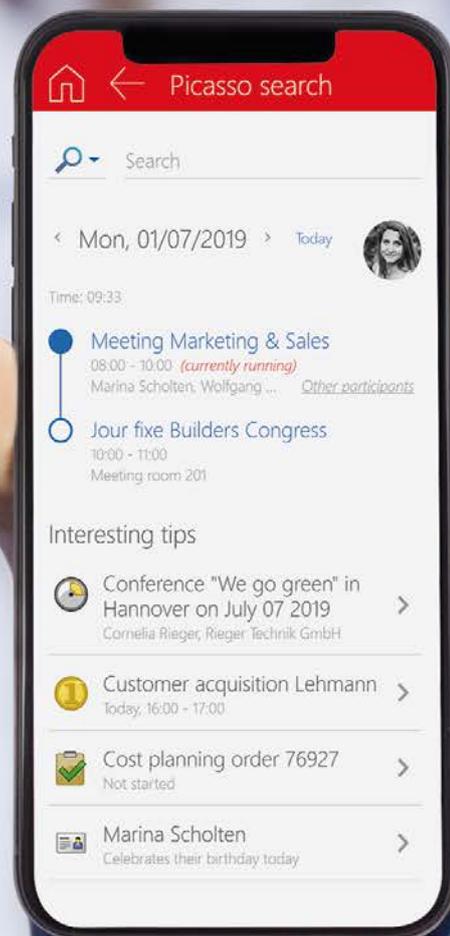




Impress your customers

Smart. Adaptive. Always ahead.



CAS <sup>globe icon</sup> genesisWorld

Highlights of the new version





# CAS genesisWorld x11

## A real must-have

We are delighted to be presenting the x11 version of our CAS genesisWorld CRM solution to you today.

Discover the highlights in detail on the following pages. Flexibly customizable CRM and xRM offer exciting possibilities for you to enhance the quality of your relationships in day-to-day business practice. From communication with marketing prospects and direct sales contacts, to one-on-one customer meetings, and transparent resource planning for your team.

The new CAS genesisWorld version x11 is a real must-have. It will help you make emotional connections with people in an unprecedented way. Create customer experiences with an impact in line with the company's mission of Customer Centricity. Enjoy customization options using the App Designer, personalized dashboards, easy view configuration, and the practical SmartSearch feature. Based on Artificial Intelligence algorithms, the Picasso Search helps you to find exactly what you are looking for. CAS genesisWorld enables you to plan ahead even more effectively and to focus on your customers at all times.

And the best part is that you can easily take your CRM with you everywhere, using CAS genesisWorld as your own personal assistant. Work while on the go both online and offline, on a smartphone, tablet or laptop.

This year CAS genesisWorld will reliably help you to implement the EU General Data Protection Regulation (GDPR), and so enhance data protection in your business.

Whether entry-level or professional: boost your performance with the latest version of CAS genesisWorld. Get inspired to improve your day-to-day relationship management, discover new possibilities and opportunities to impress your customers, and enter the world of connected and emotional relationships.

◀ CAS genesisWorld x11 will expand the potential applications of Customer Centricity in your company.

# It's easy to get started

Every customer relationship starts with an initial contact. Sound information resources and communication capabilities are key when it comes to getting to know each other, and in ensuring the success of your marketing. CAS genesisWorld x11 provides you with features that will enable you to establish and continually build lasting and personalized relationships.

## Extensive filter options

Quickly and easily select target groups tailored exactly to your needs. You can now create distribution lists to target the people you need to reach with circulars or e-mail campaigns. The step-by-step wizard, featuring integrated e-mail campaign templates, makes sending your newsletter child's play.

## Always keep your own view

Views can be personalized and saved according to your particular application scenarios, allowing you to configure views specifically for use in the web, desktop or mobile version.

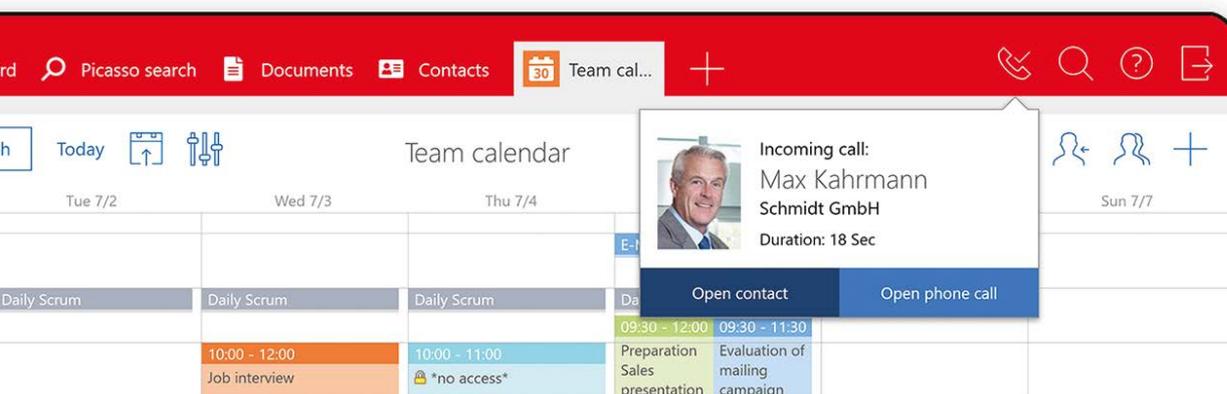
## Always look good

Whether by e-mail, on the phone or in person: whichever channel you use to communicate with your customers, with CAS genesisWorld you'll always look good.

It's not just first impressions that count, but also the personal touch. CAS genesisWorld x11 shows you immediately who is calling and, for example, with CAS genesisWorld Web you can now also prepare optimally for upcoming phone calls, by viewing the customer's dossier or project dossier before and during the call.

The telephony function is also active when the browser is closed. Missed calls are automatically logged in the background. So no call is lost. And you can now also make phone calls via the interface to Microsoft Skype for Business.

- ▼ Incoming calls are indicated in a small notification box. The caller's contact details can be opened while on a call.



## Marketing automation for customer-centric dialog

Next to the ongoing development of CAS genesisWorld Web, the Desktop version also delivers a number of new features. It now opens up new possibilities for e-mail communication with customers and prospects.

The additional integration of Evalanche from our cooperation partner SC-Networks provides you with professional marketing automation and efficient lead management.

## Enhance your polling with Survey

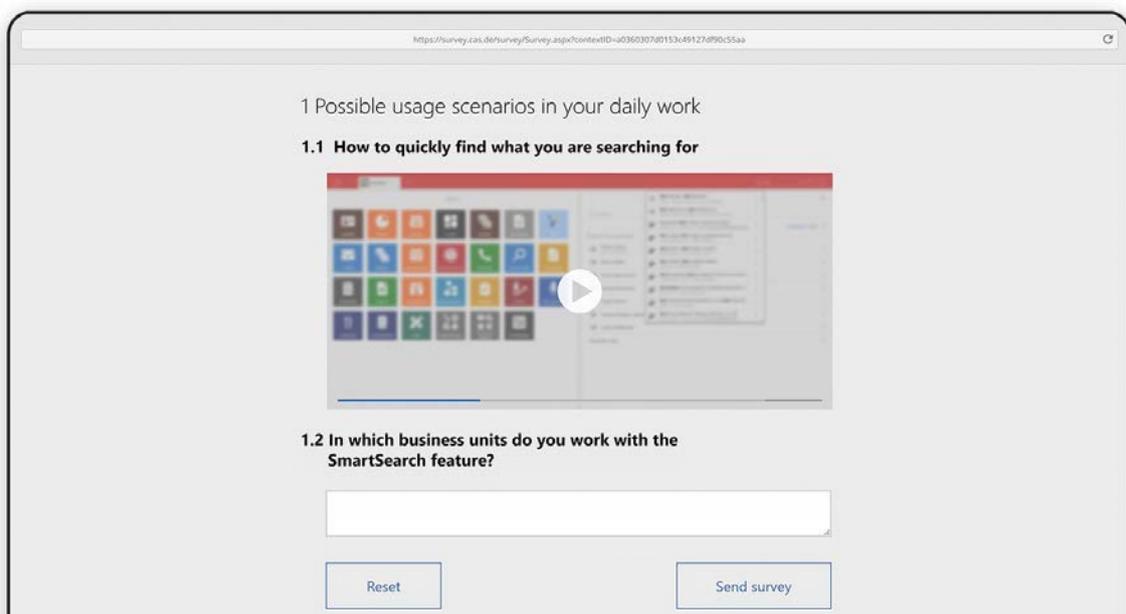
With the Survey module you can now do more than just conduct conventional polling campaigns. It enables you to embed web content such as videos or photos in your surveys. The graphical elements serve as illustrations, acting as decision-making aids but also as training features. These visual aids grab respondents' attention, and encourage greater responsiveness.

## Even more support with the CAS genesisWorld Sidebar

The CAS genesisWorld Sidebar in Microsoft Outlook gives you immediate access to key CRM information, such as the customer's dossier, when answering your e-mails for example. Version x11 provides an array of new practical features. For example, recipients can be added as e-mail recipients directly via the Outlook Sidebar, and other data records can be added as attachments.

With the new version, users of Microsoft Outlook Web and the Outlook App can now archive e-mails on an ad hoc basis, even while out and about.

- ▼ Make your surveys appealing by easily integrating videos or other media content



# Identify potential

Knowing the real needs of your customers is key to successful selling. CAS genesisWorld makes you see how the relationship with your customer has grown, and how you can employ Customer Centricity to create emotionally engaged fans of your business.

## Make success visible

The graphical progress indicator provides an at-a-glance status view of an ongoing sales prospect. The constant overview is a strong motivator in achieving goals together.

The progress indicator can also be used to visualize any other process, such as the customer life cycle, or event planning.

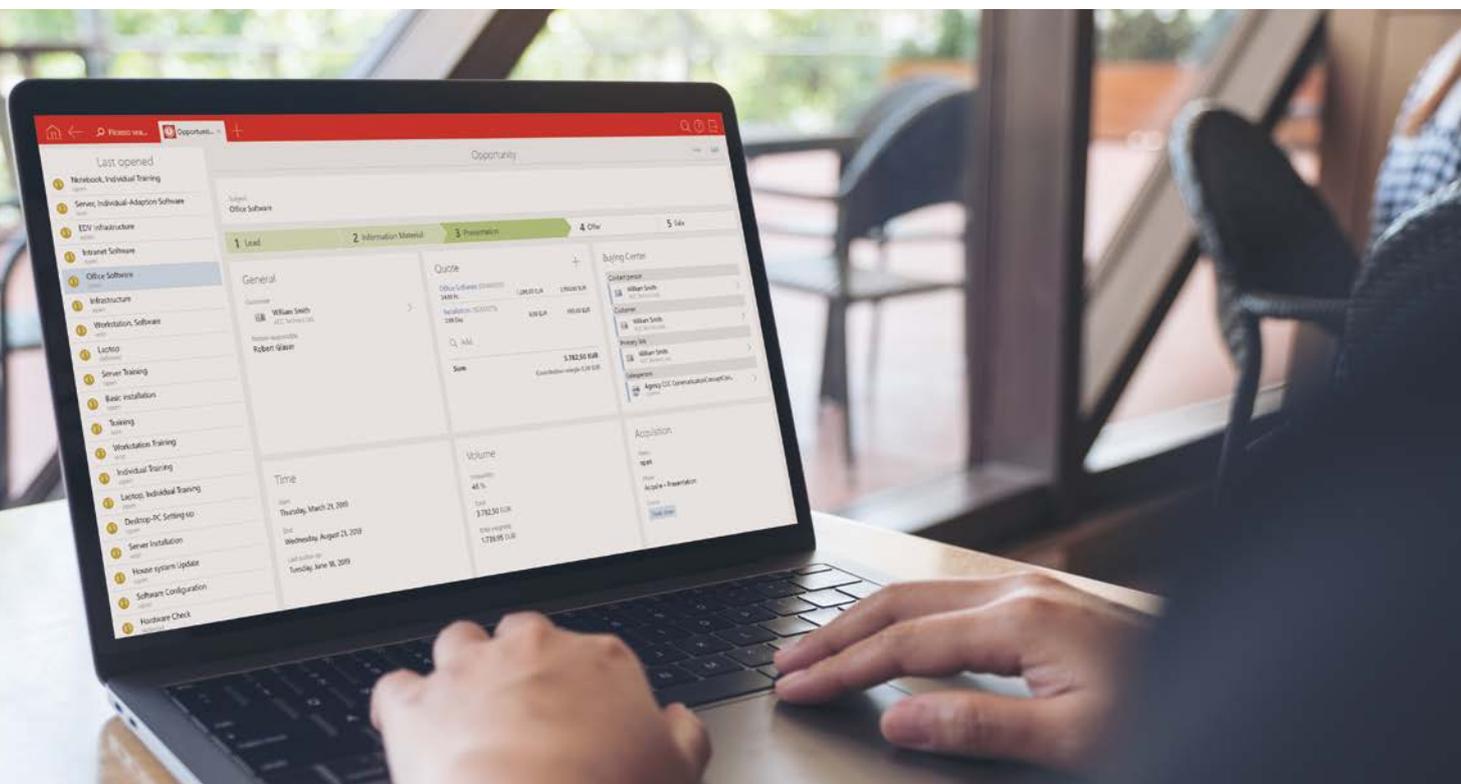
## Picasso Search: Always a step ahead

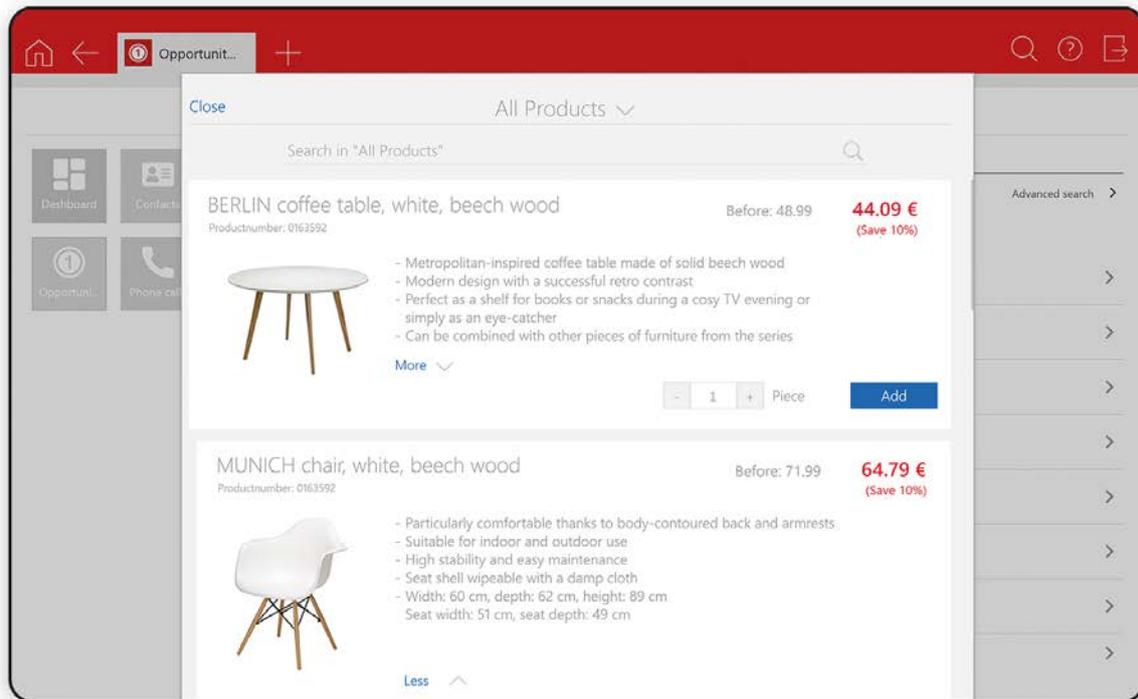
The new version x11 also includes the Picasso Search. Based on Artificial Intelligence algorithms, it will help you to prepare and organize upcoming events. Relevant information is delivered to users on a personalized basis.

And now Picasso Search's MyDay widget can be set up as the home screen on your smartphone, meaning your scheduled appointments and other diary items are always in view. The information associated with each scheduled appointment means contact details, documents or the detailed diary can be viewed with a single touch.

With Picasso search and other smart assistants in CAS genesisWorld, you can identify your customers' needs quickly, and create exciting and inspiring customer experiences. The CAS Future Labs unit is continuously driving the development of smart assistants.

- ▼ The progress indicator provides transparency:  
The phasing can be adapted to your needs





▲ The product catalog shows your portfolio and engages the customer directly.

## At eye level with the customer

The new product catalog in our mobile apps places you at eye level with your customers when engaging in dialog with them. Excel spreadsheets or analog tools are often mood-killers. By contrast, the tablet-based integrated product catalog enables you to work with your customers to select products and services, and so create a completely new consulting experience that is transparent and user-friendly.

The advantage: It's easy to add items to a quote drafted on the mobile device. The internal sales admin staff can then use the data to quickly prepare an official quote and send it for confirmation. The effect: The customer receives the quote - by e-mail for example - even before the salesperson has left. Or he approves the order on the spot by signing the quote electronically on the salesperson's tablet.

## Top-class reporting

Views and dashboards provide all the key information at a glance for specific user groups, such as management, sales or service functions. They offer a quick starting point enabling immediate decision-making.

Dashboards and views can be personalized even more to provide a sound information resource based on enhanced reporting and evaluation. Lists, charts, RSS feeds and information from external websites can be integrated using the App Designer.

# Freedom of choice with CAS CRM

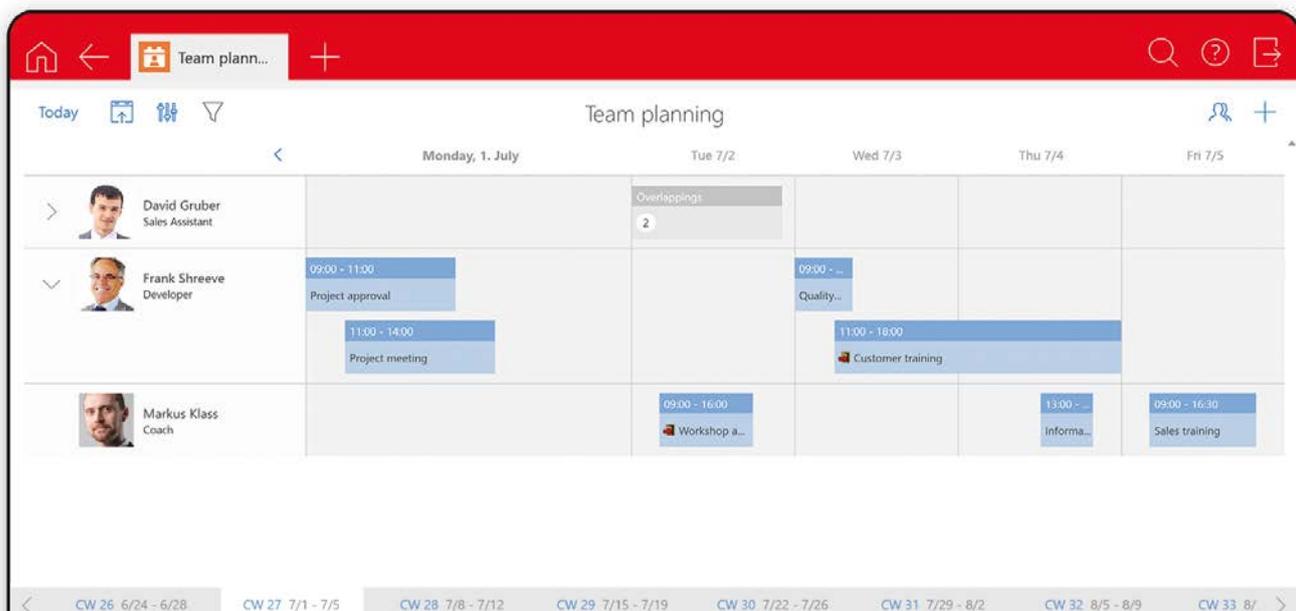
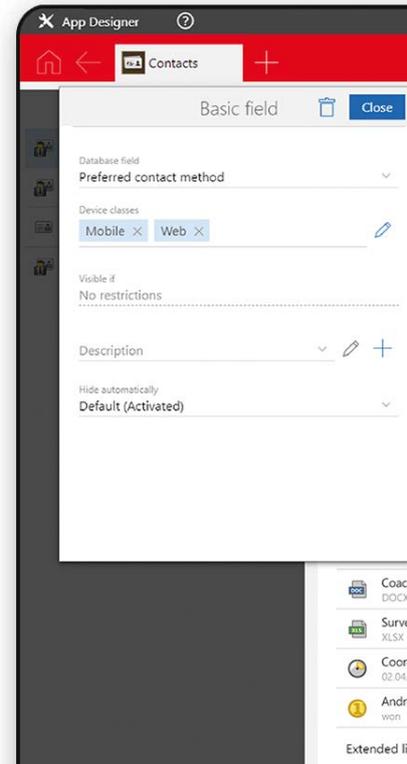
Whether on a smartphone, tablet or the Web: CAS genesisWorld will help and support you and adapt to your needs. When you're on the road, you also can access key customer information offline on your mobile device.

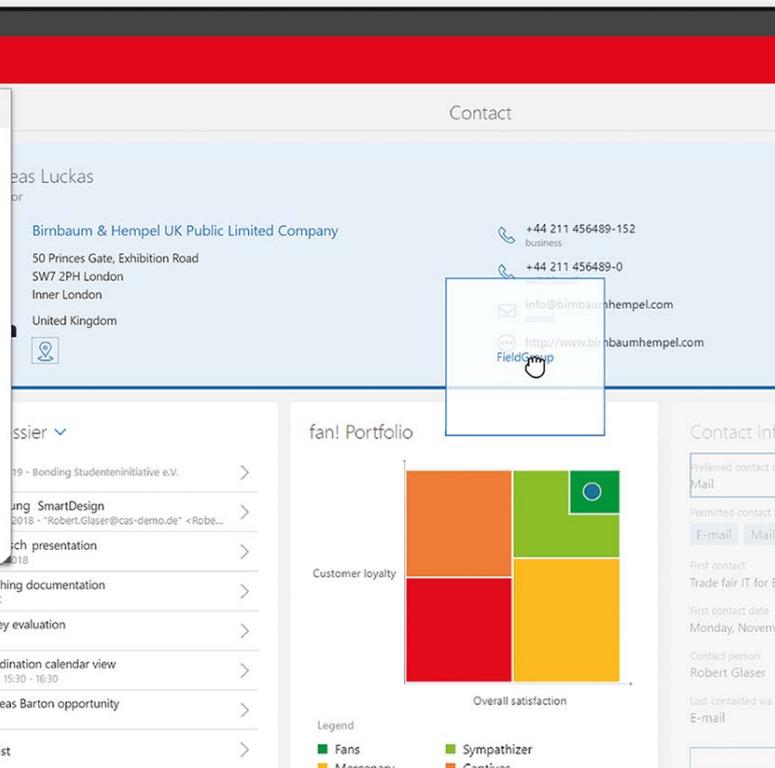
## Team planning to impress

Plan centrally by including all the departments involved, for example, for site visits by your service technicians or field sales team, taking into account their individual workload capacities.

The benefits for day-to-day practice: All service technicians see their own personal appointments schedule. Refer-backs or misunderstandings, as occur in analog systems, are a thing of the past.

- ▼ The new team planning function enables you to coordinate schedules professionally and in a team-oriented way.





▲ Use the App Designer interface to create custom styles for your business.

## Individual, smart, flexible and mobile

Winner of the German Design Award, the integrated SmartDesign® technology impresses with its state-of-the-art user interface and uniform look and feel.

The app-in-app concept offers the facility for wide-ranging enhancement. Apps can be custom-grouped using drag-and-drop in order to support company-specific workflows.

The App Designer gives you more styling options than ever before, meaning CAS genesisWorld Web can be adapted to your requirements even more flexibly, and without needing any programming skills. In this way, you can create custom user interfaces tailored to your business. Information can be distributed across tabs to provide greater clarity for example.

## Digital sovereignty: Data protection is the priority!

With CAS genesisWorld you are in control of your data. The new version helps you comply with statutory retention periods. You can also delete personal data, such as in compliance with regulatory requirements.

When a user account is deactivated, all the user's personal data can be deleted if so required. That means all scheduled appointments, personal details, incoming e-mails, social media accounts, filters, and custom views.

Other data can also be comprehensively removed from the system after a certain period of time. The recycle bin is automatically emptied. You can delete data based on rules and you can delete data manually depending on the situation.

## Other highlights:

## That's by no means all

The new version x11 features more additional highlights: With OpenSync, data can be synchronized bidirectionally with any third-party systems, such as ERP solutions. That offers full flexibility for integration into your existing system landscape.

### New mobile features

CAS genesisWorld apps can now be made available to corporate users via Mobile Device Management (MDM). Centralized administration and preconfigured settings make the mobile apps easier to use.

Other highlights include mobile recording of times and expense receipts. An especially useful feature is the facility to upload images from the gallery, in order to document a project for example.

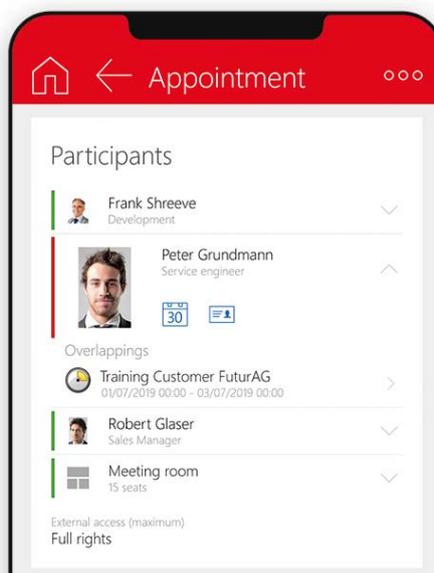
### Great practicality

A document can be shared directly from CAS genesisWorld Web by e-mail. The document's name is included directly in the subject line.

### Easy appointment scheduling

The new version offers high levels of user-friendliness for appointment scheduling when on the road. Overlaps are automatically checked if they occur. When you add a participant to a scheduled meeting, a color code indicates whether the person concerned is already booked up at the planned time. Smart entry of the right location in the schedule aids quick orientation, such as in quick-view mode or in Picasso search.

- ▼ Appointments can be scheduled on mobile devices, complete with warnings of any overlaps.





For more details on these and many other highlights of CAS genesisWorld x11 visit [www.cas-crm.com](http://www.cas-crm.com)

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