

First steps

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CAS genesisWorld





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1 CAS genesisWorld - Basics

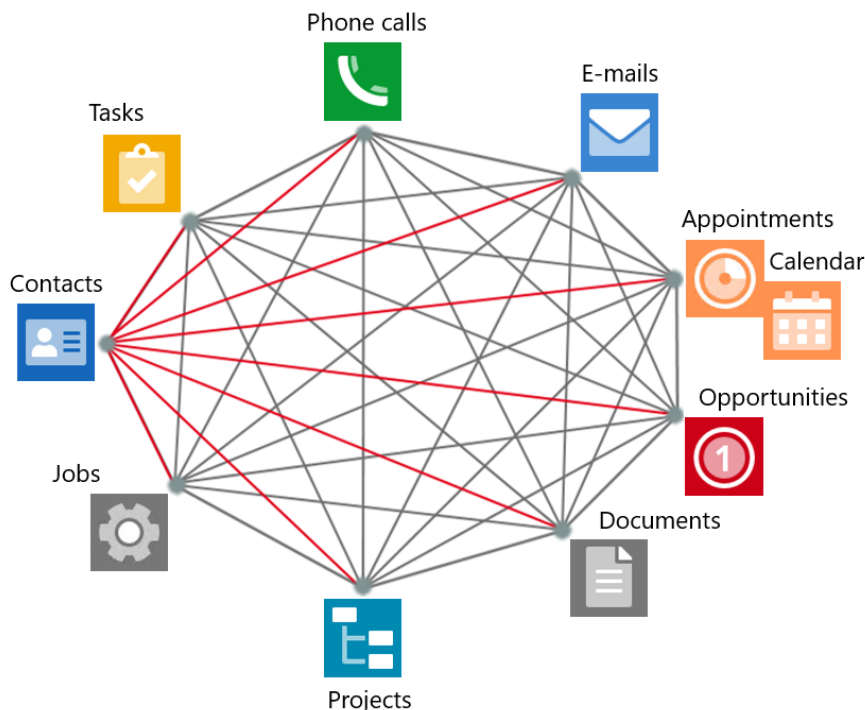
With CAS genesisWorld, you work on a central corporate memory for all activities and information about prospects and customers. You thus ensure better customer care that is oriented towards the needs of customers and binds them to the company.

In addition to classic customer relationship management, CAS genesisWorld offers you the opportunity to map any relationships with other players, such as suppliers, partners or employees.

Each company is unique – and CAS genesisWorld adapts itself to it.

CAS genesisWorld is designed according to a modular principle, set up specifically for each company, and extended in such a way that individual business processes can be mapped. Due to its modular structure, CAS genesisWorld is adapted to the requirements and processes and provides the best possible support.

It does not matter whether you want to access your data in the office, while on the road, or from home: A corresponding CAS genesisWorld client is available for every scenario. You can also access the necessary data offline.



CAS genesisWorld is integrated into the corporate landscape and you will find the information where you want to use it.

You can continue to use familiar Office tools such as Microsoft Outlook, Microsoft Word, or tools from various e-mail marketing providers using the interfaces to third-party systems which are included in the program.

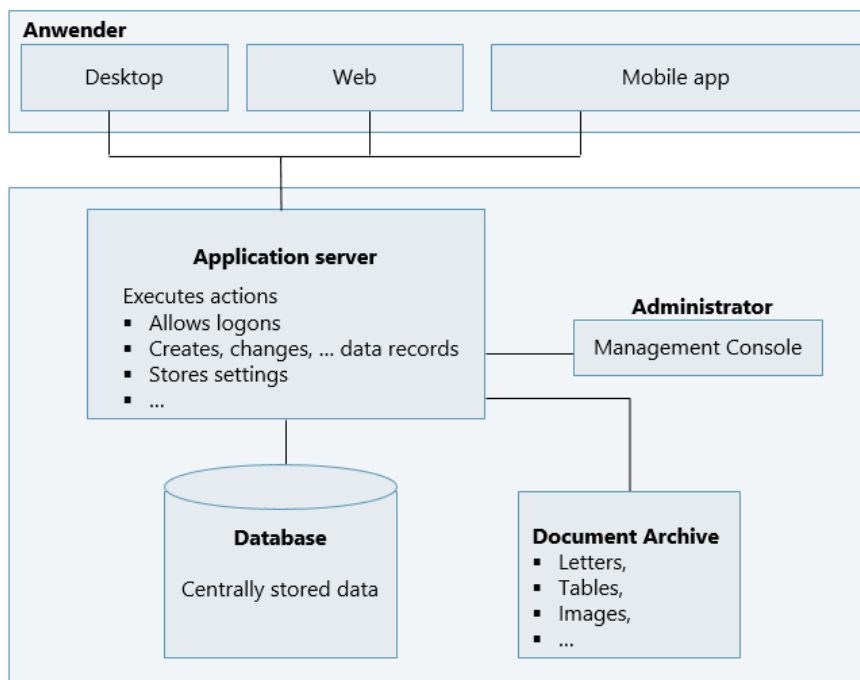
This allows you to benefit from important information from these third-party systems that are integrated into CAS genesisWorld. Through standardized interfaces, other systems such as ERP (Enterprise Resource Planning) or DMS (Document Management Systems) can be connected and used for a more efficient collaboration.

In every company, many people work together to win, care for, and retain customers, to carry out projects for the company or customers, and so on.

They create and manage, for example, appointments, e-mails, tasks and documents together with their colleagues in CAS genesisWorld. Thus, they access and share the knowledge of the entire company.

1.1 CAS genesisWorld architecture

CAS genesisWorld's architecture is based on a client/server model and comprises several programs for clients and servers.



The CAS genesisWorld **Application Server** performs steps such as searching, saving or editing data records by accessing the database and the Document Archive. You can log on to the application server with every client. When you log on, your CAS genesisWorld user account and your access rights are checked.

Your data and data settings are stored centrally in the **database** of a database system like the Microsoft SQL Server. With this central storage, data is also available centrally - for all users and for all clients.

The **Document Archive** is a special folder in which, for example, Microsoft Word documents, Microsoft Excel tables, or graphic files can be saved. These so-called archive files are also centrally available via the Document Archive.

1.2 Where do I find information about CAS genesisWorld?

The documentation for CAS genesisWorld and the individual programs of CAS genesisWorld includes two manuals, several online helps and guides with different contents; the documentation can be accessed via different channels.

- The documentation is available on the hilfe.cas.de page and can be accessed via a link.
- The two manuals include basic information and guidelines for working with CAS genesisWorld. Manuals are provided as PDF files.

The **First steps** manual explains the architecture and the basic principles when working with CAS genesisWorld for users and administrators.

The **Installation and setup** manual explains the basics and first steps for installing and updating CAS genesisWorld for administrators.

Both manuals provide an insight in essential areas and topics – as comprehensive as necessary, and as compact as possible. For this reason, a link is provided to the relevant help page for specific functions so users can access more detailed information about how to use these functions.

- You can access online help pages for each CAS genesisWorld client, which describe the correct use and procedure for each function. Each online help is a collection of HTML pages with a table of contents containing the structure, a search, and sometimes an index.

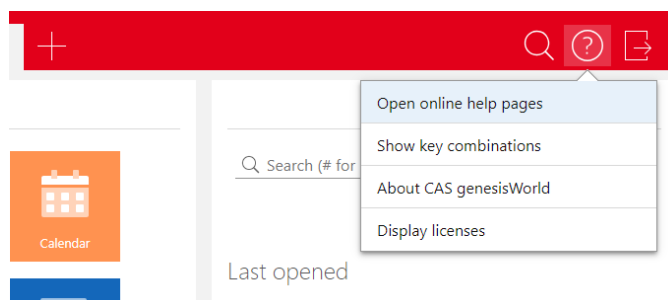
You need access to the internet to open an online help. Your default browser is used to open and view the help files with the settings defined on your computer.

- The user guides describe extensions for CAS genesisWorld for administrators and users.

The online help can also include contents from the user guides for CAS genesisWorld extensions if the specific functions are available in the documented client.

Tips and tricks

Most online help pages are context sensitive. With the **Help** button or the F1 key in the program or the respective window, the corresponding online help page is opened.



2 CAS genesisWorld clients

Several clients are available for users and administrators for different applications.

2.1 Clients and user application areas

Users can work with one or even multiple of the available clients. The clients support different operating systems and technologies and each client has a different focus and field of application with respect to CRM (Customer Relationship Management) and customer care.

- With the clients, users can record and manage data for their daily tasks, including appointments, tasks, addresses, opportunities, documents, and so on.
- You manage processes with CAS genesisWorld in your company, for example, an address check or e-mail campaigns.
- You can deploy interfaces to Microsoft Word or Microsoft Outlook and also work with other CAS genesisWorld modules.

This manual explains the basics and the interaction of different functions for CAS genesisWorld. These basic functionalities and also the way of creating and editing data as well as the deployment of (automatic) functions are similar in the different clients.

The following descriptions thus refer partly to the desktop client and to CAS genesisWorld Web. The illustrations also represent both clients. The mobile apps are mentioned in exceptional cases as these clients differ in the functional scope of CAS genesisWorld Web.

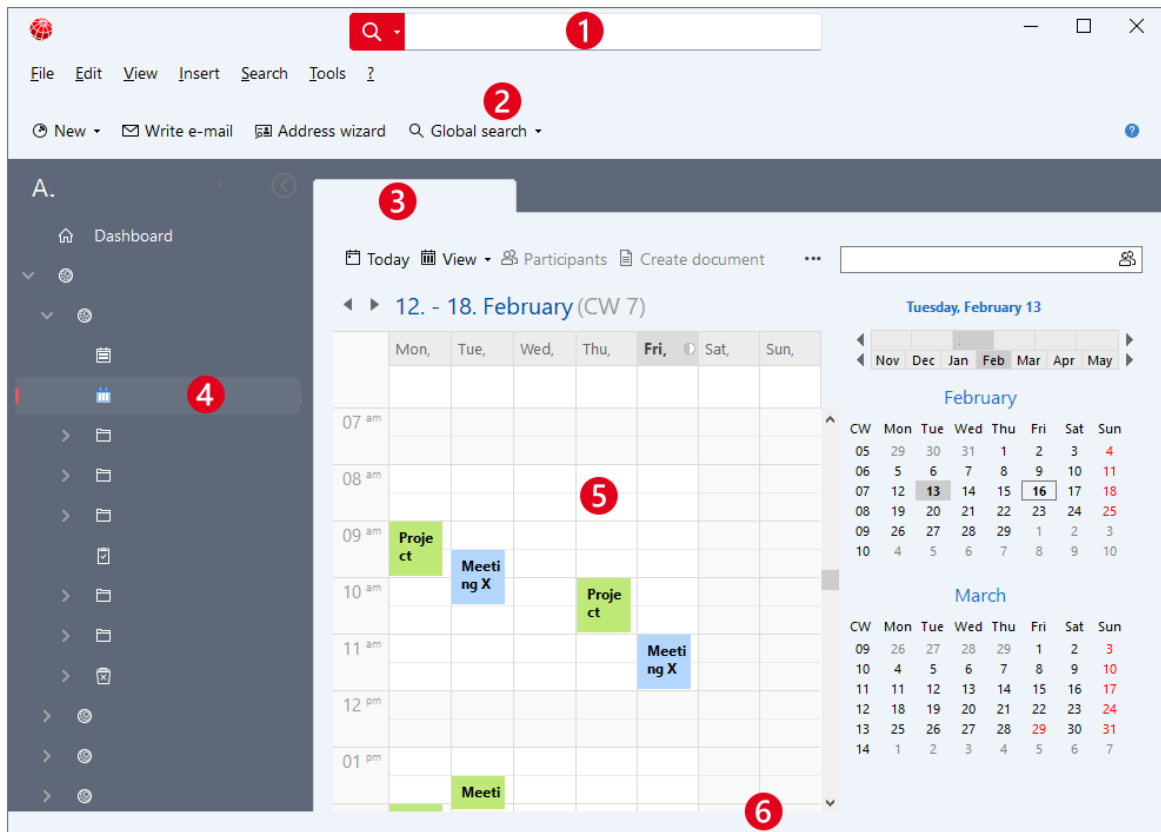
2.1.1 Desktop client

This client runs on the Windows operating system.

- In this client, you set up and execute functions to administer data and processes.
- You can define automatic functions and defaults.
- Some functions, automatic functions, and defaults may only be important for you. However, in some cases, these functions can also be available in other clients or for other colleagues.

① Search field

If you do not define otherwise using the drop-down list, the system automatically searches addresses. You can select the data record type you wish to search in the drop-down list to the left of the search field. You can enter one or multiple words as well as parameters and jokers in the search field.

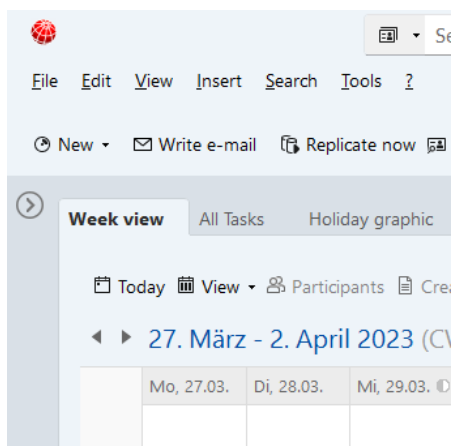


2 Menu bar and toolbar

The menu and toolbar functions are displayed depending on the context and this may result in differences, for example, when displaying functions in the calendar or a list. Move the mouse pointer over an icon to view the tool tip.

3 Tabs

Several opened views can be displayed as tabs.



4 Program navigator

In the pane on the left of the program window you will see the program navigator, which contains different folders and views for your work.

5 Views

After clicking an entry on the left side of the program navigator, you will see either views with data records or folders.

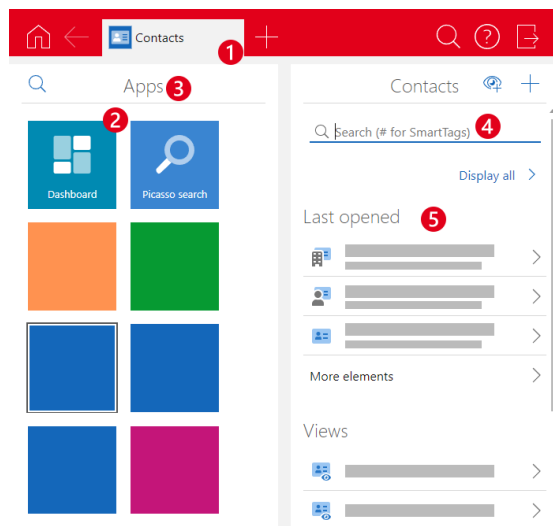
Folders are special views for a better overview in the navigator and contain views themselves. For example, a *Planning* folder contains different calendar views and a *Documents* folder contains different document lists.

6 Status bar

The status bar is displayed at the bottom of the program window and contains different information.

2.1.2 CAS genesisWorld Web

When working with CAS genesisWorld Web, you work with a supported browser. The operating system is not relevant. This client can be useful on the go, when working from home or with a laptop.



1 All open tabs are displayed on the upper left side.

2 Apps

When starting CAS genesisWorld Web, several apps are displayed on the first page. This view on data and data functions is similar to the one in the desktop client navigator.

Most apps refer to one data record type, such as appointments, tasks, addresses, opportunities, or documents. When you open such an app, the last opened data records are displayed on the right and you can access them directly. This view includes all clients. If you have last opened a project in CAS genesisWorld Web, this project is also displayed as last opened project in the desktop client and vice versa.

In an app for a data record type, you can also find lists with data records of this data record type.

Apps can also include a collection of related apps for different fields of activity, such as project management, products and receipts, or custom groups you define for your company's fields.

- 3 After clicking the magnifying glass, a search field is displayed above the apps. By entering, for example, **Pro** you can find the **Products**, **Product uses** and **Projects** apps. The search also finds an available app with the name **Internal projects**.
- 4 When you open an app, you can find a search field to search the data records of an app.
- 5 You can also find a list of last used data records as well as a list of views available for the data record type.

Some apps, such as the calendar, use all the available space in the window so that as much data and functions as possible are displayed.

- 6 In the upper right, you can find general buttons, for example, to access the so-called SmartSearch across multiple data record types, to access the online help pages, or to log off.

2.1.3 CAS genesisWorld SmartDesign mobile app

When using this client, you work with a mobile app for the iOS, Android, or Windows operating systems on a corresponding mobile device. These clients all support mobile working and, for example, key functions for the sales team.

With the mobile app, you can make list views and data records available offline for almost all data record types. You can also make the dossiers of appointments available offline. For offline use, the data records are saved locally. You can also search, link, edit, and delete the displayed data records and create new data records.

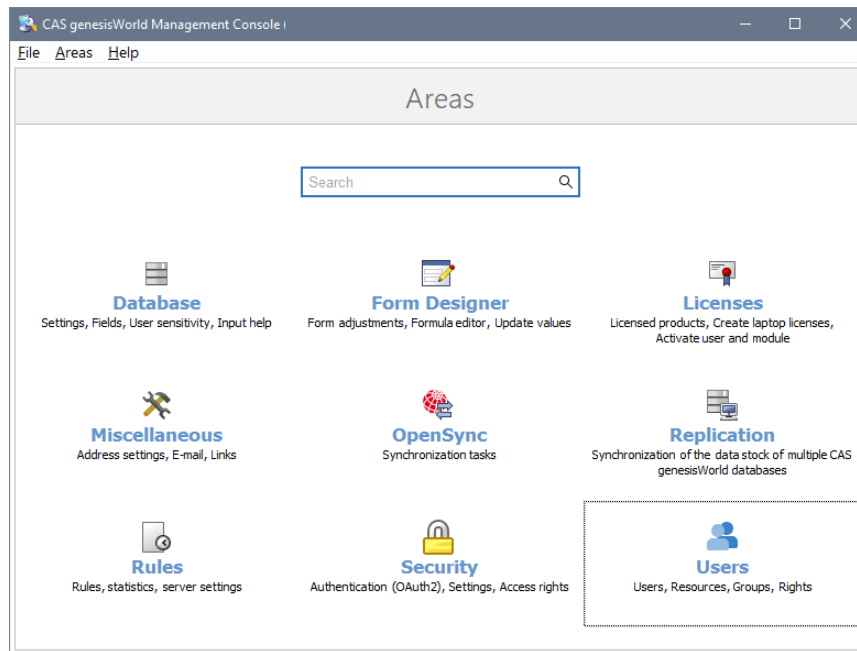
The interface, the organization of data in apps, and the available functions in the mobile app are very similar to CAS genesisWorld Web.

2.2 Clients and areas of application for administrators

The administrator also uses several clients to manage CAS genesisWorld and to define settings and defaults for users.

- In the Management Console of CAS genesisWorld, you define central defaults, set up adjustments and workflows for your company, and create user accounts.

You require a user account to be able to work with a CAS genesisWorld client. Furthermore, the administrator defines access rights to data and functions for each user account.



- With the Database Wizard, you manage databases and the connection to the Application Server.

CAS genesisWorld data also includes user accounts, the corresponding user settings, rights, and other defaults and adjustments.

You can deploy more than one database with CAS genesisWorld. However, one database is always defined as the default database.

- With the Server Manager, you, for example, start services that enable external access to the CAS genesisWorld database via CAS genesisWorld Web or the mobile app.

3 Basic concepts for all clients

Some basics apply to all users and deployed clients.

3.1 Logging on

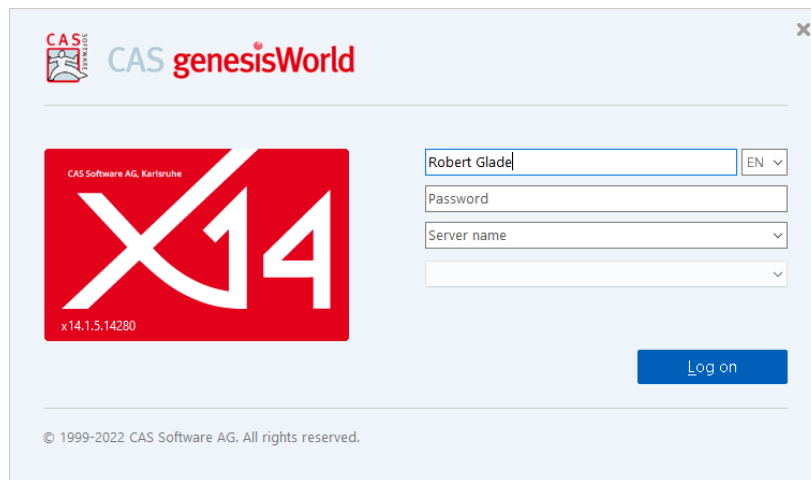
Users need to log on to the CAS genesisWorld user clients and the Management Console. Users can log on to clients with

- the user name and the password of Windows, or
- the user name and the password for CAS genesisWorld.

You also need the name of the application server to log on. You only need the name of the database if the company uses more than one database. If you do not specify a database, you automatically log on to the default database.

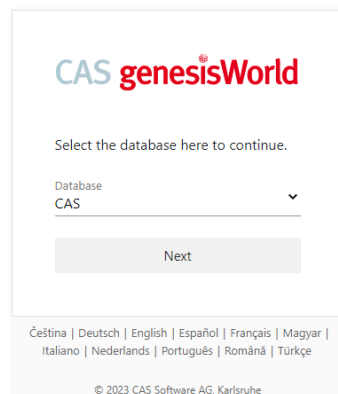
You will be able to use your Windows user name and password to log on to the program if your administrator has made the necessary settings. If you do so, you do not have to remember another user name and password for CAS genesisWorld.

- ✓ In the logon window of the desktop client, you do not have to enter anything and press the Enter key of the keyboard or click the **Logon** button.



Now, you will automatically be logged on to CAS genesisWorld using your Windows user name and password.

- ✓ In CAS genesisWorld Web, you also do not need to enter a value in the following window and can immediately click **Log on**.



- ✓ This type of logon can only be used if you are logged on to Windows on the currently used computer and if the computer is located in the network of the company.
- ✓ After you have logged on to your company network once, the logon with Windows authentication is also available on the go. But only until you change your password again. Then, all you need to do is log on to your company network again.
- ✓ Both windows are displayed when using the CAS Authentication Server. The administrator defines the corresponding settings.
- ✓ When you click **Log on with CAS genesisWorld** in the window displayed above, the following window opens. Then, you can enter your CAS genesisWorld user account data.

- ✓ In the mobile apps, you can log on with your CAS genesisWorld user account, via Windows, or biometrically.

3.2 Users, rights, and data

As CAS genesisWorld user, you have a CAS genesisWorld user account. Resources are specific user accounts. User accounts and resources can be collected into groups. The administrator creates these groups.

3.2.1 User accounts, resources, and groups

You and your colleagues in your company have a user account when you collaborate via CAS genesisWorld.

- Each user account for CAS genesisWorld is defined via a unique name, for example, using the first and last name of a user. An e-mail address is assigned to the user account.

If you can log on using your Windows user name and password, the administrator has allocated and thus connected the Windows and CAS genesisWorld user accounts.

- The **Administrator** user account is a default account and cannot be deactivated or deleted. This ensures that at least one user can log on to CAS genesisWorld.

More user accounts for administrators with more or less rights can be set up.

- Resources are operating resources such as devices, cars, or rooms. A resource can also have an e-mail address.

You cannot log on to CAS genesisWorld with the name of a resource user account.

- Groups contain user accounts or resources as members with shared settings and defaults that are defined by the administrator according to different criteria.

Criteria can be, for example, responsibilities, common rights or collaboration types. For example, each department is a group, all colleagues with the right to merge address duplicates are a group, or another group consists of all vehicles that are available as resources.

- With a user account, you can assign rights to a data record or other CAS genesisWorld data for other user accounts, resources, or groups.

You enter users, resources or groups in the rights field as participants or authorized persons.

- **All (public)** is a specific user who is available as default user in clients for users and who represents all users.

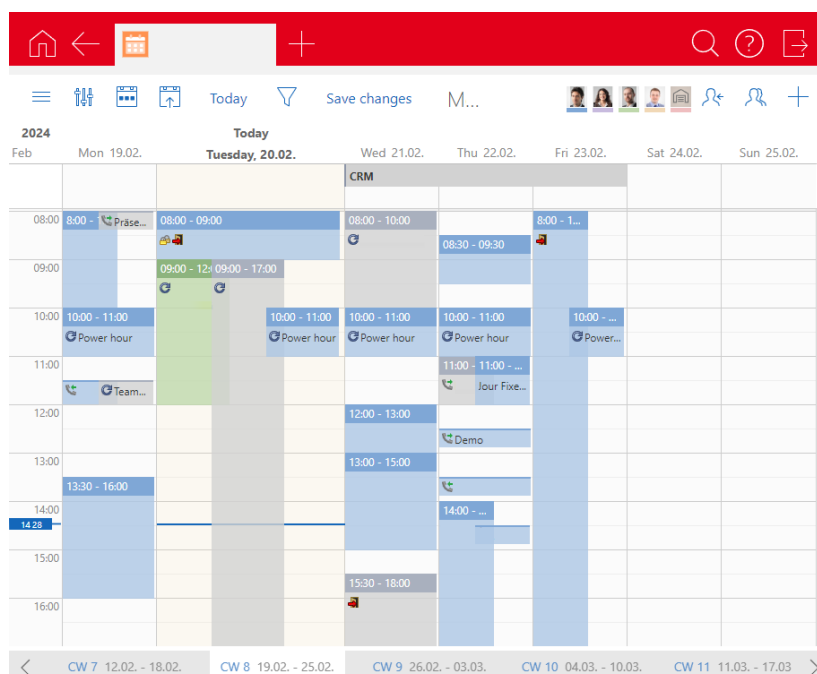
You can use this user account to grant rights to all of your colleagues at once.

3.2.2 Rights for user accounts, resources, and groups

The administrator first defines which user accounts, resources, and groups have access rights and rights to certain data and functions. As user, you can also assign rights to data.

This allows you as a user to access the data of colleagues from your department or other departments that are relevant to your work.

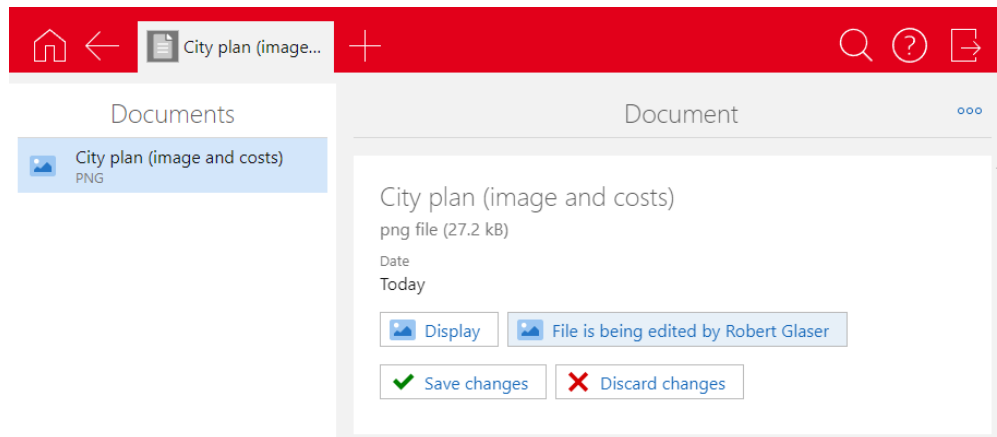
A team calendar is an example of how settings for rights affect each other: In a weekly calendar, you can display your own schedule, other colleague's appointments and resources, for example, a workshop room.



3.2.3 Central storage of shared data

CAS genesisWorld enables you to work with shared data, which means all users can access and edit the same data record. With rights, you can control whether users have more or less rights when working with data.

When working with documents, the system displays whether the document is currently being edited by another colleague.



3.3 Data record types

A data record includes various information related to each other. For example, the address data record Michaels contains all the relevant information on the customer named Michaels, such as first name, last name, postal address, and so on. The respective information, a **Field value**, is contained in a so-called **Field**.

The data records of a kind are the so-called data record types, for example, appointments, tasks, addresses, opportunities, documents, and so on.

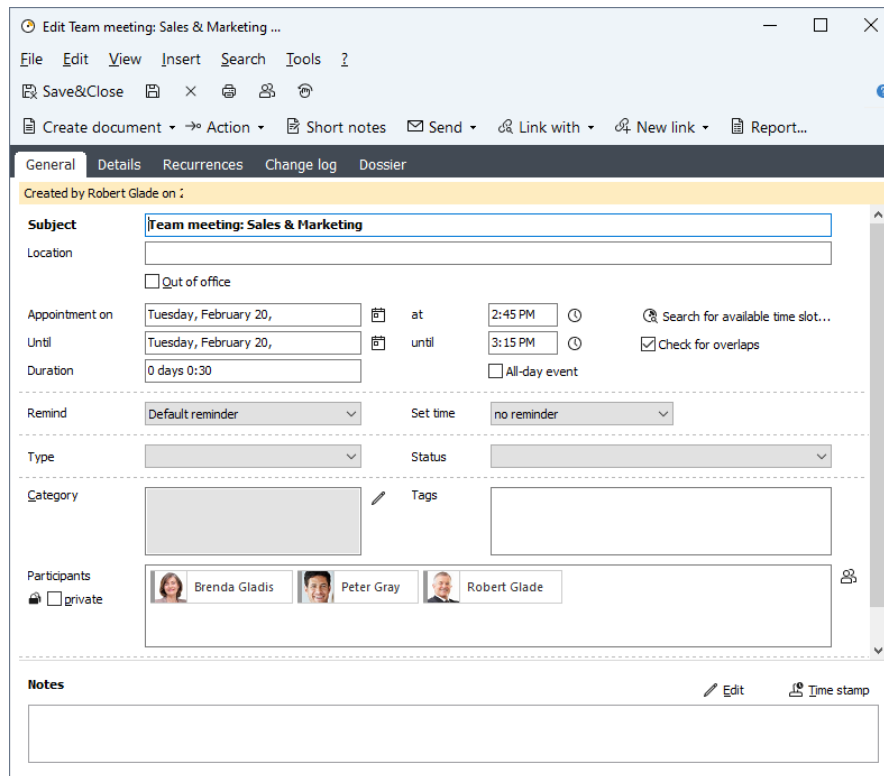
Each data record type in CAS genesisWorld has specific fields and functions. However, the data record window structure and the procedure when creating or editing data records works the same for all data record types. Creating and editing are described using the example of an appointment and a task.

Addresses, opportunities and documents are important default data record types and are described in this manual. You find descriptions of more data record types in the online help pages.

Only a few of the specific fields and functions for data record types are described here. For each data record type, you will be referred to the help pages with further information.

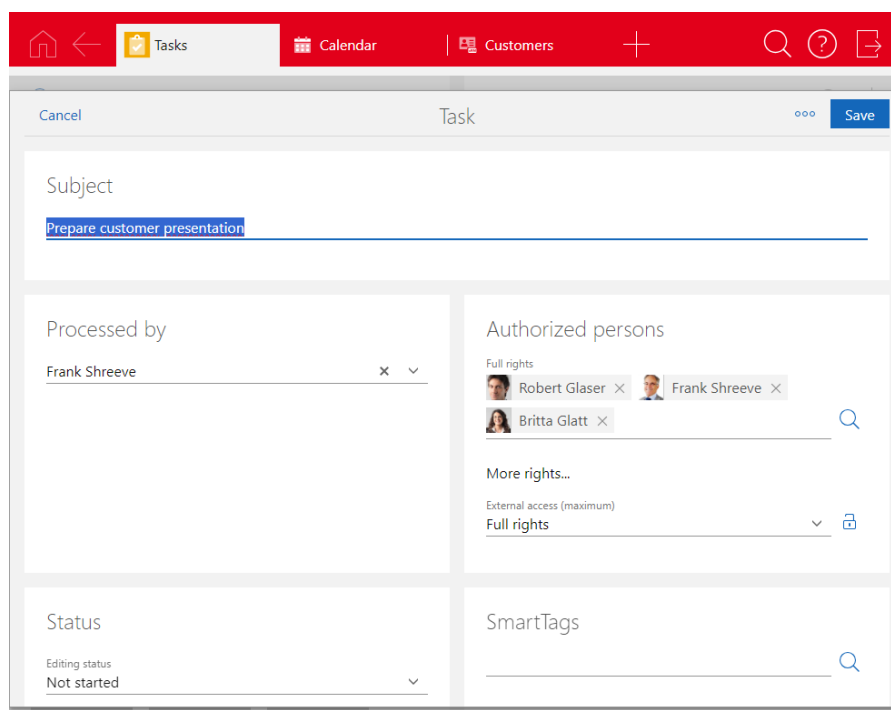
3.3.1 Appointments and tasks

🕒 An appointment is an activity with participants at a specific time, which takes place in a specific location or as an online meeting.



With a task data record, you define which task is to be completed till when in a specific context.

The previous image shows an appointment in the desktop client, the following figure shows a task in CAS genesisWorld Web. The comparison of the two data records shows several similarities, for example, for the **Subject** or **Participants** or **Authorized persons** fields.



3.3.2 Working with different functions

The user interface and how you access functions are similar in both clients. Often, you have various options to call functions.

The following example illustrates the different options for opening a data record. The available options for calling a function depend on the context, that is, the used client and which part of the interface is in focus. For example, are you working in a program window, a calendar, a list, or an opened data record.

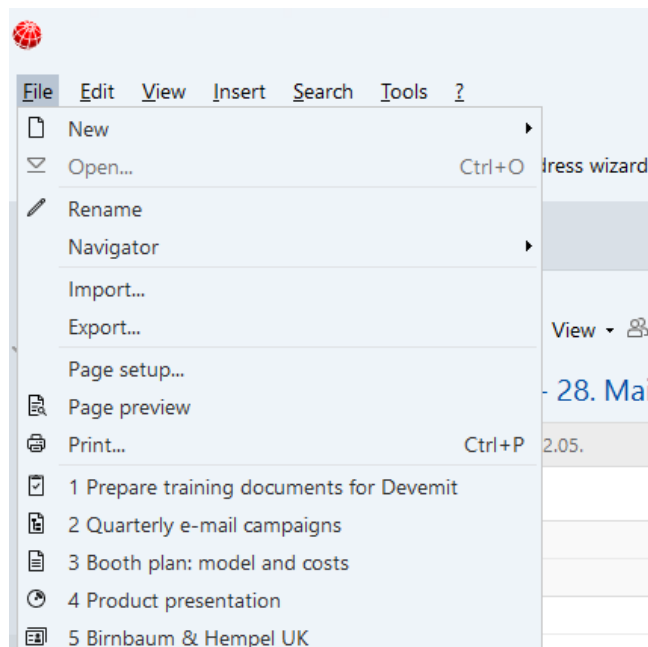
In the online help, you can usually find at least one description of how to call a function.

The desktop client offers you the following options:

- ✓ Select a data record, for example, in a calendar, go to the **File** menu of the program window, and click **Open**.

In the menu bar of a Windows program, the functions are displayed in sorted order. Thus, you can easily find related functions under the corresponding menu entries.

- ✓ Double click a data record, for example, in a calendar.

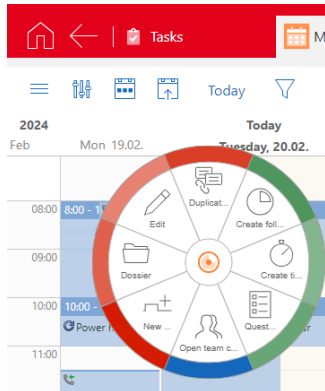


- ✓ Right click on a data record to open the context menu and click **Open**.
- ✓ The Ctrl + O key combination opens a selected data record.
- ✓ The last opened data records are displayed in the **File** menu of the program window and are opened with a mouse click.

In CAS genesisWorld Web, you usually work with buttons.

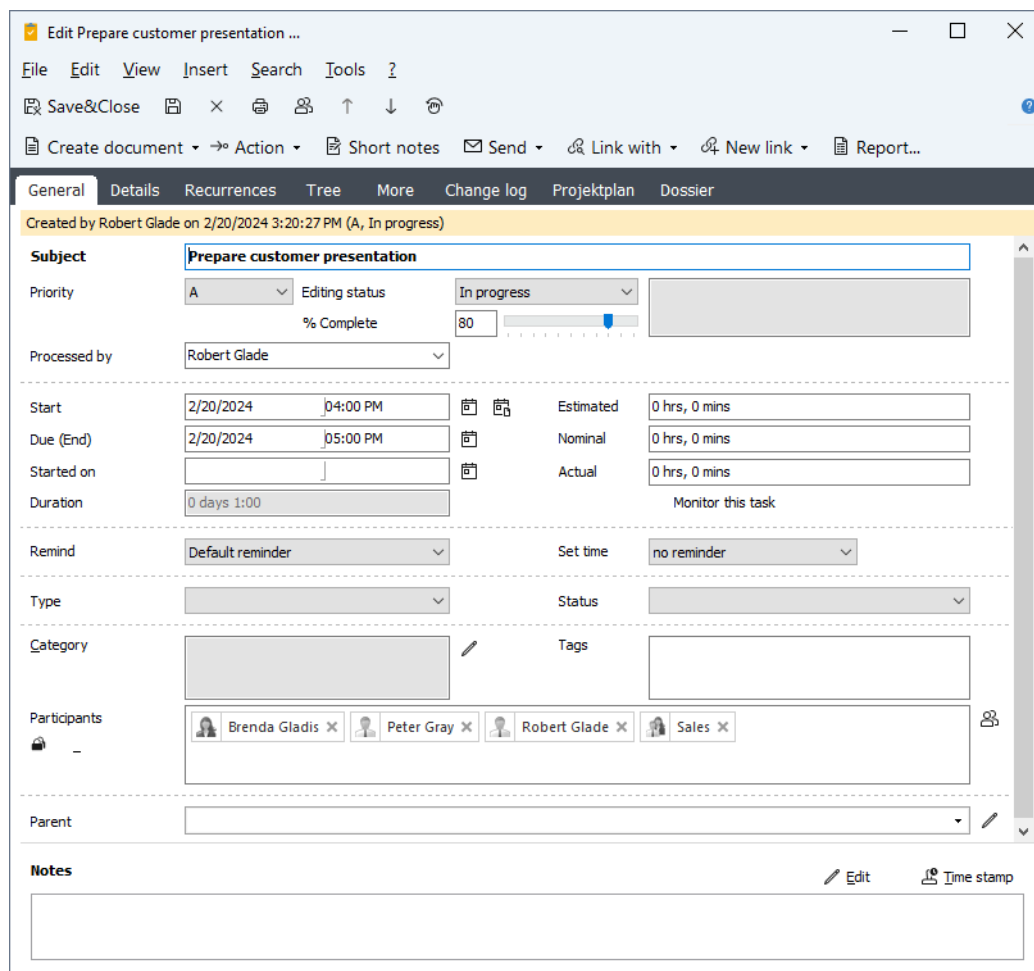
- ✓ You open a data record with a mouse click.
- ✓ In most cases, you can also access the radial menu by right-clicking a data record. The radial menu always contains functions frequently required in the current context.

These include, for example, the **Duplicate** function for documents, appointments, and tasks. This function helps you to create a new data record by copying an existing data record.



3.3.3 Structure of data record windows and common fields

Depending on the data record type, different fields are available in a data record window of the desktop client. The fields are arranged in content areas. The content is furthermore structured on different tabs.



- The **General** tab contains the most important fields of each data record type, such as the **Subject** or the **Name** and **Postal address** of an address.
- All changes made to a data record are logged in a list and displayed on the **Change log** tab. You can undo all changes.

This tab is only displayed and you can only undo changes if the administrator has granted you the necessary rights.

- The **Dossier** tab displays the data records with which the currently opened data record is linked.

For example, an appointment can be linked with the related addresses, the preparation task for the meeting, and the agenda document. Thus, you can clearly record the connections and dependencies of each data record.

- The data record can contain more tabs, for example, depending on the data record type, the deployed CAS genesisWorld version, or the settings defined in your company.

In CAS genesisWorld Web, related fields are arranged in blocks with a heading, for example, **Location** or **Participants**. Tabs are also available, for example, the **Change log** tab.

In the mobile apps, the most important fields of each data record type are displayed on one page.

Similar fields in all data record types

Which fields are available in a data record or on a tab depends on the opened data record type. An address contains different fields than a task or an appointment. However, some fields are always available in the same or an analogue form.

- ✓ The first field is usually called **Subject** and is an input field in which you enter text.

By default, the **Subject** field is displayed in all lists. This field is also searched by default without any settings necessary. It therefore helps if the entry for this field is as precise and unique as possible.

- ✓ Similar input fields for text include, for example, **Location** in appointments or **Keywords** in all data record types.

- ✓ It is possible to enter additional CAS genesisWorld users as **Participants** or **Authorized users** in almost all CAS genesisWorld data record types.



The users or resources displayed in this field are granted specific rights to the data record and can thus access it. This means, for example, they can only open the data record for reading or also editing, see chapter "User accounts, resources and groups" on page 15.

- ✓ In the **Notes** field, you can enter longer text for each data record. The text can be formatted and contain images or hyperlinks.
- ✓ For all fields with a date and time, data can be entered manually, for example: **Date on ... at, Start and End, Holiday from ... to, or First contact date.**


Entries in these fields always correspond to a certain form such as dd.mm.yyyy for a date.

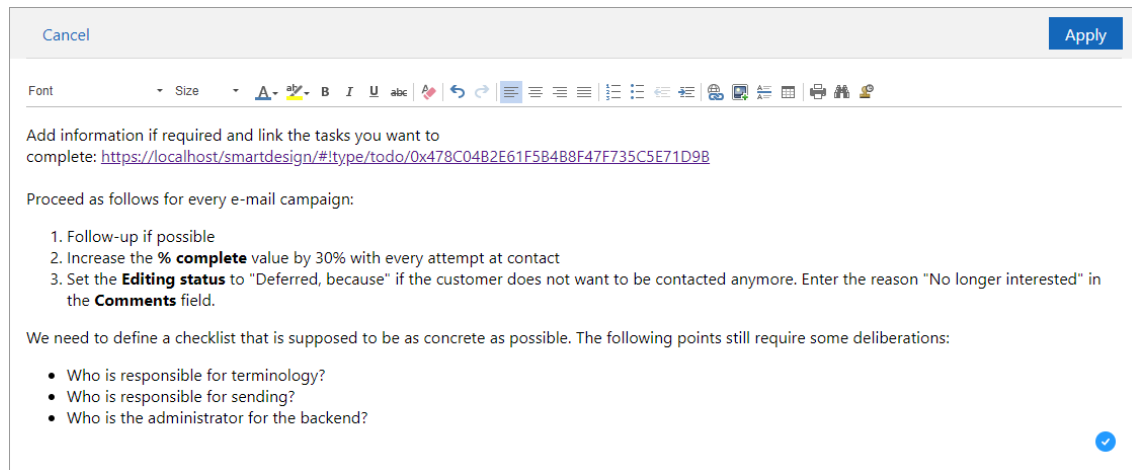
Supported entries in data record windows


Different features support input help functionality: a button consisting of a symbol, or a symbol and text, and so-called drop-down lists.


-   Buttons for a date or time open a window so that you can select the entries and do not have to enter them.

- ✓ Drop-down lists are indicated by a small arrow at the end of the field and you can select entries from the list. Depending on the field, you can also manually enter a value or only select one or multiple entries from the drop-down list.

-  The **Edit** button in the **Notes** field in the desktop client opens a window with an editor. Here, you can insert images or hyperlinks, format text, check spelling, and so on.

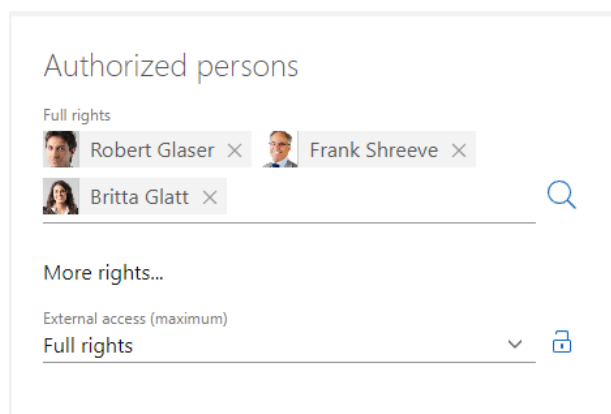


 In CAS genesisWorld Web, you can find the functions for editing text directly above the field.

 You can always manually enter users, groups, or resources in the **Participants** or **Authorized users** field. Alternatively, you can click the button to open a window in which you can select users, groups, or resources.

When creating a data record, you are automatically entered as the only participant. If you enter further participants or assign access rights, others can also access the data record.

Thus, you define participants and access rights to share your data with other users so that all employees can access the same data.



3.3.4 Special fields and automatic functions for appointments and tasks

You can find more information on all functions and procedures described below in the respective online help, for example,

- in the CAS genesisWorld Web Online Help on the following page: [Appointments](#).
- in the online help for the desktop client on the following page: [Creating/Editing tasks](#).

Special fields for appointments

- ✓ You can check for and display overlaps with other appointments, phone calls, or holidays.

You can view overlaps directly in a calendar, indicated by parallel entries. If you want to display overlaps with phone calls, the calendar must display the corresponding data record type.

You need to have entered the start and end in the data record window of, for example, an appointment or phone call. Then, the overlaps are displayed in the **Participants** or **Authorized persons** field. When creating such a data record, overlaps are only displayed when you exit the **Participants** or **Authorized persons** field.



If there are overlaps for a participant, a button is displayed in the top right-hand corner of the data record window. Click the button to open an overview in which you can see the number of overlaps.

The display of participants in CAS genesisWorld Web and in the desktop client differs only slightly.

The settings defined by the administrator and by the user in the desktop client determine whether the system checks for overlaps and with which data record types.

- ✓ With the **All-day event** option, corresponding appointments are displayed in the calendar directly below the date and weekday. All-day appointments are designed to be used for events such as anniversaries, jubilees, and so on. The day is not blocked by this function, further appointments for this day can still be entered.

Special fields for tasks

- ✓ You indicate the progress of a task by selecting an **Editing status** in the drop-down list, manually entering a value, or moving the slider in the **% Complete** field.
- ✓ If you enter a user other than yourself in the **Processed by** field, this user is automatically entered as participant when saving the task.
- ✓ If the **Monitor this task** option is activated, participants or authorized persons of the task are automatically notified via e-mail if the due date of the task is exceeded and/or the **Due date** or **Priority field** is changed.

Functions and automatic functions

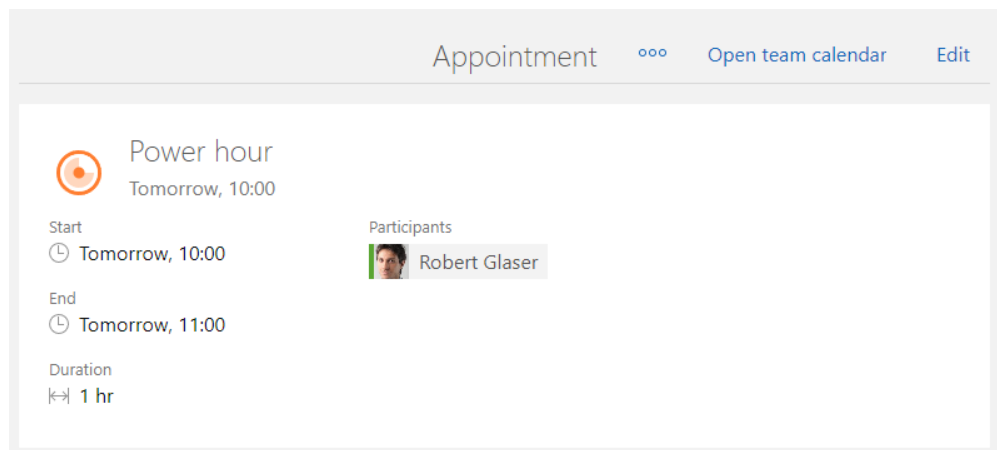
If you want to reschedule an appointment, you can quickly find free time slots with a team calendar.

- ✓ If you open an appointment for several participants in CAS genesisWorld Web or the mobile app, the **Team calendar** button is displayed.

Team calendar opens a week view with all participants and resources entered in the appointment.

The calendar then displays alternative free time slots.

- ✓ You can also call the **Team calendar** function from the radial menu of an appointment.



- ✓ In the desktop client, right-click the appointment and select **Display calendar view for participants**.

Events or meetings usually take place in corresponding meeting rooms in a company. Rooms can exist as resources in CAS genesisWorld, see "User accounts, resources and groups" on page 15. The administrator needs to mark the corresponding rooms as resources for you to be able to use the following function.

- ✓ If you add the resource of the room to the appointment, the name of the resource is automatically entered in the **Location** field of the appointment.

3.3.5 Addresses

In CAS genesisWorld, you can manage addresses or contacts of, for example, customers, partners, prospects, employees, applicants, or service providers in different ways: keep your data up-to-date, create address management processes, and integrate address management in other processes. Addresses are critical data for many business processes. To support these processes, the address data record type offers many fields as well as automatic functions.

You can find more information on addresses in the online help for the desktop client on the following page: [Address management](#). In the CAS genesisWorld Web Online Help, you can find more information on the following page: [Contacts](#).

The screenshot shows the 'Edit company Birnbaum & Hempel UK' window. The form is divided into several sections:

- Company:** Birnbaum & Hempel UK, Public Limited Company, Service
- Company address:** 50 Princes Gate, Exhibition Road, London, SW7 2PH, United Kingdom
- Contact data:** +44 211 456489-0 (Phone (switchboard)), +44 211 319419 (Fax (central)), info@birnbaumhempel.com (E-mail (central)), http://www.birnbaumhempel.com (Homepage)
- Contact methods:** E-mail*, Mail, Fax, Phone
- Person responsible:** Robert Glaser
- Type:** Customer
- Status:** (empty)
- Category:** Kunde, Partner | Vertriebspartner
- Tags:** Public Limited Company

Below the form is a 'Notes' section with a '2012 Annual Report' entry. At the bottom, there is a table of contact persons:

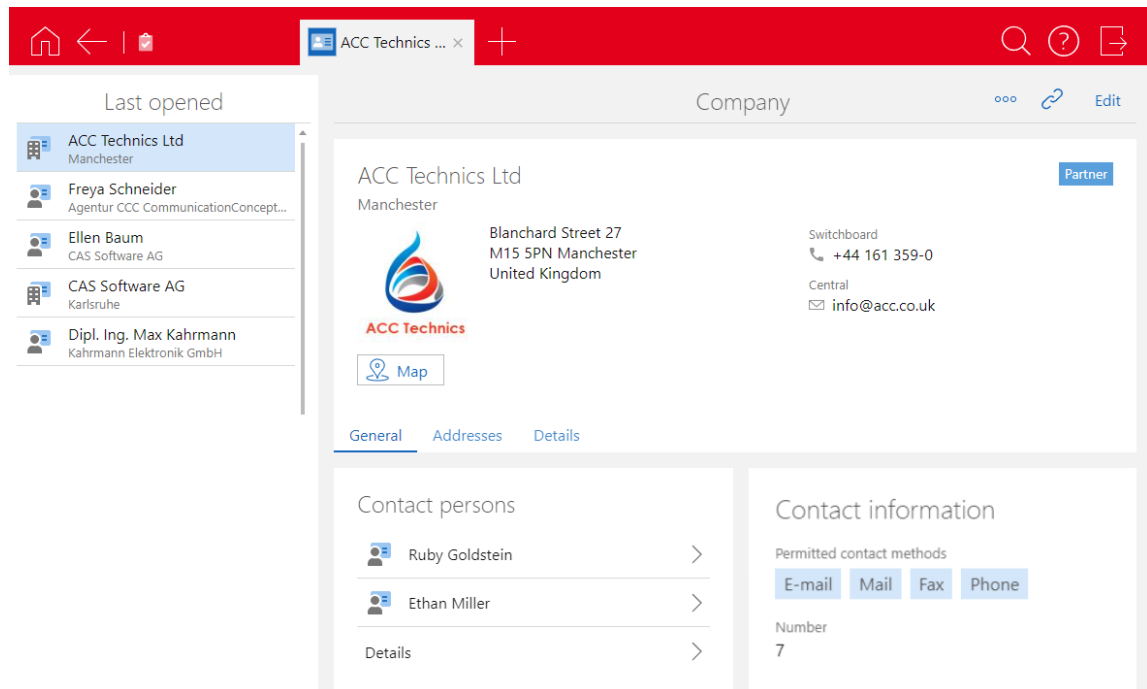
For...	Title	First name	Name	Department	Function	Phone (business)	E-mail (business)
Frau		Fiona	Braun	Customer Service	Kundenservice	+49 211 456489-53	Fiona.Braun@birnbaumundhempel.de
Herr		Fritz	Müller	Vertrieb	Vertriebsleiter	+49 211 456489-152	Fritz.Mueller@birnbaumundhempel.de
Herr		Theodor	Meissner	Customer Service	Produktmanager	+49 211 456489-27	Theodor.Meissner@birnbaumundhemp
Ms		Dorothea	Bing	Controlling	CEO	+44 211 456489-39	dorothea.bing@birnbaumhempel.com

An address contains the data of persons and/or companies. The program differentiates between three types of addresses:

- The first two address types, companies and contact persons, are linked with each other as each contact person is assigned to a company.

Depending on the settings made by your administrator, the company data is displayed in the contact person data record. This data is then only maintained in the data record of the company.

- An individual contact contains both fields for a company as well as a person.



User sensitivity

Participants can be entered for all data record types in CAS genesisWorld and thus rights can be assigned for this data, see chapter "Similar fields in all data record types" on page 22. If rights can be assigned, the data records are user-sensitive.

Addresses are often not user-sensitive. In this case, it is not possible to enter participants.

The administrator defines in the Management Console whether data is user-sensitive. For data records that are not user-sensitive, the corresponding rights that the administrator has defined for these data records apply. Users cannot change rights for this type of data.

Special fields

- ✓ You can enter multiple postal addresses in one address data record. In company data records, you can enter a **Company address** and a **Delivery address**. In contact person data records and individual contacts, you can also enter a **Home address**.

One of the postal addresses is the default address and thus taken into account when creating documents, for example, a form letter.

- ✓ In CAS genesisWorld Web and the mobile apps, you define the **Default address** via a drop-down list.

In the desktop client, the postal address displayed the last time you have saved the data record is used as the default address.

- ✓ If you enter a first name, the **Gender** field is automatically completed in individual contacts and contact persons.

The **Form of address** and **Salutation** fields are also automatically completed.

The **Form of address** value is used in the postal address on letters or envelopes.

The **Salutation** field contains the direct form of address, such as "Dear ...", " ".

With these fields, you can define a different form of address for each address data record, for example, for the contact person of a company, the company itself, or one of your partners.

- ✓ You can also enter multiple phone numbers, fax numbers, and e-mail addresses in one address data record.
- ✓ By selecting the permitted and preferred **Contact method**, such as **mail**, **e-mail**, **telephone**, and so on, you can address customers, suppliers, partners, and so on, according to their preferences.

For permitted and preferred contact types, the system checks whether the corresponding fields such as postal address, e-mail address, or phone number are available.

Functions and automatic functions

- ✓ The automatic address check is performed when you edit and save an address.

In the process, the system automatically completes certain fields with address values, checks the manually entered values, and suggests new improved values if necessary.

The address check is performed for address fields and contact information in particular.

Company address

Street
CAS Weg 1-5

Post code Town
76131 Karlsruhe

District ⚠

State/Region
Baden-Württemberg

PO Box

Post code PO Box PO Box

Additional info

Suggestion for change

Do you want to correct the address dat...


- Hagsfeld
- Innenstadt
- Innenstadt-Ost
- Innenstadt-West
- Neureut


- 🔧 The administrator determines the criteria for the address check. You as a user can view and maybe change some of the settings in the desktop client if the administrator has granted you the corresponding rights. To change the settings for the address check, open the **Tools** menu, click **Settings**, and open the **Addresses** tab.

You can find more information in the online help for the desktop client on the following page: [Automatic address check](#).

- ✓ Using the address wizard, you can create address data records almost automatically in the desktop client or CAS genesisWorld Web. To do so, you can use the address data from an internet page, a cover letter, or an e-mail.

Simply copy the text of the address to the clipboard.

 In the desktop client, open the **Tools** menu, click **Address wizard**, and select which address type you want to create with the copied text.

 In CAS genesisWorld Web, you first create a contact with the desired address type and then click the **Address wizard** button.

The appropriate information is automatically entered in the address fields where field mapping is possible.

- ✓ In the mobile apps, you can scan a business card instead of using the address wizard. You can then also save this data in CAS genesisWorld.

- ✓ Input help options are available for some specific fields in data record windows, for example, the **Sector** field in addresses. The administrator defines which input help options are available for which fields in your company.

For some input help fields, you can only select existing entries, for others you can enter an alternative text in addition to the predefined values.

- ✓ **Type** and **Status** are a related pair of fields and are available in the Premium Edition. Using the input help options for these fields, you can coherently categorize data records and define different company processes.

For example, users can select standard and special leave in the **Type** field of a **Holiday** data record type. If you select **Standard** in the **Type** field, the following options are available in the **Status** field: **Company holiday** and **Special leave**. If you select **Special leave** in the **Type** field, you can then select the following values in the **Status** drop-down list: **Flextime**, **Wedding** or **Funeral**.

In address data records, you can select the following values in the **Type** field: **Customer**, **Supplier**, or **Employee**. Depending on the selected type, other values become available in the **Status** field.

A mandatory field requires an entry before the data record can be saved. Mandatory fields also depend on entries in the **Type** and **Status** field.

You can find more examples in the online help for the desktop client on the following page: [Type and status: functions and examples](#).

3.3.6 Opportunities

- ① With an **Opportunity**, you manage possible sales or orders from customers. You assign the address of a potential customer to the opportunity. You also manage the corresponding products and services that are supposed to be included in the potential sale in the opportunity. All phone calls, e-mails, correspondence, and so on, are linked with the opportunity and address.

Thus, you can map the entire process from the first contact with a prospect to the quote to the conclusion of the sale. Similar to addresses, opportunities include many fields and automatic functions to help you map all the information. You can review past communication, plan future contact, and analyze the results of one or more opportunities.

You can find more information on opportunities in the online help for the desktop client on the following page: [Opportunities](#).

You can find more information on opportunities in CAS genesisWorld Web on the following page: [Opportunities](#).

Subject Parquet floor installation
Customer Birnbäum & Hempel UK
Status open
Phase Lead
Source Mailing
Probability 25 %
 Use calculated probability

Total (EUR)	1.000,00	Contribution margin (EUR)	0,00
Total weighted (EUR)	250,00	Weighted contribution margin (EUR)	0,00

Product items
 Paquet (1), Laminat (1)

Last action on
Next activity
Remind All participants
Set time no reminder

Parent Birnbäum & Hempel UK

Notes

Special fields

- ✓ Each opportunity is in a **Phase** of the sales process as a **Lead** or **Quote**. Additionally, each opportunity comes from a **Source**, such as a trade show or a customer recommendation.

The entries you can select in the respective drop-down list as well as the **Status** values **open** or **lost** are all input help options, see chapter "Functions and automatic functions" for addresses on page 28.

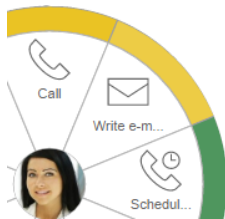
- ✓ You can find an estimate of the probability of closure in the **Probability** field.
- ✓ The **Next activity** field shows planned follow-up steps: for example, today is Monday 9:00 and you open an opportunity. This opportunity is linked with an appointment on Tuesday and the task for the meeting minutes on Wednesday. The **Next activity** is the appointment on Tuesday. If you open the opportunity after the Tuesday appointment, the meeting minutes task is displayed as the next activity.
- ✓ An opportunity can always include **Product items**. Products are another data record type in CAS genesisWorld. With this data record type, you can record products and services as well as prices, units, descriptions, technical details, and so on.

An item in an opportunity can, but does not have to be based on a product. An item in an opportunity can contain individual prices, quantities, or discounts for the customer.

In an opportunity, product items are created in the **Product items** tab or block.

Functions and automatic functions

- ✓ You can include opportunities that have not yet been completed in analyses. To do so, the values in the **Total** field for closing and in the **Contribution margin** field are automatically weighted with the value entered in the **Probability** field.



You can directly contact the customer, any contact persons, and all other addresses linked with the opportunity. In CAS genesisWorld Web, you open the radial menu using the right mouse button. If you then click **Call** or **Write e-mail**, you contact the default phone number or e-mail address.

☎ ✉ In the desktop client, select a phone number or e-mail address from the corresponding drop-down list in the toolbar of the opportunity.

With one click, you can simply open the desired address data record.

- Click **Create quote** in the action menu of the opportunity to create a form letter.
- ✓ You can then use different mail merge fields from all data records that are linked with the opportunity in the form letter for the quote. These can include:
 - a recipient with the postal address fields from the customer's address,
 - the **Document validity** of the quote from the opportunity,
 - pictures or descriptions of the **Products**, and
 - the **Product items** with the data specifically recorded for the opportunity.

3.3.7 Documents

📄 You can work with different types of documents in CAS genesisWorld. In general, you can differentiate two types: those documents for which you edit and record the text directly in CAS genesisWorld, and those that include an archive file that you edit in another program and indirectly save in CAS genesisWorld.

- For example, you can record a meeting in a **Short note** or write and send HTML e-mails to one or more addresses using the **E-mail campaign** data record.

The document data record contains fields and functions for CAS genesisWorld, such as the **Subject** or specifications for access rights.

In addition, you always edit the text with an editor in CAS genesisWorld, see chapter "Supported entries in data record windows" on page 22. The document data record is stored completely in the CAS genesisWorld database.

- In the second document type, the document data record also contains fields and functions of CAS genesisWorld and also a connection to a so-called archive file.

An archive file can be any file you can create on your computer. Archive files are, for example, Microsoft Word documents, Microsoft Excel tables, images in any format, PDF files, audio files, and so on.

You do not edit an archive file with CAS genesisWorld but with a program for the respective file type.



An icon shows the file type for a document record with an archive file. Use the icon button in CAS genesisWorld to start the appropriate program.

This requires for all CAS genesisWorld clients that a program for the corresponding file is available on the computer or mobile device used.

The connection between the different document types and CAS genesisWorld can be made in two ways.

- The file is physically stored, for example, in a folder in the network. If your company has already defined a fixed folder structure for saving documents, you can also continue using this system. You can only create a document data record with this type of connection with the desktop client.

However, only users who have rights and access to the respective folders can open the archive file of this type of document data record. Furthermore, these archive files cannot be opened or edited in CAS genesisWorld Web or the mobile apps.

- Alternatively, you can save the archive file in the Document Archive, see chapter "CAS genesisWorld architecture" on page 7.

Only archive files from the Document Archive can be displayed and edited in CAS genesisWorld Web and in the mobile apps.

Even when creating document data records, you can only save the archive file in the Document Archive when working with CAS genesisWorld Web or the mobile apps.

Document data records without archive files can be created in all clients equally.

The screenshot shows a document form in the CAS genesisWorld Web interface. The form is titled 'Document' and has a red header bar with navigation icons and the document name 'Angebot Mafark...'. The form is divided into several sections:

- Subject:** A text field containing 'Quote for Mafark AG'.
- General:** A section with three fields:
 - Number:** A text field with a blue '13²' icon to its right.
 - Document language:** A dropdown menu currently set to 'German'.
 - Category:** A text field with a blue pencil icon to its right.
- Times:** A section with three date fields:
 - Date:** A date field set to '30.01.2024'.
 - Valid from:** An empty date field.
 - Valid to:** An empty date field.
- SmartTags:** An empty text field with a blue magnifying glass icon to its right.
- Authorized persons:** A section with:
 - Full rights:** A list of users with their names and a close button: Robert Glaser, Frank Shreeve, and Britta Glatt.
 - More rights...:** A dropdown menu currently set to 'Full rights'.
 - External access (maximum):** A dropdown menu currently set to 'Full rights'.

Special fields

^{1,2,3} The **Number** field is available in multiple data record types and is supposed to help sort the data records. This field can contain numbers and other characters.

The button automatically creates a number according to the rules defined by the administrator.

If corresponding rules exist, a number may already have been entered when creating the data record.

- ✓ The **Valid from** and **Valid to** fields are helpful if you publish similar documents with different validity, such as price lists.

The fields are displayed in CAS genesisWorld Web if values are entered. In the desktop client, you can find the fields on the **Details** tab.

- ✓ You complete the **Gender** field using a drop-down list with the following values: male, female, other, and no entry.

This allows you to map different relations, for example, that a single contact can be a company or a family. Entries in this field enable automatic functions for correspondence.

Functions and automatic functions

- ✓ Two users cannot edit a document simultaneously. This is prevented with the document lock. If you open a document that is already opened by another user, the system notifies you and you can only open the document in read mode.
- ✓ Letters or form letters and e-mail campaigns are always based on a template. When working with CAS genesisWorld, there are two types of templates for document data records.

The first type of template can be created and used in CAS genesisWorld for each data record type. The template contains specific field values, for example, a specific Category value, a list of users with access rights, a subject line, and so on. As soon as you use a template when creating a new data record, the predefined values from the template are adopted. This type of template is possible, for example, for an **E-mail campaign**.

The second type of template comprises two structural elements and applies to document data records with an archive file such as a Microsoft Word document, a Microsoft Excel sheet or a picture: The document data record in CAS genesisWorld is the template for the data record type and the archive file is also a template.

If you want to write a letter or form letter, the Microsoft Word template contains the address with the e-mail merge fields, the salutation, maybe a default text, the greeting formula, and so on. The archive file of a Microsoft Excel sheet or a picture can already contain content.

- ✓ For letters, form letters and e-mail campaigns, automatic functions are available. These automatic functions are based on the entry in the **Document language** field of a document and the entry in the **Gender** field for addresses, see chapter "Special fields" on page 27 for addresses.

If, for example, you write a letter, form letter or an e-mail campaign in English to several recipients from different countries, the value of the **Salutation** field of an address is inserted in different languages. But you also have the option to use the **Salutation in document language** e-mail merge field from the address.

Now the salutation is automatically inserted in the language that is defined in the **Document language** field of the document data record.

For more information on automatic functions for document and address generation and their interaction, see the online help pages of the desktop client on the [Comfortable communication](#) page.

- ✓ When creating an e-mail campaign in CAS genesisWorld Web, you first select whether you want to create the e-mail campaign with or without a template and thus with already existing field values and possible texts.

Then, a wizard in CAS genesisWorld Web supports the creation of the document.

The administrator can customize the wizard and the respective fields for your company.

You test and send the e-mail campaign using the wizard. Additionally, you can use the wizard to add more data, for example, authorized persons or links to the data record.

3.4 Links

Almost all the information that you use in your daily work is connected or related to other information.

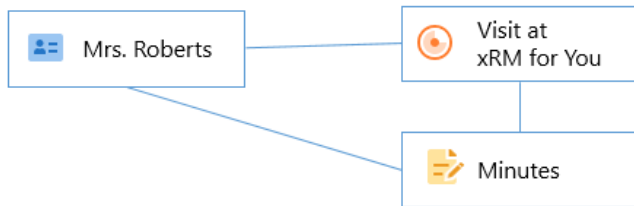
An address includes the name, postal address, contact data, and so on. Additionally, an address contains other relevant data, for example, correspondence, meetings, tasks, phone calls, e-mails, and so on. Customer addresses can be linked with opportunities or other addresses, for example contact persons, and the opportunity can in turn be linked with a quote document and an appointment for delivery.

These relations and connections between data records are recorded in CAS genesisWorld using links. A link connects two data records.

If you have scheduled an appointment with a customer, the address is linked with the appointment.



For each activity with regard to the customer you create new data records: phone calls, tasks, appointments, documents, e-mails, and so on.



All data records for a customer are linked with the customer's address.

- All business transactions for a customer are documented with data records in CAS genesisWorld.

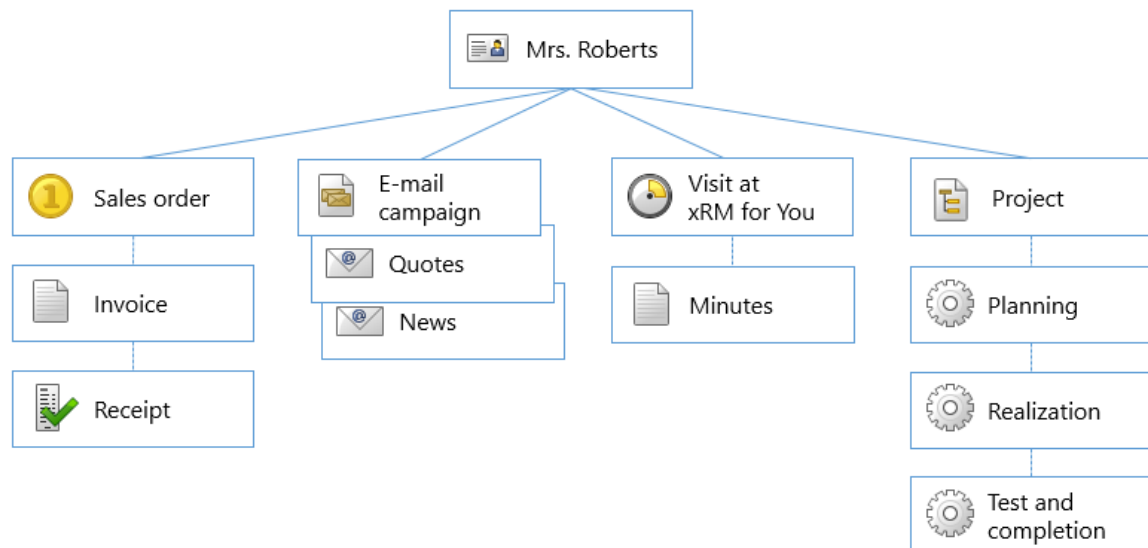
Whether phone calls, e-mails, or letters – with the different data record types available, different business activities can be recorded including all relevant data.

- All data records for phone calls, e-mails, cover letters, and so on, are linked with the customer or address data record.

Over time, you get a collection of linked data records for the customer and thus an overview of the "history" of this customer with your company. You and your colleagues have all access to the relevant information with this customer because you work with shared data in CAS genesisWorld, see chapter "Central storage of shared data" on page 17.

The lines in the images represent the links between data records. These links are simple and undirected connections that are the same from each data record to the linked data record. The name of this link type is **General link**.

Other link types are available and can be symbolized by, for example, two arrows with a point and different meanings for each arrow and direction.



A company can comprise a head office with several branches. You can create a company data record for each of these branches. The link from the company data record of the

head office to the branch office is then called **Child** and the link from the branch office to the head office is called **Parent**.

Primary links are a special link type. You can find a description of this link type below. You use primary links to link data records with each other in a fixed hierarchical structure.

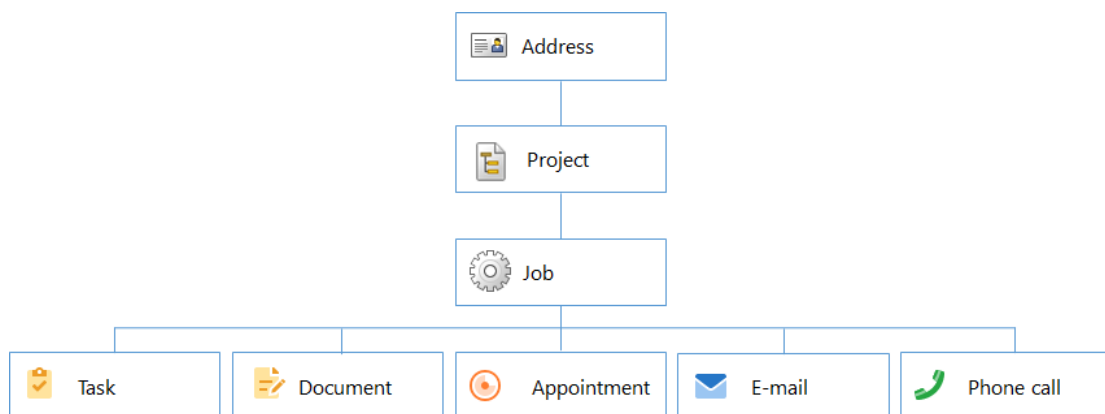
3.4.1 Link types and primary links

A link between two data records in CAS genesisWorld initially represents a connection between two data records. Data records can be linked with any data record in any direction. Links receive a name: the link type. For example, if you link an opportunity with an address, the link is of the **Customer** link type. Certain link types are available by default in CAS genesisWorld. Additionally, the administrator can create new link types for your company in the Management Console.

The Premium Edition contains another special default link type, the Primary link type. With primary links, you can link data records of specific data record types with other specific data record types. This way, you can create a hierarchical structure with multiple levels.

The illustration shows the maximum number of hierarchy levels. The order of the hierarchy levels is fixed. You can omit levels but you cannot change their order.

The first level in the hierarchy is always an address, for example, a customer or a supplier. On the following child level, you can link projects. A project has one single primary link to an address. An address can be linked with several projects.





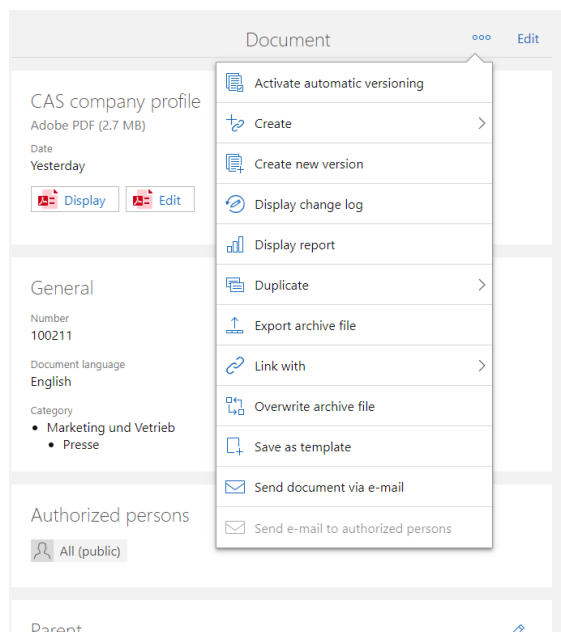
Let us have a look at an example: a customer is interested in a product. You create the project **Product A for customer**. Before you can start selling a product, many different tasks need to be completed: you need to schedule **Work meetings** or create a **Quote** and a **Commission**. Thus, you first create the **Work meetings** job and then link any appointments for presentations or customer visits, as well as documents, phone calls, and so on with the job data record. You do the same for the other jobs that are related to the customer project. After the **Product A for customer** project, you can always link other projects to the customer. CAS genesisWorld thus records the history you have with that specific customer.

You can find more information in the online help for the desktop client on the following page: [Primary links](#).

3.4.2 Linking data records

You can link data records using various functions. Depending on what you are doing, you can select the easiest one.

- ✓ Data records can simply be linked from within data records and in lists: two buttons enable this function.
- In CAS genesisWorld Web, you always find the corresponding functions in the action menu.
-  With this button, you first search for the data record to be linked and then you create a new data record in the search window.
-  With this button, you create a new data record. When saving the new data record, this data record and the initial data record are linked with each other.
- ✓ In the desktop client, you usually link data records via the **Link with** button, or create and immediately link a new data record using the **New link** button.



After deleting or removing a link, the connection between two data records no longer exists. Each of the two previously linked data records still exists, only the link between these two data records is removed. This also applies if you have created a new data record and at the same time have linked this newly created data record with another data record.

- ✓ If you remove this link, neither the previously linked data record nor the newly created data record is deleted/removed.

3.4.3 Smart searching and linking


Specific data records are linked on several occasions in CAS genesisWorld, as described in the following examples.

- A contact or an address is entered in the **Customer** field of an opportunity.
- You can enter decision makers, salespersons, or other **Contact persons** in opportunities.
- A contact or an address is entered in the **Address quick info** field of a phone call.
- When working with primary links, you link many different data record types, such as documents, phone calls, appointments, and so on with addresses, projects, or jobs.

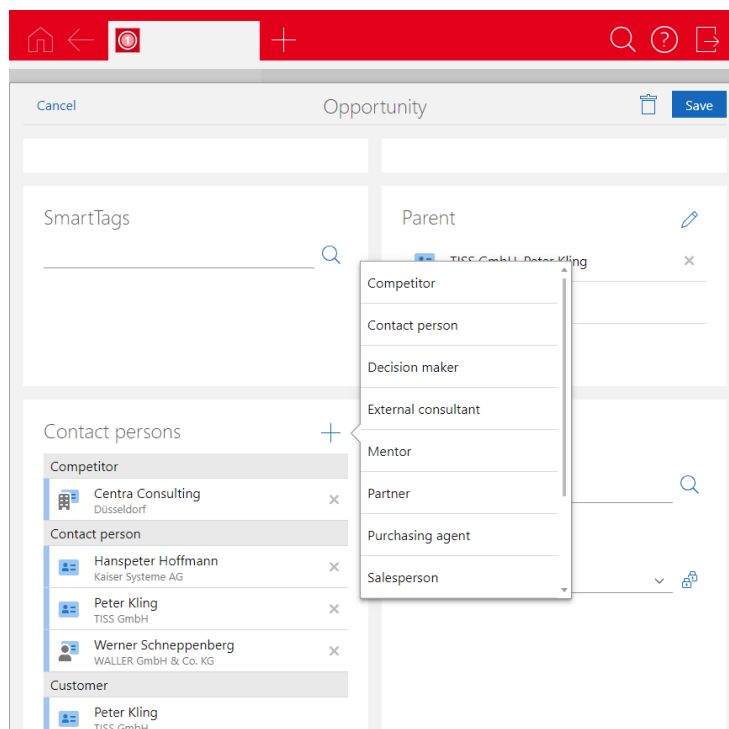
In these cases, a special link type is always entered, sometimes automatically.

- ✓ As soon as you enter a text in CAS genesisWorld Web in the **Customer** field of an opportunity or in the **Address quick info** field, a window opens.

This window displays the data records that you can link with your data record. If text has already been entered, it is displayed in the search field.

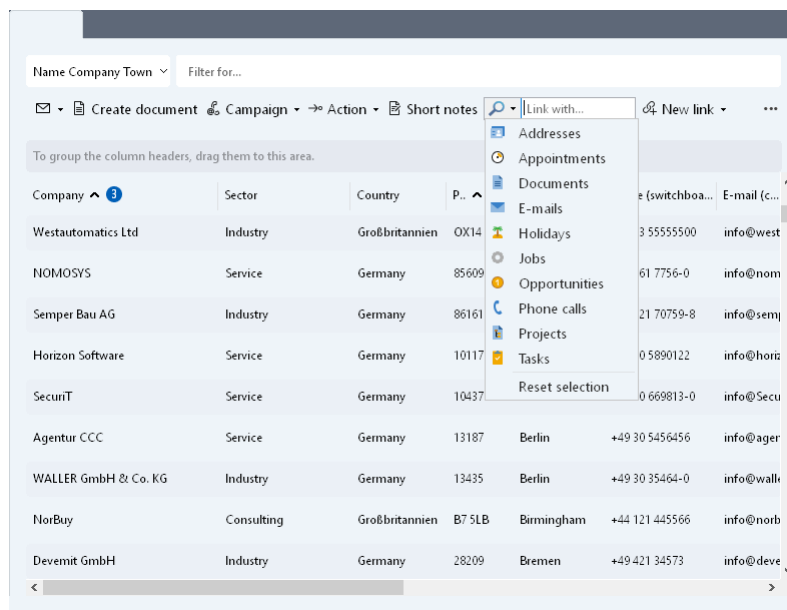
 The button next to a link field opens the window in which you can search for data records which you want to link.

- ✓ Open the list in the **Contact persons** block of an opportunity and select the link type for a contact.



- ✓ The **Parent** block displays icons for each data record type for which you can enter a primary link.

- ✓ The desktop client displays a selection of possible link types (if a number of link types can be selected for a data record type) after you have selected the data record type which you want to link.
- 🔗 The **Link with** button in the desktop client transforms into a search field when you click in the field and if the SmartSearch has been activated.
- ✓ If you then enter a search term and click one of the results, the opened data record is linked with the selected data record.
- ✓ You can find multiple search fields with similar functions at other location in the desktop client. For example, the **Customer** field in opportunities, the **Address info** in phone calls, or the **Add address(es)** button in distribution lists.



4 Views for a better data overview

You use views to arrange and structure data records in a specific display format. We differentiate between data records and the display of data records in CAS genesisWorld.

- Each data record is stored and remains stored in the database until the respective data record is deleted permanently.
- In contrast, a view is a combination of properties. You use these properties to define which data from the database are displayed in which way.

You can create or change a view if you have received the necessary rights from the administrator. If you do not have the necessary rights, your colleagues or administrators who do can create views for you. If you have the necessary rights, you can also create list views in CAS genesisWorld Web for yourself or others.

If you change a view, it can display more, less, or different data records. Deleting a view may result in certain data records disappearing from the view completely.

Deleting a view only deletes the defined properties for this view. The data records displayed in the view are still stored in the database.

Each view shows the current state of the data. For example, colleagues are updating addresses, your colleague sets several tasks to completed, and a new project has been created: When opening the view, the current status is retrieved from the database.

In the desktop client, views are arranged in navigators; in CAS genesisWorld Web and mobile apps, views are arranged in apps.

For the different data record types, different views are available in each client, which are described in the online help. The following important views are available in all clients:

- Data records of all data record types can be displayed in list views.
- Dossiers show linked data records.
- Calendar views display data record with a time reference, that is, appointments, phone calls, jobs, or holidays.

4.1 Lists

Lists are important views for each data record type. In a list view, you can see data records listed in rows. The columns display fields and field values of these data records. Typically, lists display data records of one data record type.

Lists are dynamically built in several ways.

- When you open a view, the displayed data records are always up-to-date.

<input type="checkbox"/>	Filetype	Created on	Subject
<input type="checkbox"/>		08.03.2024, 16:16:05	Frequent crashes after printing
<input type="checkbox"/>		08.03.2024, 16:15:06	Individual order probability for items
<input type="checkbox"/>		14.01.2021, 11:31:47	Leasing contract CompuTech GmbH & Co. KG
<input type="checkbox"/>		14.01.2021, 11:30:26	Contract Kahrmann elektronik Ltd.
<input type="checkbox"/>		13.01.2021, 11:32:46	CAS genesisWorld function overview - Desktop and V
<input type="checkbox"/>		12.01.2021, 16:24:57	Offer 412312392
<input type="checkbox"/>		12.01.2021, 15:37:56	Platinum partner price list
<input type="checkbox"/>		12.01.2021, 15:36:47	Price list gold partner
<input type="checkbox"/>		12.01.2021, 12:07:35	CAS company profile
<input type="checkbox"/>		11.01.2021, 11:00:53	Release Notes CAS Products x15
<input type="checkbox"/>		11.01.2021, 11:00:41	System Requirements CAS Products x15

- You can customize views to only display the fields currently relevant to you depending on the context.
- You can create individual views for different purposes if you have the necessary rights. For example, you can create a list displaying open opportunities, a list for products and services, or a list for open invoices.
- You can find more data records that are relevant in the current contact in the individual data record in smaller lists. For example, you can find a list of contact persons in company data records or linked data records in the dossier.

In the desktop client, so-called view formats define which fields are displayed in lists, in which order they are displayed, the field order, and so on. A default view format is available for each data record type. These default view formats are defined either by your colleagues with the necessary rights or the administrator.

The default view format is used if no other special properties are defined in a view. This view format applies in all clients and even, for example, when you open a list of search results.

- ✓ You can find more information on view formats in the online help for the desktop client on the following page: [View format tab](#).

4.1.1 Customized lists

Even if you have no rights to create or change a view, you can temporarily customize a list for a specific task or information you require.

However, even if you have the necessary rights to change views, sometimes it is not worth it to create or change a list view for certain tasks. Direct changes are much quicker.

The direct changes to the view properties are retained as long as the view is opened.

The following options are available both in CAS genesisWorld Web and in the desktop client for most use cases.

Sorting by fields

If you want, for example, to check whether the price information is up-to-date, all documents should be displayed sorted by validity in descending order.

- ✓ To sort the list by a field, click on the field name. The list is then sorted in ascending order.
- ✓ Click the column header again to sort the list in descending order. A triangle next to the field name indicates the sorting direction.
- ✓ You can adjust the column width.

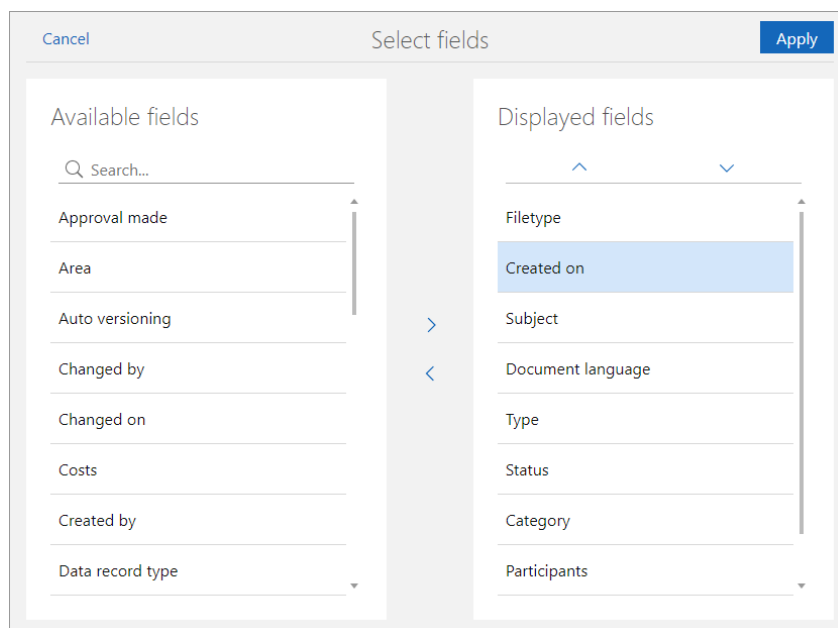
Place the cursor on the - imaginary - line between two fields. Press the mouse button and move the cursor to the right or left.

<input type="checkbox"/>	Filetype	Created on	Subject	
<input type="checkbox"/>		08.03.2024, 16:16:05	Frequent crashes after printing	>
<input type="checkbox"/>		08.03.2024, 16:15:06	Individual order probability for items	>
<input type="checkbox"/>		14.01.2021, 11:31:47	Leasing contract CompuTech GmbH & Co. KG	>
<input type="checkbox"/>		14.01.2021, 11:30:26	Contract Kahrmann elektronik Ltd.	>
<input type="checkbox"/>		13.01.2021, 11:32:46	CAS genesisWorld function overview - Desktop and V	>
<input type="checkbox"/>		12.01.2021, 16:24:57	Offer 412312392	>
<input type="checkbox"/>		12.01.2021, 15:37:56	Platinum partner price list	>
<input type="checkbox"/>		12.01.2021, 15:36:47	Price list gold partner	>
<input type="checkbox"/>		12.01.2021, 12:07:35	CAS company profile	>
<input type="checkbox"/>		11.01.2021, 11:00:53	Release Notes CAS Products x15	>
<input type="checkbox"/>		11.01.2021, 11:00:41	System Requirements CAS Products x15	>

Changing displayed fields

You can change the displayed fields and the order of a list. For example, you only want to see the essential fields in the price information.

☰ In the **View menu**, **Select columns** opens the **Displayed fields** window.



✓ The fields on the right pane are displayed in the list. Use the arrows in the middle to move fields from left to right and vice versa.

You can also use the drag and drop function to move fields.

- ✓ You change the order of the fields by clicking a field on the right and clicking the arrows above the fields.

You can also change the sort order in the right list using the drag and drop function.

4.1.2 Different lists for different purposes

In addition to the respective lists for all data record types, further lists are available at various locations in CAS genesisWorld.

Lists as parts of data records and views

You can also find smaller lists in blocks in opened data records.

- In the data record window of a company, you can find a list of contact persons.
- You can also find a list of product items in a block in opportunities.
- In CAS genesisWorld Web, links are displayed in the **Dossier** block of a data record. In the desktop client, the links of a data record are displayed on the **Dossier** tab.

Dossiers display multiple data record types in a single list view.

- When you open the **Picasso search**, appointments of the current day, current documents, important contacts, and so on, are displayed in individual blocks on one page.

The screenshot displays the Picasso search interface. At the top, there is a red navigation bar with a home icon, a back arrow, a search bar containing 'Picasso search', and a plus sign. On the right side of the bar are icons for search, help, and share. Below the bar, the main content area is titled 'Picasso search' and includes a filter dropdown set to 'All' and a search input field. The interface is divided into several sections:

- Left sidebar:** Shows a calendar view for 'Thu, 02/17' with a profile picture. It lists events such as 'CRM trade show', 'E-mail campaign', 'CAS Profile', 'Jour Fixe Devermit - Conclusion?', 'Brainstorming: Onboarding new partner', and 'Presentation xRM'.
- Interesting tips:** A list of items including 'CAS genesisWorld for Devermit', 'Offer 2014-20002', 'Quote: 2014-10000', 'Vernissage schedule', and 'CAS Profile'.
- Important appointments:** A list of events like 'Jour Fixe Devermit - Conclusion?', 'Presentation company: CAS and CAS geni...', 'Web layout', 'Vernissage schedule', and 'Lunch'.
- Important contacts:** A list of contact names and companies, such as 'Walter Berger (Devermit GmbH)', 'Thomas Leutner (Kahrman Elektronik GmbH)', 'Max Kahrman (Kahrman Elektronik GmbH)', 'Kai Rahner (Kahrman Elektronik GmbH)', and 'Brigitte-Sabine Rudolf (Kahrman Elektronik...)'.
- Current documents:** A list of documents including 'CAS Profile', 'Important for customer experience', 'Quote: AN2014-20006', and 'Offer 2014-20002'.

CAS genesisWorld Web and the mobile apps do not have an app for all data record types and therefore a list view is not available for all data record types. However, in the dossier list in a data record, you can find all data records that are linked with the opened data record. You can open the displayed data records by clicking them.

More special lists

In CAS genesisWorld, you can use combined lists to display more than one data record type and corresponding linked data records.

For example, you can use a combined list for 2 data record types to display all customers or prospects with open opportunities that have received no e-mail campaign during the last half year.

If you display, for example 4 data record types, you can create one list that comprises multiple upcoming activities for a Christmas party. These activities can include appointments, phone calls, and tasks.

In the desktop client, you can use a multilist or twin list for the same purposes.

4.1.3 Lists in CAS genesisWorld Web and the mobile apps

Compared to the desktop client, there are some differences for list views in CAS genesisWorld Web and the mobile apps.

When you select an app in these clients, you can find multiple lists for the respective data record type on the right pane. You can open these lists by clicking them.

- A **Search** opens a list of data records for the data record type of the app.
- You can also open lists by clicking **Display all**, **Last opened**, and **Extended list**.
- The **Views** function shows all list views for the data record type of the app that you have created in CAS genesisWorld Web.

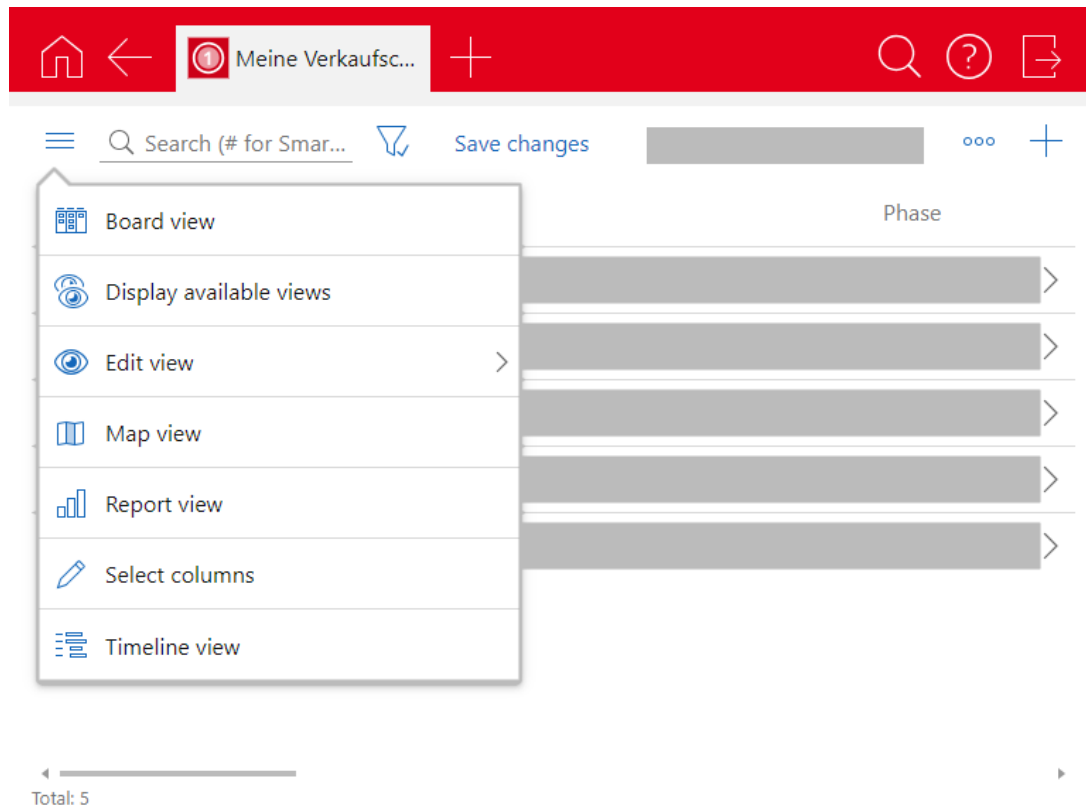
In addition, the list views that you have defined yourself or that have been defined for you in the program navigator of the desktop client are displayed, see chapter "Desktop client" on page 9.

If you do not use the desktop client, the administrator defines a program navigator for your user account in the desktop client. Administrators can define navigators for you even if you do not use the desktop client as they can create public navigators and views for specific teams or departments in the desktop client, see chapter "Rights for user accounts, resources, and groups" on page 16.

- ✓ For a view from the desktop client to be displayed in the other clients, the corresponding option must be activated on the **General** tab of the **Properties** window.

CAS genesisWorld Web

- 🔒 The list views from the program navigator are read-only, but can be temporarily changed in CAS genesisWorld Web, see chapter "Customized lists" on page 43.
- ✓ You can temporarily change views, save locked views under a new name and then change them, or create new list views in CAS genesisWorld web if you have been granted the necessary rights.



- ✓ List views created in CAS genesisWorld Web are not available in the desktop client and can only be changed in CAS genesisWorld Web.
- ✓ You can find more information in the CAS genesisWorld Web Online Help on the following page: [Views](#).

Mobile apps

The mobile apps display views that you have created in CAS genesisWorld Web. Moreover, you can find the views from the program navigator in the desktop client that you or the administrator have set up for your user account.

- ✓ In the special **Marked as available offline** view, you can see the corresponding offline data records. You find the options to activate the offline functions in the **Settings** app.
- ✓ You cannot create new views in the mobile apps.

4.2 Dossiers

Dossiers display lists with linked data records.

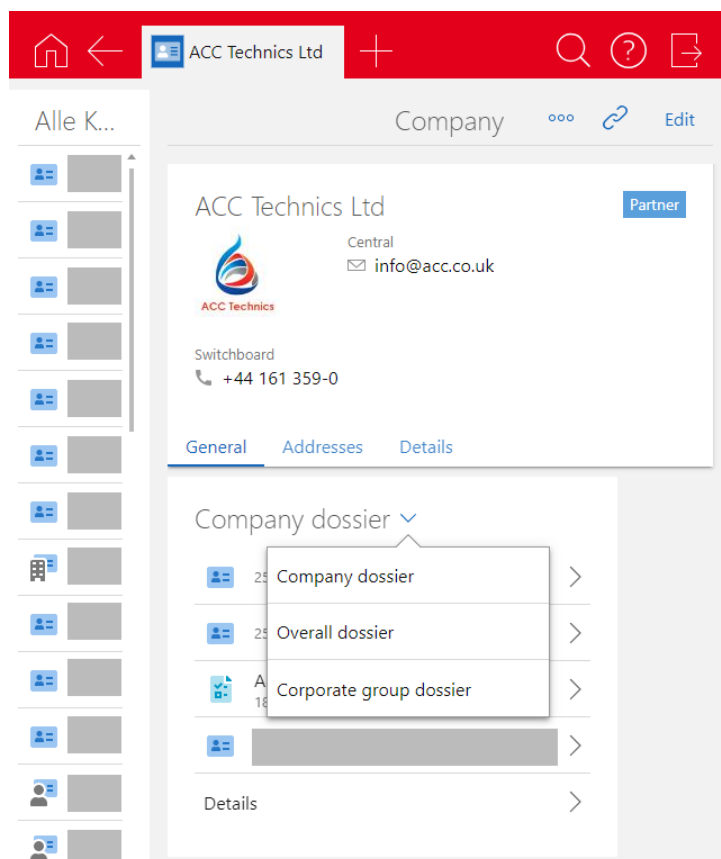
4.2.1 Views for links in CAS genesisWorld Web

In CAS genesisWorld Web, the **Dossier** block is displayed in a data record if links exist for this data record. The administrator defines how the dossier is organized.

Contact can include different types of dossiers:

- a corporate group dossier which includes the links of all related companies and contact persons,
- a company dossier which only includes the links of one company,
- An overall dossier which includes the links of the company and all contact persons with other data records, or
- a dossier which only displays the links of one contact person.

The dossier type setting is saved for all clients. For example, if you select the **Corporate group dossier** to be displayed in CAS genesisWorld Web, the **Corporate group dossier** is also displayed in the desktop client.



Click **Extended list** in the, for example, **Corporate group dossier** or **Company dossier** block to display the linked data records in a list view.

Which data record types are displayed in the dossier depends on several settings:

- The administrator defines which data record types are displayed in dossiers.
- In the desktop client, you can define for each data record type which linked data record types are displayed in the dossier. These settings also apply in CAS genesisWorld Web.

If you do not work with the desktop client, these settings are defined by the administrator.

In an opened data record, primary links are also displayed in the **Parent** block in addition to the dossier, see chapter "Link type and primary links" on page 38.

4.2.2 Views for links in the desktop client

In a **Dossier view** in the program navigator, you can see the links of several data records of one data record type. A dossier view always refers to a specific data record type, such as an address dossier or task dossier.

In an individual opened data record, you can only find the links of this data record with other data records on the **Dossier** tab of the data record window.

A **Dossier view** in the program navigator comprises multiple parts.

The screenshot displays the 'Address Dossier' interface. At the top, there is a search bar for 'Name Company Town' and a 'Filter for...' field. Below this is a toolbar with icons for 'Display', 'All links', 'Only own links', 'Dossier', and 'Delete link'. A table with columns 'is Company', 'Company', 'Form of...', 'Title', 'First name', 'Name', 'Town', and 'E-mail' is shown, with a red circle '1' highlighting the 'Name' column. Below the table, there are radio buttons for 'Display', 'All links', and 'Only own links', and a dropdown menu for 'Dossier'. A sidebar on the left shows a list of dossier types, with 'Addresses' highlighted and a red circle '2' next to it. The main content area shows a 'Subject' filter and a table with columns 'Do...', 'Date', 'Subject', 'Category', and 'Additional information'. A red circle '3' highlights the 'Subject' column. Below the table, there is a section for 'Project number', 'Tags', and 'Notes', with a red circle '4' highlighting the 'Notes' field.

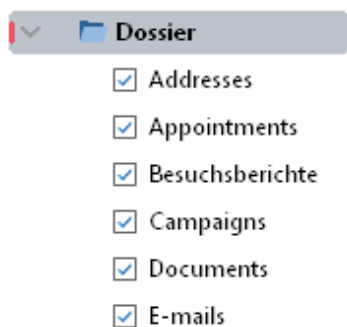
- 1 In the upper part of the view, you can find a list. If you have opened an address dossier, you can find addresses here, tasks when working in a task dossier, and so on.

If you only want to display specific links in a **Dossier** view, you need to select one or multiple data records at 1.

In an opened data record on the **Dossier** tab, this upper list is not available and you do not need to select a data record. This is because, in the data record window, you only work with the links of one individual data record, and not with those of multiple data records.

The other areas (2-4) of a dossier are available both in a dossier view and on the **Dossier** tab in a data record.

- 2 At the bottom left of the window, you can find the link navigator containing views for links.



At the top of the link navigator, you can find an entry that is also called **Dossier**. Click the small arrow at the left of the row to open a list containing checkboxes for data record types. This way, you can select which data record types are displayed in the list. The administrator defines which data record types and checkboxes are displayed.

Select a view, such as **Appointments** or **Dossier**, in the link navigator.

- 3 This area displays the data records that are linked with the data record selected at 1 or the opened data record.

If you have selected the **Appointments** view at 2, you can see all appointments linked with the address in an address dossier, all appointments linked with the task in a task dossier, and so on.

- 4 If you click a linked data record in the list at 3, the most important fields of this data record are displayed in this preview.

Whether a preview is displayed can either be set for all dossiers in general or for one specific dossier.

4.3 Calendar

Calendar views are available in all clients as daily, weekly, or monthly views. In calendar views, you can see and manage your appointments during a specific time period. Depending on the settings, you can also see appointments of colleagues or other scheduled times such as holidays or phone calls.

All calendar views are structured similarly and comprise multiple areas.

① In the calendar area, you see appointments, and with the corresponding settings you can also see other activities such as holidays or phone calls.

Different icons indicate appointments, phone calls, or holidays, as well as specific appointments, such as out-of-office appointments, online meetings, recurring appointments, and so on.

② In the monthly overview, you change the time period displayed in the view.

③ The task list in the calendar shows your tasks scheduled for today.

④ Select or enter users to display the activities of your colleagues in the team calendar.

✓ You can change the size of the individual areas, such as the monthly overview or the task list, using the separators. You can hide the areas completely using the **View** menu.

In the calendar, you can call several functions directly with the mouse. This functionality works in a similar way in all clients.

✓ You can change the time period displayed in the desktop client using the arrows in the upper left corner or in the month view. In CAS genesisWorld Web, buttons for this purpose are available above the calendar area. You can also use the timeline below the calendar area.

✓ Double-click to open an appointment for editing.

✓ In the desktop client, you create a new appointment by double-clicking an empty area. You can also select an empty time slot and open the context menu.

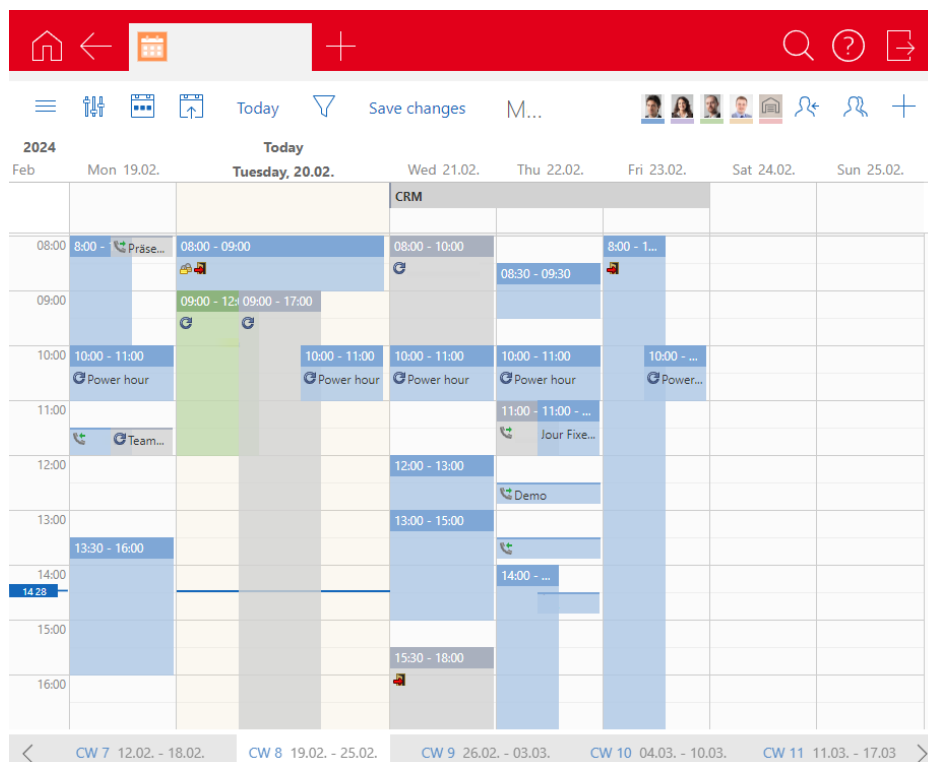
In CAS genesisWorld Web, you only need to select the time period to create a new appointment.

✓ You can use the drag and drop function to move an appointment both in the desktop client as well as CAS genesisWorld Web.

✓ In each client, there are additional displays, for example, for public holidays and additional functions, for example, for changing the time period of an activity. These features are described in the respective online help.

4.3.1 Team calendar

The team calendar in each client makes it easy to find out when a colleague has free time and schedule appointments with colleagues. You can quickly find a common appointment for several people and, for example, a meeting room by viewing appointments for several users and resources. To be able to view the appointments of other users, you must have received the corresponding rights from the administrator.





In CAS genesisWorld Web, click the **Team** button and select the desired users, groups, and resources in the next window.

The colors of the appointments are different for users, groups, and resources.



In the desktop client, you can define individual colors for different appointments in the **Settings** window.

- ✓ When you create a new appointment in the team calendar, the users, groups, and resources displayed are automatically adopted in the appointment as participants.

This function is the same across all clients.

4.3.2 Calendars for resources

With a calendar view for one or multiple resources, you can easily manage the capacity and times of, for example, meeting rooms or company vehicles.

- The calendar view only displays appointments of the meeting room.
- This calendar view is available for everyone in the program navigator who books or prepares meeting rooms.
- Everyone who books or prepares meeting rooms also has external access rights to the meeting room resource.
- The additional service resource is entered as a participant in an appointment if the person responsible for catering is to provide coffee and drinks.
- When you create an appointment in the calendar view of the resource, the room is automatically booked. You must still enter persons as participants.

5 The rights system

For reasons of data security and data protection, rights that regulate the editing of data, the display in views, and the access to functions can be assigned in CAS genesisWorld.

The figure below shows the topics of this chapter and basic areas for which rights are assigned:

- for the editing of data,
- for the display of data, and
- for specific functions.

Rights for editing data

Ownership rights	External access rights	Personal and confidential
Data record participants Public data Delegating data records	Working in a team Restricting rights	

Rights for displaying data

Program navigator	Team calendar	Searching
Views View formats		

Rights for functions

Change your password	Extensions with modules	Functions according to role
		For example, exporting addresses For example, rules For example, administration rights

The following basics are essential when working with CAS genesisWorld. Many other settings for rights are available, especially for the administrator. If you as a user need specific rights for a function, the online help mentions the required rights on the corresponding help page.

The administrator assigns the rights

The administrator defines the basic settings for rights in the Management Console.

With the rights for editing data, the administrator defines which data record types and which fields of data record types you can view and edit. Moreover, the administrator defines whether you, as a user, are also allowed to grant editing rights to other users. External access rights determine whether and which colleagues in the entire company or in your team may view and edit your data. External access rights also apply to you and determine whether or not you can view and edit the data of others.

The administrator also defines the rights for the display of data. For example, views define which data is displayed and how, see the chapter "Views for a better data overview" on page 41.

The administrator also defines the user rights to functions, which can i. a. define how you log on to CAS genesisWorld. These rights also determine whether you are allowed to execute certain functions, for example, send a form letter to multiple addresses, create rules, or use CAS genesisWorld modules.

What options do I have as a user?

As a user, you usually define rights for editing data when you create a new data record: in doing so, you determine which rights other users receive to this data record.

If you have the right to display data, you can, for example, create or change views.

As a user, you cannot define rights to functions but only receive them depending on your daily tasks and the modules you use.

5.1 Rights for editing data

If you want to test the functions described in this chapter, a colleague can be helpful. You can set different rights and see which consequences the settings have.

In CAS genesisWorld, we differentiate between users, administrator(s), groups, and resources.

Users are defined as all those who work with one or more CAS genesisWorld programs, for example, with the desktop client, CAS genesisWorld Web, or the Management Console, see chapter "CAS genesisWorld clients" on page 9.

To be able to work with CAS genesisWorld as a user, log on to one or more programs of CAS genesisWorld, see chapter "Logging on" on page 13. When logging on, you directly or indirectly use a CAS genesisWorld user account, see chapter "User accounts, resources, and groups" on page 15.

Administrators are special users with extensive rights. At least one user account for an administrator is always available in CAS genesisWorld. At least one administrator is responsible for CAS genesisWorld and configures the programs, creates additional user accounts, assigns rights, manages default values, and so on. Most of these settings are defined in the Management Console.

The administrator can group several users of CAS genesisWorld in special groups according to the requirements of your company, see chapter "User accounts, resources, and groups" on page 15. Each user can belong to multiple groups, for example, you can be a member of the **Department ABC** group, the **Team A** group and also the **Users of Module X** group. Users in the same group often have comparable rights and can access each other's data.

For each resource, a special "user account" is created in the Management Console. This allows resources to be entered as "participants" in a data record, such as an appointment. The administrator can also group resources to better manage them in CAS genesisWorld.

When working with CAS genesisWorld as a user, you work with your user account. You then edit data and settings of CAS genesisWorld for this user account.

5.1.1 Ownership rights

When you create a data record, you usually automatically gain ownership rights to this specific data record.

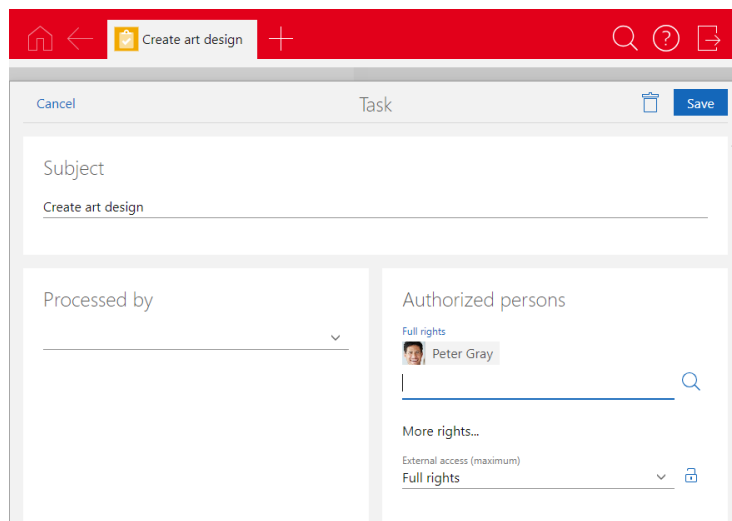
For example, when you create an appointment or task, you "own" this data record and have full rights to it.

Assigning ownership rights to data records

When creating or editing a data record, you can enter further users as participants or authorized persons in the data record. This way, you grant ownership rights to the data record to the entered users. Different rights levels, from **Read** to **Edit** to **Duplicate** and so on, define which access level is available to the entered users.


The basic procedure for assigning ownership rights is similar for all data record types.

✓ For example, create a new task.



After you have created the task, you are automatically entered with **Full rights**. This means, at first, you are the only participant with ownership rights.

✓ If you start typing in the **Full rights** input field, a small selection of users, groups, and resources is displayed. It does not matter whether the letters you enter appear at the beginning, at the end or in the middle of the name of users, groups, or resources.

 Alternatively, you can use this button to open a window with all users, groups, and resources. In this window, you can search for and enter further authorized persons.

All users, groups, and resources in the **Full rights** input field have exactly these rights.

✓ If you want to enter more authorized persons with other rights, you need to select **More rights**.

If you do so, additional input fields are displayed below **Edit** and **Read**. Here, you can also enter a value or select users, groups, and resources with the respective button.

- ✓ If you enter a group as a participant, you grant ownership rights to multiple colleagues at once.

Thus, the users, groups, and resources entered in the corresponding access rights fields also become owners of the data record with specific ownership rights. The highest level is **Full rights**. This means, users can not only edit data, but also delete it.

You can find more information on access rights in CAS genesisWorld Web in the corresponding online help on the following page: [Access rights](#). You can find more information on access rights in the desktop client in the corresponding online help on the following page: [Selecting participants](#).

Public data

If no access rights are defined for data in CAS genesisWorld, then this data is available to all users, that is, public. Public data can be viewed with every user account and edited by all.

You cannot define ownership rights as a user if a data record type is not user-sensitive, see chapter "User sensitivity" on page 27. Addresses are public data records.

There can be many more data records in CAS genesisWorld that require all users or many users to have access:

- The document containing the instructions on how to create and manage addresses is mandatory reading for all colleagues.
- The date for the Christmas party is entered in the calendar for everyone.
- You want to display the most important fields for each data record type to all users in list views in CAS genesisWorld.

The special **All (public)** user is used to represent all users of CAS genesisWorld. If you enter this user in a data record, you can also assign certain access rights. For example, if you and a colleague are responsible for the instructions on how to manage addresses, enter yourself and the colleague with full rights. You assign the **Read** right to the **All (public)** user. Now, you and your colleague can edit the document, add links, and so on. All other users can only read the document, but not edit it.

Delegating data records

If you remove yourself as a participant in an appointment or set access rights only for others and not for yourself, you delegate the data record.

As long as the data record is not delegated a second time, some of your rights will remain. This allows you to change the data record again, for example, if you have accidentally delegated the data record or if you need to enter more information in the **Notes** field.

5.1.2 External access rights

External access rights are the rights a user receives from other users to their data. You can understand external access rights from two perspectives:

- Other users have access to your data.
- You have rights to access the data of other users.

The administrator makes general settings for the company to determine whether external access rights are used at all.

If your company uses external access rights, the administrator defines the external access rights for all users and data record types. Then, you can use the external access rights to access data of other users and other users can access your data. For example,

- you can see the activities of others in a calendar view and others can see your activities,
- you can edit a document together with others,
- all appropriate users can access the team's tasks to replace others who are on holiday or sick leave, or
- jobs and other data records can be delegated.

The administrator can define these external access rights for each user account or alternatively for groups. The administrator can group user accounts or resources as groups with members. The following applies for groups:

- external access rights are defined between groups. However, at the same time,
- each member of a groups has in turn external access rights to other individual members.

You can change the general external access rights set by the administrator for any data record for which you have ownership rights. If a data record is user-sensitive, you can define the external access rights in the following field: in the **External access** field in CAS genesisWorld Web or the **Maximum external access right** field in the **Select participants** window in the desktop client. Both fields have the same function. The external access right to a single data record weighs more than the general external access right. So if you want to restrict rights for one single data record, you can set external access rights for this one data record to grant fewer permissions.

External access rights for resources

Resources do not have external access rights to others. Only user accounts or groups can have external access rights to resources.

This means that if one or multiple resources have been entered as authorized persons in a data record, then all colleagues with external access rights to the entered resources can edit the data record.

5.1.3 Protecting your data

Although most of the data is shared when working with CAS genesisWorld, it may be necessary to protect specific data through restricted access rights. You have several options to protect your data.

- You define different levels of ownership rights and external access rights to grant access to data records. This way, you can grant more or less access to data.

If you set a data record to **Private**, users have very restricted access and editing rights. The **Read** right allows users to see data records and **Full rights** allows users to even delete data records.

These three rights are always available to work with. The administrator defines in the Management Console, whether further rights levels are available to users, such as **Edit** or **Duplicate**.

- Personnel data or other data that needs to be protected can be set to be only visible to certain colleagues. Additionally, you can limit the number of colleagues who can edit this protected data.

In this case, the access rights are assigned by the administrator only.

- Teams work with projects, jobs, documents, and so on. Not everyone may be allowed to see all data, or only some team members are allowed to access specific data due to various reasons.

The basic access rights are defined by the administrator. Members of the team can also define rights.

- Only a few access rights may be required for a conversation with superiors, a document for planning, or critical phone calls.

Each user can define ownership rights and external access rights if these are used in your company.

Rights are inherited

In CAS genesisWorld, you can be assigned rights in different ways.

- The administrator assigns you rights to data record types and to data record fields.
- As a user, you can be a member of one or multiple groups. Each group can receive rights to data record types and to fields of data records. These rights apply to each member of the group.
- Each group member can have more or fewer rights to the data of other group members. These access rights are granted by the administrator. Superiors can, for example, view all data records of their team.

- The administrator also defines rights of other users and external access rights between different users and groups. These settings can be made for all data record types.

Rights are inherited. This means the rights for the illustrated examples above add up, and the highest right always applies. The highest right is the right that permits most.

The administrator assigns rights in accordance with the predefined corporate guidelines which apply as broadly as possible. You can change these general rights in the data records to which you have access. The following rules help you to assign rights.

- You cannot assign more rights than you have.

In turn, this means that by granting rights, you limit the access rights of other users to your data.

- If you are able to set rights for your own data, you can also set ownership rights and external access rights.

In doing so, you further specify the general rights set by the administrator for individual data records.

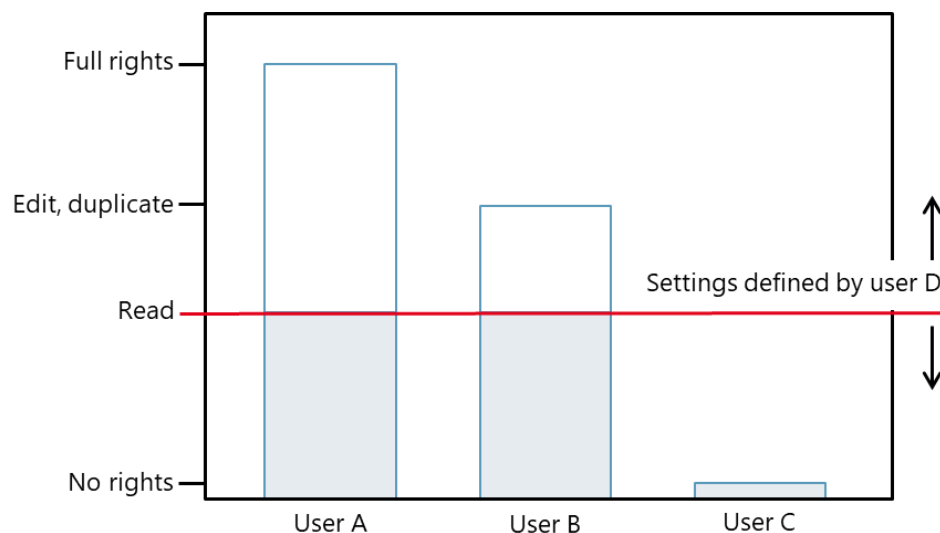
- Ownership rights have priority over external access rights. If the ownership rights to a data record restricts the external access rights of other users, the ownership right applies and not the external access right.

In this case, rights are not added but inherited.

Restricting rights

Certain colleagues can access your data through external access rights.

The figure shows an example of the different rights. The administrator has assigned external access rights that other users have to your data as the user D. These rights are illustrated by the columns for user A, B, and C.



- ✓ As the user D, you create a data record and set the **Read** right as the maximum external access right. The red line indicates this external access right. By setting the external access right, you change the general external access rights defined by the administrator.

This means that users A and B can only read the data record and no longer edit or delete the data record. Nothing changes for user C, because this user has not been granted any rights to you as user D.

Another user E has rights to user A. This means that user E also has - inherited - rights to your (user D) data. User E then also only has the **Read** right.

Thus, by granting access rights and external access rights as user D, you move the red line up or down and grant more or fewer rights to the data record. As a result, each user only has the maximum rights you choose to grant.

Restricting external access via ownership rights

Alternatively, you can also assign fewer rights to specific users without taking into account external access rights.

- ✓ Enter a user as an authorized person or participant in a data record to grant them the **Read** right.

Ownership rights have priority over external access rights. The authorized person or participant only has the **Read** right to the data record. It does not matter which other rights they inherit.

Similarly, you can define different access rights for groups and the individual group members. For example, you can enter a group as an authorized person or participant with full rights. User A is a member of the group and has full rights in the group. User A then also has full rights to the data record in which you have entered this group as a participant.

- ✓ Now, you can also enter user A as an authorized person or participant. Assign the **Read** right to user A. As a result, user A only has read rights to the data record even though they are a member of the entered group.

Confidential and private data records

The easiest way to deactivate external access rights to your data records is by setting the data record to **Private**. Only users that have been entered as authorized persons or participants have access to this data record. Additionally, the selected ownership rights apply.

 External access rights are deactivated for private data records.

- ✓ If you enter **Confidential** as the external access right, the following colleagues can see the data record:

all users that have been entered as authorized persons or participants in the data record

and all users that have full rights and access to confidential data records as external access rights.

The administrator usually also defines who has access to confidential data records. This right can be useful to grant, for example, to an assistant you work closely with.

You can display appointments and other activities in the calendar, see chapter "Calendar" on page 51. Private or confidential data records can be viewed in the team calendar. They are marked with ***No access*** if the current user has at least the **See times in the calendar** external access right to the data record. If this is the case, the start and end of the appointment are visible.

The authorized persons or participants of a confidential data record are visible if the administrator has allowed this and you have general external access rights to one of the authorized persons or participants.

Please also keep in mind: the statement "I do not see the data record" by a colleague often means they do not have the necessary rights to view the data.

5.2 Rights for the display of data

Data in CAS genesisWorld is displayed in a certain way. With views, you can display, for example, certain data records and fields with a specific sort order, see chapter "Views for a better data overview" on page 41. You define the display of data via multiple settings, for example, by defining navigators or creating apps, views, view formats, filter, and so on. The administrator also defines who has the right to make these settings. If you have the necessary rights, you can create your own views. All views of CAS genesisWorld always display the data records to which you have rights.

If you have the rights to data and the rights to define the display of data, you can, for example, also define which users are allowed to display which data. For example, you might want to display all the product specifications from all the departments, or all the opportunities from all the sales teams to whom you have at least **Read** rights, see chapter "Protecting your data" on page 59.

If you are not allowed to change views or do not want to change a view, you can display data, for example, in the team calendar, see "Team calendar" on page 52.

5.3 Rights for functions

Rights for functions help with data protection and data security.

First of all, your administrator defines which functions and which modules you are permitted to use.

If you work in specific areas or have special responsibilities, you may be given special rights or even administration rights so that you can supervise, for example, workflows for colleagues.

5.3.1 Role-driven functions

CAS genesisWorld stores important, sensitive data from all departments in a company. The information employees need to access for their work varies depending on the department they are in. Customer and personnel data, for example, is of a particularly sensitive nature and should therefore only be accessed by authorized users.

The requirements for role-driven functions can be explained in three key points:

- rights for data editing functions,
- rights to display data, and
- data protection measures, especially for addresses.

Data protection measures

Data protection measures have been implemented to prevent that data is retrieved from CAS genesisWorld without permission and to protect sensitive information, so that only authorized users can see or use the following functions, for example:

- form letters, e-mail campaigns and label printing for multiple addresses,
- import/export of addresses, for example, via an export to Microsoft Excel, copy and paste,
- using the address wizard, or
- creating reports.

You can find more information in the online help on the following page: [Special rights for data protection](#).

Functions for default values

You can customize the views in all clients and all related concepts such as apps in CAS genesisWorld Web or navigators in the desktop client and thus create a custom CAS genesisWorld interface.

If you have the corresponding rights, you can define views for your team or define input help values.

You or specific employees can also create templates for form letters, e-mails, or other communication, archiving templates for e-mails, or other data record templates. This way, you can optimize processes and standardize the look & feel of your contents.

Powerful functions

Certain specific functions greatly affect other data records, users in your company, or the company in general and thus require specific rights. These functions include, for example:

- The system automatically enters a specific group of users as the authorized persons or participants of a specific project.
- If an appointment with external participants has been created and takes place in a meeting room, the responsible persons automatically receive a notification of a new task. The task then includes the information on when the room needs to be prepared and how many participants are to be expected.
- The address management team has the right to **Merge duplicates**.
- The data management team has the right to change field values for many data records at once. This helps to standardize data records in regular time intervals.
- Reports with working hours are created for each team and each quarter and are automatically sent to the lead manager.

5.3.2 Extensions with modules

CAS genesisWorld extensions and modules

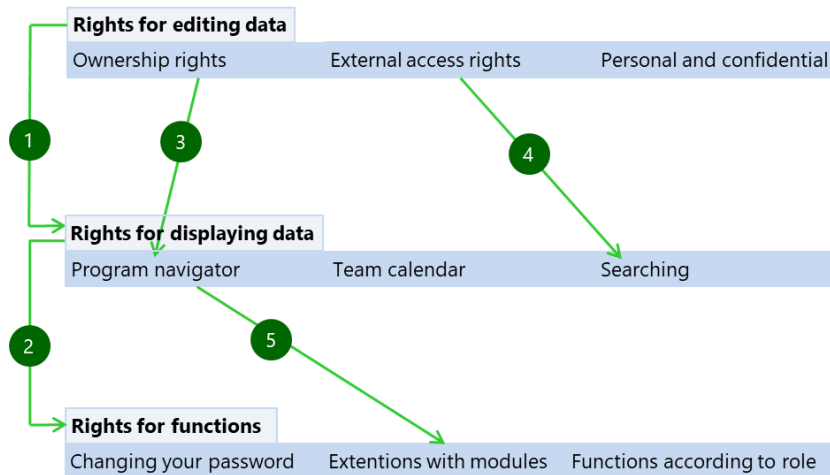
- extend the program with new data record types, for example, e-mail campaigns in Marketing pro or receipts for Easy Invoice,
- offer additional functionality, for example, hierarchical input help options or primary links in the Premium Edition,
- enable access to CAS genesisWorld via the browser for CAS genesisWorld Web or mobile devices running on iOS, Android and Windows with the mobile apps,
- offer interfaces to exchange data from CAS genesisWorld with other programs such as Evalanche for e-mail marketing or Exchange sync for working with Microsoft Outlook, and more.

Usually, editions and modules require their own licenses, which is why modules have to be unlocked by the administrator for specific users. Additional rights may be required.

You can find an overview of the available modules at [CAS genesisWorld knowledge hub](#) and detailed information via the respective links.

5.4 Connections and context

The figure illustrates several examples of how rights influence each other.



- 1) Rights to data - at least **Read** rights - are necessary so that you can at least view the data.
- 2) Rights that determine how data is displayed are necessary so that functions apply to data.
- 3) If you have been granted ownership or external access rights to data, then this data is displayed in views.
- 4) If you have external access rights, you will find the data you can access with these rights using the search function - without requiring a specific view in the program navigator.
- 5) The program navigator or apps contain special data and views if you are working with one or more modules.

You can find more information on rights in the online help. This scheme and these principles help you to better understand the underlying logic.

6 Working to match corporate processes

Each company has standardized or half-standardized work processes which should always be followed.

- When talking data, these standardized processes can include predefined field values in a data record or entirely predefined data records. This way, you can ensure all data is maintained similarly.

Examples are input help or templates, for example, for documents.

- Colleagues with similar routines often also work with similar data.

Special navigator views can be created for these teams with similar tasks.

- Most people nowadays use software such as Microsoft Office to create and edit documents, e-mails, graphics tools to edit images, and so on in their day-to-day business.

Default interfaces for these commonly used programs ensure seamless data exchange with CAS genesisWorld. You do not need to learn new software skills and you can work together with the same data across all data record types.

- Moreover, you can integrate more software for specific purposes in your company. Modules offer more interfaces to enhance the standard version.

An example is the connection to an ERP system, to Evalanche for e-mail marketing purposes, or Helpdesk online for a ticket system.

- You can extend and customize CAS genesisWorld with various modules for even more specialized functions and processes.

For example, you can use the Form & Database Designer or the App designer to customize the data record window in the desktop client or the data record forms in CAS genesisWorld Web and the mobile app for your company. Use the Project module to manage and structure your projects. The Replication module enables you to log on to cas genesisWorld independent from the company network or an internet connection.

You can implement any custom requirements as CAS genesisWorld can be adapted to fit any company. Defaults are mostly defined by the administrator in the Management Console and are then available for users in the clients.

This also means that the CAS genesisWorld in your company can differ from the version documented in the online help pages. When in doubt or if you require any specific information on a function in your company, we recommend contacting your administrator or the person responsible for CRM in your company.

6.1 Input help, templates, and links

A company-wide, unified, and at the same time easy-to-maintain handling of data can be ensured by systematically implementing defaults. To do so, input help options and link types are defined by the administrator. Templates are maintained from colleagues that are responsible for this task, but you can also define templates for yourself to make your work easier.

6.1.1 Input help

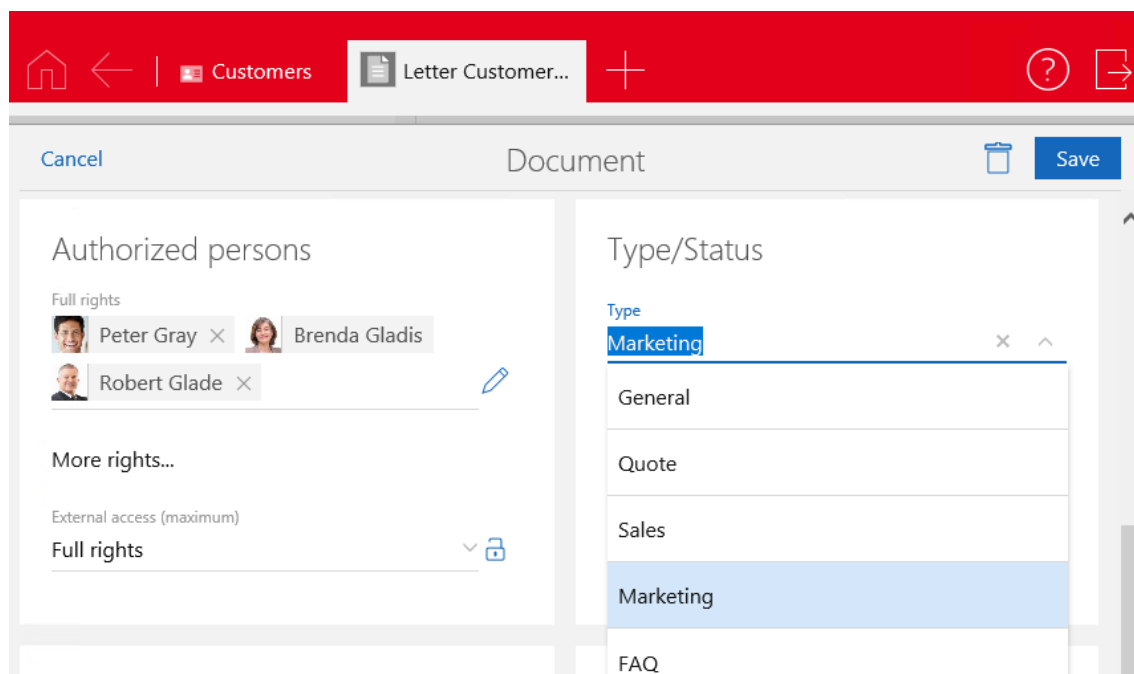
Input help options as defaults for specific fields in data record windows are already mentioned for addresses, see chapter "Functions and automatic functions" on page 28

for addresses. The drop-down lists for the **Type** and **Status** fields that have already been mentioned are also input help options.

There are different types of input help.

- You can either select one or several entries.
- Additionally or alternatively, you can enter any text.
- In the Premium Edition, a selection tree is available which offers a tree structure from which you can select a number of items in a specific order.

Different input help options can be made available for users of different business units. Furthermore, the users of CAS genesisWorld can use the software in different languages. You can manage and maintain the input help options in these languages. Each user will see the entries of an input help in the language in which they have logged on to CAS genesisWorld. To maintain input help options in different languages, the administrator must enter them in different languages. Thus, you cannot enter free text if the input help options are available in multiple languages.



6.1.2 Templates

You can cover entire work processes by using templates. Examples include:

- You can choose from different templates for business e-mails, cover letters to business contacts, letter, or form letters.

These templates are available for document data records, see chapter "Functions and automatic functions" on page 35.

- Templates for quotes can be found in opportunities.

CAS genesisWorld Web already offers existing document templates you can use to create your documents.

Examples of templates for other data record types include:

- For appointments, you can create templates for recurring appointments which take place at different times with the same participants.
- When working with tasks, you can create templates for notifications to the human resources department, to the service for the facility management, and the department for information technology.
- When working with projects with links, you can create templates for e-mail campaigns to invite the participants of project appointments or for project protocols that are to be sent to all participants.

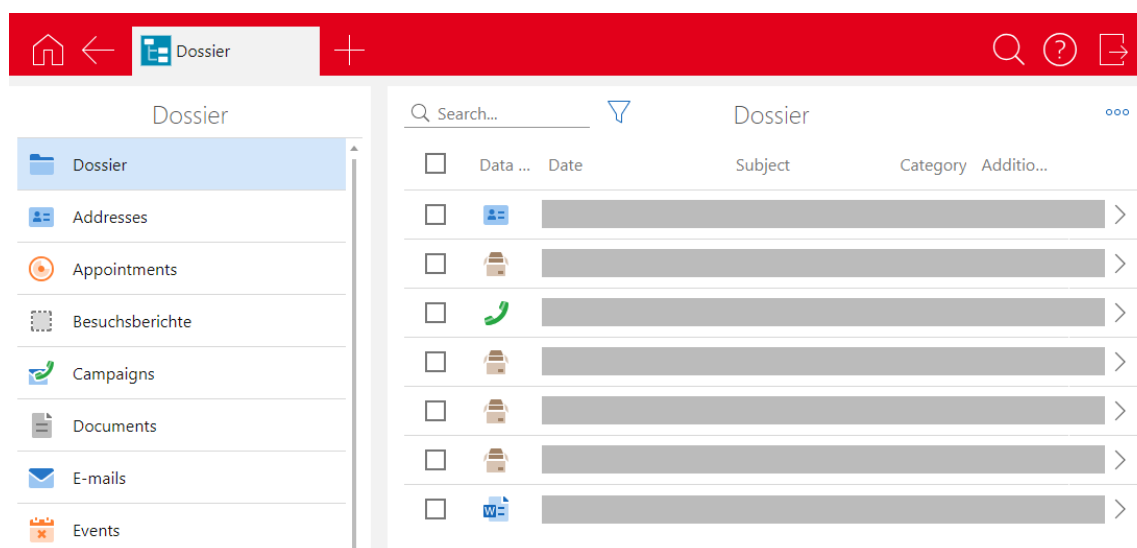
You need to enter the users who are supposed to use a template as authorized persons or participants in the template data record.

- ✓ An easy way to create a template in the desktop client is to duplicate an existing data record. Then, change the desired fields and click **Save as template** in the **File** menu.

You can find more information on templates in the desktop client online help on the [Document templates](#) page. You can find more general information on templates for data record types on the [Data record templates](#) page.

6.1.3 Working with links for easier workflows

Another useful function in CAS genesisWorld is to work with links to connect information and model workflows.



Create a project. You can use the **Notes** field of the project to define which data records are to be created for each step of the project. All the data records which illustrate different working steps are linked with the project.

The linked data records are displayed in the **Dossier** of the project. A new colleague or a colleague from a different unit then only needs the information about the project to imitate the process.

The appointment, the e-mail campaigns for the invitations and any protocols, as well as the protocol documents can also be linked with other data records.

To create a similar project, you then only have to duplicate the project data record. However, we recommend duplicating without links, see chapter "Working with different functions" on page 19. You then create new appointments, tasks, e-mail campaigns, documents, and so on for the new project and link the new data records with the project data record, see chapter "Linking data records" on page 39.

You need to duplicate the project without links. If you also duplicate the links, all links of the previous project are simply duplicated. However, we want to create an entirely new project and thus also new appointments, tasks, and so on.

Another option is to use primary links for smarter working, please refer to chapter "Link types and primary links" on page 38. The central data record of a hierarchy for primary links is always an address. A project – that may also include jobs – is then already automatically structured.

6.2 Default interfaces

You exchange data between two systems via interfaces.

By default, multiple interfaces to third-party programs are available in CAS genesisWorld. The administrator defines the settings for the exchange and which user have the rights to exchange data.

6.2.1 E-mail

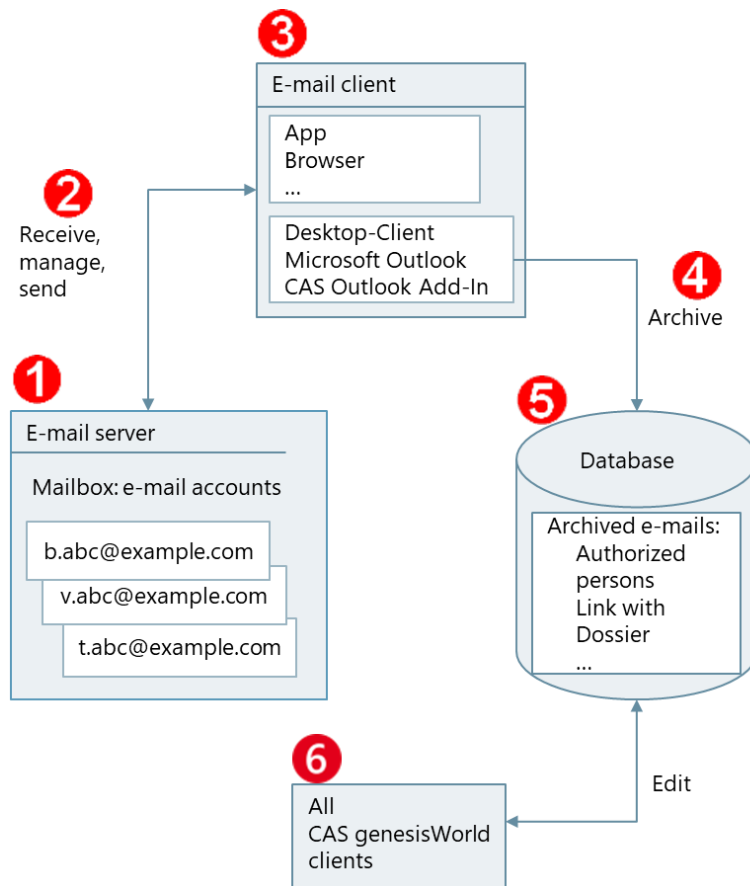
E-mails are managed and edited on an e-mail server and are not native CAS genesisWorld data records.

- 1 Each e-mail server includes multiple mailboxes and e-mail accounts. Each e-mail account has a unique e-mail address.

For e-mails, data protection through secrecy of correspondence must be ensured. Companies may set up differing guidelines to ensure data protection.

For example, your administrator might set up a personal e-mail account for each person in your company. Alternatively, your team might have access to one e-mail account for multiple employees, for example, `info@company.com` or `team@company.com`. Users always have to log on to the e-mail server and an e-mail account.

The administrator defines and sets up the e-mail accounts in your company.



- 2 All employees receive, manage, and send e-mails via an e-mail account on the e-mail server.
- 3 To receive, manage, and send e-mails, users require an e-mail program.
- 4 To exchange e-mails between CAS genesisWorld and an e-mail account, the deployed program must support the CAS genesisWorld interface for e-mails. Users can archive e-mails in CAS genesisWorld via the interface.

Depending on the CAS genesisWorld client you are using, you have different options for archiving.

The CAS genesisWorld Desktop Client includes an e-mail program. You access your e-mail account via views in the program navigator of the desktop client. Alternatively, you can also work with Microsoft Outlook. Both approaches allow you to archive e-mails.

CAS genesisWorld Web does not include an e-mail client. If you work with Microsoft Outlook, you can transfer e-mails as well as other data to CAS genesisWorld using the CAS Outlook Add-In. You can find more information in the CAS genesisWorld Web Online Help on the following page: [CAS Outlook Add-In](#).

Using the add-in, you can also, for example, access CAS genesisWorld contact data, such as e-mail addresses, and attach document data records or contacts from CAS genesisWorld to your e-mails.

The administrator or you as user can configure the add-in for CAS genesisWorld Web. You can find more information on the add-in functions in the online help of the desktop client on the following page: [Configuring the Microsoft Outlook Add-In](#).

When using the mobile app for CAS genesisWorld, you can use a corresponding Microsoft Outlook app to also access your e-mail server on the mobile device and archive your e-mails to CAS genesisWorld.

- 5 When archiving e-mails, the e-mail on the e-mail server is copied and saved as CAS genesisWorld data record in the database.

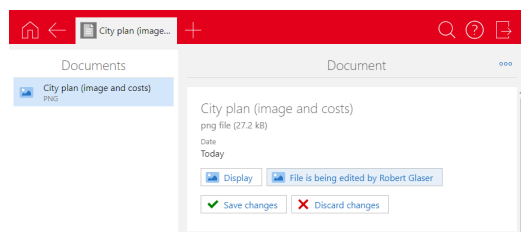
Once an e-mail has been saved as a data record, you can apply all CAS genesisWorld-specific functions to this e-mail data record: managing access rights, linking this e-mail data record to other data records, or displaying it as data record in a dossier.

- 6 You can view and edit archived e-mails in lists or dossiers in all clients. As with any data record, you need access rights to the archived e-mails, see chapter "Rights for editing data", on page 55.

6.2.2 Editing archive files

Archive files are saved in the so-called Document Archive, see chapter "CAS genesisWorld architecture", on page 7. You edit these archive files with the corresponding program on your computer, see chapter "Documents", on page 32.

- ✓ When you open the archive file for editing, the file is transferred to the computer you are currently using and opened in the appropriate program. You can then edit the archive file and it will be transferred back to CAS genesisWorld after you have finished editing.



- ✓ In the desktop client, the archive file is automatically transferred, opened with the respective program, and then once again saved in CAS genesisWorld.
- ✓ In CAS genesisWorld Web, you can work with similarly automated functions if you install the CAS Smart Add-on.
- ✓ In the mobile apps, you need to install the respectively appropriate app for all document file types to edit the archive files. If you do so, you can also open, edit, and save documents on your mobile device.
- ✓ If you click **Open file in read-only mode** or **Display**, the archive file is opened in read-only mode in the respective program.

If you open a file in read-only mode, then close the file, and save the document data record, the archive file in the document data record will not be changed.

You can always read or display an archive file even if a colleague is currently editing the file and has thus locked the document for editing.

The functionality described so far is the same for all archive files, that is, for PDF or graphic files, presentations with Microsoft PowerPoint, or any text files.

The interface for Microsoft Word files offers additional functions to write letters and form letters. The following automatic functions can be used in the desktop client and in CAS genesisWorld Web with the CAS Word Add-In.

- ✓ You can write a form letter to one or multiple addresses. The function to create a form letter document data record is available in list views and the address data record window.
- ✓ Mail merge fields enable you to work with placeholders in a Microsoft Word document.

When printing or sending a letter, mail merge fields are filled with content from CAS genesisWorld, for example, your name, your company, or address fields of recipients such as salutation.

- ✓ You can write a quote directly from within an opportunity as a letter or form letter. You can insert all addresses which are linked to the opportunity as recipients.

You can also insert mail merge fields from the opportunity or data records linked with the opportunity in the form letter. Of course, the items of the opportunity are also included in the quote.

- ✓ You can find more information in the online help of the desktop client on the following pages: [Form letter basics](#) or [Product items tab](#). Alternatively, you can find more information in the CAS genesisWorld Web Online Help on the following page: [Editing form letters in Microsoft Word](#).

6.2.3 Telephony integration

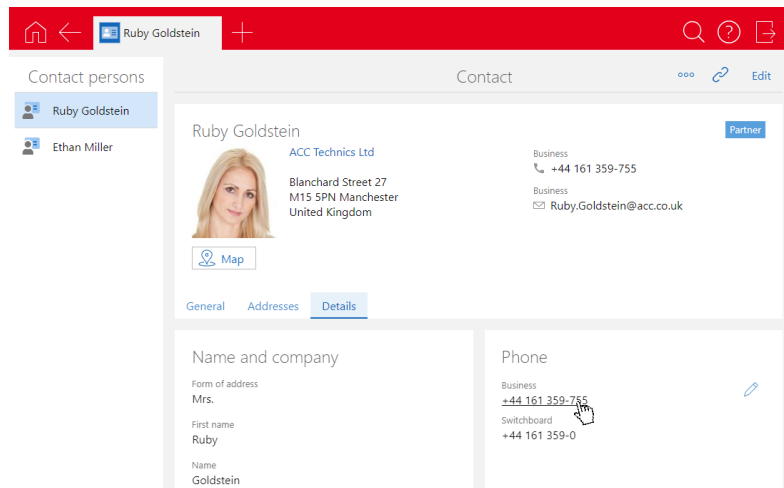
By integrating a telephone system, you can access telephony functions in CAS genesisWorld.

Depending on the telephone system in the company, certain components must be set up or installed. The administrator usually sets up the telephone system.

The integration must be set up for all clients. In CAS genesisWorld Web, you need to install the CAS Smart Add-on to use the automatic telephony functions.

- ☎ In the desktop client, all phone numbers in an opened address data record are displayed in the toolbar and the most important phone numbers are displayed in a larger field in the data record. You call a number by clicking it.

- ✓ You can also call a phone number by clicking a number in a data record or the business card of a contact in CAS genesisWorld Web or the mobile app.



- ✓ When you click a phone number in any of the CAS genesisWorld clients, the system automatically creates a phone call data record if this function has been activated in the settings.

The called party, the phone number, and the time of the call are automatically entered in the phone call data record. The phone call data record is automatically linked with the address or contact.

You can change automatically entered values and you can always enter the contents of the call.

The automatic functions vary slightly depending on the client. For example, you can transfer values with the CAS Smart Add-on in CAS genesisWorld Web or use the telephony functions of your mobile device when working with the mobile app.

- ✓ You receive a notification about an incoming call in the desktop client and in CAS genesisWorld Web.

These clients also offer a list of missed calls for a better overview.

- ✓ Additional functions are available in the desktop client. You can, for example, receive a notification when calling a CAS genesisWorld user who is in an appointment or on holidays.

- ✓ You can find more information on the necessary telephony settings in the respective online help. In the online help for the desktop client on the following page: [Phone calls: Who? What? Where? and When?](#), in the CAS genesisWorld Online Help here: [Phone calls](#), and in the Mobile App Online Help on the following page: [Phone calls](#).

6.3 Extended program functions with modules

You can adapt CAS genesisWorld to the needs of your company through three types of extensions: company-wide interfaces, modules for company units, and modules for individual changes to the data structure and interfaces of CAS genesisWorld.

A module is an extension of CAS genesisWorld, which usually requires a paid license. How much a license costs depends on the number of user accounts you want to activate the module for. Not all employees need access to every module. Thus, some modules are not activated for all colleagues.

Each module extends CAS genesisWorld with additional functions and often with additional data record types. All modules are embedded in the usual CAS genesisWorld rights system. However, modules can also include more rights for managing module settings or additional data. Moreover, the usual ownership rights, access rights, and external access rights apply for all data record types, even the ones included in the extension modules.

Each company works with individual combinations of different modules. The basic functions and accessible data can vary for any two CAS genesisWorld users depending on the team and daily tasks of the respective employee.

6.3.1 Modules for company-wide interfaces

Synchronization of data between different systems and CAS genesisWorld allows the maintenance of data in different systems and access to data in both systems.

- Receipts, open items, products, delivery blocks, and so on, can be managed with an Enterprise Resource Planning (ERP) system.

You can access and use, for example products from the ERP system in opportunities or ERP receipts in customer or supplier dossiers using the OpenSync extension that allows for a data exchange with third-party systems.

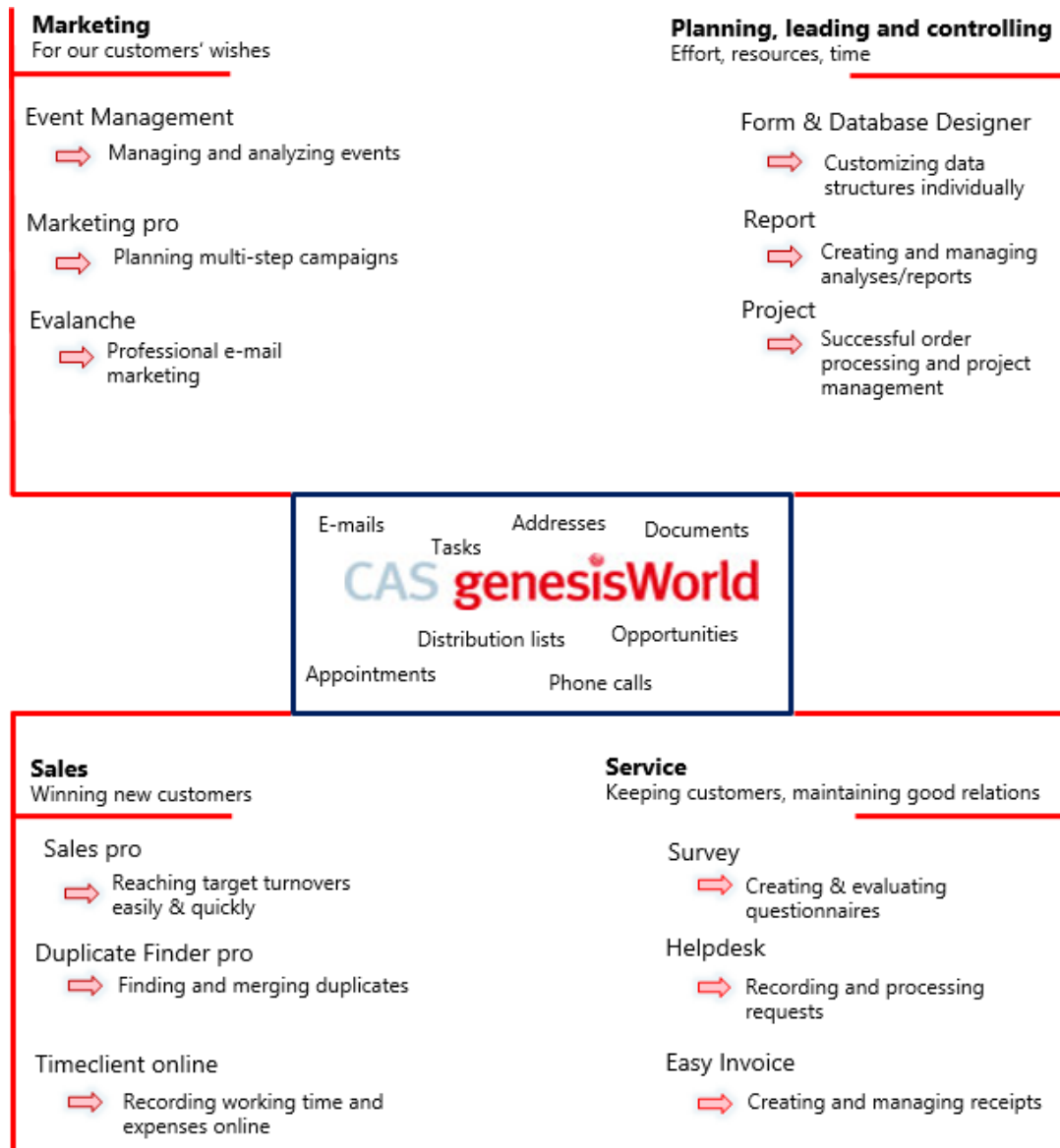
- Exchange sync allows you to integrate CAS genesisWorld with Microsoft Exchange or Microsoft Outlook to exchange address and appointment data.

Thus, you can manage appointments and addresses of different company teams in both programs. At the same time, all changes are recorded in both systems and all users have access to the same data in the two programs.

- The Evalanche integration enables e-mail marketing. User select addresses in CAS genesisWorld as the target group and then transfer these addresses to Evalanche. They can then create, test, and send personalized e-mails in Evalanche. If any e-mails cannot be delivered or recipients unsubscribe from a distribution list, the corresponding information is re-transferred to CAS genesisWorld and included in the recipient's dossier.

6.3.2 Modules for business units

CAS genesisWorld is available in different editions. The Standard Edition offers central functions for relationship and information management.



Other editions offer combinations of modules for special requirements of a company or industries. The online help pages of each program describe the functions of all editions and modules of the respective client.

The figure shows an overview and examples of some modules and their functionality. You can find more information and links to the documentation of each module on the following page: [CAS genesisWorld knowledge hub](#).

- With Survey, for example, you can systematically collect data from prospective customers, customers, suppliers, or employees to find out more about requirements and assessments, training results or complaints, use of products, and need for advice.

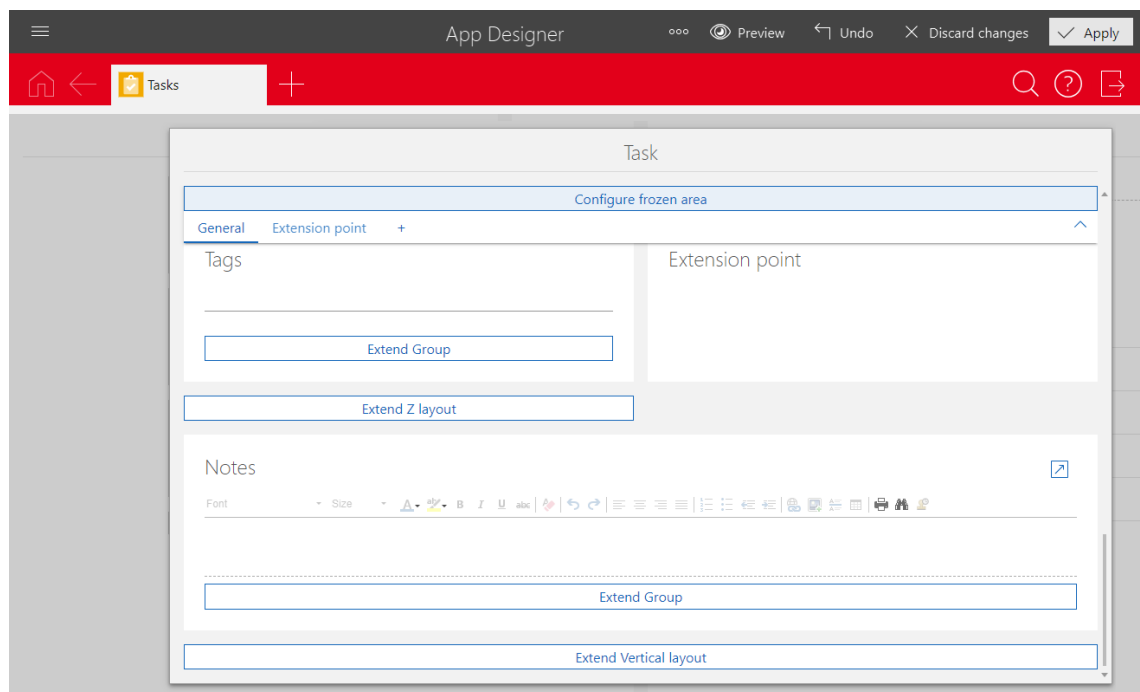
- With Project, you manage orders and projects, and plan, track, and evaluate resource plans, expenses, and time recording.

CAS genesisWorld is available in multiple languages by default. Various functions support the international use and collaboration of users in different countries. These functions are described in detail in the respective online help.

6.3.3 Individual data structure and user interfaces

You can customize and extend the CAS genesisWorld standard with modules and additional data record types. Even more customization options are available for the company-specific adaptation and extension of data record types and interfaces.

The administrator can create additional fields for all data record types and an additional data record type individually for your company already with the Standard Edition.



The administrator can customize CAS genesisWorld Web and the mobile apps using the App Designer. The figure shows a data record window in CAS genesisWorld Web. The areas that can be customized are outlined in blue.

- ✓ For some data record types, an overview of the most important data of the opened data record is displayed in the upper area. You can customize this area.
- ✓ In the middle area of the data record form, the so-called Z layout, you can move entire areas around, change their alignment, add new elements, or remove displayed elements.
- ✓ You can display specific fields and/or field groups in all data record types.
- ✓ You can vertically extend the form with new elements in the lower part of the window.

You customize the interface for the desktop client using the Form & Database Designer.

- Even without the license for this module, administrators can add up to 10 fields to the different tabs of the data record window in the desktop client.
- If you have the license for the module, you can create new windows and tabs and customize the display of available windows and tabs.

You can also add, for example, formula fields to automatically calculate values, other interface elements for links, or mandatory fields.

These custom design options are another reason why CAS genesisWorld looks different in every company.

This means that the documentation of CAS genesisWorld only ever describes the default version of CAS genesisWorld and might not perfectly match the functionality in your company.

7 Custom processes

CAS genesisWorld can support your daily routines and match your requirements with custom settings, templates, and many more options to model your processes.

7.1 Settings

You can define custom settings for each CAS genesisWorld client.

These settings apply to you personally. This means that if you log on to your account, for example, with another computer than usually, the same settings you have defined in the respective client apply.

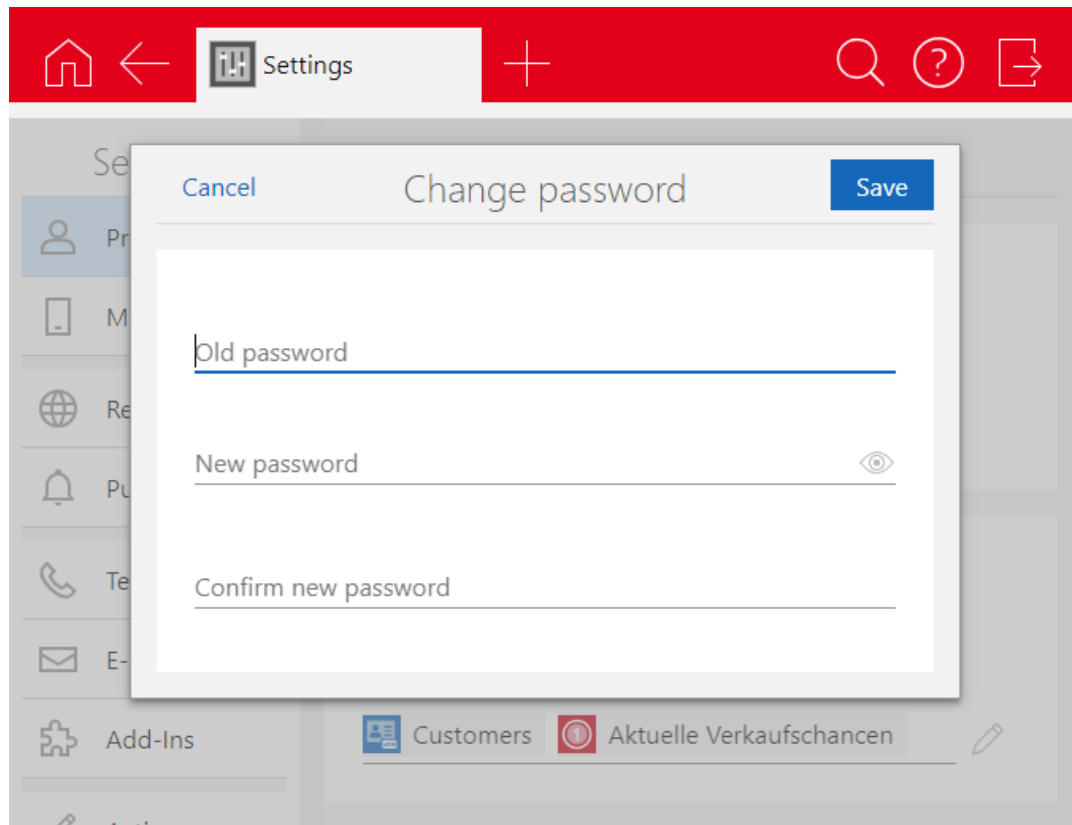
When working with the mobile app, the settings defined by the user always only apply to the mobile device currently in use.

Some settings apply to more than one client. The administrator can also define some default settings that you can only change with the corresponding rights. You can find more information in the respective online help.

Examples for settings that apply to several clients

The **Automatic address check** is executed in all clients and the corresponding settings are always taken into account, see chapter "Functions and automatic functions" on page 28.

Both in the desktop client and also in CAS genesisWorld Web, you can change the **Password** for CAS genesisWorld. The changed password is valid in any client the next time you log on to CAS genesisWorld. You cannot change the CAS genesisWorld password in the mobile apps, but a changed password also applies in the mobile apps. After you have changed the password, you need to log on again the next time you open the mobile app.



Different **Holiday** settings apply depending on the country and on the regions you work in. You can define the settings for the holidays that apply to your country or region in the desktop client or in CAS genesisWorld Web. If you change the holiday setting, the changes apply in all clients, even the mobile app. Holidays are relevant at several locations in CAS genesisWorld.

- Holidays can be displayed in all calendar views.
- How many work days count for the holiday settings depends on whether weekends and **Public holidays** are included in the calculation.
- When scheduling recurrence patterns for appointments and tasks in the desktop client, you can take public holidays into account by defining exceptions.
- If you work with the desktop client and activate the corresponding function, CAS genesisWorld will remind you to use the out-of-office wizard on the last work day before an upcoming holiday.

7.2 Good to know for your daily business

This handbook has already listed some functions and automatic functions for specific data record types, for example, the overlap check or address check, see chapter "Functions and automatic functions" for appointments on page 25 and "Functions and automatic functions" for addresses on page 28.

Various other functions in CAS genesisWorld offer automated help to facilitate daily work.

The following chapters describe some of these automatic functions. On the main pages on **Address management**, **Contacts**, or **Project management** in the online help, you can find useful links to tips and tricks for each data record type or certain functions.

7.2.1 Archiving templates for e-mails

An e-mail only becomes a CAS genesisWorld data record once it has been archived to CAS genesisWorld, see chapter "E-mail" on page 69. You have several options for archiving e-mails. Depending on the program, process, and client, more or less settings are available.

You can archive both sent and received e-mails with the corresponding functions. You can archive both a list of e-mails and individual e-mails.

- You can use the **One-click archiving** function for e-mails in the CAS Outlook Add-In even if the desktop client is not installed.
- If you do not use the desktop client, the **Default settings** defined by the administrator apply.

These **Default settings** define the external access rights to archived e-mails. One of two alternatives applies: either archived e-mails are set to private and only you can access them or the archived e-mails can automatically be accessed by all users that have external access rights to your data records.

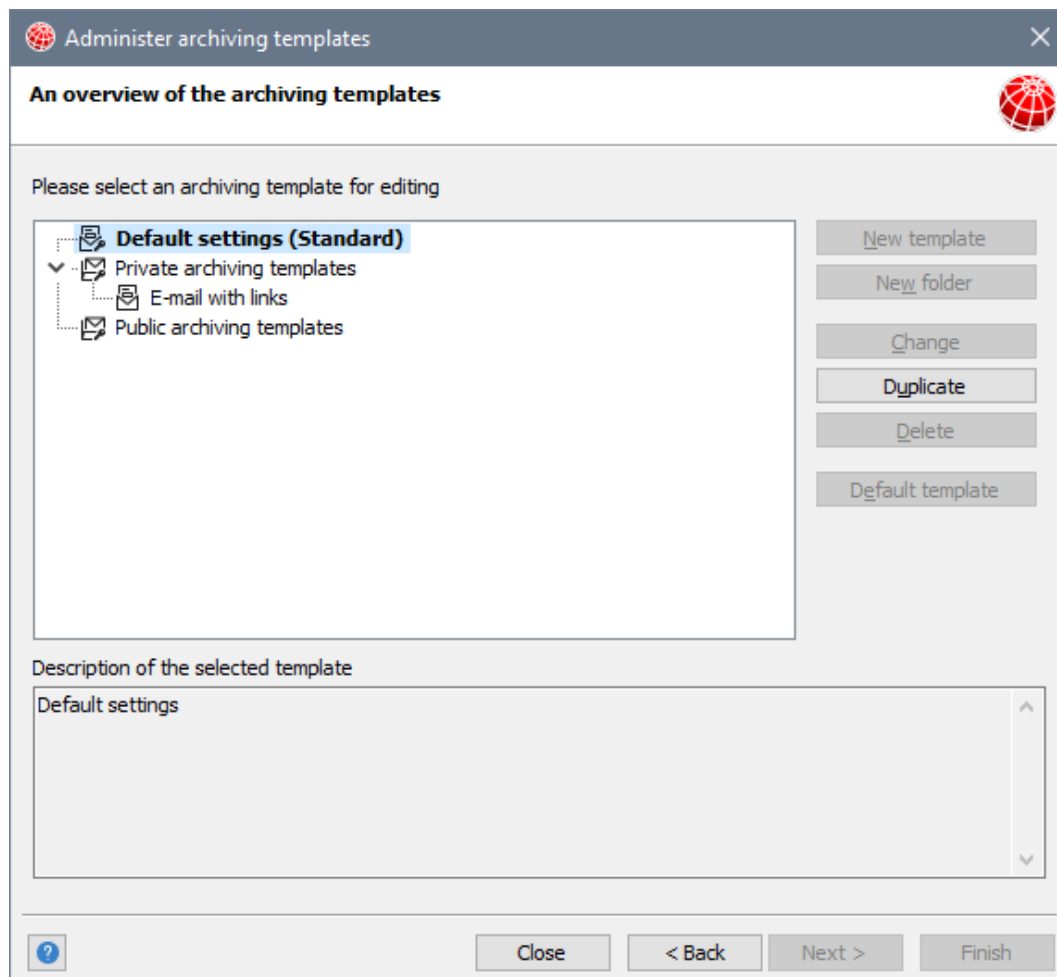
- If you use the desktop client, you can create your own archiving templates.

With archiving templates, you can automate the archiving of similar business e-mails. For example, you can define access rights or automatically link certain e-mails with addresses or projects.

- With the desktop client, you can create personal archive templates and public templates for other colleagues.

You can also archive e-mails without a template.

- If you use the desktop client, you can define a personal or public archiving template as the **Default template**.



- If you then use the One-click archiving function, the default template automatically applies.


If you do not define a **Default template**, the **Default settings** defined by the administrator apply.

- Depending on the program, you can overwrite some defaults of an archive template directly while archiving data.

Even if you cannot edit the defaults of an archiving template directly, you can always edit the predefined values in the e-mail data record using one of the CAS genesisWorld clients.

7.2.2 Rules for e-mails

Do you often receive e-mails such as newsletters or status notifications which you read at a certain time? Do you work with archiving templates or folders for e-mails?

 You can find the **Rules for e-mails** tab on the **E-mails** tab in the **Settings** window.

- ✓ With rules for your e-mail accounts, you can automatically move e-mails to specific folders or archive them.

- ✓ Alternatively, you can create a rule by selecting an e-mail in a list view, opening the context menu, and adopting parameters for the rule.

The rules are executed via the application server if the corresponding settings have been defined. Using rules, you can manage your mailbox without opening the desktop client.

7.2.3 Appointment invitations

You can also invite colleagues to appointments instead of immediately entering them as participants. You can also invite customers, partners, or other contacts.

- ✓ Invited users, groups, or resources see the appointment, for example, in their calendar and can accept or decline invitations.

Participants in CAS genesisWorld Web have full rights after they have accepted the invitation. Invited participants in the desktop client can be assigned specific rights.

- ✓ You invite customers, partners, or other contacts to an appointment by entering their e-mail addresses as a participant in the data record.

The invitation functions are available if the administrator has activated the invitation management in CAS genesisWorld.

A CAS genesisWorld user becomes the organizer of the appointment. The e-mail account of this user is used to send the notification e-mails for the appointment and receive the reactions of the invited participants.

If the e-mail address of a recipient is already available in an address data record in CAS genesisWorld, the appointment can automatically be linked with the address.

Whether the appointment and corresponding addresses are automatically linked is defined by the administrator.

You can find more information on the invitation management functions in the online help of the desktop client on the following page: [Invitations to appointments](#). In the CAS genesisWorld Web Online Help, you can find more information on the following page: [Manage invitations](#).

7.2.4 More tips

You can find more information on the following functions and tips in the online help of the desktop client.

- ✓ Each client offers different options to exchange data and data records for multiple purposes by sending them as an e-mail attachment.

You can send addresses as vCards using each client. When sending document data records, you can send the archive file. If you receive an archive file, you can open it in the corresponding program.

You can send any data record to the entered authorized persons in the desktop client and CAS genesisWorld Web. In the desktop client, you can access more functions for sending, for example, you can send multiple data records at once or even entire CAS genesisWorld views, send iCal files, or use the drag-and-drop functions for similar purposes.

In CAS genesisWorld Web and the mobile clients, you send data records via a link. In the desktop client, you send them as a GBT or GTF file as an attachment. Click the link or the attachment to open the data record in the respective client.

- ✓ You can restore deleted data records in the desktop client or CAS genesisWorld Web.

Deleted data records are first moved to the list views in the **Recycling bin** folder or app. Here, you can find list views for each data record type and restore data records or delete them permanently. When deleting or restoring data records, your rights to data records are taken into account.

7.3 Searching and filtering data

The amount of data in CAS genesisWorld is often very large. Navigators, views, and apps are used to structure the data by work areas. However, some views can also become extensively large. Or data records from other departments are not displayed in your views.

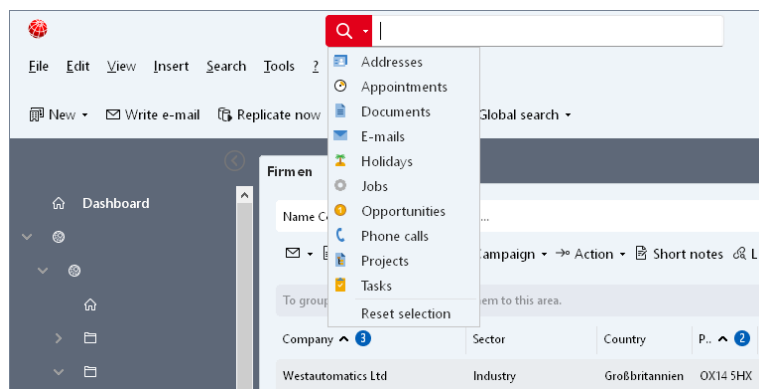
Thus, CAS genesisWorld offers different search functions at different locations so you can find all the data you are searching for. Your rights are taken into account during any search. Usually, your search results will only show you those data records to which you have access rights.

CAS genesisWorld offers the so-called SmartSearch. With the SmartSearch, you can search one search term in multiple data record types at once. You can also use the SmartSearch to search the contents of archive files. You can find the SmartSearch at several locations in CAS genesisWorld: in the search field in the toolbar of the program window, in the upper right search field in CAS genesisWorld Web, and so on.

The administrator must activate the SmartSearch in the Management Console. If the SmartSearch is not active, you can only search one single data record type at once. In this case, you have to define which data record type you want to search before entering the search term.

7.3.1 Central search field

The desktop client includes a search field in the toolbar of the program window.



- ✓ If you enter characters in the search field and the SmartSearch is active, matching search results of several data record types are displayed as soon as you have entered the first two characters.

If the SmartSearch is not active, the system only searches addresses when entering a search term.

- ✓ With or without the SmartSearch, you can always search the individual data record types. To do so, open the drop-down list and enter a parameter. Parameters exist for each data record type, for example, **TA** for tasks or **AP** for appointments.

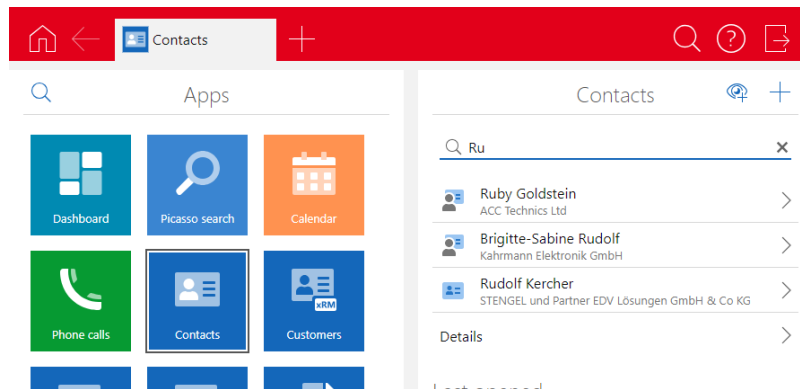
You will also find parameters helpful when searching in specific fields or for special characters. You can find more information in the online help for the desktop client on the following page: [Individual search](#).

- ✓ The system only searches archive files if you have selected the Documents data record type.

 Select the data record type from the drop-down list or enter **DO** in the search field.

In CAS genesisWorld Web, the SmartSearch is displayed in the upper right corner if the administrator has activated this search feature, see chapter "CAS genesisWorld Web" on page 11.

- ✓ Using this search field, you can also search multiple data records at once.
- ✓ You can also enter search parameters and, by entering **DO**, search archive files.



You can find more information on the **SmartSearch** feature in the respective online help.

In CAS genesisWorld Web, you can also find a search field in many apps.

- ✓ As soon as you start entering characters, the search results are displayed here. The search here always searches the data record type of the selected app.

7.3.2 Filtering data in lists

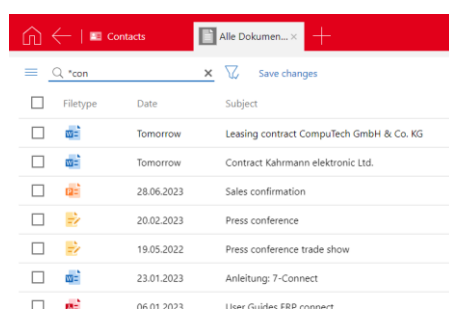
You can use the search field above the list to reduce the data records in a list view to a small number of data records or only one data record. If you do so, the search field acts as filter for the list.

You can create a dynamic list using the search field above the list, see chapter "Lists" on page 42. You can quickly adjust the list by entering a different search term in the search field. This filter above list views is available in all clients.

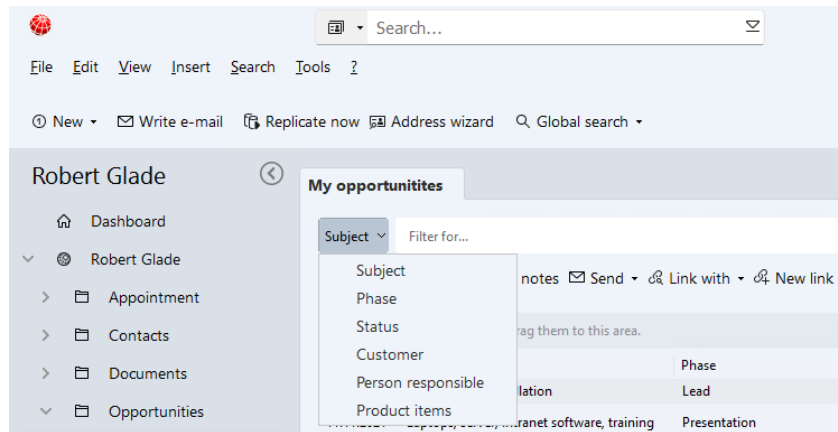
- ✓ As soon as you enter characters in the search field, the list is reduced.

It does not matter whether the entered characters are at the beginning, in the middle, or at the end of the field to be searched.

In CAS genesisWorld Web and the mobile apps, the entered characters are searched in all fields which are set in the **Search** window of the desktop client at **Fields to search in**. The settings and the fields to be searched can be changed in the desktop client and by the administrator.



In the desktop client, the system searches for the entered characters in the field which is set in the **Filter for** drop-down list.



- ✓ Select another field from the drop-down list if necessary. You can select any text field that is displayed in the list view in the drop-down list.
- ✓ By default, the system first searches the entered characters at the beginning of the selected field. If you do not know the exact beginning, enter an asterisk (*) or a percentage sign (%) first and continue typing without a space.

7.3.3 Filter

With a filter, you can filter for specific data records in a large amount of data records. To do this, you define filter conditions in a way that matches the data records you want to find. A filter condition includes

- a data record field,
- an operator or a condition, such as greater, less, starts with, ends with, and so on,
- a filter value or another field, and
- an indication which data records of which users or resources should be filtered.


A filter for selecting a number of data records becomes the more accurate the more filter conditions you enter.

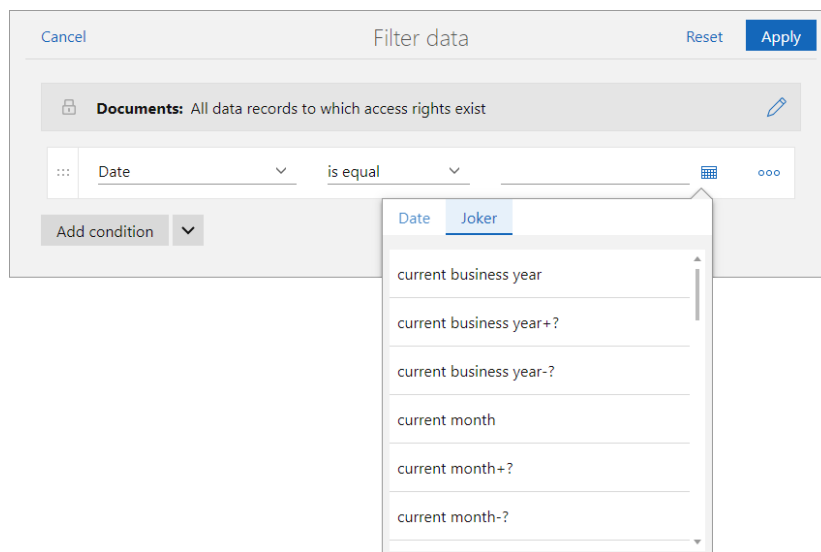
In views, filters define which data records are displayed in the view. Filters are therefore part of the collection of properties that define a view, see chapter "Views for a better data overview" on page 41.

The filter function once again illustrates the difference between individual data records and data record views. If you change the filter settings, this does not affect the data records in the database. At the same time, deleting a data record does not affect the filter settings. However, a deleted data record can no longer be displayed in a view with a filter. If you change a filter, the view displays different data records. However, the data records previously displayed are still available in the database and can be found, for example, by a simple search.

- ✓ In CAS genesisWorld Web and the mobile app, you can use a filter in the extended dossier list to select which data record types are displayed in the dossier.
- ✓ You can also define filters with multiple filter conditions that are detailed and complex in other extended lists.
- ✓ In general, you can use filters to define which data records are displayed in list views, see chapter "Lists" on page 42.

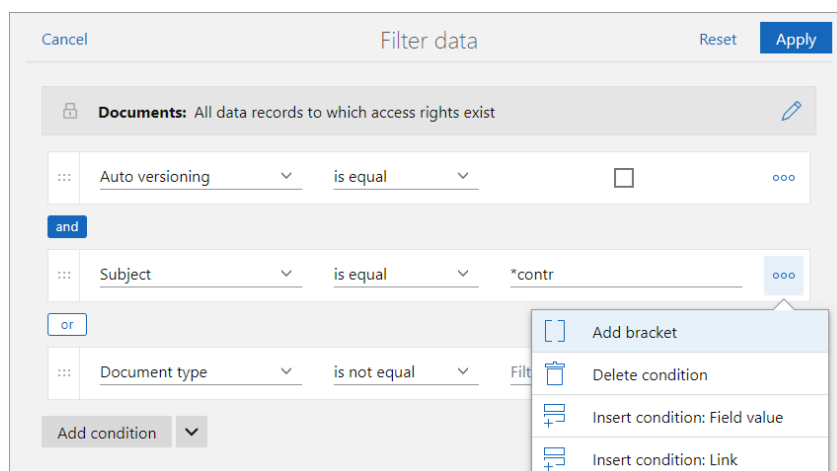
The date field jokers help to automatically display data records from specific time periods in a list. For example, enter **today** to display data records of the current day, or **today +?** or **today -?** to define a larger period of days.


 You can view all available jokers for days, weeks, months, or years by clicking the date button and then **Joker**.



- ✓ When you save a view, the filter is also saved and will be used for this view the next time you open it.

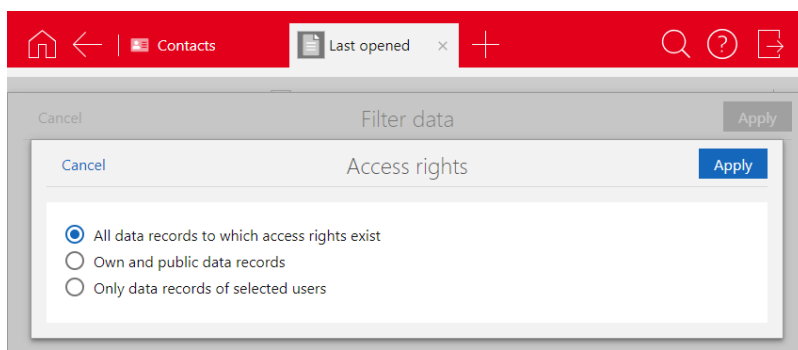
To create and modify views, you require the necessary rights, see chapter "Rights for the display of data" on page 62.



 Use the button next to the name of the displayed data record type to select the authorized persons whose data records you want to display.

This setting can be compared to a filter condition for the **Participant** field of a data record.

However, the participants in this field are always listed in the order in which the authorized persons or participants were entered in the data record. Thus, a filter condition for the **Participant** field, for example, with the **starts with** operator can return wrong results. This is why you can separately define which data records of which users you want to include in the filter.

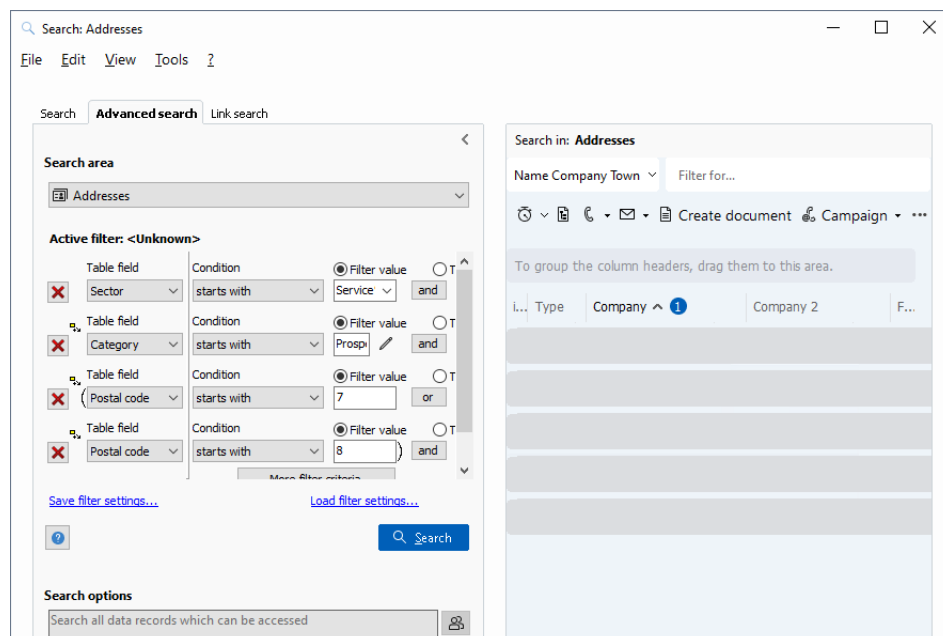


✓ In the desktop client, filters are available in the properties of a view and additionally in the **Search** window on the **Advanced search** tab.

You access the date jokers in the desktop client by pressing the F2 key.

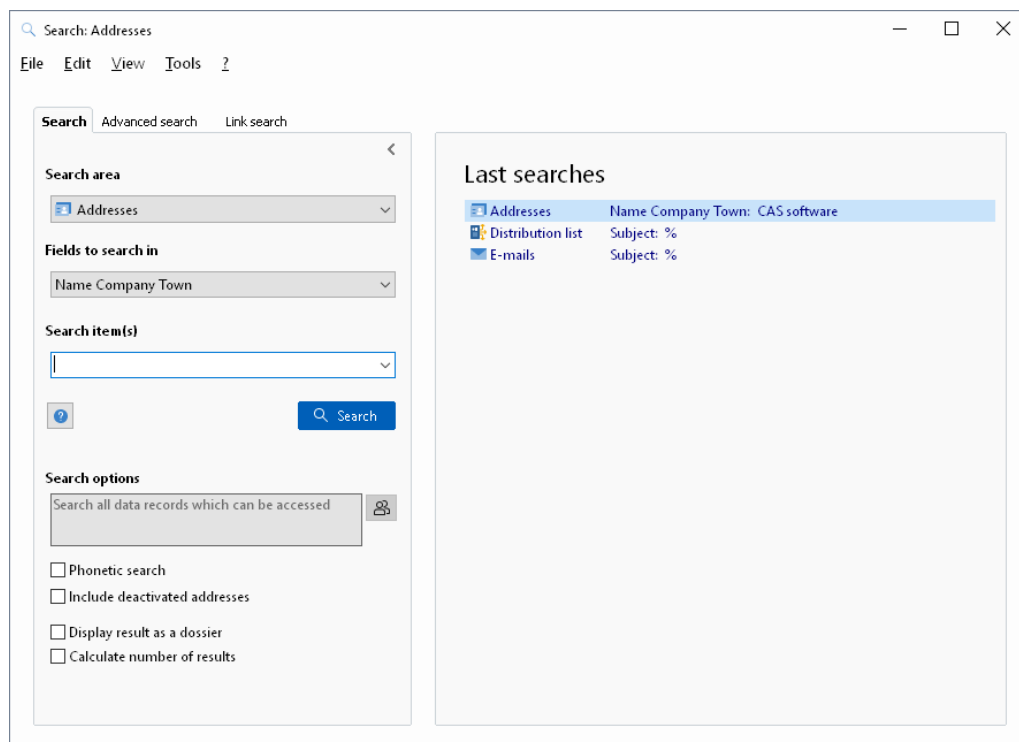
On this tab, you search using filter conditions. You can save a filter and recall it by accessing this tab. You do not require rights to navigators or views to do so.

✓ Activate the **Public** option to save a filter and make it available to all users in the desktop client.



7.3.4 Search window in the desktop client

You can define a very detailed search with multiple criteria in the desktop client.



- ✓ Open the **Search** menu and click **Global search**.
- ✓ Select specific **Fields to search in** and enter **Search item(s)** to search in the selected fields.
- ✓ In the **Settings** window of the desktop client, you can define search patterns with various combinations for the fields to search in.

7.3.5 Link search

Using the **Link search** in the desktop client, you can find specific data record with or without links. You can also filter for linked data records in CAS genesisWorld Web. This function is only available in the Premium Edition.

For example, you want to display all companies whose place of business is located in Karlsruhe and that are also linked to the **Send trade fair invitation** task.

- ✓ First, you define the data record type, for example by opening a list of company addresses.
- ✓ Next, you define which companies you want to search for. In the example, the companies are companies with the **Location** Karlsruhe.
- ✓ You then select the **Link** you want to search for in which data record types. Here, we search in tasks.

- ✓ Then, select further criteria to filter the searched tasks, for example, the used link types, defined access rights, or that the **Subject** must contain **Send trade fair invitation**.

The screenshot shows a 'Filter data' dialog box. At the top, there are 'Cancel', 'Filter data', 'Reset', and 'Apply' buttons. Below this, a grey bar indicates the current filter: 'Tasks: All data records to which access rights exist'. The main area contains three filter conditions stacked vertically, separated by an 'and' button. The first condition is 'Subject contains Send trade faire invitation%'. The second condition is 'Link exists with Address via Any link'. The third condition is 'Postal code starts with 76%'. At the bottom, there are 'Add condition' buttons.

- ✓ You can find more information on how to filter linked data records in CAS genesisWorld Web on the following page: [Filter linked data records](#).

8 Processes and automatic functions in your company

With CAS genesisWorld, you can efficiently organize simple or more complex processes.

- ✓ For example, you can sort your documents in list views according to the **valid from** and **valid to** fields to keep an overview of which price lists, prospects, or presentations are still valid.
- ✓ Use a filter in address dossiers to limit the displayed data record to only those links that are relevant to you, such as links with opportunities and appointments.
- ✓ Using templates, you can optimize and simplify the creation of data records for recurring tasks, see also chapter "Templates" on page 67.

You can use input help options, the **Type** and **Status** fields, mandatory fields, and access rights to simplify complex processes across departments and the whole company.

- ✓ With the **Type** and **Status** fields, you can, for example, distinguish holiday, special leave, and overtime compensation. You can sort your addresses into customers, suppliers, and employees, which all require users to complete different mandatory fields in the data record, see chapter "Input help" on page 66.

- ✓ Scheduling appointments is made easier with external access rights to other users' calendars. You can find free time slots or book meeting rooms with calendar views for resources, see chapter "Calendar" on page 51.

You can use CAS genesisWorld to manage complex processes and manage data. Different systems support you in your data management: ownership rights, access rights to data record types, and external access rights between users and/or groups. The input help and template functions for letters and e-mail campaigns are also essential to model complex processes in CAS genesisWorld. They support you in your personnel management, sales processes, or system administration.

8.1 Processes with data record types

Some data record types already include automatic functions that enable a structured approach to processing data.

The following examples describe functions that have not yet been mentioned in the "Data record types" chapter on page 17, but illustrate functional connections between one or more data record types, such as addresses, documents, and opportunities.

The functional connections are mostly used by CAS genesisWorld users. These users should coordinate their approach to ensure the best results.

The documentation includes information on any settings that can be defined by the administrator and how the clients differ.

8.1.1 Tasks

- ✓ In your own or delegated tasks, you can use an option to monitor the due date of the task. If the due date has been exceeded and/or the **Due** field or the **Priority** of the task has been changed, the user is notified.

All clients offer you the option to monitor tasks and e-mail notifications are sent to inform you about the monitored task.

- ✓ In the **Settings** window of the desktop client, go to the **Calendar** tab and then open the **General** tab to define whether the start of pending tasks with a certain priority is automatically moved to the current day.

Pending tasks are then automatically stored in lists for which a certain time period is defined, such as a **Pending tasks** block in the dashboard.

This desktop client setting applies to all clients.

- ✓ With reminder settings, you can let yourself and other users be reminded of the due date of tasks, the start of appointments, the start of jobs, or upcoming holidays.

The system then automatically opens a reminder window. You can also be reminded when a recurrence pattern for appointments will end soon.

This function is only available in the desktop client.

- ✓ Recurrences can be set for appointments, tasks, jobs, and holidays, and you can only create and edit them in the desktop client.

You can edit individual entries of a recurrence pattern in CAS genesisWorld Web and in the mobile clients if you can access the corresponding data record.

8.1.2 Addresses

- ✓ The duplicate check automatically identifies address duplicates. Your administrator defines the corresponding settings in the Management Console.
- ✓ If you want to find out more about the location of an address or if you want to plan a business trip, maps help you with orientation.

The desktop client offers you the additional option to display the geographical distribution of contacts.

- ✓ You can also research information in social networks or from address providers from within an address data record.
- ✓ You can manually or automatically record the communication method with which you have last contacted an address, for example, via letter, phone call, or an appointment.
- ✓ You can deactivate addresses so your data is not deleted and remains available for reference even if the business process has already been completed.
- ✓ You can keep the field values in a company data record and the corresponding contact persons synchronous. If you do so, specific fields can only be edited in the company data record, and other fields only in the contact person data record.

The **Company** and **Sector** fields are always kept synchronous if this option is activated. Fields that contain postal address data can only be changed in a company data record, whereas specific phone numbers can only be maintained in contact person data records.

The administrator defines which fields are kept synchronous or can be edited in which address type.

8.1.3 Documents

- ✓ You can use **Field variables** from CAS genesisWorld in form letters in Microsoft Word and e-mail campaigns to automatically insert recipient data, for example, names, phone numbers, e-mail addresses, and so on. You use these field variables by inserting mail merge fields in the letter or template.

Field variables are defined in the desktop client settings.

You can use field variables both in the desktop client and CAS genesisWorld Web.

- ✓ Mail merge fields from data records of CAS genesisWorld have already been mentioned, see chapter "Functions and automatic functions" on page 32 for opportunities and chapter "Functions and automatic functions" on page 35 for documents.

In general, you can use the mail merge field from address data records if you have created a document for addresses. You may also be able to insert mail merge fields from other linked data records, for example, from products when creating a document for an opportunity.

You can use mail merge fields in letters in Microsoft Word, in e-mail campaigns, and in xRM e-mails.

- ✓ The links between document data records and addresses are automatically entered in e-mail campaigns and xRM e-mails. Additionally, the quotes created for opportunities are automatically linked with the contacted addresses. When using Microsoft Word, links are entered after the letter has been created if the document data record has been created with the corresponding function from within an address.
- ✓ If you want to add an attachment to an e-mail, an e-mail campaign, or an xRM e-mail, you can only attach the archive file of a document data record, for example, the PDF file.

You do not have to save archive files in a separate external folder from CAS genesisWorld to use them as attachment.

- ✓ You can find more information on how the interplay between fields, functions, automatic functions, addresses, documents, and other form letter features works in the online help for the desktop client on the following page: [Comfortable communication](#).

For example, the system checks for the Gender, Form of address, Salutation, and Country fields whether they logically match and whether e. g. a male surname matches the selected form of address.

As field values are entered via input help options, entries may be available in several languages.

In this case, the **Document language** field in document data records may offer automatic functions for country- and language-specific postal addresses for recipients.

The administrator can enhance and extend these automatic functions for your organization, for example, add further first names or salutations for specific countries, or add a preferred language for countries that use different official languages.

8.1.4 Opportunities

- ✓ You assign an address as the **Customer** of an opportunity.
- ✓ You can assign more addresses as **Contact persons** and **Competitors**.
- ✓ You can add the products or services a customer is interested in or wants to buy to an opportunity as **Product items**.

Products and **Product groups** are data record types in CAS genesisWorld which can be transferred from an integrated Enterprise Resource Planning (ERP) system to CAS genesisWorld. With product data records, you manage products and services as well as the corresponding prices, units, descriptions, technical details, and so on. You can group products in product group data records.

You can create new custom product items for each opportunity or add existing products and then customize the price or unit details in the respective item.

- ✓ The sums of a possible or actual closing, the **Contribution margin**, and so on are calculated automatically from the product items and closing probabilities.
- ✓ You can create a quote document that includes the entered product items of an opportunity directly in the data record by clicking **Create quote** in the opportunity. Such a quote document can be a form letter you can create with all available form letter functions, such as templates, field variables, and mail merge fields from the opportunity or linked data records.

The **Document validity** of quotes is defined centrally in the Management Console and is calculated in the opportunity using the current date.

- ✓ You can define a number of **Currencies** and currency settings in the Management Console and in the desktop client. These settings affect all data record types with currency fields and thus also opportunities.

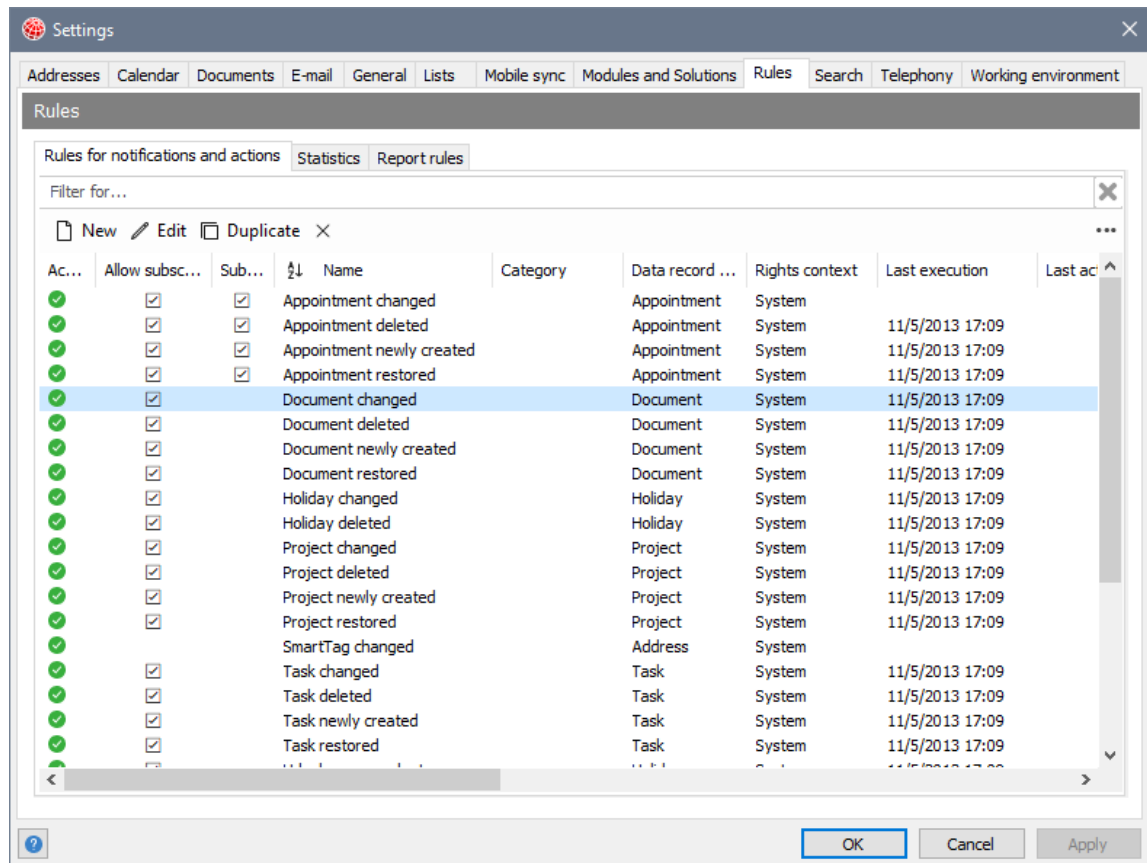
8.2 Notification and action service

With the notification and action service, two types of rules can be defined which both require special rights.

- With rules for notifications, users receive e-mails to notify them when certain data records have been changed or if a deadline has been missed.

You usually only receive notifications if you have subscribed to a rule. The administrator can, however, set a mandatory notification for specific rules: you will then receive a notification and it does not matter whether you have subscribed to a rule or not.

- You use rules for actions to let the system automatically create new data records, link data records, and so on if a due date is exceeded by a specific data record or a specific data record has been changed.



In the following, you can find some examples for rules in the notification and action service:

- As a participant of an appointment, you want to be notified of each appointment change.
- The project supervisor, Miss Parker, wants to be informed if the status of certain project tasks is set to **Completed**.
- Mr. Glaser, as the head of the Services department, wants to be informed about any unfinished tasks. He wants to be notified every time the **Start** date of an unfinished task is exceeded by more than 180 days.
- The users A, B, and C are informed if customer A has purchased a new product. The e-mail text includes the name of the customer in the salutation.
- If a support ticket is created for topic X, the user Y is supposed to automatically be entered in the Processed by field.

Notifications can become very complex and are created with auto text. The notifications can also include links to data record in one or multiple of the CAS genesisWorld clients. Click the link in an e-mail to open the data record and check, for example, if the appointment was rescheduled or a task has been delegated to you.

CAS genesisWorld users, addresses, or any e-mail address can receive notifications. You can also take different languages into account depending on the recipient.

8.3 More examples

The standard version of CAS genesisWorld already includes automatic functions without any modules or extensions.

- ✓ The data record windows in CAS genesisWorld can include the **Dashboard** tab depending on the settings by the administrator. This tab can be useful, for example, in projects and addresses.

Data record dashboards show important data of the current data record and its links.

- ✓ You can invite participants to appointments with both internal and external participants.
- ✓ Special data protection rights protect your data, especially addresses, from unauthorized access and data loss in CAS genesisWorld. Your data remains protected while exporting addresses, creating form letters, or printing labels.
- ✓ With so-called actions, you can change multiple fields in multiple data records at once, automatically enter participants, or create new linked data records. With these actions, you can very quickly change many data records at the same time. Thus, graded rights are available for executing different types of actions.

If you have reached this page: Thank you very much for your interest. We hope you have gained an overview of the CAS genesisWorld functions. You can perform many tasks in CAS genesisWorld in more than one way. This user manual only describes a small portion of functions and use cases. Find out more about the various functions in the corresponding client online help. You may discover a few new tricks for even easier functions.