

New in Version 12



CAS ^{globe icon}genesisWorld

New Functions in Version 12

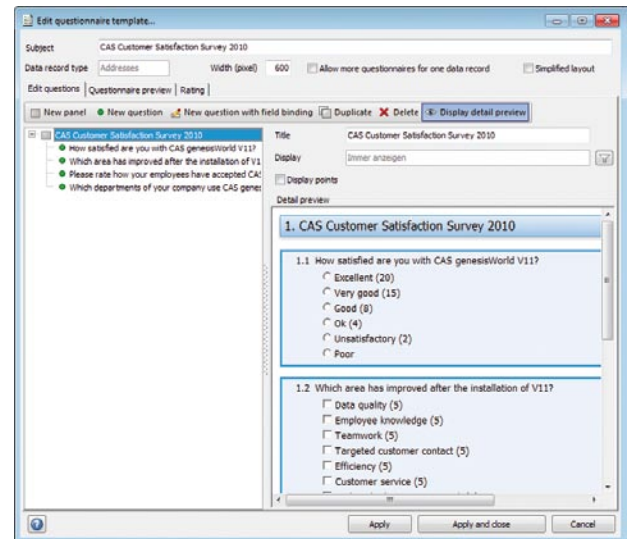


For highest demands: Modules, add-ins and efficient administrative functions

The new CAS genesisWorld Version 12 makes daily work a lot easier for all users: The optional Survey module with smart functions helps you to easily create surveys. The new Lotus Notes® integration, the iPhone app and extensions for the Inxmail integration allow you to act more flexible and stay in touch while on the move. Administrators benefit from many features that enable them, for example, to implement the legal requirements for data protection. Many more smart features in the new version will make work more enjoyable for you. CAS genesisWorld proves once more its leading role in successful customer relationship management.

New Survey module

How do your customers assess a completed project? How do users feel about an innovation? The optional Survey module helps you to create questionnaires, record answers and link existing questionnaires with other data records. Employees in support, sales and marketing can use questionnaire templates to record feedback on training courses, customer complaints and much more in CAS genesisWorld to later analyze the data.



Use the optional Survey module to create questionnaires, and to analyze the answers.

The Survey module makes it a lot easier to qualify addresses. You can use questionnaire templates to qualify prospects: When is the right time for a decision? What is your budget? Survey users can retrieve all important information with the right questionnaires. Address information can be transferred directly from the questionnaire to the address mask which is then automatically updated. You can predefine specific criteria and thus easily assign prospects to certain products and identify your prospect's potential.

Users can create new questionnaires at no time using different templates. Different sections in each questionnaire help to structure the content. Users benefit from various different answering options: They can select from answer selection lists, Yes/No options, number input fields, scales, rankings, templates or free-text input fields. The editor of the questionnaire can furthermore enter explanatory text for a question and even influence the course of the interview by creating dependencies: the question that follows is displayed depending on the answer given before.

You can now embed questionnaires in the navigator, search for them and display them in a separate tab, for example, in addresses. If the Marketing module is deployed together with the Survey module, the questionnaire can also be added as an action to the campaign. With the optional Report module, questions and answers can be professionally evaluated. Survey is available for all CAS genesisWorld editions.

Customer management made easy

Data protection laws can be easily implemented

A highlight of the new version: it supports companies to comply with the legal data protection regulations. Our experts of CAS Software AG have developed new functions in CAS genesisWorld that make it easier for users to implement the European Union data protection directives. The requirements that result from these directives can hardly be met without using highly professional CRM tools.

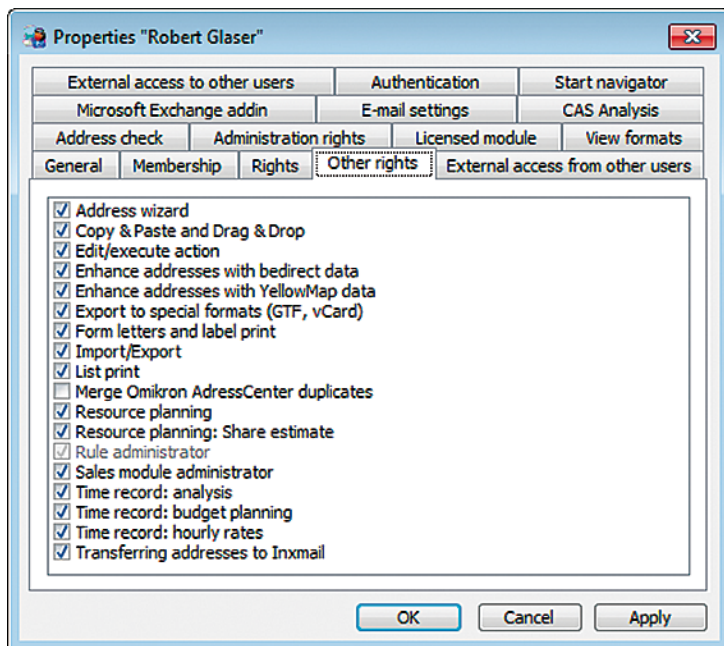
Understanding the high value of your customer data is a key factor. Companies should strive to protect and maintain their data. It is very important to enter and store customer data in such a way that legal requirements are met and data is processed correctly. Data needs to be well protected, for example, from violation by unauthorized persons or from theft and data loss. This can be ensured by monitoring logon behavior, the use of access rights, user input, and export of data.

Another important factor for your company's success is to address your target-group and customers in the right way. Depending on your marketing actions you have to consider different legal regulations – for phones, faxes and e-marketing. It is up to you to make sure that your customer's data is protected in each phase. Technical and organizational measures are both necessary to comply

with the legal regulations.

Version 12 contains detailed security mechanisms to ensure that especially customer-related address data is protected as required by law. You can set up specific rights and rules for the import/export of data including special formats such as GTF or vCard. Furthermore, specifications for the address wizard can be made as well as for copy and paste, drag and drop, form letters, label/list print and reports. Only if users have the corresponding rights they can use the specific functions and therefore need special permission to edit a number of data records at the same time.

With the right CAS genesisWorld settings, you can thus prevent unintended loss of personal data and ensure that data protection complies with legal regulations. A big plus for your administrators: With the new CAS genesisWorld version, the Management Console has been restructured and administrators have now a better overview of the rights management functions.



The administrator defines user rights with just a few clicks.



Intelligent innovations for CAS genesisWorld

You will be thrilled about the functions of the Standard and Premium Edition of CAS genesisWorld making work life a lot easier for you.

- The new “Action” function that comprises the “Change selection” will facilitate your daily routines, “Change participant” and “Follow-up action” functions will facilitate your daily routines. Defined actions can now be found in the favorites list and can be executed for selected data records with just one click.
- If you want to add a new participant to an appointment, CAS genesisWorld notifies you immediately about overlaps.
- If you work with chart views, you can not only see the legend but also percentage and absolute values.
- For product items in opportunities, you can also enter discounts (as percentage or absolute values) which are included in the total price.
- When merging duplicates, values of an ERP address are given special consideration in the merging dialog.
- For follow-up actions, CAS genesisWorld automatically selects the link type that matches best.
- More flexibility when creating form letters: Instead of using the “Use PO Box address” option, you can select “Prefer PO Box address”. If no PO Box address exists, the common address is used.



- You can now contact contact persons linked with an opportunity from within the opportunity with the Standard edition.
- Notification rules comprise linked addresses that will be automatically informed about changes, for example, external addresses.
- Notifications can be personalized using the data in address fields.
- The “Current user” variable can now be used for filter settings – including the dashboards of our CAS Web products.
- If phone calls have already been made and tasks have been completed, all reminders will be deactivated.
- Deactivated addresses are crossed out in lists.

Exclusive functions for the Premium Edition and Suite

If you work with the Premium Edition or Suite of CAS genesisWorld Version 12, you benefit from improved features for primary links for follow-up actions. If the follow-up action, for example, is a “phone call”, CAS genesisWorld automatically applies the unique, primary-linked information of the parent data record.

Web access with ERP views

The ERP views from the Windows client are now also available in Web access. For example, the “ERP” tab is now displayed in addresses and users can see relevant data such as open entries.

The screenshot shows the CAS genesisWorld web interface. The browser address bar displays the URL: <http://cas-51-messe1/genesisworld/gwweb.dll/bcaddress/bcaddres>. The main content area is titled "Company" and shows the "ERP" tab selected. The company name is "Devenit GmbH". Below this, there is a "Statistic - Receipts" section with a table showing sales data for 2009. The table has two columns: "Time period" and "Total". The data row shows "2009" and "10.000,00 EUR".

Time period	Total
2009	10.000,00 EUR

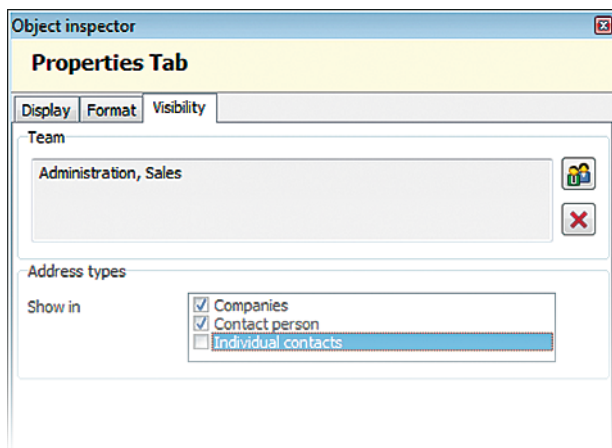
The “ERP” tab now shows relevant key figures also in Web access.

Modules **fulfill customer wishes**

The CAS genesisWorld modules with many smart functions will be great helpers in your daily work.

Form & Database Designer module: Make the design of your user interface a child's play

The optional Form & Database Designer module with new features is now even more attractive: The administrator decides whether or not a menu offering the company dossier, contact person dossier or overall dossier is displayed in companies and contact persons, whether filter or groupings include links and whether users can see hints for certain fields which makes some processes, for example, the job training for new employees, a lot easier and more efficient. The object inspector is now clearly structured and administrators have, for example, different display options for user-sensitive data record types.



With the object inspector, the administrator quickly defines which department is allowed to see which kind of address type.

Project module for more efficiency for project management processes

Many smart functions complete the Project module: A mixed list with projects and items enables you to quickly analyze project items and enter invoice recipients in a project. The new fields "Billed internally/externally on/by", "Enter costs as turnover value" and "Set turnover to Null" support you to create the bill of expenses with less effort. Expenses can now also be entered in form of receipts, daily expenses, travel costs or as a lump sum.

Helpdesk module makes your support faster

New functions cut down response times in the support team. For example, the data record window for tickets offers a consolidated view of data, an FAQ search is instantly available and the rules and action service has been enhanced.

More transparency: Report module with Crystal report viewer and XML export

CAS genesisWorld has created an individual space for reporting features to enable users to create custom reports of any kind which can then be displayed with the Crystal Reports Viewer. Report data can furthermore be exported as XML file, even in XSLT format to adjust data during the export. Users will thus save more time and processes are made transparent.

Sales module with discount function

Product items in opportunities of the Sales module now contain the "Discount" field which can be entered as percentage or absolute value. Discounts are included in the calculation of the total sum, for special products, a defined period or selected customers.



Central administration **to simplify processes**

Efficiency not only for users, but also for administrators – advantages of a quick and productive CRM solution. CAS genesisWorld Version 12 also benefits administrators: The administrator can change settings for many users at once, define the maximum size of documents and insert new subscribers to a rule with just one mouse click.

Not only performance, but **HIGH performance**

Large operations are much faster processed: Large distribution lists are quickly sent and links to big data volumes can be created in no time.

Installation with automatic **software distribution**

In addition to the ".exe" file, MSI packages are available and the installation can be performed via an automatic software distribution. Even the Word add-in is contained in these packages. Administrators thus save a lot of time.

Dashboards: **Up-to-date overviews for all users**

Administrators can create special elements for dashboards and make them available for everyone so users can embed these elements in their own dashboards: They immediately see relevant reports, missed calls or changed documents.

Duplicating users with model templates

When duplicating a user, CAS genesisWorld automatically adopts settings for rights, navigators, view formats and actions. The administrator can define user profiles for example for temporary personnel or CEOs that serve as model template. New employees will thus find a predefined corporate working environment in CAS genesisWorld.

E-mail accounts with custom settings

The administrator defines in the Management Console whether a user is allowed to change e-mail accounts or create new ones and can thus prevent an excessive use of these functions. A user might not be allowed to make changes, but he or she can still change passwords, signatures, folders and rules. In this way, CAS genesisWorld offers you the option to define company structures without losing your flexibility.

Quickly creating view formats and navigators

With the redesigned user interface, it is now easy to define varying right levels for many users at once. The administrator, for example, defines in the Management Console whether a user can create, edit or only select list formats. The same applies to navigators. The default e-mail account of a user is automatically embedded in the navigator if the administrator has defined the corresponding placeholder. And that's not all: All saved settings are also visible in Web access.

The administrator can predefine dashboards. All team members will thus be able to access the same information.

Changes and errors excepted.





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