

Sumarul functiilor

# Customer Centricity

Pentru companii de viitor

**CAS** genesisWorld

xRM si CRM pentru IMM-  
uri si companii medii



# Liderul solutiilor germane xRM/CRM

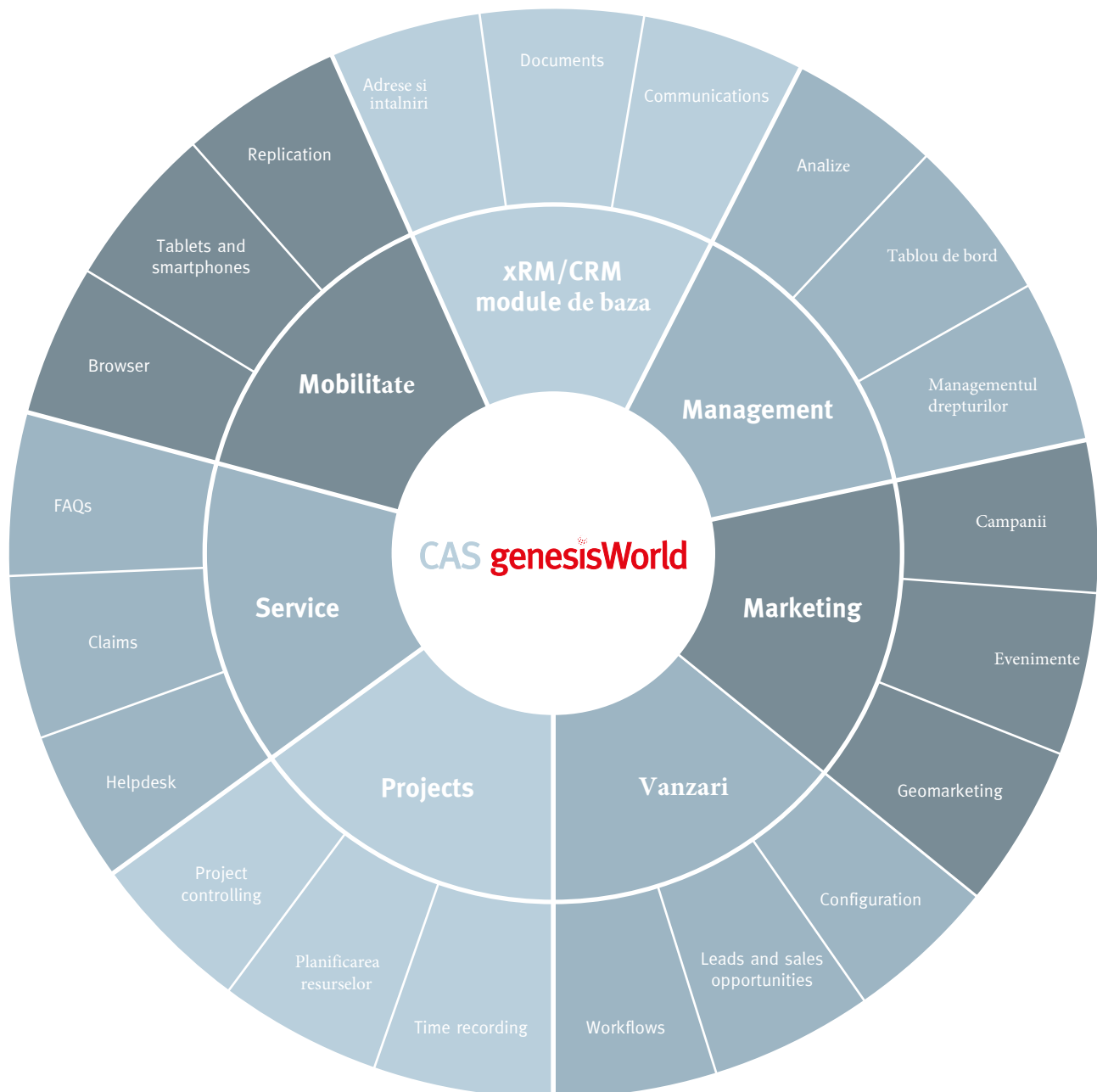
## pentru companiile SME: CAS genesisWorld

CAS genesisWorld ofera suport si informatii pentru toate relatiile cu interne sau externe ale companiei prin functionalitati simple si numeroase module, interfete su add-on-uri. Editia Standard ofera functionalitati de baza CRM de succes pentru companiile mici, in timp ce editia Premium adauga functionalitati pentru procese complexe de business.

Modulele Add-on oferta posibilitatea de a configura in mod flexibil CAS genesisWorld nevoilor dumneavoastra specifice, garantand managementul relatiilor adaptat strans afacerii.



Link de descarcare a brosurii in limba engleza:



# CAS genesisWorld dintr-o privire

## Functionalitati pentru **toate departamente**

### Introducerea si managementul adreselor

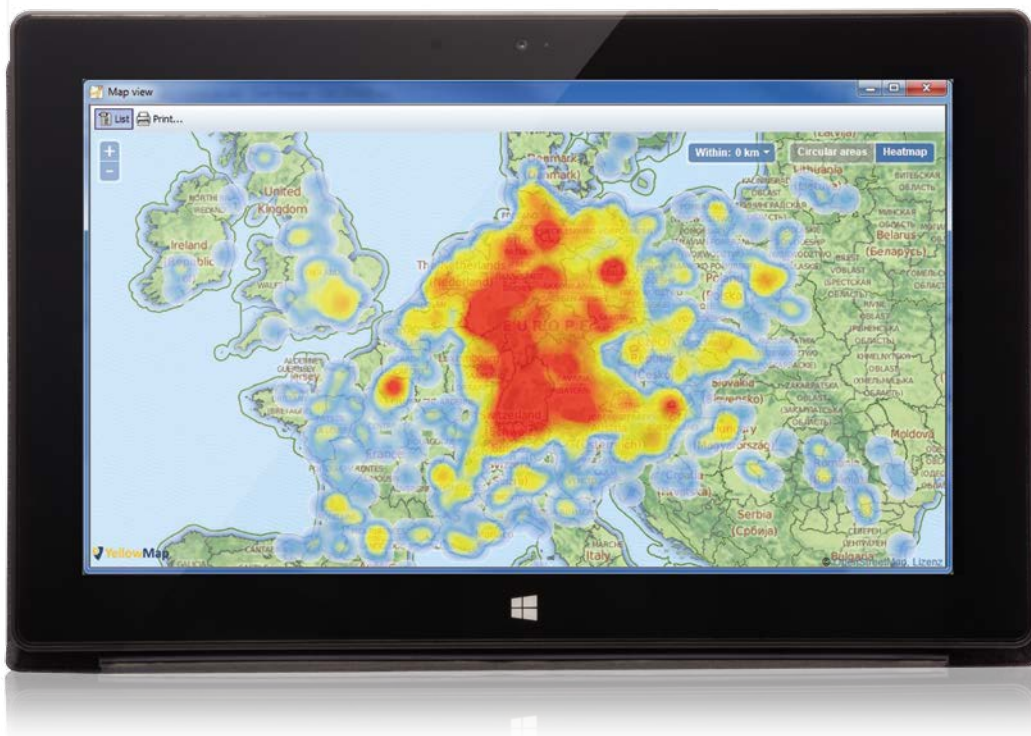
Centralized address management	All addresses, such as company, customer and sales information, stored in a central database.	S
Recording of legal entities	Input of addresses as companies/organizations.	S
Recording of natural persons	Enter addresses as individual contacts.	S
Assignment of contact persons	Easily assign contact names to a company with the option to transfer from company A to company B if the person moves job.	S
Synchronized field values	Automatically synchronize identical address data for company and assigned contact persons.	S
Addresses with picture	Optionally include pictures of contact persons.	S
Address categorization	Custom categorization options, including as A/B/C customer, lead, partner or supplier.	S
Supplementary and mandatory fields	Input and maintenance of additional information based on supplementary and mandatory fields, such as „Initial contact“ or „Interested in“ complying with data protection requirements.	S
Input assistance	Assisted address input based on predefined defaults.	S
Filter functions	Targeted searching and filtering of addresses by any criteria.	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 letters for legal correspondence.	S
Preferred contact method	Define a preferred contact method, such as e-mail, phone, letters, fax or SMS.	S
Address wizard	Intelligent copy-and-paste address input from e-mail signatures, websites and documents.	S

### Contact

Access all customer and sales lead data and contact the relevant people directly from the address view.



Consistency check	Automatic consistency check of address data such as postal code matching location or first name matching salutation.	S
Address autocomplete	Autocomplete address data fields, e.g. autocomplete city, state or district after entering postal code.	S
Address deactivation	Deactivate addresses, such as when a contact person leaves the company.	S
Address synchronization	Synchronize addresses with Microsoft Exchange®.	S, P, Z
Data synchronization with mobile devices	Synchronize data unidirectionally and bidirectionally with mobile devices.	S, P, Z
Export/import as vCard	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	Automatic check of duplicate addresses when entering and editing a data record.	S
Automatic duplicate merge	Wizard to help merge redundant addresses and their dossiers.	S
Duplicate cleansing	Complete duplicate check across all address data by OMIKRON Address Center.	Z
Grouping	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 your route.	S
Map view	Georeferencing and map visualization of selected addresses based on OpenStreetMap embedding.	S
Proximity search	Select addresses in a defined radius.	S
Heatmaps	View selected addresses graphically in the form of heatmaps.	P



#### Heatmap

Use heatmaps and charts to generate clear, informative geographic data analyses.

Phonetic search	Simplify address searching based on phonetic similarities, e.g. searching for „Johnson“ returns hits for „Jonson“ and „Jonsen“.	S
Full text search	Easy searching by full text.	S
Distribution lists	Group addresses in mailing lists for targeted communication.	S
Territory support	Assign addresses to sales territories and manage access using a detailed rights system.	S
Unicode	Support for country-specific address formats such as Turkish, Romanian, Polish or Spanish based on Unicode capability.	S
Access and editing rights	Customize address access and editing rights with three options (public, user-sensitive, private) to assure data protection.	S

### 360° view of customer data

Customer dossier	Structured and chronological view of all entries relating to an address, including display of e-mails, schedules, documents, sales leads, purchase orders or ERP data.	S
Customer dashboard	Optimized view providing a quick indicator of current status and key customer details.	Z
Semantic meaning of links	Define relationships between data records based on defined values, such as links between customers, competitors and key contacts within a lead.	S
Filter options	Wide-ranging filter options for selective presentation of linked data relating to a customer, such as pending sales leads.	S, Z
User-specific configuration	Access only to the data important to the user.	S

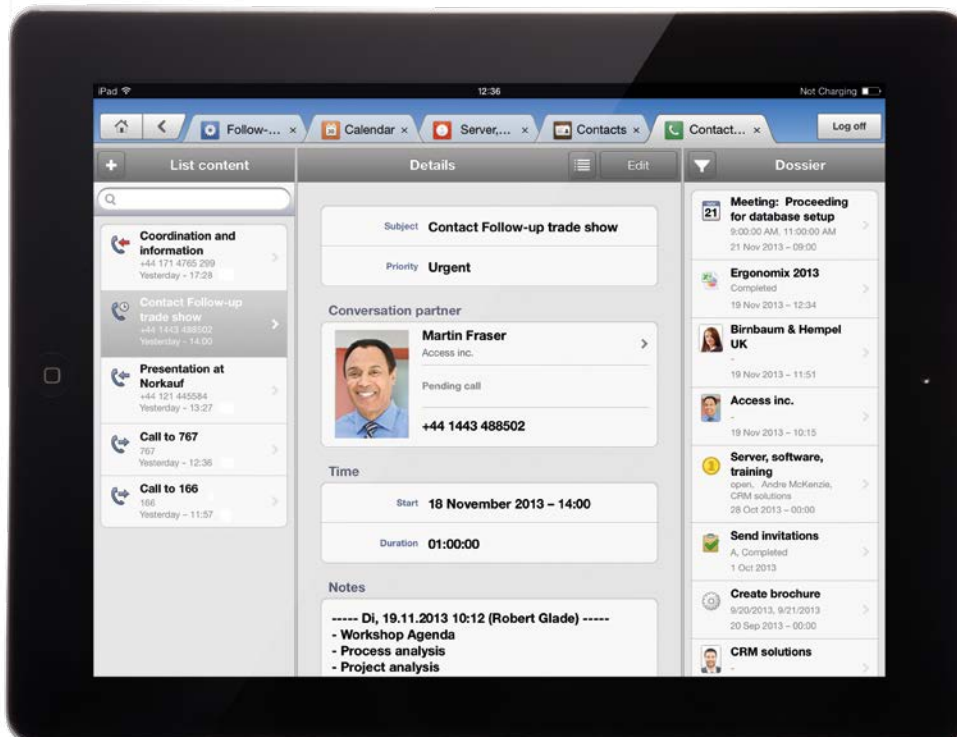
### Find data in a targeted way

Global search	Search all record types, such as addresses, documents, schedules or e-mails.	S
Wide-ranging filter functions	Search across all fields and display targeted data, e.g. search for B-customers in postal code area „76...“.	S
Phonetic search	Find addresses based on phonetic similarities, e.g. searching for „Johnson“ returns hits for „Jonson“ and „Jonsen“.	S
Complex search queries	Enter complex search queries based on filter conditions, bracketing rules, „and/or“ logic links and „greater than/less than/equal to“ conditions.	S
Link search	Find information relating to links, for example addresses in the “Customer” category linked to a lead in the last two years.	P
Search dossier	Browse dossier entries based on specific rules, such as in the „Keyword“ field of the dossier view.	S

## Manage documents and customize your communication

### Documents

Document Management extins	Administreaza orice format de document, inclusiv PDF, fisier de imagine, document MS Office sau CAD.	S
Microsoft Office® interface	Flexible interface to create and edit documents directly in Microsoft Office®.	S
Templates	Standardized templates including letters, faxes and e-mails for quick composition.	S
Customized templates in corporate design	Customizable templates including letters, faxes and e-mails for quick composition conforming to corporate design rules.	S
Customized form letters	Compose and send customized form letters, faxes and e-mails with field variables, form fields and attachments.	S
Save as Favorites	Save frequently-used document templates as Favorites.	S
International address formats	Support for international address formats.	S
Version management	Save previous document versions with detailed naming.	S
Archiving	Easy archiving of external files with drag and drop.	S
Open file to edit or read	Open files in write mode for editing or in write-protected read-only mode.	S
Document block	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 search	Support for full-text searching across all content in all documents.	S
Linking	Link documents with any data record, such as an address or a scheduled appointment.	S
DMS interface	Flexible interface to external document management and archiving systems.	Z
ERP interface	Flexible interface to ERP systems to synchronize documents, products and addresses.	Z



### Phone calls

Set up phone calls and log the results directly in the call memo.

<b>E-mails</b>		
Integration of external e-mail clients	Integrate external e-mail clients such as Microsoft Outlook®, Thunderbird or Lotus Notes.	S
Internal e-mail client	Optionally use the e-mail client integrated into CAS genesisWorld	S
Online operation	Online access to continually updated e-mails in the CAS genesisWorld e-mail client.	S
Send status	Display the current status when sending broadcast e-mails.	S
Archiving	Customize e-mail archiving or use templates to automatically configure the appropriate links and participants	S
E-mail rules	Set up rules for automated moving or archiving to predefined folders.	S
Linking	Automatically link e-mail to addresses.	S
Send from addresses	Directly send e-mails from the address book.	S
Delayed sending	Send e-mail merges at a set later time.	S
Server archiving	Archive e-mails independently of the e-mail client used or the hardware (such as tablet).	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	Configure an out-of-office assistant with reminders.	S
<b>Telephony</b>		
Caller ID	Identify incoming calls by name and address, automatically opening the address view or call memo.	S
Speed dial	Speed dial directly from the address screen.	S
Caller information	Display relevant information about the caller before answering the call.	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.	S
Call logging	Generate call logs and missed-call lists.	S
Call memo	Document call content in a memo.	S
Automatic link	Automatically link the call memo to the person calling/being called.	S
Scheduled phone calls	Schedule phone calls as a dedicated data record and view in your calendar.	S

## Notification and action services

Custom notifications	Customizable rules for automatic notification, such as in the event of a document being changed.	S
Workflow support	Automatically trigger follow-up actions in response to an initial action, e.g. 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
Primary notification link	Automatically archive notifications with import of the primary link.	P
Notification of change of address	Notification of changes to addresses with archiving of the notification.	S
Include link types	Include link types in the notification and action service.	S

## Intranet and company portal

Company information	Presentation of different sections, such as corporate divisions.	Z
Employee gallery	Display an employee gallery with details of their skills and competencies.	Z
Noticeboard and discussion forums	Company-wide, departmental, group- or project-specific interchange.	Z
Mapping of processes and workflows	Technical mapping of processes for quick handling, such as automated creation of a task when submitting an IT support request.	Z
Personal home page	Define a personal home page, such as „My appointments today“, a news ticker, personal favorites, or notifications.	Z
Phonebook	Employee phonebook with search functions and direct access to the employee's personal page.	Z
Competency search	Search for employees with specific competencies or skills.	Z
Corporate and department schedules	Access to shared calendars of other departments or of the entire company.	Z
Birthday lists	Birthday lists with active notification on home page.	Z
Knowledge and information database	Structured filing of key documents and information with simple search and access.	Z
Organization chart	Overview of corporate hierarchy with direct contact options.	Z
Holiday management	Vacation requests and approval by the relevant line manager; administration of holiday entitlements.	Z
Holiday calendar and lists	Overview of taken, approved, refused and scheduled holidays.	Z
Absence management	Management of absence periods, with overview and evaluation options.	Z
Online forms	Access to online forms, such as for improvement suggestions, and creation of custom online forms using an integrated form designer.	Z
Checklists	Integrated customizable preparation and planning checklists, such as for trade fairs or business trips.	Z

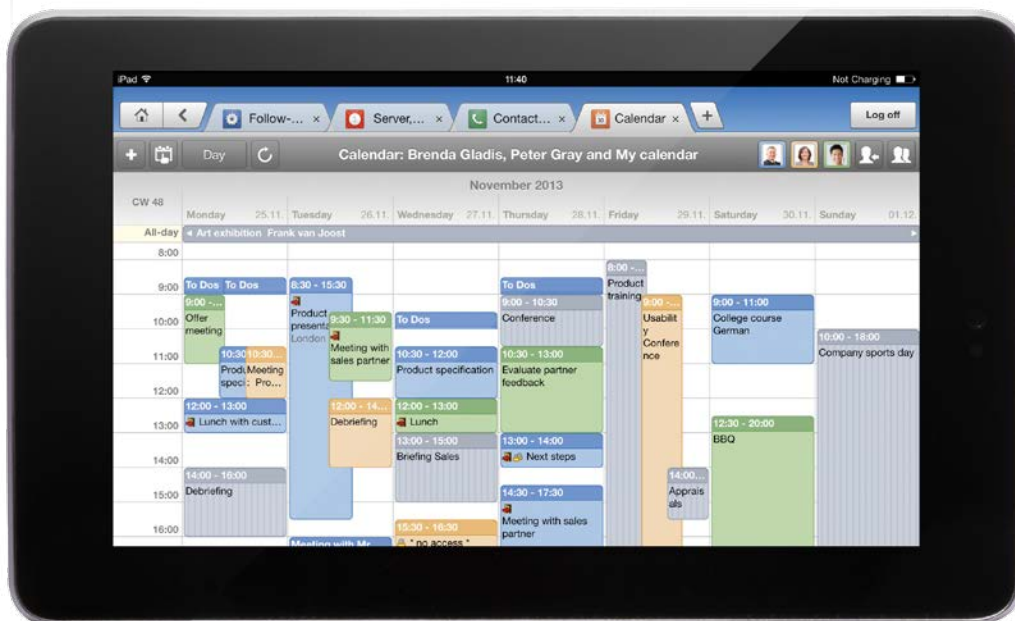


Calendar	Personal calendar with warning in case of overlaps with other scheduled appointments.	Z
Team calendar	Access to the released diaries of other employees and groups.	Z
Resources calendars	Access to released resources planning diaries.	Z
Resources management	Management of resources such as meeting rooms or company vehicles.	Z
Folders	Consolidate key documents relating to a project in one dossier.	Z
Project overview	Project home page with linked information including assigned staff, scheduling, documents and tasks.	Z
Task management	Manage your own tasks and delegate to others.	Z
Document management	Structured filing and publication of all kinds of documents.	Z
Address management	Manage company and contact data.	Z
Automatic notifications	Notification of key new developments or changes such as „New appointment“ or „Delegated task“.	Z

## View calendar and plan schedule

### Calendar

Personal calendar	Custom calendar with public, confidential and personal forward planning.	S
Team calendar	Display multiple users in one calendar to provide a quick overview of free times.	S
Holiday calendar	Enter and display holiday times.	S
Colleague 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
Processes	Depict processes such as project steps, phone calls and vacations in the calendar.	S



### Calendar

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

Create appointments	Easily create appointments directly in the calendar and automatically include the relevant participants.	S
Access rights	Allow special viewing rights in free or blocked periods.	S
Task list	Display current tasks in the calendar.	S
<b>Appointments</b>		
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.	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 whole day.	S
Recurring appointments	Create recurring appointments on a daily, weekly, monthly or yearly basis.	S
Automatic postponement	Automatically postpone serial appointments in case of conflicts with weekends or public holidays.	S
Notification service	Notification shortly before expiration of recurring appointments, on creating new appointments and changes to existing ones, and when scheduled appointments are deleted.	S
Alert function	Customizable alerts for the relevant participants.	S
Overlap warnings	Issue an overlap warning in the event of a double-booked appointment or double allocation of resources such as projection equipment or a laptop.	S
Move appointments	Move scheduled appointments easily with drag and drop.	S
Appointment finder assistant	Find free appointments for one or more participants taking into account time, place, duration, resources and possible overlaps.	S
Delegate appointments	Create appointments for third parties.	S
Planner chart	Overview of multi-day schedules such as 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
Schedule in iCal format	Import/export schedules in iCal format.	S
Data synchronization with Microsoft® applications	Schedule synchronization with Microsoft Exchange® / Microsoft Outlook® or with mobile devices.	P, Z
Data synchronization with mobile devices	Synchronize schedules with mobile devices.	P, Z
Live access to schedules	Access to schedules in real time via mobile devices.	P, Z

## Plan tasks and follow-up tasks

Tasks	Centralized management of 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, such as by keyword, 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.	S
Shift tasks	Automatically shift the task if not completed.	S
Task scheduling	Schedule a task by resubmission.	S
Alert function	Automatic alert at task deadline.	S
Task delegation	Create tasks for other colleagues, with tracking.	S
Notification service	Notification of newly created tasks or on receipt of a delegated task.	S
Prioritization	Prioritize tasks as A, B or C.	S
Duration	Plan the time to complete the task, with estimate, target and actual.	S
Completion status	Display completion status as a progress bar or a percentage.	S
Data synchronization	Synchronize data with mobile devices.	P, Z
Workflow support	Automatically generate tasks in response to defined events.	P

## Report evaluation and forecasting

Report views	Display key performance indicators in groupable value tables or graph form.	Z
Company-wide dashboard views	Define company-wide dashboard views to provide an overview of all relevant data.	S
Record-specific dashboard views	Display all relevant data of the current data record including linked information.	S
Global reporting	Generate complex, multidimensional evaluation reports across all record types, including linked data records.	S
Detailed reports	Evaluation of selected data records in interactive report views based on filtering.	S
Customer dashboard	Customer-specific overview of defined data including sales figures, claims and products sold.	Z
Project dashboard	Project-specific overview of defined data including sales figures, claims and products sold.	Z
Charts	Create overview reports based on the complete data set in table and graph format.	S, Z
Interactive report table	Simple interactive grouping by text field, date (e.g. year, quarter, month) and link type to customizable nesting depth.	S, Z

## Report evaluation and forecasting

Pivot table	Aggregated data view in pivot tables. Optional presentation as sum total, minimum, maximum or average values.	Z
Predefined templates	Use context-specific templates to quickly generate reports and analyses.	S, Z
Custom templates	Configure and save your own custom report templates.	Z
Scheduled reports	Generate reports at predetermined intervals with automatic distribution.	S
Crystal Reports	Connection to Crystal Reports.	Z
Result data export	Data export in formats including RTF, PDF and Microsoft Excel® for further editing or presentation in other systems such as Microsoft Access® or Business Intelligence Tools.	S, Z
Print designer	Generate high-quality printouts using the included print designer.	S
Archiving	Archive reports directly in the document archive.	Z
Sales pipeline	Graphical allocation of forecast sales to the individual phases of the selling process.	Z
Forecast	Wide-ranging options for evaluating sales opportunities, such as by territory or sales executive.	Z

## Define data structures

### Administration and customization

Customization without programming skills	Create and administer centralized, company-wide rules on the management console via user interfaces with no programming or scripting languages.	S
Data structure customization	Set up new data record types according to specific business requirements, creating new fields, input and selection options or views for example.	Z
User interface customization	Customize dialog boxes of a data record type, such as by customizing tabs and creating new ones.	S, Z
Multilingual labeling	Generate multilingual tab and area names.	S
Dynamic formula fields	Results fields for mathematical calculations or texts, dynamic control of input assistance options.	Z
Centralized user rules	Specify filters, groups or access rights according to centralized rules, such as for team calendars, import and export rights, 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

## User-specific setup

Custom dashboard	Users can personalize their CAS genesisWorld home 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	Centralized navigators for corporate divisions or departments with folders and other views in a tree structure.	S

## Utilize technical flexibility

Automatic software distribution	Install CAS genesisWorld, software updates, add-ins and modules by automatic software distribution.	S
Multitenancy	Access to different databases with one application server.	S
Optimum server capacity utilization	Automatic load distribution to manage optimum capacity utilization of multiple CAS genesisWorld application servers.	Z
LDAP server	Access from external programs such as Microsoft Outlook® to addresses in CAS genesisWorld via the Lightweight Directory Access Protocol (LDAP).	S
Unicode and country formats	Correct display of international character sets. Addresses displayed in country-specific format.	S
Time zone capability	Display international activities such as scheduled appointments, tasks, vacations and phone calls in the day and week view of the relevant time zone.	Z
Primary links	Hierarchical links for direct assignment of all project data to addresses.	P
Interfacing with third-party applications	Share and synchronize data with any third-party applications in CAS genesisWorld.	Z

## Add interfaces to CAS genesisWorld

### Integration into Microsoft Exchange® with Microsoft Outlook®

Microsoft Outlook® as default e-mail client	Optionally use Microsoft Outlook® as your e-mail client in CAS genesisWorld.	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 receivers' and/or senders' addresses.	S
Live access to addresses	Live access from Microsoft Outlook® to addresses in CAS genesisWorld.	S
Shared address book	Synchronize addresses between Microsoft Exchange® and CAS genesisWorld.	Z
Schedule synchronization	Define synchronization schedules between Microsoft Exchange® and CAS genesisWorld.	Z

## Integration of 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.	Z
Bidirectional data synchronization	Enter and edit address and project data in both the ERP system and CAS genesisWorld with automatic synchronization.	Z
Automatic address linking	Link addresses to products and posting documents and display additional information from the ERP system for wide-ranging reporting options.	Z
Product catalogs	Present product groups and single products as HTML pages in catalogs with selected features and graphics with user-friendly export options.	Z

## Data quality and enrichment

Duplicate cleansing	Duplicate checking across the complete address book with OMIKRON Address Center, followed by duplicate cleansing.	Z
Address checking	Verification of correct postal address by cross-check against databases of YellowMap AG.	S

## Professional e-mail marketing

Personalized e-mails with no programming skills	Compose and personalize e-mail mailshots in HTML format, without need of any programming skills, for selected customer groups with Inxmail Professional.	Z
Quality checking	Quality control including checks for errors in links, test mailing and definition of a release procedure before sending mailshots.	Z
Address checking before sending	Check correct e-mail address and check for possible removal of the address from the associated mailing list on transferring mailing lists from CAS genesisWorld to Inxmail Professional.	Z
Management of newsletter subscriptions and cancelations	Log newsletter subscriptions and cancelations to update future mailshots.	Z
Evaluate the success of mailing campaigns	Wide-ranging report options covering opening, click or cancelation rates, with visual depiction of the mailshot's success.	Z
Automatic archiving	Archive sent mailshots in the recipients' dossiers.	Z

## Management functions

### Draft reports quickly and easily

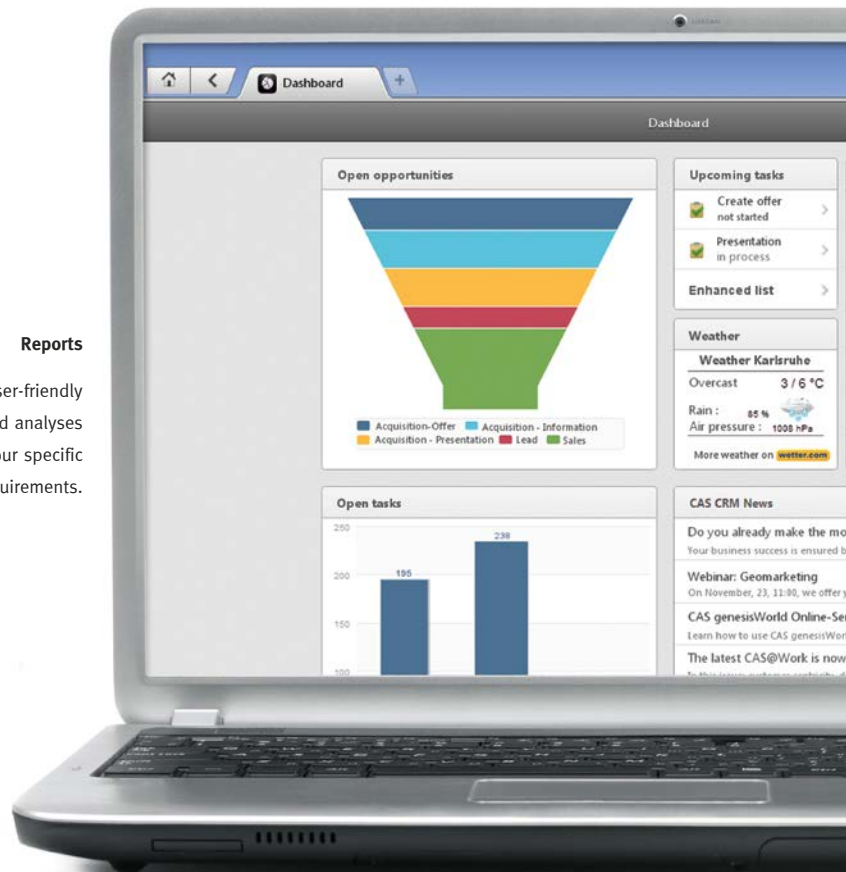
Evaluations and reports	Automatically compile all kinds of up-to-date reports.	S
Templates and display formats	Create context-specific templates. User-friendly display formats for reports, including table, graph and diagram form.	S
Preview	Report preview for checking and correction as necessary.	S
Reporting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

### 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
Initiate single actions	Define rules for single actions relating to specific data records in case of changes or if scheduled intervals are missed, such as when new records are created.	S
Definition of workflows	Define rules to automate complete workflows, such as which events automatically trigger which actions.	S

#### Reports

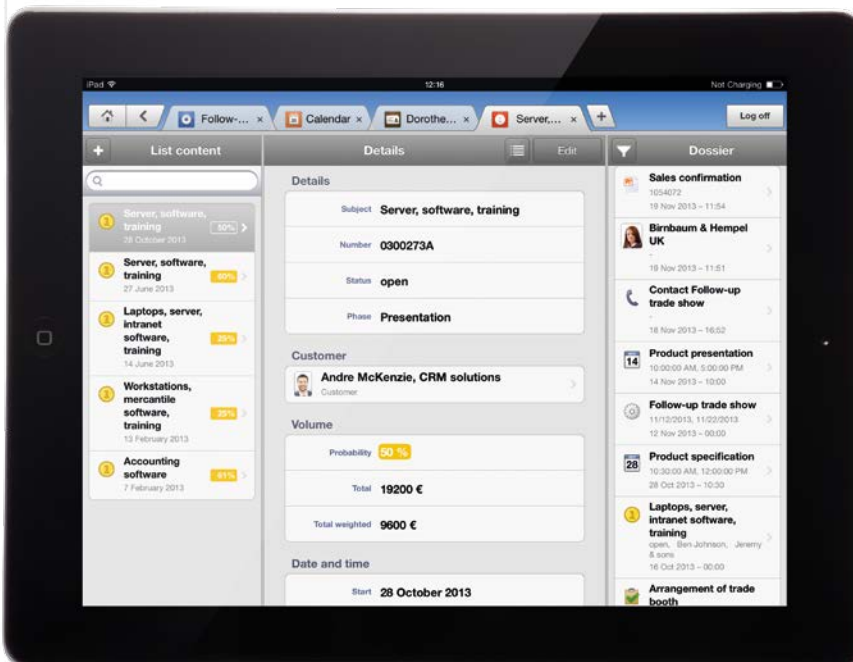
Compile user-friendly reports and analyses tailored to your specific requirements.



## Marketing functions

### Plan, execute and evaluate campaigns

Target group selection and mailing list	Combine specific target groups in mailing lists based on the central address database applying wide-ranging search and filter functions.	S
Link search	Address search including linked data records to enhance target group accuracy.	P
Phonetic search	Address search by spelling, e.g. „Johnson“, „Jonson“ or „Jonsen“.	S
Allowed and preferred contact method	Automatic compliance with the allowed and preferred method of communication before making contact/sending out mailshots, in order to comply with data protection regulations.	S
Personalized communication for mailshots	HTML templates and campaign wizard for personalized communications by e-mail, letter, fax and phone.	S
Communications templates	Use predefined or self-produced templates for mass communications.	Z
E-mail campaigns and newsletters	Interface to Inxmail for powerful e-mail and permission marketing with wide-ranging ad-hoc report evaluation options for follow-up campaigns.	Z
Multi-stage campaigns	Manage, execute and evaluate multi-stage campaigns through various communication channels using the graphical campaign designer.	Z
Campaign status	Depiction of the status and progress of a campaign, such as „scheduled“, „active“, „complete“.	Z
Campaign documentation	Archive all information within the campaign, including targeted addresses, e-mail mailshots sent, phone calls conducted, and related documents.	Z
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.	Z
Follow-up campaigns	Support in conducting follow-up campaigns dependent on initial customer response.	Z
Budget planning	Draw up a budget for each campaign. Record costs of completed actions and media resources deployed.	Z
Currency support	Input field for estimated and actual campaign costs, in the relevant currency.	Z



#### Sales opportunity

Keep a clear overview of the entire selling process, from the initial lead, through the quote stage, to closing the sale.



Handling of incorrect addresses and bounces	Identify incorrect addresses in a campaign to improve data quality.	Z
Evaluation	Evaluate e-mail mailshot campaigns based on the assigned marketing budget in order to measure their success.	Z
Event management	Event planning with facility management, organization of invitations, and evaluation. Restrictions on the number of participants possible; registration via personalized e-mail and login link.	Z

## Sales functions

### Manage and optimize sales processes

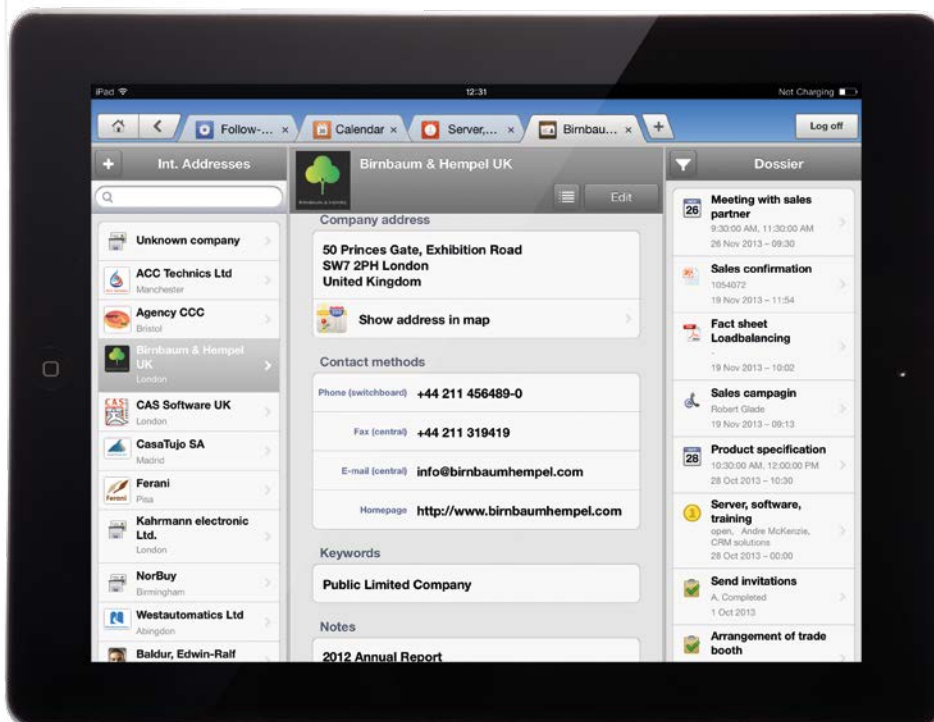
Customer dossier	Archive all documents and correspondence with a customer in the relevant customer dossier.	S
Lead	Data record type for quick data input directly on making contact with a lead for subsequent address qualification with the option to convert it into a sales opportunity.	Z
Opportunities	Map and evaluate the entire selling process (documenting leads, quotation phase, closing and after-sales).	S, Z
Mapping of sales structures	Expand sales opportunities to include hierarchical mapping of sales structures and methods, such as definition of activities and milestones.	Z
Mapping of sales territories	Hierarchical mapping of sales territories with up to three breakdown levels, e.g. Europe, Germany and Southern Germany.	Z
Proximity search	Display and select addresses in a defined radius.	S
Definition of selling steps	Define selling steps such as by „Next activity“, indicating immediate actions such as a phone call, meeting appointment or call-back.	Z
Quote configurator	Automatically generate quotes incorporating options, product alternatives, prices and discounts.	Z
Quote documentation	Draw up and document a complete quote, with covering letter, detailed product information or proposals for financing.	Z
Product configurator	Configure products based on the recorded product variants, components and prices.	Z
Product variants	Ensure combinability of product components by logging (technical) rules.	Z
Definition of criteria catalogs	Create freely definable criteria catalogs, such as to evaluate leads.	Z
Interactive sales pipeline	Interactive presentation variants for the sales pipeline with filtering by initial contact, quote, contract.	Z
Likelihood of closing	Assessment of sales based on automatic calculation of the likelihood of closing.	Z
Strengths and weaknesses analysis	Analysis option to identify the most profitable customers and leads and to predict sales.	Z
Competitor and contact weighting	Competitor analysis based on weighting and assessment of competitors and contacts.	Z
Geomarketing	Presentation of all data record types, e.g. all pending sales opportunities as heatmaps.	Z
Notification and action service	Customizable notifications, e.g. notify internal sales support when field sales updates the customer dossier.	S

ERP interface	Interface to ERP systems. Access to invoices, delivery notes or quotes directly from CAS genesisWorld without switching application.	Z
Address synchronization	Automatically synchronize addresses between CRM and ERP applications.	Z
Search and filter options	Search and filter options across all fields; administer product items, competitors, contact persons, etc.	S
Reporting	Reporting based on the complete data set, such as evaluation of all sales opportunities created in recent quarters.	Z

## Project management and service functions

### Project planning

Project overview	Overview of all project-related data, including scheduled appointments, tasks, documents, phone memos and overall status based on a traffic light code (green, yellow, red).	S, P
Status overview	Overview of 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 etc., with predecessor-successor dependencies and assignment of responsibilities and material resources.	Z
Budget planning	Budget overview based on the cumulative individual budgets, costs and sales relating to the project.	Z
Resource planning	Planning of effort by employees, capability management and overview of the workload and availability.	Z
Recording of time and expenses	Time recording on the customer, project and procedure level. Recording of expenses with integrated functions for vouchers, per-diem expenses and travel costs.	Z
Quote and order management	Compile quotes from the product catalog and ERP data at the click of a mouse.	Z
Project controlling	Evaluation of all time records, expenses and third-party services, subsequently cross-checked against budget plans.	Z
Microsoft Project® interface	Integrate Microsoft Project® and Open Workbench.	Z



#### Addresses

Keep a clear overview of individual addresses, company data records and the associated contact personnel.

## Optimize service and support

Logging support requests	Log support requests with the aid of trouble ticket pools. Rules-based internal and external notifications, such as when new requests are received.	Z
Handling of support requests	Handling of service requests from initial contact through to remedy, with scheduling, assignment of responsibility personnel, priorities or delegation.	Z
Calculation of service commitment	Automatic or manual time recording of service commitment and exact allocation of commitment per customer - subsequently or in the background.	Z
FAQs database	Collate processed trouble tickets in an FAQs database. Publish selected FAQ documents on an online portal.	Z
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.	Z
Support approval	Information on support-approved product versions and persons authorized to create support tickets. Incorporate details of support blocks on companies or individual contacts.	Z
Service Level Agreements (SLAs)	Contractual assurance of service delivery, e.g. scope, response times, processing time, documentation of product deployment and maintenance billing.	Z
Support to communication channels	Link support requests to existing communication channels such as e-mail, phone and service portal.	S, Z
Ticket management	Map complex, company-wide workflows for comprehensive ticket logging and processing.	Z
FAQ management	Powerful ticket search, including differentiation between internal FAQ entries and entries to be published on the portal.	Z
E-mail templates	Create and access e-mail fields from the ticket and their links.	Z
Default notifications	Ticket submitter and processor notified of receipt and processing of request and of changes to data record.	Z

## CAS SmartDesign, mobile solutions and replication

### Address management

Contacts	Display and search all contacts from CAS genesisWorld in list form.	P, Z
Picture integration	Add a photo of a contact.	P, Z
Company contacts	Input of addresses as companies/organizations.	P, Z
Contact	Enter addresses as single contacts.	P, Z
Addresses with picture	Optionally include pictures of contact persons.	P, Z
Centralized address management	Recording of any addresses, such as company, customer and sales information, in a central database.	P, Z
Shared address stock	Synchronize addresses between Microsoft Exchange® and CAS genesisWorld.	P, Z
Input assistance	User-friendly address input using input assistance.	P, Z
Data synchronization with mobile devices	Synchronize data unidirectionally and bidirectionally with mobile devices.	P, Z

## Group and sort data

Custom dashboard	Users can personalize their mobile app home pages.	P, Z
Personalized navigator	Custom navigators for individual employees.	P, Z
Centralized navigator	Centralized navigators for corporate divisions or departments.	P, Z
Data-specific dashboard views	Display all relevant data of the current data record including linked information.	P, Z
Customer dossier	Structured and chronological view of all entries relating to an address, including e-mails, schedules, documents, sales leads, purchase orders or ERP data.	P, Z
Filter queries	Filter the dossier to display only specific data record types.	
Customer dashboard	Customer-specific overview reports of defined data including sales figures, claims and products sold.	P, Z

## Enter and locate data

Quick data entry	Easy input of information such as scheduled appointments or addresses.	P, Z
Bidirectional data synchronization	Synchronize address, appointment and task data.	P, Z
User-friendly structuring of information	Display (team) diaries and scheduled appointments with linked addresses. List views to structure the address book, e.g. listing by A, B and C customers.	P, Z
Full-text search	Easy searching by full text.	P, Z
Offline access	Access key CRM data such as scheduled appointments, tasks, vacations and contacts when out of the office, including while being offline.	P, Z
Real-time access	Direct access to up-to-date customer data in real time.	P, Z

## Data evaluation

Report views	Display key performance indicators in groupable value tables.	P, Z
Report and report view	Display report views and pre-existing reports from CAS genesisWorld, but with no edit function. Files are not displayed in the mobile app unless a license is obtained for the Report module.	P, Z
Reports	Automatically compile all kinds of up-to-date reports.	P, Z
Opportunities	Map and evaluate the entire selling process (documenting leads, quotation phase, closing and after-sales).	P, Z
Likelihood of closing	Assessment of sales based on automatic calculation of the likelihood of closing.	P, Z

## Access to documents

Documents	Display and search all document lists available from CAS genesisWorld.	P, Z
Display documents	Device-optimized document display.	P, Z
Open files in read-only mode	Open files in write-protected read-only mode.	P, Z
Notes	Display notes in purely text form, without formatting.	P, Z

## Schedule appointments and view calendar

Appointments	Display scheduled appointments, vacation times and phone calls in a user-friendly calendar view.	P, Z
Create appointments	Easily create appointments directly in the calendar and automatically include the relevant participants.	P, Z
Public appointments	Mark appointments as public, i.e. accessible by all colleagues.	P, Z
Personal appointments	Mark appointments as personal. Personal meeting appointments can only be viewed by the person concerned.	P, Z
Confidential appointments	Mark appointments as confidential. Confidential meetings can only be viewed by authorized users.	P, Z
Out-of-office appointments	Mark appointments as out-of-office.	P, Z
All-day events	Choose the „All-day“ option when an event is scheduled for the whole day.	P, Z
Personal calendar	Custom calendar with public, confidential and personal forward planning.	P, Z
Team calendar	Display multiple users in one calendar to provide a quick overview of free times.	P, Z
Vacation calendar	Enter and display vacation times.	P, Z
Resources diaries	Display resources such as meeting rooms, company vehicles or projection equipment.	P, Z
Day/week/month view	Display schedules in day, week or month views.	P, Z
Shared calendar view	View other users' calendars.	P, Z
Full access to third-party appointments	View third-party appointments not involving yourself. This requires the appropriate rights.	P, Z
Access rights	Allow special viewing rights in free or blocked periods.	P, Z
Live access to schedules	Access to schedules in real time via mobile devices.	P, Z
Schedule synchronization	Define synchronization schedules between Microsoft Exchange® and CAS genesisWorld.	P, Z
Links	Link appointments with all relevant data records, such as documents or addresses.	P, Z

## Process mapping

Notification service	Notification of newly created tasks or on receipt of a delegated task.	P, Z
Progress status	Display task completion status as a progress bar or a percentage.	P, Z
Assignment of responsibilities	Designate a person responsible for the created task.	P, Z
Project overview	Overview of all project-related data, including scheduled appointments, tasks, documents, phone memos and overall status based on a traffic light code (green, amber, red).	P, Z
Status overview	Overview of pending, ongoing and critical projects and indication of overall status based on a traffic light code (green, amber, red).	P, Z

## Efficient communication

Phone calls	Create and edit phone calls and call memos.	P, Z
Call number recognition	Identify incoming callers on the mobile device by name, company and number via mobile synchronization.	P, Z
E-mail access	Access archived e-mails.	P, Z
E-mail archiving	Automatically archive e-mails as a scheduled appointment, task, document or e-mail.	P, Z
E-mail linking	Automatically link e-mails to receivers' and/or senders' addresses.	P, Z

## Customize and specify rights

User interface customization	Customize dialog boxes of a data record type.	P, Z
Predefined templates	Use context-specific templates to quickly generate reports and analyses.	P, Z
Expandability	Define and assign additional fields for existing and custom data record types below the default fields.	P, Z
Multilingual labeling	Generate multilingual group names.	P, Z
Rights system	Incorporate defined rights such as read-only or write access from CAS genesisWorld.	P, Z
Multitenancy	Access to different databases with one application server.	P, Z

## Using add-ins and interfaces

Questionnaires	Display questionnaires generated in CAS genesisWorld with the possibility to edit them on a mobile device.	P, Z
Route planning	Mobile display of addresses on a map.	P, Z
Mapping and routing	Display a company, delivery or private address on a map and plan your route.	P, Z
ERP interface	Flexible interface to ERP systems to synchronize ERP data such as posting documents.	P, Z

## Data replication

Full data replication	Full data replication between different locations, such as corporate HQ and branch office, with progress indicator.	P, Z
Partial replication	Selective data synchronization, such as with laptops, with import of user-defined settings and progress indicator.	P, Z
Replication via Internet	Replication directly over the Internet by WebDAV and automatic distribution of software updates within the replication network.	P, Z
Protection of private data	Private data is not transferred when synchronizing data.	P, Z
Log	Generate a log following data synchronization.	P, Z
Collision handling	Keep the more up-to-date value when a field contains differing information.	P, Z

# CAS Software AG:

## An SME for SMEs

Your partner for long-term collaboration:

CAS Software AG was founded in 1986 in Karlsruhe by Martin Hubschneider and Ludwig Neer. The 6,500 square meter CAS Campus offers space for ideas and room for further growth. Over 300 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 businesses with a great future.

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

Over 7,500 small and medium-sized enterprises, as well as global market leaders such as Daimler, Airbus, Fraunhofer, OKI and many others, employ our solutions and rely on our expertise.



What our customers say.

[www.cas.de/en/references](http://www.cas.de/en/references)

- Market leader in CRM for German SMEs
- Owner-managed business
- Over 200,000 enthusiastic users in 37 countries
- Present in 25 countries through 200 sales and solution partners
- Investment in innovation per year: 20-30% of sales turnover
- Multi-award winning solutions
- Established methodology for successful xRM/CRM implementation



“ CAS Software is one of the most attractive employers in the German SME sector. ”

Heinz Fehnrich, Mayor of Karlsruhe, recognizing CAS's triumph as overall winner at the „TopJob“ awards



Your contact



# CAS Mittelstand

A SmartCompany of CAS Software AG



CAS Software AG    Telefon: +49 721 9638-188  
CAS-Weg 1 - 5    E-Mail: sales@cas.de  
76131 Karlsruhe    www.cas-crm.com  
Germany

