



Your intelligent CRM + AIA

Efficient. Transparent. Connected.

CAS genesisWorld

Highlights of the new version

CAS
SOFTWARE


CAS genesisWorld x13

CRM + AIA for unique customer relationships

No matter the task or location – with the new CAS genesisWorld version x13, your digital office is always wherever you are. The complete CRM/XRM solution for SMEs offers you ideal support for working in the new normal, quick access to all important customer information, and combines all functions you could wish for in one CRM/XRM solution: digital processes, automated workflows, unique proximity to your customers, as well as effortless teamwork under any circumstances.

Each workspace is unique: you can look forward to maximum individuality and flexibility. Enjoy the freedom to customize your CRM/XRM with custom views that meet your needs.

Implement your business processes, easier than you think! Many new functions help you to optimize teamwork, for example, the board view in the style of a virtual kanban overview or the SmartActions. With the efficient workflows that enable cooperation between sales, marketing, and service departments, you can excite your customers with a distinctive Customer Centricity approach.

Furthermore, **Augmented Intelligence Assistants – AIA in short** – provide helpful support for your daily work, for example, the refined Picasso search.

CAS genesisWorld x13 represents both digital freedom and sovereignty, as well as maximum data security. With the continuous development of the CRM/XRM solution in compliance with data protection regulations, the „fair.digital“ quality seal certification, and the „Software Made & Hosted in Germany“ award, we ensure that any customer data is handled legally watertight and protect you and your customers from data abuse.

Let the new version x13 of CAS genesisWorld delight you: with the networked CRM/XRM solution, you are best prepared for the new digital workspace and the successful future of your company.





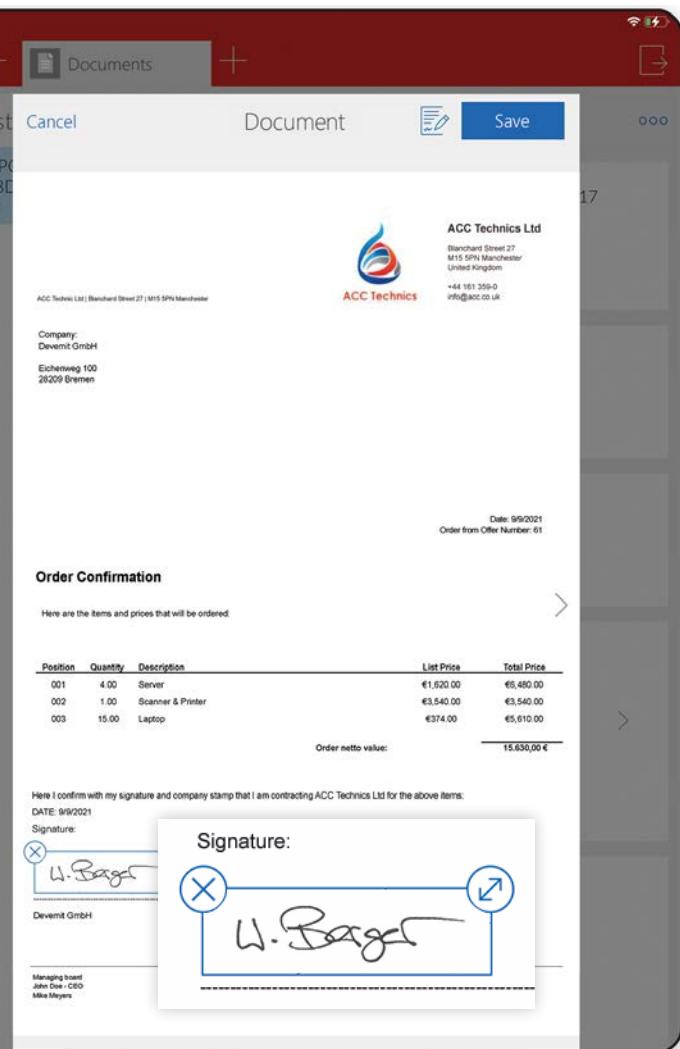
Experience digital freedom every day

Use the fundamental strengths of your complete, networked CRM/XRM solution and experience digital freedom every day with CAS genesisWorld x13. The information concerning your daily routines, for example, data on your customer, projects, opportunities, or tasks is available at one central location. Thus, you ensure efficient and consistent teamwork on all devices – anyplace and anytime.

AIA: Smart wizards at your service

A variety of Augmented Intelligence Assistants (AIA) already support you in your daily work. The new version includes even more of those smart assistants. The e-mail campaign assistant guides you through the entire process surrounding e-mail merges – from the creation of your marketing list to the e-mail design to sending it out.

The sales opportunity wizard accelerates your lead management and enables a higher completion rate. With the AI-based Picasso search, you can access another smart wizard that will provide you with the desired information even faster than before as it utilizes your previous search behavior in the CRM/XRM system.

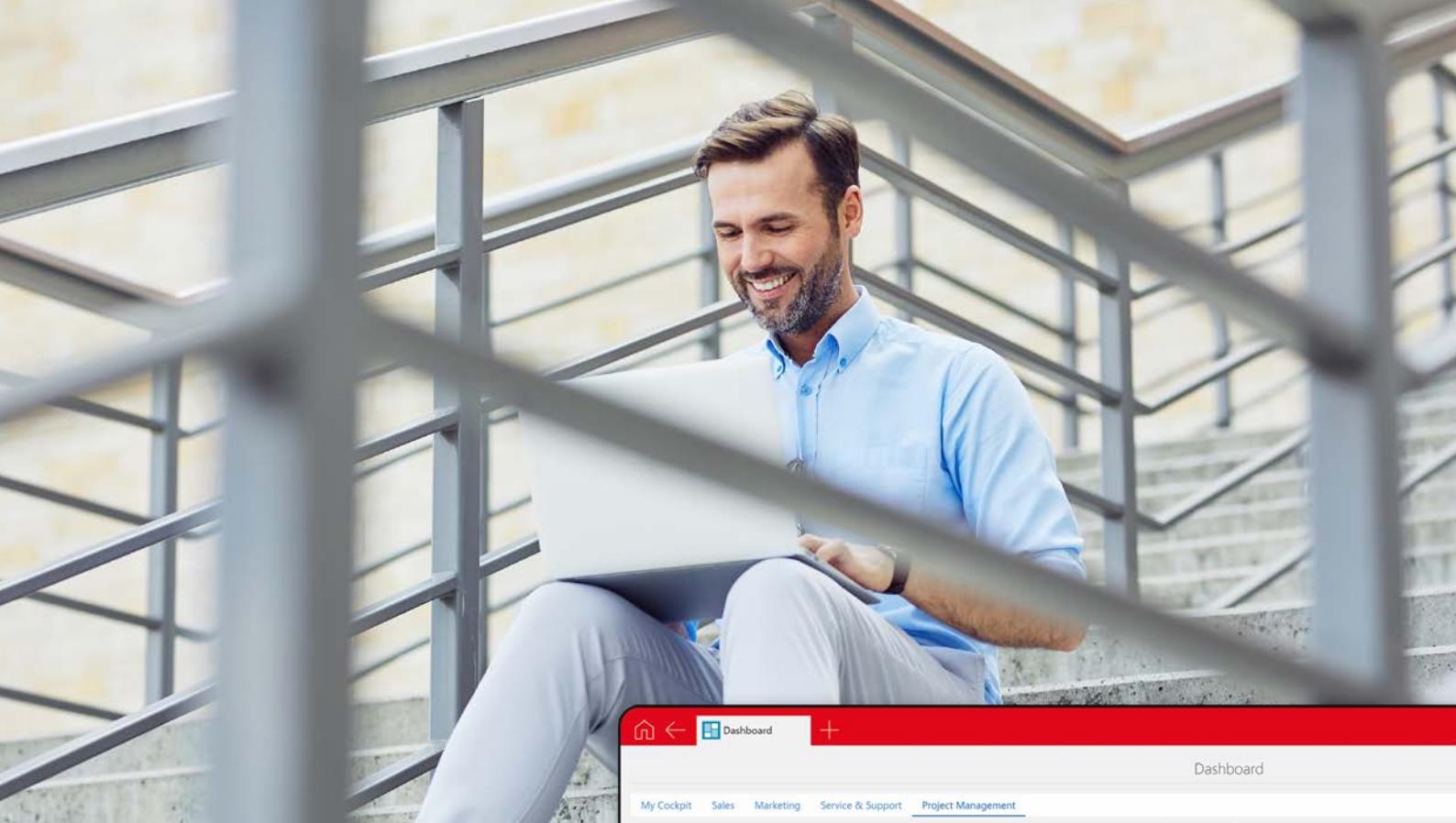


- With the CAS genesisWorld Mobile app, you have the option of having any documents signed digitally by the customer quickly and easily, even on the go.

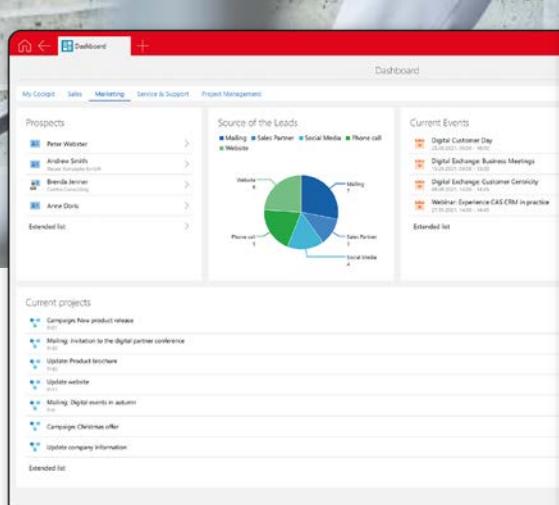
Best prepared both online and offline

Having all data available while on the go? No problem. With the CAS genesisWorld Mobile App, you are even more flexible while en route. The „Offline dossier“ function, enables you to access all important customer data without a connection to the internet while on the go. You decide which information you want to make available offline to provide your customers with the best possible service.

You need the customer's signature for a service job or an order? Printing, signing, and then scanning documents was yesterday! Now, you can let customers sign PDF documents in the CAS genesisWorld Mobile App directly on the touchscreen of any mobile device. This not only saves you time, but also ensures that all relevant customer information remains where it belongs: in your CRM/XRM .

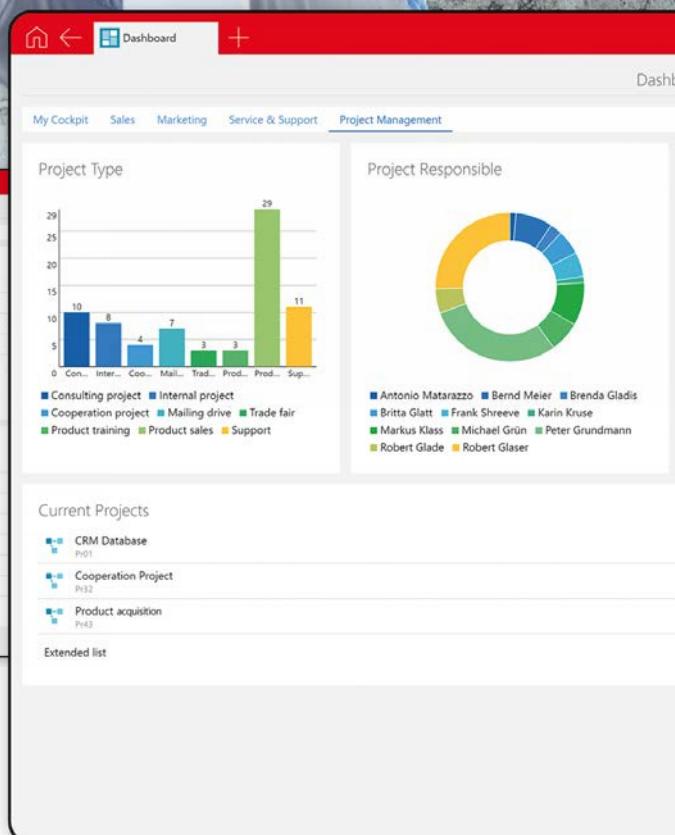


The image shows a man with a beard and short hair, wearing a light blue button-down shirt and grey trousers, sitting on a concrete staircase. He is looking down at a tablet device he is holding in his lap. The tablet screen displays a custom dashboard interface with various data visualizations and lists. The dashboard includes sections for Prospects, Current projects, and Project Management. It features charts like 'Project Type' (a bar chart with values 10, 8, 4, 7, 3, 3, 29, 11) and 'Project Responsible' (a donut chart), as well as a 'Project Status' summary with three colored boxes: yellow (Status Yellow, value 3), green (Status Green, value 47), and red (Status 1). The overall theme is professional and modern.



This screenshot shows a custom dashboard with the following sections:

- Prospects:** A list of contacts including Peter Webster, Andrew Smith, Brenda Jevon, and Anne Doris, with an "Extended list" link.
- Source of the Leads:** A pie chart showing the distribution of leads by source: Mailing (blue), Sales Partner (green), Social Media (yellow), Phone call (orange), and Website (purple).
- Current Events:** A list of events including Digital Customer Day, Digital Exchange Business Meetings, Digital Exchange Customer Gettogether, and Webinar - Experience CAS CRM in practice.
- Extended list:** A link to view more extended lists.



This screenshot shows a custom dashboard with the following sections:

- Project Type:** A bar chart showing the number of projects by type: Consulting project (10), Cooperation project (8), Internal project (4), Mailing drive (7), Product training (3), Product sales (3), Trade fair (29), and Support (11).
- Project Responsible:** A donut chart showing the distribution of projects across different responsible individuals.
- Project Status:** A summary of project status with three colored boxes: Status Yellow (3), Status Green (47), and Status 1.
- Current Projects:** A list of ongoing projects including CRM Database, Cooperation Project, and Product acquisition.
- Extended list:** A link to view more extended lists.

► Whether sales, marketing or service – with CAS genesisWorld x13 you can design dashboard individually according to your needs.

Limitless customization options for more individuality

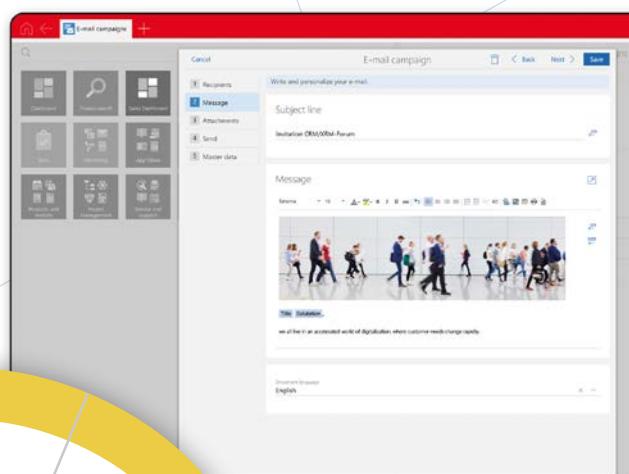
Adapt your work environment flexibly to your needs and, thus, ensure more efficiency for your personal field of work. From sales to marketing or service – with CAS genesisWorld x13, it is even easier to create custom apps or dashboards and make them available to the

relevant user groups. Just place the most important views, such as „My top customers“ or „Current projects“, in your personal app starter and gain precious time to strengthen customer relationships with CAS genesisWorld x13.

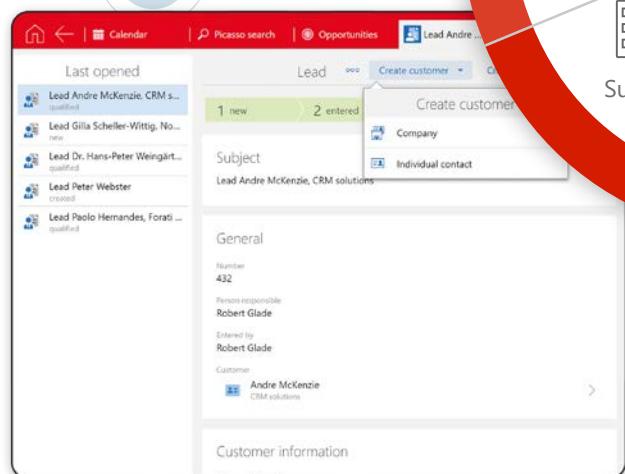
Perfectly happy

Create an exciting Customer Journey

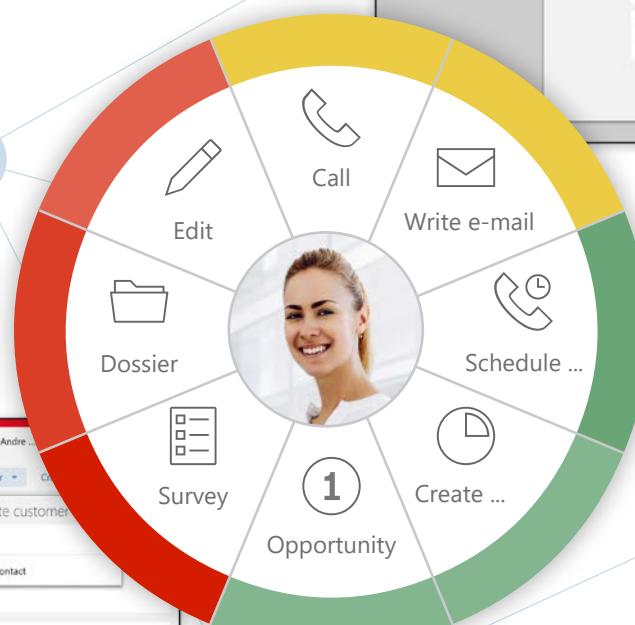
Organize your customer management to consistently meet the requirements and wishes of new and existing customers and let them become your fans. Contact prospects at exactly the right time and remain in contact by exciting them with distinctive proximity and unique expertise – even in the digital age.



- For a personal customer dialog, compose and individualize e-mails quickly and easily using the e-mail campaign wizard.

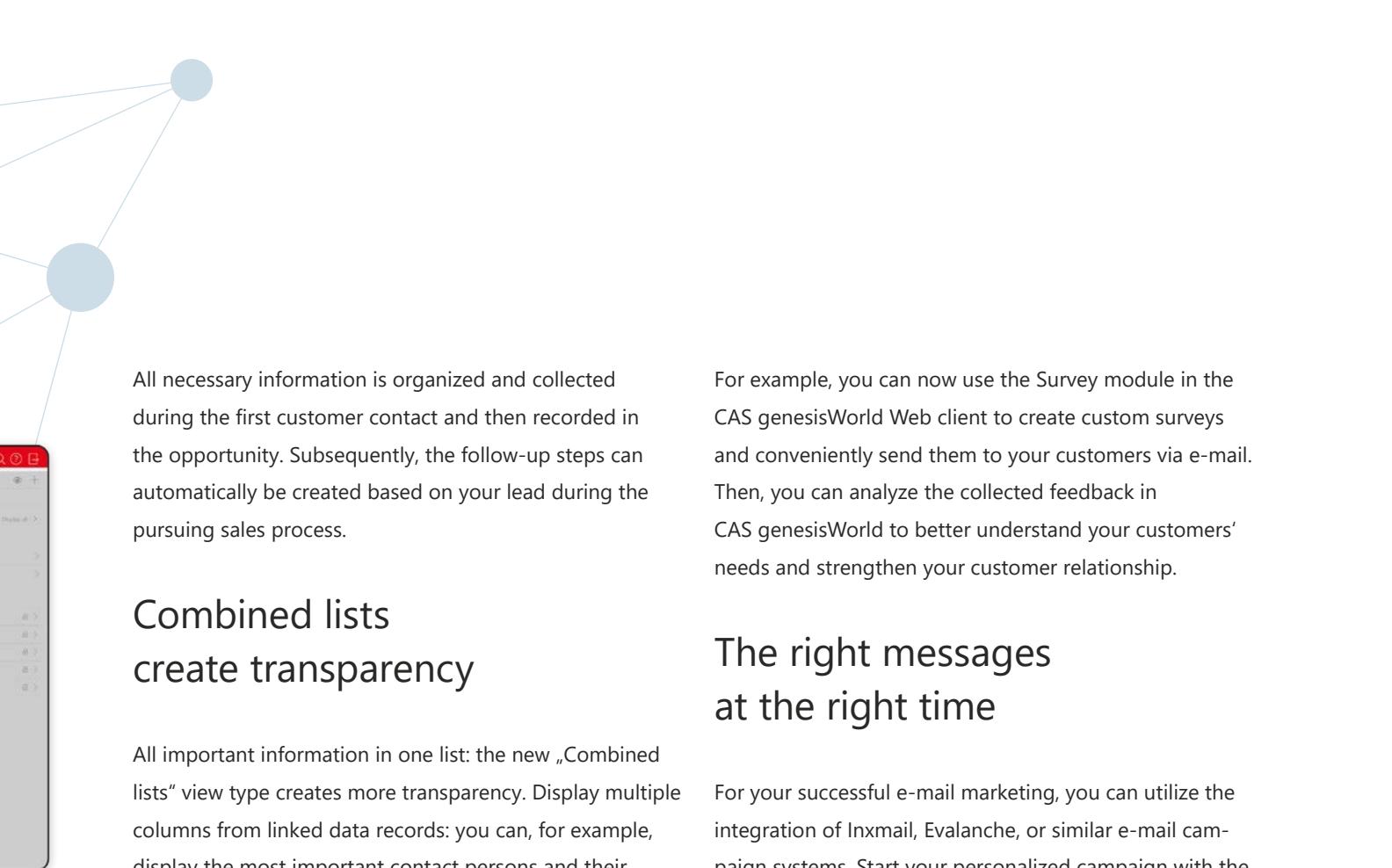


- Using the lead app, you can record all relevant information during your sales call and later use it in opportunities.



Easily gather and create digital sales leads in record time

Use your time during the first customer contact for what actually matters: the personal connection. Enjoy the valuable support provided for lead creation – as of now available in the Web and mobile clients. Using the CAS CardScanner which is now integrated into the contact wizard, you create new leads from contacts in no time. Thus, you can quickly create qualified opportunities.



All necessary information is organized and collected during the first customer contact and then recorded in the opportunity. Subsequently, the follow-up steps can automatically be created based on your lead during the pursuing sales process.

Combined lists create transparency

All important information in one list: the new „Combined lists“ view type creates more transparency. Display multiple columns from linked data records: you can, for example, display the most important contact persons and their position in the opportunities app.

SmartActions for quick actions

CAS genesisWorld x13 efficiently supports you in quickly and easily triggering the next action with just a few clicks. Use the SmartActions to save time and plan your follow-up actions by, for example, automatically creating appointments and phone calls, saving repeat actions, or executing them ad hoc. You can both create new data records and change field values or access rights.

The ideal CRM companion for your customer communication

With CAS genesisWorld x13, you can establish an even more personal and individual dialogue with your customers. For this purpose, a wide range of communication and exchange options are available to you.

For example, you can now use the Survey module in the CAS genesisWorld Web client to create custom surveys and conveniently send them to your customers via e-mail. Then, you can analyze the collected feedback in CAS genesisWorld to better understand your customers' needs and strengthen your customer relationship.

The right messages at the right time

For your successful e-mail marketing, you can utilize the integration of Inxmail, Avalanche, or similar e-mail campaign systems. Start your personalized campaign with the newsletter/marketing tool: transmit qualified addresses from your CRM/XRM to Avalanche or Inxmail.

You can easily synchronize profiles from the e-mail marketing tools to CAS genesisWorld – including a matching logic with inventory and profile data of an address – and thus start your successful customer communication. Your benefit: you no longer need to manage data in two systems, opt-in data are adopted, and duplicates are prevented.

To permanently optimize your customer communication, the success monitoring functions provide valuable insights: display and analyze statistical data on your campaign in detail, for example, the click behavior in CAS genesisWorld.



Make teamwork fascinatingly easy

Whether you're in the office, on the go, or at home: with CAS genesisWorld x13, your teamwork becomes even more efficient, focused, and customer-oriented in tasks, opportunities, and projects. The new features support you by making teamwork across the distance easier and enabling you to fully utilize the benefits of central data in an integrated CRM/XRM system.

Integrated board view for transparent workflows

Laborious task management within teams is a thing of the past: with the integrated board view, you create the ideal framework for collaborative teamwork in the form of a kanban board. With its graphical visualization of processes, you establish full transparency and can better trace the status of tasks, jobs, and other activities. Thus, task management becomes easier, bottlenecks are prevented, you

can identify dependencies as well as progress, and finally accelerate your processes. As the workload of every single employee becomes visible, the team can better coordinate and establish an agile teamwork structure. Organize even more efficient meetings by visualizing the project progress for all involved. With smoother processes as well as continuous customizations and optimizations, you can sustainably improve your work results. Thereby, the integrated board view leads to a noticeable increase in efficiency and more joy in teamwork.

Planning online meetings in Microsoft Teams

Video conferences are currently one of the most common meeting formats for communicating with each other, making decisions, or working together on projects. To ease teamwork across the spatial distance, you can plan and initiate online meetings via Microsoft Teams directly in CAS genesisWorld.

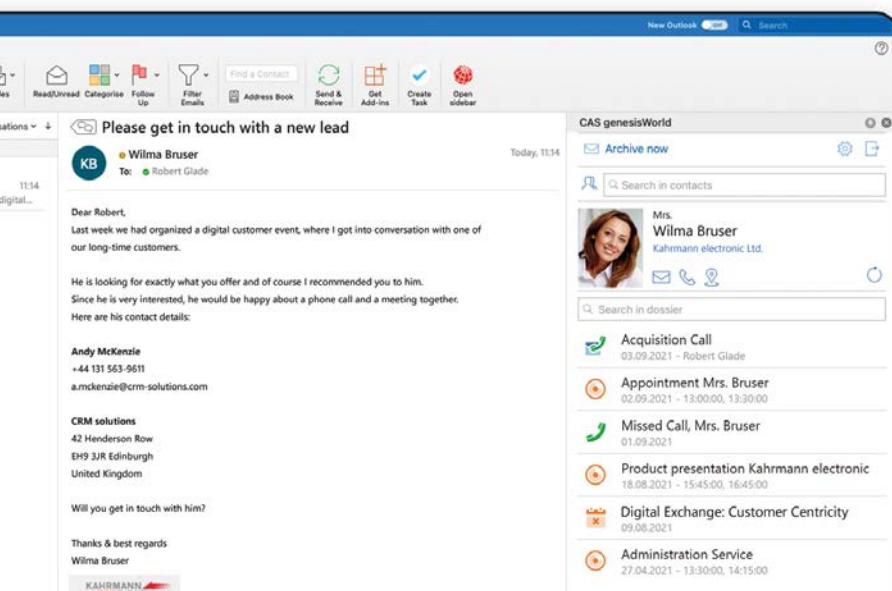
The screenshot shows a digital board titled 'Current projects' with four columns: 'Not started', 'In progress', 'Completed', and 'Deferred'. Each column has a count of items: 5, 5, 7, and 3 respectively. Below the counts are cards representing individual tasks, each with a title, status, and a small profile picture of a person assigned to it. The cards are color-coded by category.

Category	Count	Task Examples
Not started	5	Preparation for CRM training, Evaluation of the mailing campaign fit, Update product brochure, Consulting Future Ltd., Follow-up with Mr. Peter...
In progress	5	Jour fixe: new release, Mailing campaign fit for f..., Create name badges, In progress...
Completed	7	Webinar training: Custom..., Analysis of target groups..., Evaluation of the email c..., Sending brochures to Mr..., Completed...
Deferred	3	Giveaway research, Customer talk with Mr. R..., Software update...

- On the current board view, all current tasks, jobs, and activities are visualized for the team members.

New plug-in for Microsoft 365 Office Accounts – now also for your Mac

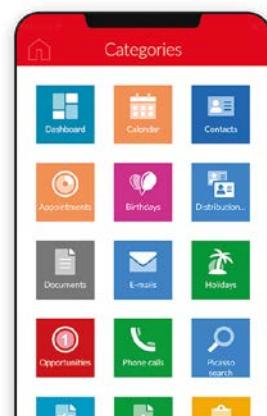
With your Microsoft 365 Office account, you can now get the CAS genesisWorld add-in both for Microsoft Windows and your Mac. For example, you can use the CAS genesisWorld Sidebar in Outlook: with this useful sidebar, you can access the customer dossier at any time while you check your e-mails. With just one click, you can both send e-mails via Microsoft Outlook and archive them in the respective customer dossier in CAS genesisWorld.



Custom calendar views

From customer appointments to regularly scheduled meetings or vacation planning within your teams: create custom calendar views for a quick overview. Save your most important calendar views including the participants and view format (day, week, or month view) to quickly access them at any time.

◀ The sidebar in Microsoft Outlook enables quick access to all important information from the customer dossier in CAS genesisWorld.



◀ The newly designed app icons are modern, smart and intuitive for your daily business on all end devices.

Data protection – no ifs and buts

Particularly in times of mobile and digital offices, trustworthy software is the basic prerequisite for any company and their employees to achieve legally watertight processes in compliance with data protection regulations. This applies especially if you want to comply with the EU-GDPR.

Data protection is a central component of the CRM/XRM solution, especially if your company deploys a combination of desktop, web, and mobile app clients online or offline. Certified with the new „fair.digital“ quality seal and

honored with the „Software Made & Hosted in Germany“ award, CAS genesisWorld represents data security – no ifs and buts. The sophisticated rights system protects – internally and externally – from unauthorized access to documents and other sensitive customer data. While en route, the integrated standard of the AppConfig Community provides even more protection in the mobile app. Using the integrated standard, you can deploy the mobile app via supported Mobile Device Management (MDM) systems.

Even more highlights

Curious about the other functions of CAS genesisWorld x13? You can look forward to further highlights and an even higher usability thanks to numerous drag and drop functions, easy-to-use telephony protocols, and much more.

We have implemented performance improvements for deep links, when accessing CRM data records from external systems, for example, an e-mail client, the Microsoft Outlook Add-In, or via the caller identification function. Furthermore, the widgets for your home screen have been extended and the document size for the web client has been increased.

New look & feel: modern, smart, intuitive

You can look forward to a fresh user interface with the newly designed app icons. Thanks to SmartDesign technology, you can find the optimized design consistently on all devices.

CAS SmartSearch

The popular CAS SmartSearch gains extended settings, i.a. for the full-text search. Customizable for your company, administrators can change the displayed fields in the search list for documents and addresses.

Mobile sync: always up-to-date

Do you always want to directly and conveniently access the most important data on your tablet or smartphone? Thanks to Mobile sync, your customer data is automatically synchronized with your mobile device from the central data base – including all benefits provided by the device's native operating system.

New in OpenSync

The self-designed CAS framework OpenSync enables the seamless integration of any third-party solution into your individual system landscape. With CAS genesisWorld x13, you can better dissolve data silos and merge information from different systems into one consistent flow of information. Thereby, you can, for example, make data from an existing ERP solution available.



You can find these and other highlights of CAS genesisWorld x13 at:
www.cas-crm.com.

**Let's start into your successful CRM + AIA future:
for strong customer relationships, healthy growth,
and sustainable company success.**

The screenshot shows the CAS genesisWorld x13 software interface. On the left, there is a navigation bar with various icons for 'Activities', 'Contacts', 'Birthdays', 'Calendar', 'Events', 'Holidays', 'Reports', and 'Service & support'. The main area is titled 'SmartSearch' and contains a search bar with placeholder text 'Search...'. Below the search bar is a section titled 'Last opened' which lists recent contacts: Paolo Hernandes (Foratil SL Spain), Michael Smith (Crownsteen Ltd.), Birnbaum & Hempel UK (London), Dorothea Bing (Birnbaum & Hempel UK Public), Robert Glade (CAS Software UK), Dipl. Ing. Kai Rahner (Kahrmann Elektronik GmbH), Andre McKenzie (CRM solutions), Elisabeth Crown (Westautomatics Ltd.), Jack Michaels (Westautomatics Ltd.), Diana Smith (Westautomatics Ltd.), Billy Gordon (Gordon Ltd.), Wilma Bruser (Kahrmann electronic Ltd.), Paul Midnight (Fair Trade and Business Ltd.), Westautomatics Ltd., ACC Technics Ltd., Kahrmann electronic Ltd., and Serviceupdate Kahrmann Ltd. At the top of the main window, there are several buttons: a magnifying glass icon, a question mark icon, a refresh icon, a plus sign icon, and a 'Display all' button. The overall interface is clean and modern, with a red header bar.

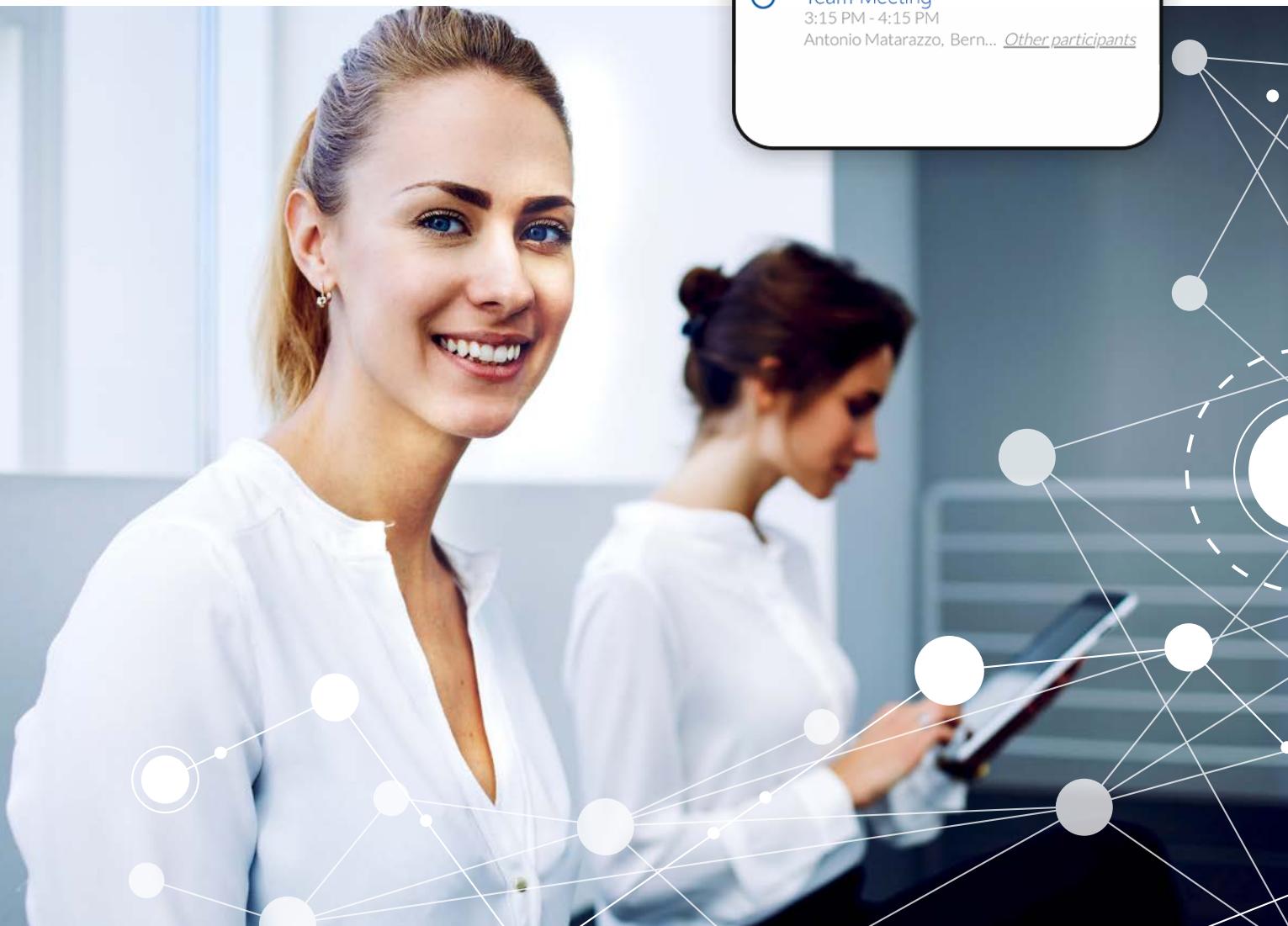
◀ The intelligent CAS SmartSearch displays your personalized search results in the search list, sorted by relevance.

The collage includes the following icons:

- Leads: A blue icon with a person and a document.
- Events: An orange icon with a calendar and an 'X'.
- Dashboard: A teal icon with a grid of four squares.
- Reports: A green icon with a bar chart.
- Distribution list: A blue icon with two people and a list.
- Opportunities: A red icon with a white circle containing the number 1.
- Picasso search: A blue icon with a magnifying glass.

Picasso search (Smartphone interface):

- Search bar: Search
- Date range: Fri, 09/03 - Today
- Profile picture: A man with glasses.
- Appointment: Appointment Mrs. Bruser, 10:30 AM - 11:00 AM, NW5 1SP London, 35... by Robert Glade. Includes a contact card for Wilma Bruser.
- Preparation: Preparation 1:30 PM - 2:00 PM by Robert Glade.
- Webinar: Webinar: Experience CAS CRM in practice 2:00 PM - 2:45 PM by Robert Glade. Includes a contact card for Webinar: Experience CAS C...
- Team Meeting: Team Meeting 3:15 PM - 4:15 PM by Antonio Matarazzo, Bern... Other participants.





A SmartCompany of CAS Software AG

CAS Software AG

CAS-Weg 1 - 5

76131 Karlsruhe

Germany

Phone: +49 721 9638-188

E-mail: info@cas-crm.com

www.cas-crm.com



100%
Service
Quality
Future

