users.	P
"Out-of-office" appointments	Mark appointments as "out-of-office".	P
All-day events	Choose the "All-day event" option when an event is scheduled for the entire day.	P
Notification service	Receive notifications shortly before recurring appointments are due to expire and when creating new appointments and when editing or deleting existing appointments.	P
Delegate appointments	Create appointments for third parties.	P
Links	Link appointments with all relevant data records, for example, documents, addresses or projects.	P
Live access to appointments	Access appointments in real time via mobile devices.	P

## Schedule and delegate tasks

Tasks	Centrally manage all ongoing or completed tasks, classified as single, recurring or team tasks.	P
List overview	Display tasks in freely definable list form with random sorting, for example, by subject, priority or deadline.	P
Assigning responsibilities	Designate a person responsible for the created task.	P
Input assistance	Two-stage input assistance in the form of task "Type" (e.g. "Support") and "Status" (e.g. "In progress") with dynamic mandatory field definitions.	P
Moving tasks	Automatically move the task to a new deadline if not completed.	P
Task scheduling	Schedule a task by using follow-up tasks.	P
Task delegation	Create tasks for other colleagues, with tracking.	P

Choose between flexible calendar view options, such as your own calendar or a team calendar.



Notification service	Send notifications about newly created tasks or on receipt of a delegated task.	P
Prioritization	Prioritize tasks as A, B or C.	P
Duration of processing	Plan the time you need to process tasks.	P
Completion status	Display completion status as a progress bar and a percentage value.	P
Workflow support	Automatically generate tasks in response to defined events.	P

## Evaluate data with reports and create forecasts

Predefined report templates	Access report templates for presenting an overview of data as a PDF file.	P
Report views	Display indicators in value tables which can include different group levels, or in graph form.	A
Scheduled reports	Generate reports based on existing report templates at defined intervals with automatic delivery.	P

## Define data structures

App Designer	Enhance existing apps without programming knowledge with information, elements and charts via drag and drop or build custom apps.	P
App Designer Scripting	Enhance apps for company-specific calculations and processes with the App Designer Scripting.	A
Predefined templates	Access context-specific templates to quickly generate reports and analyses.	A
Rights system	Incorporate defined rights such as read-only or write access from CAS genesisWorld.	P

## Access your data anytime and anywhere

Dashboard	Start page with intelligent view that displays all the latest topics and information relevant for your business.	P
Manual selections	With manual selections, you can enhance dashboard views and add data records and documents that you need for your daily work, for example, presentation slides or product price lists.	P
Offline access without active network connection	Search and access existing data records with full rights and create new data records while being offline.	P

# Management functions

## Display and evaluate reports

Evaluations and reports	Automatically compile all kinds of up-to-date reports.	P
Automatic sending	Time-triggered sending, for example, an automatic weekly report scheduled to always be sent on a Friday.	P
Report and report views	Display aggregated key performance indicators.	A
PDF reports	Generate PDF reports with live indicators and graphic charts.	A

## Sales functions

### Manage and optimize sales processes

Customer dossier	Archive all documents and correspondence with a customer in the relevant customer dossier.	P
Opportunities	Display the entire sales process (lead acquisition, offer phase, completion and after sales).	P
Mapping of sales structures	Expand sales opportunities to include hierarchical mapping of sales structures and methods, such as the definition of activities and milestones.	A
Proximity search	Display addresses within a defined area.	P
Price and discount lists	Include price and discount lists for offer calculations.	A
Geomarketing	Display all data record types, such as all pending sales opportunities in maps as a heatmap.	A
Notification and action service	Customize notifications, for example, a notification is send to the internal sales team if the field staff updates a customer document.	P
Reporting	Create reports based on the complete data set, such as the evaluation of all sales opportunities created in recent quarters.	A
Person responsible for Opportunities	Define a person responsible and a deputy for an opportunity.	P

## Project management and service functions

### Project planning

Project overview	Display an overview of all data belonging to a project such as appointments, tasks, documents and caller logs.	P
Status overview	Display an overview of pending, ongoing and critical projects or milestones and an indication of overall status based on a traffic light code (green, yellow, red).	P
Delegate	Define a person responsible for a task.	P
Completion status	Display task completion status as a progress bar or a percentage value.	P
Report and report views	Display aggregated key performance indicators.	A

# CAS Software AG: an SME for SMEs

## Your partner for long-term collaboration

CAS Software AG was founded in 1986 in Karlsruhe and is still managed by co-founder and CEO Martin Hubschneider. The 6,500 square meter CAS Campus offers space for ideas and room for further growth. Over 400 people on the Campus and at the CAS App Center develop innovative xRM/CRM solutions for successful businesses from a variety of different sectors.

Find out what our team and our solutions can do for you. Become part of a community of customer centricity businesses with a great future!

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

Over 20,000 companies, including global market leaders such as Daimler, Airbus, Fraunhofer, OKI, employ our solutions and rely on our expertise.



What our customers say.  
[www.cas-crm.com/references](http://www.cas-crm.com/references)

## CAS Software AG

- Owner-managed business
- Over 400,000 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: 24% of turnover
- Multi-award winning solutions



» CAS Software is an agile and dynamic company, focused closely on innovation. «

Prof. Dr. August-Wilhelm Scheer  
Top100 Jury Member and BITKOM  
Executive Board Member



# Contact



CAS Software AG  
CAS-Weg 1 - 5  
76131 Karlsruhe, Germany  
Phone: +49 721 9638-188  
E-mail: [info@cas-crm.com](mailto:info@cas-crm.com)  
[www.cas-crm.com](http://www.cas-crm.com)

