

New functions

CAS genesisWorld x9



CAS genesisWorld

xRM and CRM for small and medium-sized enterprises



CAS genesisWorld x9

The first CRM with an integrated fan principle

With CAS genesisWorld x9, put your customers in the spotlight with numerous new functions to help you implement the WIN-WIN Customer Centricity corporate philosophy and generate genuine customer enthusiasm.

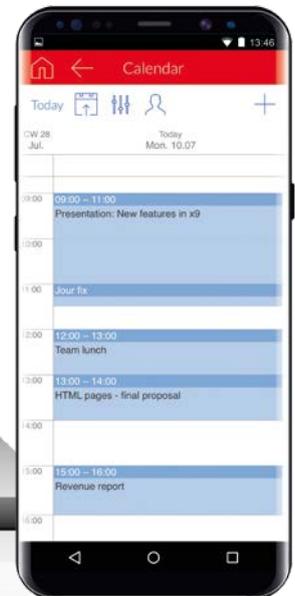
Product highlights include new customizable interfaces, expanded offline functionality, a practical Outlook add-in and expanded functionality for the SmartSearch. CAS genesisWorld x9 is the first CRM solution to implement the fan principle. It enables to determine individual

customer satisfaction and the general fan rate of a company directly as a gauge for your company's own Customer Centricity, providing a basis for marketing and sales activities to be optimized and centered around the customer.

Whether you're a beginner or a pro, discover what makes CAS genesisWorld x9 so great and find out about the most important new features in detail over the following pages.



◀ The modern look & feel combined with the radial menu provides a new perspective of all business contacts.



Modern, consistent, intuitive – the new look & feel on Web and mobile

As an all-round talent, CAS genesisWorld x9 is designed for use in a wide variety of fields – the new functions not only place the focus on the customer, but also assist and help save time with day-to-day tasks, supporting you with an intelligent information network for your daily routines – especially when you're on the move.

And with an extensive facelift, CAS genesisWorld x9 feels particularly modern and uniform in both

the Web client and the mobile app, with the new look & feel featuring optimized interfaces and smart toolbars that represent a new standard in user-friendliness. Appropriate x9 apps based on SmartDesign® for all commonly used mobile platforms ensure that CAS genesisWorld also offers a unique user experience outside of the office.

The new version enables ▶
blazing fast input of all
information in a single
user interface.



Easy to use for an optimized user experience

The CAS SmartDesign® technology, an internationally unique feature, has been further enhanced for this new version x9 of CAS genesisWorld. The standardized user interfaces adapt responsively to a variety of operating systems, platforms and mobile devices. The minimalist design language lets the user focus on the most important details. This latest version provides exceptional user friendliness and the best user experience when working with CAS genesisWorld.

Flexibly customizable

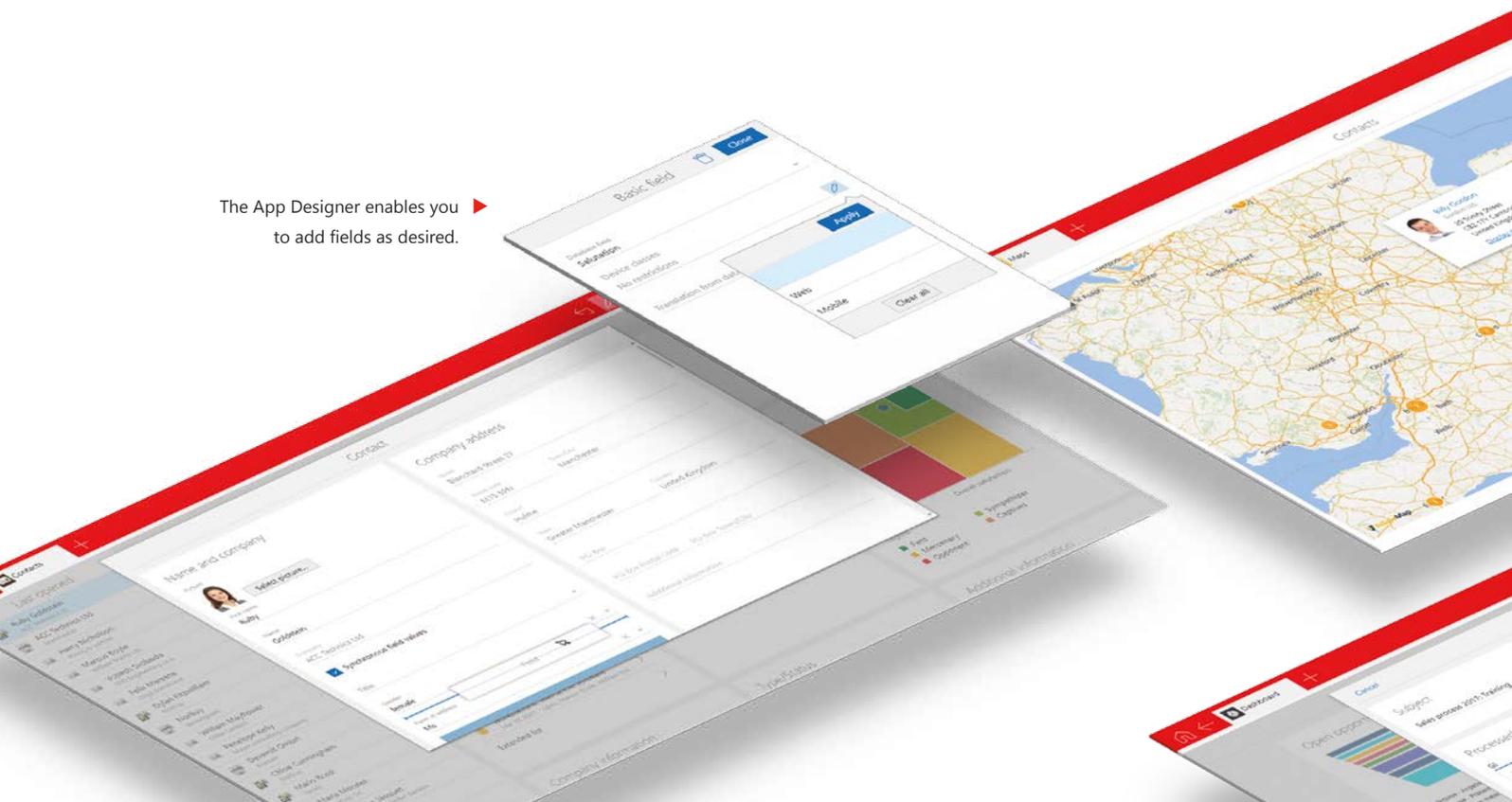
CAS genesisWorld Web and the mobile apps not only look good, but also adapt themselves flexibly to the wishes and needs of the user. The benefit of SmartDesign® technology is particularly apparent in the customization options. For

instance, customer-specific apps can be created and offered for global access for the relevant platforms – both for the Web client and in the mobile app.

With the App Designer, custom apps can be created without any programming knowledge. Use formulas to represent complex business workflows with ease, and place customer-specific information usefully in a data record. This shows how user interfaces can be optimized to your needs and fields can be added as needed – both offline and online.

Your local CAS genesisWorld partner will also help you to define app groups, customize your dashboard and integrate customized HTML apps.

The App Designer enables you to add fields as desired.



The fan principle – a barometer for the emotional loyalty of your customers

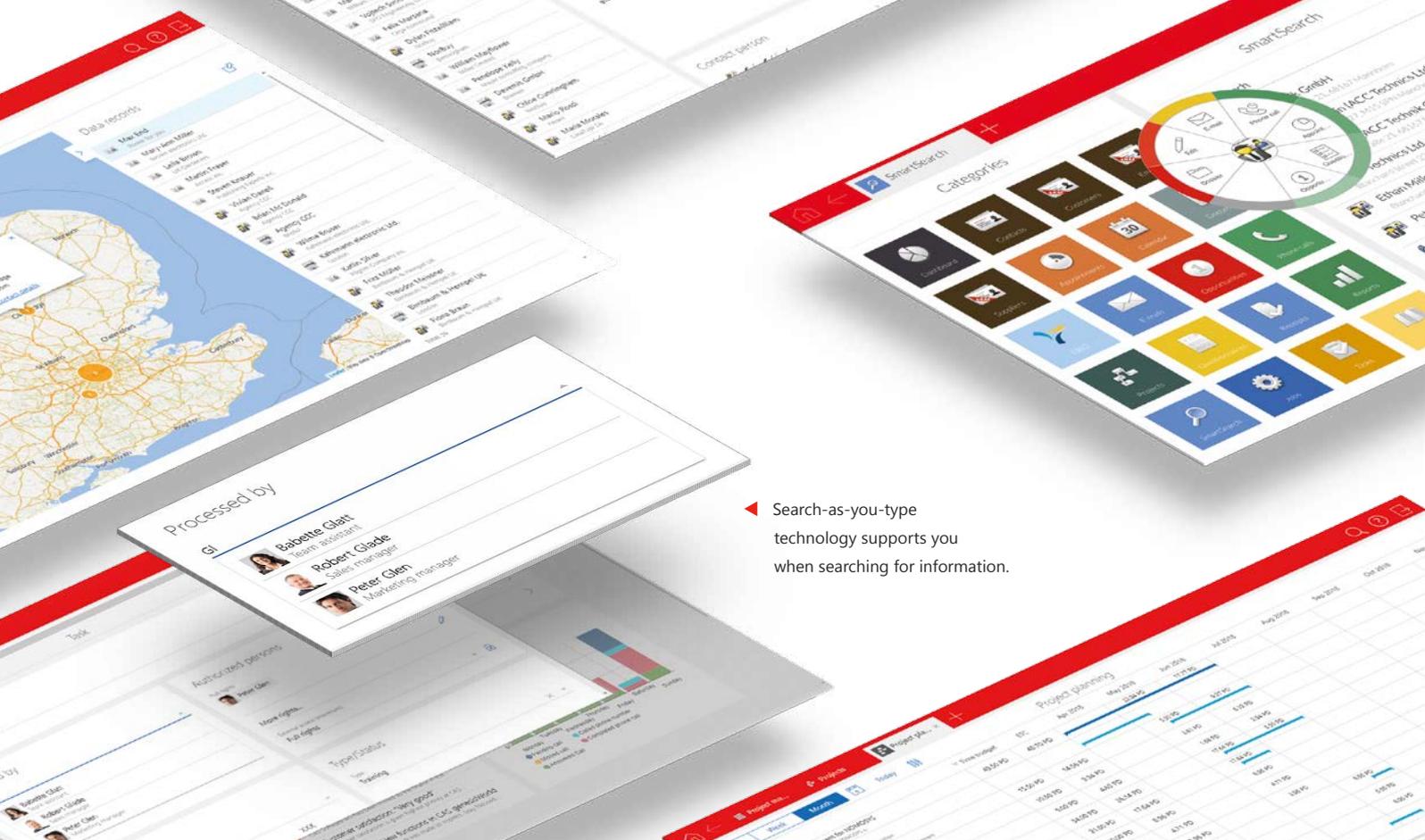
The only way to keep your business on a success path and actively work towards improvements is to be familiar with the quality of your customer relationships, and CAS genesisWorld x9 is the first CRM & xRM solution in the world to place the emotional factors of customer

relationships at the forefront with its integrated fan system. It allows individual emotional loyalty and customer satisfaction to be evaluated and visually represented using the fan portfolio. Fans and followers whose loyalty to the company is exceptionally high can be found at a glance. At the same time, it lets you identify customers looking to switch away and provides the opportunity to regain their loyalty.

The fan portfolio grades customers according to their emotional loyalty towards a company or product.



Search-as-you-type technology supports you when searching for information.



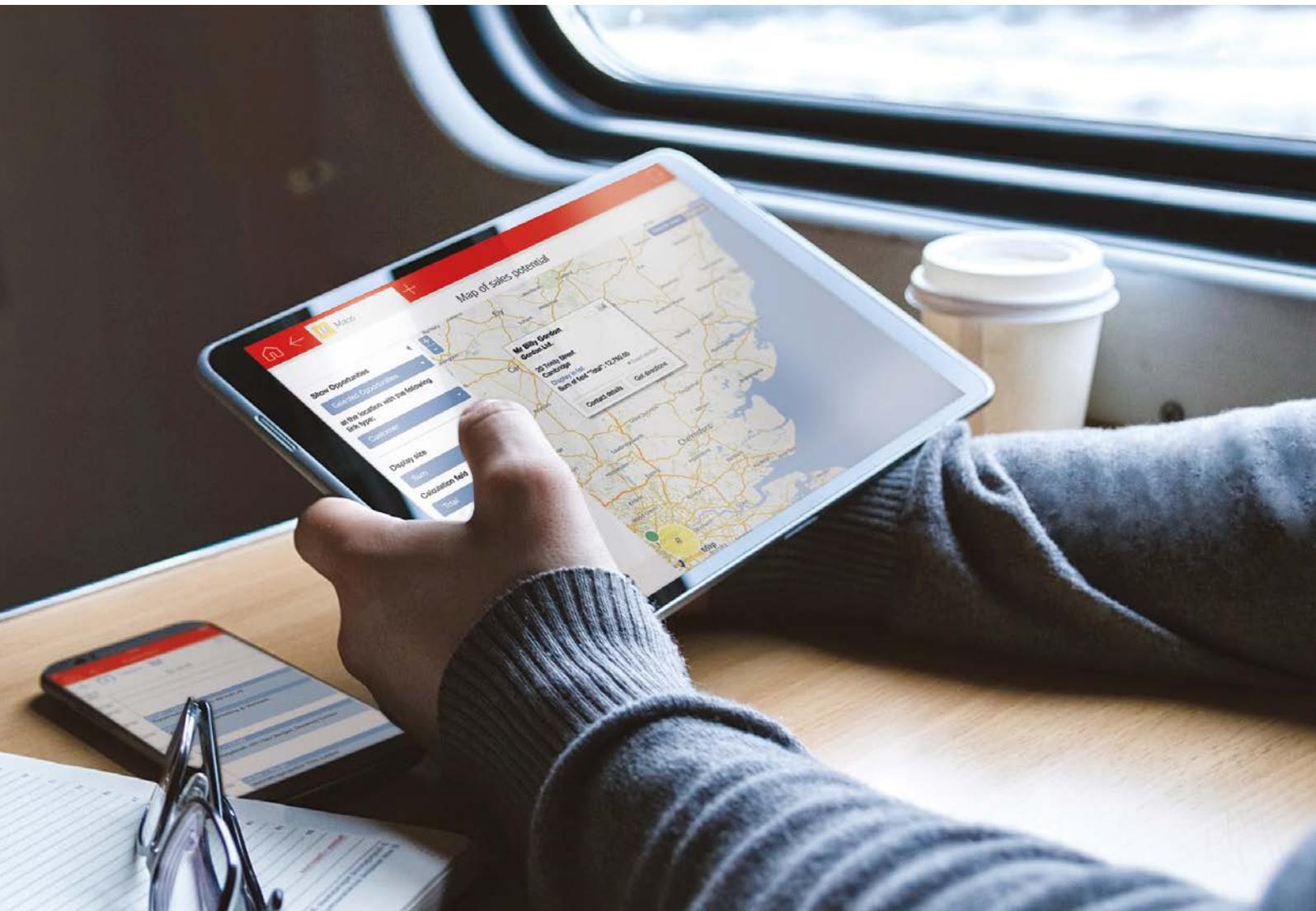
Optimum sales support – also while on the move

Managers, field sales personnel and service technicians can also benefit from the latest generation of the mobile apps – on-the-go access to all relevant data and the ability to efficiently create and edit contacts and information help boost your sales activities and increase the success of your workforce.

In addition to the high level of adaptability to the needs of your business, the expanded offline functionality is one of the highlights of this new version – CAS genesisWorld x9 enables you to record and modify any data offline. Once a connection is available at a later time, the newly recorded

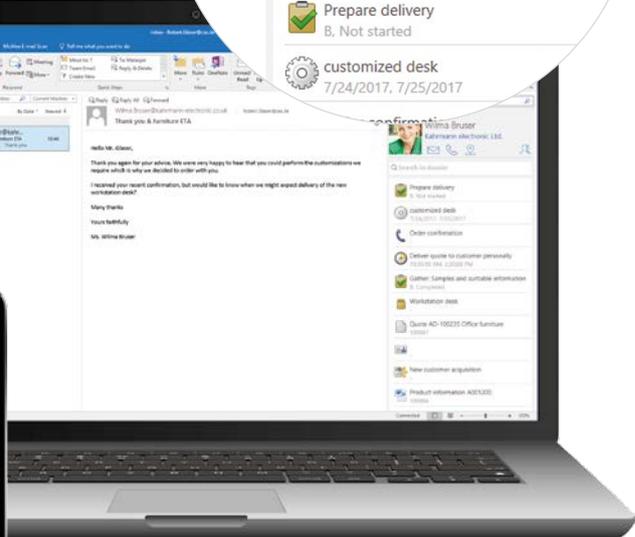
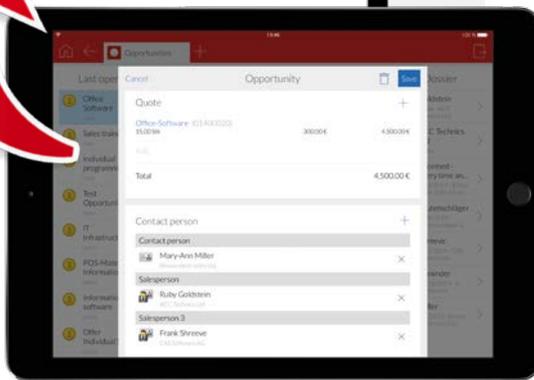
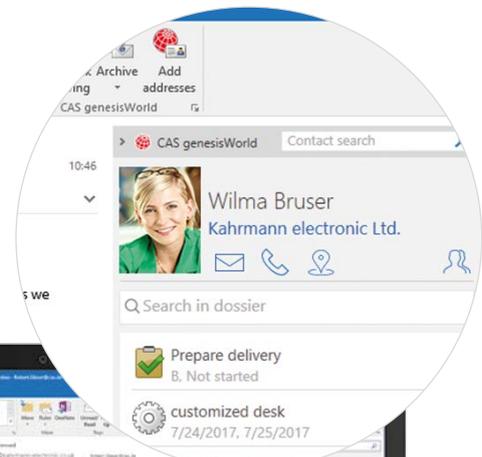
data is automatically updated. Likewise, users of the new version can store individual favorites offline and access them. All upcoming appointments and current contacts are presented smartly, providing easy access to all necessary information when visiting customers.

In addition to the list view for addresses, users can also optionally have these displayed in a map view. This provides ideal support for your field sales team when planning visits, for instance, allowing them to plan their sales activities in detail.





An integrated sidebar provides Microsoft Outlook users with access to a customer's dossier.



Based on a sales opportunity stored on a tablet, an offer or order can be generated directly.

CAS genesisWorld x9 expands the potential for additional sales opportunities considerably, allowing optional product items to be added at any time. Version x9 also offers the option of adding alternative product descriptions to individual products. This enables smart and efficient information processing and storage to assist your sales personnel as they engage with customers directly.

Open Sync technology provides a new way of connecting with ERP systems. Products and documents can be transferred from any ERP system to CAS genesisWorld, adding ERP-related data to views of customer relationships, projects and tasks.

More highlights of x9

Users of the Microsoft Outlook e-mail client can access the dossier of their customers in CAS genesisWorld directly from Outlook, providing them with an up-to-date overview of correspondence and activities most recently conducted with the customer in question.

SmartSearch allows addresses and documents to be found in the blink of an eye, enabling a relationship to be established with them with ease.

Existing CAS genesisWorld modules such as Easy Invoice are enhanced with new functions and features. The same is true of other modules such as Survey, Helpdesk and many more.

You can find out about these and many other highlights of CAS genesisWorld x9 at www.cas-crm.com/x9.

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