CAS Products x14.3.0

Product information







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1 Introduction

This document describes all the major and new features relating to CAS genesisWorld since the release of the x14.1.0 version.

Customer-driven product changes taken from support feedback are described in the readme files that are included in every software update.

All software updates are cumulative, which means that when you install a software update, you automatically inherit the changes that have been made in earlier updates - this guarantees that you always have the latest version.

2 CAS genesisWorld x14.3.0

2.1 CAS genesisWorld SmartDesign Mobile App

CAS genesisWorld SmartDesign Mobile App 25.18.0

Improved Caller ID under iOS

As of now, even more incoming calls are identified under iOS. Now, in addition to the stored **Default 1** phone number for individual contacts and contact persons, the phone numbers from the **Default 2** field as well as the mobile number can also be identified.

If a call is received from a company's central telephone number **("Head office" telephone** field), then the name of the company in question is now displayed as the caller, provided the company name is stored in the contact data record.

3 CAS genesisWorld x14.2.11

3.1 CAS genesisWorld SmartDesign Mobile App

CAS genesisWorld SmartDesign Mobile App 25.15.0

Sending business cards in vCard format

To share a contact with other people, you can use the **Send as vCard** action. When doing so, all contact data such as the person's name, telephone number and e-mail addresses are sent as well as their contact photo, if they have one.

In the **Business card** section you can also send your own contact details in the vCard format if you wish. Only the data displayed beneath the QR code is sent as business contact data.

3.2 CAS genesisWorld 0365 Outlook Add-In

In the sidebar for e-mails to be sent, you can now display the file of the selected data record and perform further actions.

\square Send & Archive $ \bigcirc $ $ \bigcirc $
Q ▼ Robert ×
Robert Glaser (CAS Soft ••••
Robert Glade (CAS Soft 000 CAS Software UK
Add as recipient
Attach as .gbt
Attach as vCard
Insert as link
Display dossier 🔚
Einladung zur Vernissage 08.07. 10:00, "Robert.Glaser@
Einladung zur Vernissage 08.07. 09:59, "Robert.Glaser@
Einladung zur Vornissaga

For e-mails you have received with attachments, you can now transfer the attached file directly as a document to CAS genesisWorld.



To log any errors related to the Outlook Add-In, you will be required to export the event log file via the link in the settings and then forward this file to your contact person, for example your administrator, partner or support service.

Version 1.5.18 © CAS	Software AG
Data Protection	Export logs

4 CAS genesisWorld x14.2.10

4.1 Management Console

Authentication for the administrator user account

The different authentication options for CAS genesisWorld can also be selected for the administrator user account.

4.2 New module functions

4.2.1 Project/Helpdesk

Appointments filter in the Team Planning app

V In CAS genesisWorld Web you can now set a filter for appointments in the **Team Planning** app.

Use the new button to filter user skills.



When the view is reopened, the skills filter is reset and not saved. You can only save one filter for the view of these appointments.

4.3 CAS genesisWorld SmartDesign Mobile App

CAS genesisWorld SmartDesign Mobile App 25.12.0

Presenting your own business card

With the new **My business card** category, users can easily and comfortably share their business contact data with other people via a scannable QR code. The information contained therein is displayed below the QR code.

For this to work, the contact's data record or the user's address have to be linked with their CAS genesisWorld user account.

An option to scan another person's business card is available to users directly in the **My business** card category below the **Create from business card** option. The same capabilities are available to the user as are available for the action of the same name in the **Contacts** category.

These functions are available as of version x15.1.9 of the CAS genesisWorld Application Server. Please note, these functions will completely replace those of the CAS CardScanner.

Tickets can be created from product uses.

The prerequisite for this is the CAS genesisWorld Application Server as of version x15.1.9.

4.4 Microsoft Outlook Add-In

If you have deployed the CAS Authentication Server, then logging on to the Microsoft Outlook Add-In can only occur via its logon page.

If the CAS Authentication Server is not active, then the user can choose whether they wish to use their Windows credentials to log on, or their CAS genesisWorld credentials.

Users who have not yet used the **OAuth** option to log on, will have to reregister after they have updated, provided the CAS Authentication Server is active.

Add-in options X	Add-in options X
CAS genesisWorld	CAS genesisWorld
✓ Use the extended Microsoft Outlook integration with CAS genesisWorld Authentication Server name test.cas.de Port 443 ✓ Use SSL Log on	 Windows Logon data Database DEMODB User name britta glatt Password ••••••• Domain Log on
OK Cancel Apply	OK Cancel Apply

Figure 2 Settings with an active CAS Authentication Server

5 CAS genesisWorld x14.2.9

5.1 New module functions

5.1.1 Easy Invoice

XRechnung version 3.0.1

After the update, you can create XRechnungen with Easy Invoice in the new 3.0.1 version.

To do so, you the current version of the Crystal Report integration must be installed.

Figure 1 Settings with a deactivated CAS Authentication Server

Displaying the XRechnung version in the management console

You can see which XRechnung version of the XRechnung standard you are using by navigating to the **Easy Invoice** area of the management console under **XRechnung**.

😪 CAS genesisWorld Management Console (localhost) - EXAMPLE				
<u>F</u> ile <u>A</u> reas <u>H</u> elp				
 Areas 	XRechnung			
🛃 Easy Invoice	Version			
General	3.0			
Number assignment	Our set it has set it a			
Payment terms	Quantity units			
Fin. accounting transfer	Unit			
Extended receipt creation	licences			
XRechnung	pieces			

5.1.2 Project

Editing the status of project items

In CAS genesisWorld Web, you can now change the status of individual project items.

Under status, the same status options are available as in the project. Depending on your settings, the options might be dependent on the project type.

New project items are created with the same status as the project.

5.1.3 Helpdesk

Creating tickets for product use via the Action menu

In CAS genesisWorld Web, you can now create tickets for product uses.

To do this, open the Action menu in the upper right-hand corner and select **Create > Ticket**.

The new ticket will automatically adopt the following values: Customer, Service agreement, Product and Version from the product use data record as well as the product area.

The prerequisite for this to work is that the "End of maintenance" value is not in the past.

5.2 CAS genesisWorld SmartDesign Mobile App

CAS genesisWorld SmartDesign Mobile App 25.11.0

- Tapping a segment in a chart opens a list of the data points used by the chart.
- You can create groups for the product items in an opportunity. To do this, you will see the Add group option available via the plus button in the Quote block.

6 CAS genesisWorld x14.2.8

6.1 General

• Encryption protocol TLS 1.3

In the e-mail account properties, you can now also select TLS 1.3 as an encryption protocol. This is available for all e-mail accounts which have been created in the management console for the action service, in the server manager for the update service and for user e-mail accounts.

Selecting the default is equal to TLS 1.2.

6.2 CAS genesisWorld SmartDesign Mobile App

CAS genesisWorld SmartDesign Mobile App 25.10.0

- Web apps and web widgets use the new Edge browser engine under Windows.
- Web widgets are also available during offline use. Loading is now faster as the information is now stored locally.

7 CAS genesisWorld x14.2.7

7.1 CAS genesisWorld SmartDesign Mobile App

CAS genesisWorld SmartDesign Mobile App 25.9.0

Selecting groups for items

If one or more groups have been created for product items in an opportunity, then you can select them when creating or editing items in **Parent groups**.

Reloading customizations

The **Reload customizations** button is available in the **Settings** app. With this button you can load the existing DSL customizations. In the process, however, the Mobile app will be restarted. The user's settings and any data which is available offline are retained.

8 CAS genesisWorld x14.2.6

8.1 General

 To update CAS genesisWorld, the CASUpdateInstaller.exe is now available. This program replaces the previous HotfixSetup.exe.

The new program uses the update service mechanisms. Accordingly, the appropriate CAB file for the update has to be available in the same folder.

The Windows user through whom the file was started, has to have write access to the directory.

The CASUpdateInstaller.exe can also be started with the /uninstall parameter to execute a rollback to an earlier version.

An update using the CASUpdateInstaller.exe program can also be performed on a computer which has a running update service, as long as an update has not already been started.

An overview or selection of versions will no longer be available.

As usual, partner solutions can also be installed in this way.

8.2 CAS genesisWorld SmartDesign Mobile App

CAS genesisWorld SmartDesign Mobile App 25.8.0

Selecting the Telephony app for outgoing phone calls

If multiple apps for telephony have been installed on a mobile device, then as of now, you can select which app you wish to use for outgoing calls.

The selection can be saved by choosing the **Remember selection** option in the settings and changed by navigating to the **Default app** category under **Telephone** in the settings.

If just one telephony app is installed on a mobile device, then the options described above will not be available to the user and the existing app will always be used.

We support the following third-party apps for outgoing telephone calls:

Telephony apps	iOS	Android	Windows
Microsoft Teams	х	х	х
WhatsApp	х	х	x
Skype	х	х	x
FaceTime	х	-	-

If you are using the Exchange sync module and you are the organizer of an appointment, then you will also be able to manage the **Invitations** block when creating a new appointment or editing an existing appointment.

9 CAS genesisWorld x14.2.5

9.1 New module functions

9.1.1 Project

Daily per diem rates for 2024

The per-diem rates for Germany in 2024 are now online and also available through the installation of the desktop client, you can enter them into the **Project** area of the Management Console under **Expenses**.

Please note that the per diem rates for business trips within Germany will also be changing in 2024

9.2 CAS genesisWorld SmartDesign Mobile App

CAS genesisWorld SmartDesign Mobile App 25.6.0

- Colors set for App Groups in CAS genesisWorld Web will be transferred.
- If a user has logged on via a user-defined identity provider, then this will be displayed in the logon list.
- The search field is displayed directly above lists on smaller displays and no longer has to be displayed above the action menu.
- If the Exchange sync module is being used, then the External access (maximum) field is now displayed in appointments.

10 CAS genesisWorld x14.2.4

10.1 CAS genesisWorld SmartDesign Mobile App

CAS genesisWorld SmartDesign Mobile App 25.4.0

- When searching for company data on Unternehmensverzeichnis.org, the country where the company headquarters is located is displayed directly.
- Only those users with the additional Address Wizard right can create new contacts from business cards.

11 CAS genesisWorld x14.2.3

11.1 New module functions

11.1.1 teamWorks

In portal management, a hint text can be entered in the **In case of error, enter a hint text on the logon page.** The text is displayed if, for example, the database or application server cannot be reached.

12 CAS genesisWorld x14.2.2

This software update includes some general further developments and improvements in the areas of stability and performance.

13 CAS genesisWorld x14.2.1

13.1 New module functions

13.1.1 Form Designer

Preview of link lists

You can now display previews for the linked e-mails or notes of other linked data record types in link lists, which have been positioned using the Form Designer.

Edit company NOMOSYS	-		×			
Eile Edit View Insert Search Iools 2						
毘 Save&Close 蹈 × ⊜ ⊗ ㅎ			0			
🖼 Address services 🕫 🗄 Create receipt 🔹 🖾 🖧 - 🖄 🖏 Hourly rates 💲 + 🖸 + 🗎 Create document + 🔿 Action + 🖻 Short notes 🔍 Link with + 🖧 New link + 🗎 Report	🕮 Map	p				
General Details Event notifications Area map Campaigns (1) Group structure Billing Time records Tree Questionnaires Change log Dossier Customer dashboard						
Created on 11/17/2011 4-41: IS PM from Robert Gaser						
Event notifications Overal dosaier V S Refresh & Unix with	🛃 Delete	e link				
To group the column headers, drag them to this area.						
🕴 🖉 Sent on 🖌 Received on 🛩 Sender Recipient Subject						
8/8/2023 9:59:13 AM 8/8/2023 9:59:17 AM "Robert.Glade@cas-demo.co.uk" <robert.glade@cas-demo.co.uk> john.miler@nomosys.com Invitation to a vemissage</robert.glade@cas-demo.co.uk>						
8/8/2023 9:59:10 AM 8/8/2023 9:59:14 AM "Robert.Glade@cas-demo.co.uk" <robert.glade@cas-demo.co.uk> jack.bauer@nomosys.com Invitation to a vemissage</robert.glade@cas-demo.co.uk>						
Invitation to a vernissage	4					
Nobert.Glade@cas-demo.co.uk 🔽 🖓	To	-				
Sent 8/8/2023 9:59:10	1					
To: jack.bauer@nomosys.com						
Dear Mr. Bauer,	Dear Mr. Bauer,					
You are cordially invited to the vernissage of our "Painting & Drawing in the Renaissance" exhibition from Rupert Tetherstock						
on Thursday, November 9 2023 at 6:00 PM in the event rooms at CAS Software AG.						
We are very much looking forward to seeing you there and hope you and your friends can join us for some light refreshments afterwards.						
Faithfully yours						
Robert Glade						

You will find the associated settings on the "Display" tab in the link list properties.

Object inspector x						
Link list properties						
General	Display	Size	Selection options			
Name						
Name	e	E	Event notifications			
View for	mat					
Displ	ay link typ	es				
View format Standard (public) \checkmark						
Dossier						
Use d	ossier					
List heig	ht (pixel)		100			
Navigato	or	1	inks (public)		\sim	
		N	lavigator width (Pixel)		500	
🗹 Displi	ay previev	N				
		P	review height (Pixel)		360	

13.1.2 Easy Invoice:

XRechnung Version 2.3.1

As of now, using Easy Invoice you can create XRechnungen with the new version of XRechnung v.2.3.1.

To ensure this function is available, you will have to update the Crystal Report integration.

13.2 CAS genesisWorld SmartDesign mobile app

- CAS genesisWorld SmartDesign Mobile App 25.1.0
 - We now also support TLS 1.3 (Transport Layer Security) encryption under Android.

14 CAS genesisWorld x14.2.0

14.1 CAS genesisWorld Web

Duplicating checking in CAS genesisWorld Web

If a contact is created or changed, then a duplicate check is performed automatically. If one or more possible duplicates are found, then the two contacts can be merged or you can save the new contact anyway.

You can make changes to the settings for duplicate checking in the Management Console. For more information see <u>Online Help</u>



If you decide to merge the two contacts, then an overview gives you the option to decide which contact data should be transferred to the merged contact data record.

(i) Using this button, opens the respective contact on the new tab.

••• With this button you can exclude the respective contact from the duplicate check.

0.0110-01	merge oupricates	
Checked contact Hans-Jürgen Müller Jannen AG Jannenstraße 12 12345 Tannenstadt Sefect all data	Duplicate* Hans-Jürgen Müler Tannen GmbH Tannenweg 12 12345 Tannenstadt Select all data	Merged data Hans-Jürgen Müller Tannen AG Tannenstraße 12 12345 Tannenstadt
Mäller	O Name Müler	Norm Müller
Company Tannen AG	C Cooperay Tannen GmbH	Company Tannen AG
Sehration Sehr geehrter Herr Müller	C Selvation Sehr geehrter Herr Müler	Saturtion Sehr geehrter Hen Müller × ~
Tannenstraße 12	O Tannerweg 12	Sevel Tarinenstraße 12

In this way, you can merge two duplicates to create a new contact, even if several possible duplicates were found.

Via the action menu in an open contact you can select **Merge duplicates** to perform a duplicate check and merge any potential duplicates.

App Designer

Release views in the App Launcher

You can now also place released views into the **App Launcher** element. All the authorized users of the view can call these from the App Launcher without having to save the view beforehand as an app.

The release views can only be selected if the user, who placed the App Launcher element, has been granted the **Edit views (public)** right.

14.2 New module functions

14.2.1 Report

Automatic integration with Crystal Reports 2020 64 bit

The Crystal Reports integration used in the CAS genesisWorld Desktop client now also supports the automatic integration of the data source with the Crystal Reports 2020 64 bit version.

A manual integration of the data source is only necessary when using parameter fields or when fields are missing from the data source, see <u>User guide Report</u>.

14.2.2 Survey

Questionnaires with Chromium components

Chromium is now used in the desktop client instead of the Microsoft Internet Explorer to display, preview and edit questionnaires in the template editor.

15 CAS genesisWorld x14.1.11

15.1 General

The "CAS genesisWorld - Installation and Setup Manual" version x14 for administrators is now available in English.

15.2 Server Manager

In the Server Manager, the new option **Allow HTTP connections only from localhost for Web Services** allows you to specify that outside communications are possible with SSL encryption.

Please ensure that the SSL encryption is correctly configured. Additionally, all servers have to have the same settings. If not, then functions such as SmartSearch will no longer work.

15.3 Management Console

OAuth2 provider

When creating or editing OAuth2 providers in the **Security** area of the Management Console, you can enter additional properties.

 Endpoint (Discovery): If this endpoint is specified, clicking the Load button allows the data for Endpoint (Authorization) and Endpoint (Token) to be filled in automatically.

You should ensure that you enter all endpoints so that OAuth2 providers can function correctly in all areas of CAS genesisWorld. For example, the e-mail account settings in CAS genesisWorld Web use the **Endpoint (Discovery)**.

• **Logon parameters:** This entry is optional and is added to the end of the URL used to call the authorization. The entry is used entirely with the URL and not validated.

If a reverse proxy is in use, the new endpoint for the OAuth2 providers must be supplemented accordingly.

- Prefix for the endpoint path: /oauth2provider (service Web Services)
- You should enter this endpoint as follows in the configuration for the reverse proxy:

```
<conditions logicalGrouping="MatchAny" trackAllCaptures="false">
   <add input="{PATH_INFO}" pattern="genesisrest.svc(.*)" />
   ...
   <add input="{PATH_INFO}" pattern="sso.svc(.*)" />
   <add input="{PATH_INFO}" pattern="oauth2provider(.*)" />
   </conditions>
```

15.4CAS genesisWorld Desktop

Remove format button in the Editor

In a formattable notes field, the formatting from the copied text often does not fit well with existing content. Unsuitable formatting from highlighted content can be removed using the **Remove formatting** button.

15.5 CAS genesisWorld Web

Managing e-mail accounts

Users can edit e-mail accounts in CAS genesisWorld web in the **E-mail** area of the **Settings** app.

Cancel	Send test e-mail	Edit e-m	ail account		Î	Appl
i In If y wii au	formation on O. you select the OAuth 2.0 ndow. Follow your prov thorization.	Auth 2.0 D authorization and subsequently cli ider's instructions and return to the	ck Authorize, then the authoriza CAS genesisWorld Web setting	tion process will start in a Js. Do not close this windo	a new ow duri	ing
Name Andrew E-mail addr	ess		Access data ^{User name}			
✓ Defa app	ult account, e.g. for ser ointment invitations	nding e-mail campaigns or	Authentication method OAuth 2.0		×	~
			Provider ① This field is mandatory			\sim
			+ Authorization	Status Pending		
Outbo	x server		Inbox server			
E-mail serve	er.	Port	E-mail server	Port		
Encryption		× ~	Encryption		×	~
🖌 The	outbox server requires	authentication				

If different access data for incoming and outgoing mail servers are entered in the desktop client for an e-mail account, these can only be displayed in CAS genesisWorld Web and cannot be edited.

Prerequisite for e-mail accounts with Authentication method OAuth2.0:

In the Server Manager, the correct **External URL** under which the service can be reached must be entered for the **Web Serv**ices service. Additionally, you have to enter the **Endpoint (Discovery)** for the provider you wish to use.

Versions for documents

In the action menu of opened documents a version of the currently saved archive file can be created with **Create new version**.

The **Versions** block is automatically displayed for a document as soon as a version has been created. Subsequent versions can also be created via the **plus** symbol.

Click **Details** to open the extended list and display all versions of the document. If an entry is marked in the list, a preview can be displayed for this version via the action menu or the version can be restored.

When the **Enable automatic versioning** option is active, it creates an automatic version each time the archive document is saved. This action cannot be undone.

15.6 New module functions

15.6.1 Inxmail Professional

Removing recipients

Synchronizing with Inxmail Professional has been changed so that addresses can also be removed from the e-mail campaign lists. If an address is removed from a distribution list in CAS genesisWorld, the corresponding recipient is also removed from the list in Inxmail Professional and is no longer unsubscribed as before.

Unsubscribing in CAS genesisWorld is no longer possible.

Creating e-mail campaigns directly with Inxmail New Xperience

First of all, set the access data in the Management Console: under **Miscellaneous** > **Inxmail** > **Inxmail New Xperience** tab.

These credentials are different from the credentials for the REST interface or Inxmail Professional. You can acquire the credentials from Inxmail GmbH.

The product documentation for Inxmail New Xperience can also be found at Inxmail GmbH.

If the credentials have been entered, then you can create a new e-mail campaign from an open distribution list in Inxmail New Xperience.

To edit an e-mail campaign in Inxmail New Xperience, the user has to suitably authenticate themselves.

15.7 CAS genesisWorld SmartDesign mobile app

- CAS genesisWorld SmartDesign Mobile App 24.14.0
 - The online help for the Mobile App has been updated to HTML5. If the help is not displayed properly, then you may have to empty the page cache.
 - Fields formatted as **Person days** now take the values set in the Management Console, for the duration of a person day, into account.

16 CAS genesisWorld x14.1.10

16.1 General

 Calling premium information from the Unternehmensverzeichnis.org business directory has been removed

We removed the option for fetching associated premium information (such as Schufa credit worthiness reports) directly from a company at the Unternehmensverzeichnis.org business directory.

16.2 CAS genesisWorld Desktop

- All calls from websites within the CAS genesisWorld Desktop Client have been transformed to https.
- In an open view of the File type, you can set whether or where the preview should be displayed in the Menu under Display view with Preview.

16.3 CAS genesisWorld Web

Deeplink search from contacts with telephone numbers

Various telephony providers offer the option that an incoming call additionally calls a URL that contains a parameter with the phone number. In CAS genesisWorld, contacts

can be searched for by calling up a URL that contains a telephone number as a parameter.

```
<smartdesign-URL>/#type/address?phonenumber=<number>
For example:
https://demo.cas.de/smartdesign/#type/address?phonenumber=+49
151 85412687
```

If you have saved exactly one contact in CAS genesisWorld that contains this number in one of the fields for telephone numbers, then this contact will open directly in a new tab. If several contacts contain the same phone number, a list with the corresponding contacts will be opened.

For example, in Microsoft Teams, administrators can specify in the **call policy settings** that incoming **PSTN (Public Switched Telephone Network) calls** invoke the browser with the appropriate URL and the **{phone}** parameter.

For more information on possible settings, please refer to the documentation of your telephony provider.

Remove format button in the Editor

You can now remove formatting for selected content in a formattable notes field to edit, for example, copied text elements. Often the formatting of copied text does not match existing content. Often the formatting of copied text does not match existing content. This discrepancy can be quickly corrected using the **Remove format** button.

16.3.1 App Designer

Managing apps

In the **App Designer** section of the **Administration** App, you will now find the new **App management** section. Previously, different general settings for apps could be found at different locations. Now, you will find all the relevant settings in the Administration app

When you are in the context of an app, you can click **Edit app** in the **View** menu of the App Designer toolbar to open the settings for that app.

Additionally, if the **App Designer** is enabled, you can right-click an app tile and select the Edit App option.

In the Administration app you can set the display name, icon or the background color for an app. Additionally, you will also see options for translations, the script module and possible setting schemes available for the **Settings** app.

=		App Designer	니. New page L1 Publish
Administration +			Q (?) 🗗
Administration		App Designer settir	ngs
🖌 App Designer			
App access	Active	All customizations	Change display of data record types Display options for data record types
Released actions	Deactivate	Reset	Open
	App management		Q search
	Name	Source	Supported platforms
	Global smartdesign.base	Default	Web client, Portals, Mobile App, SmartWatch
	Appointments smartdesign.appointment	Default	Web client, Mobile App
	Birthdays smartdesign.birthday	Default	Web client, Mobile App
	CPQ quotes smartdesign.merlinhub	Default	Web client, Mobile App
	Calendar smartdesign.calendar	Default	Web client, Mobile App
	Contacts smartdesign.address	Default	Web client, Mobile App
	Customers smartdesign.address.customer	Default	Web client, Mobile App
	Dashboard smartdesign.cockpit	Default	Web client
	Distribution list smartdesign.distribution	Default	Web client, Mobile App
	Documents	- ()-	

You will find more information in the documentation under: <u>https://partnerportal.cas.de/SmartDesignSDK</u>

Creating settings schemes

Now, via the App Designer in the **Administration app** you can create settings schemes for your own apps. Using a settings scheme you can create and design your own settings page for the **Settings** or **Administration** apps.

You will find more information in the documentation under: <u>https://partnerportal.cas.de/SmartDesignSDK</u>

16.4 New module functions

16.4.1 Event Management

 If texts with breaks were entered into Event online, then the breaks were also adopted into the CAS genesisWorld data record.

16.5 CAS genesisWorld SmartDesign mobile app

- CAS genesisWorld SmartDesign Mobile App 24.13.0
 - Changes to archive documents can now be adopted more easily. A document that has been opened in the app for editing in another application can be saved back to CAS genesisWorld directly via the mobile device's share dialog.

The prerequisite for this is that the application does not change the file name and that sharing or sending to the CAS genesisWorld Mobile App is possible and permitted.

- You can now select the desired app you wish to use to open and display a contact's address on a map. The selection made can be saved and changed again in the settings if required. If you are using iOS you can choose between Apple Maps and Google Maps (if installed). If you are using Windows, you can choose between Windows Maps and Google Maps (website). Nothing changes for users of Android mobile devices.
- If a license for Event Management is available and has been unlocked for a user, then event registrations can be created and edited.

This function requires the CAS genesisWorld x14.1.9 Application Server.

- HTML content in e-mails is now displayed.
- We have improved the layout of charts.
- The mobile apps now offers additional support for bar chart labels.

17 CAS genesisWorld x14.1.9

17.1 General

Mail merge: Improved use of templates for different languages

If the **Document language** field contains an entry for a mail merge document data record and the CAS Word Add-in is used, then the mail merge field labels are displayed in this language.

Thus, a template can be created in a client which has English set as the logon language, this also allows further editing by a user who has logged on in German.

17.2 Management Console

New area - Security

On the Management Console home page, you will see the new **Security** area which offers settings for password policies, security settings and the management of OAuth2 providers.

17.3 CAS Authentication Server

17.3.1 Logging on with a user-defined Identity Provider

As of CAS genesisWorld x14.1.9 administrators can set up a logon via a freely defined Identity Provider. Users can then logon to CAS genesisWorld directly via the Identity Provider's logon site, which was set up earlier. After logging on successfully using this method, CAS genesisWorld will open.

This type of set up using a freely definable Identity Provider is always possible, if OpenID Connect is based on OAuth2 and supported by the Identity Provider.

Setting up the logon with a freely definable Identity Provider

- Register an application with the desired Identity Provider. Usually you will be required to enter the following information:
 - A name for the application you wish to register.
 - The account type for which the application should be valid
 - A suitable redirect/callback URL:

https://<<URL of the logon page>>/genesisrest.svc/identity/providercallback

Example: https://smartdesign.MyCompany.io/genesisrest.scv/identity/providercallback

- A client secret with the desired expiry date
- The identifier as a **Token type** for **ID**, which can be used to identify the respective user account in CAS genesisWorld.

For CAS genesisWorld to identify the logged-on user account, the corresponding value (ID) from the Identity Provider must be entered manually in the corresponding properties of the user account in CAS genesisWorld.

Then you can enter a new OAuth2 provider of the User-defined (Identity Provider) type, in the Security > Authentication (OAuth2) area of the Management Console.

Adopt the respective values from the Identity Provider in the Management Console window. You will see the logon to the desired Identity Provider displayed below the **Title** you entered on the logon page of the CAS Authentication Server.

💦 OAuth2 provider prop	erties	-		×
OAuth2 provider	User defined (Identity Provider)			~
Title				
End point (authorization)				
End point (token)				
Tenant ID				
Application-ID				
Client secret key				
Scope	openid			
More properties	User property:			
	Valid in all CAS genesisWorld domains			
	Save in file OK		Cancel	

- ✓ The **Scope** has already been entered for the necessary **openid** and is extendable.
- In the More attributes field, enter the user attribute whose value is to be used as an identifying attribute, e.g. SID.
- ✓ In the User Management area of the Management Console, select the Logon with Identity Provider logon variant, for all the respective user accounts which should be able to logon to CAS genesisWorld via this Identity Provider.

When logging on, select an Identity Provider from **Logon with** and enter the corresponding value of the selected user attribute for each user account.

Clicking the button inserts any content from the cache.

Address check	Administrati	ion rights	Licensed modules	View formats	Business unit
General M	Membership	Rights	Other rights	External access	from other users
External acces	s to other user	s A	uthentication	Navigators	E-mail settings
) Without Wind	lows authentica	tion			
) Support integ	rated Windows	authentica	tion		
	Windows authe	entication			
	logon data	- renewed of t			
	logon data				
DLogon with Id	lentity Provider				
Allocate users					
Logon with				\sim	
Liser property					
				1001	
Value:					
Users log on to	CAS genesisW	orld via the	selected Identity Pr	ovider.	

If you are using Microsoft Azure Active Directory without a local active directory, then this can be entered as an OAuth2 provider of the **User-defined (Identity Provider)**

type. After the user accounts have been allocated, they can logon directly through the **CAS Authentication Server** via the Azure Active Directory.

Logging on to CAS genesisWorld

If an **OAuth2 provider** of the **User-defined (Identity Provider)** type has been entered, and the **Logon with identity provider** option has been enabled for a user account, then the following will apply when logging on:

- Logging in to the desktop client and the management console is possible with an optionally available CAS genesisWorld user name and password.
- Logging on via the established Identity Provider is mandatory for all logons over the web interfaces in conjunction with the CAS Authentication Server from CAS genesisWorld. This applies, among other things, to logging on to CAS genesisWorld Web or the mobile apps.

Logging on with an optionally available CAS genesisWorld user name and password is no longer possible via the web interfaces with the user accounts if a Logon with Identity Provider has been set up.

The following restrictions apply for those user accounts for which the Logon with Identity Provider function has been configured.

Mobile sync cannot be used

LDAP cannot be used

17.4 New module functions

17.4.1 Inxmail Professional

For Inxmail distribution lists, CAS genesisWorld defines which type of contact e-mail address is used, for example, **Default** or **Business**.

If an address is added to a distribution list by synchronization and a different type is used in the distribution list, this address will be marked in the distribution list.

If such an e-mail address of the address is changed and, for example, subsequently set as the **default**, then distribution lists with this e-mail address are checked. Consequently, any invalid markings are removed.

17.5 CAS genesisWorld SmartDesign mobile app

CAS genesisWorld SmartDesign Mobile App 24.12.0

The mobile app now supports the display of groupings in aggregated lists and charts in the dashboard.

18 CAS genesisWorld x14.1.8

18.1 General

- Microsoft SQL Server 2022 has been released.
- New user guide for the Easy Invoice module in English

The user guide has been fully revised to reflect the content in version x14.1.4. The user guide is available as a both a PDF and in the usual online help format.

Inxmail New Xperience

We have also released deploying Inxmail New Xperience in combination with Inxmail Professional and Inxmail Synchronization for CAS genesisWorld.

Inxmail New Xperience is the new editing module for Inxmail Professional for the design of creative and attractive e-mail campaigns. As usual, it can be tailored to suit your needs, e-mail campaigns are sent via Inxmail Professional.

When editing an e-mail campaign in Inxmail New Xperience, the e-mail campaign list you wish to use from Inxmail Professional is selected in the Synchronization area.



If a synchronization to Inxmail Professional for an e-mail campaign has been configured, then the e-mail campaign can be personalized via the attributes of the recipients by using suitable mail merge fields.

The desired fields have to be configured appropriately in the synchronization from Inxmail to CAS genesisWorld.

The functions for Inxmail New Xperience will not described in detail here. You will find more information at Inxmail GmbH or via their product documentation.

callto and tel protocols now supported

In the Management Console you can set General callto or tel as the default protocols under **Miscellaneous** > **Addresses** > **General callto or tel.** This sets the default for how calls are to be made from CAS genesisWorld Desktop or CAS genesisWorld Web.

18.2 CAS Authentication Server

18.2.1 Revised logon page

When more than one database is connected, users now log on to CAS genesisWorld via 2 pages when using the CAS Authentication Server.

On the first page, the database is selected first, before the logon data is entered in the second step.

The database selection can also be skipped by using a parameter in the URL via the new variable **tenant**: https://<<URL of the logon page>>/?tenant=<<database name>>

The selected database is stored locally in a cookie, so that when you log on again in the same browser, no further selection is necessary. To change the database, from the second logon page, use the left arrow to open the first page.

18.2.2 Logging on with Microsoft Azure Active Directory

As of CAS genesisWorld x14.1.8, administrators can set up a logon with Microsoft Azure Active Directories for users, a so-called federation. Logons are then performed directly via the Microsoft Azure logon page. After logging on successfully you can use CAS genesisWorld.

A federation is possible if Active Directory is also available locally, on the company's network, and over which user accounts from CAS genesisWorld and Active Directory have been assigned.

Setting up the logon with Microsoft Azure Directory

✓ Register application on the Microsoft Azure Portal.

- Enter an app name.
- Define an account type for which the app should be valid.
- Enter the following URL for Redirect/Callback:

https://<<URL of the logon page>>/genesisrest.svc/identity/providercallback Example:

https://smartdesign.MyCompany.io/genesisrest.scv/identity/providercallback

- Define a client secret with the desired expiry date.
- Using Add optional claim under Token configuration add a Token type for ID with the value onprem_sid.

Then create a new OAuth2 provider of the Microsoft Azure AD SSO type for the Microsoft Azure Active Directory in the Management Console in the Miscellaneous area > under Authentication (OAuth2).

Transfer the appropriate values from the application in the Microsoft Azure Portal to the Management Console window. You will see the logon with Microsoft Azure displayed under the registered **Title** on the logon page of the CAS Authentication Server.

<table-of-contents> Properties of the OAut</table-of-contents>	h2 provider	-		×
OAuth2 provider	Microsoft Azure AD SSO			\sim
Title	< <any title="">></any>			
Endpoint (authorization)	https://login.microsoftonline.com/common/oauth2/v2.0/authorize			
Endpoint (token)	https://login.microsoftonline.com/common/oauth2/v2.0/token			
Tenant ID				
Application ID				
Client secret				
Scope	openid			
	Valid in all CAS genesisWorld domains			
	Save in file OK		Cancel	

In the User Management area configure the logon via Active Directory for all the user accounts for which it should be possible to logon to CAS genesisWorld using Microsoft Azure and the CAS Authentication Server.

Using the CAS Authentication Server, it is possible to log on via the web interfaces for: CAS genesisWorld Web, the mobile apps, the Microsoft Outlook Add-In and the CAS Smart Add-on.

To do this, open the **Authentication** tab, select the **Use Windows credentials** option and assign the appropriate user account from the local Active Directory.

Logging on to CAS genesisWorld

If you have defined an **OAuth2 provider** of the **Microsoft Azure AD SSO** type and enabled the **Use Windows credentials** option for a user account, then the following will apply for the logon:

- You can log on as usual to the desktop client and management console using your Windows credentials and a check via the Active Directory.
- All logons via the web interfaces in conjunction with the CAS Authentication Server from CAS genesisWorld have to take place via the Microsoft Azure Active Directory.

This applies, among other things, to logging on to CAS genesisWorld Web or the mobile apps.

CAS genes	isWorld
🕑 Database: 🖗	104,904
User name	
Password	0
Remember user	
	Log on
or -	
Use Windows	logon

Logging in to the local Active Directory by entering Windows credentials is no longer possible via the web interfaces if logging in via Microsoft Azure has been set up.

The following restrictions apply to those user accounts which have been set up to use Microsoft Azure to log on:

Mobile sync cannot be used

LDAP cannot be used

18.3 CAS genesisWorld Desktop

Using shared mailboxes

In the desktop client you can configure shared mailboxes, that is multiple users having access to a shared mailbox. This is now also possible if **OAuth2** is being used as an **authentication method**.

For this different user names are entered for the inbox and outbox. For the inbox, the e-mail address of the shared mailbox is entered as the user name. The private e-mail address is entered for the outbox. As usual, the access data for the personal e-mail account must then be entered in a browser window.

For shared mailboxes, it is possible to use the same token for fetching and sending emails.

Changes to icons for the data record type and for the calendar

We have revised a number of icons for data record types so that they can be more easily recognized when used with light background colors in the navigator.

In the calendar the icons for Holidays, Out-of-house appointments and so on are now colored independent of the individual icon settings for the data record types.

 We have extended the synchronization of company data for Switzerland and Lichtenstein

In addition to Austria and Germany, the service used for enriching data from the Unternehmenverzeichnis.org has now added Switzerland and Liechtenstein. Thus, the **Unternehmensverzeichnis** button is now available for addresses from Austria, Germany, Liechtenstein and Switzerland.

Removed query regarding recipients for e-mail campaigns

With e-mail campaigns, not all recipients were added if a user responded to a query regarding the permitted contact methods. The response to the query could no longer be changed if the user had elected to not display the message in future again. Thus, the query was removed.

18.4 CAS genesisWorld Web

Define up to 10 start apps

Now, in the **Profile** menu of the **Settings** app you can define up to 10 apps which will open automatically at the start up of CAS genesisWorld Web. You can select apps and views which have been saved as apps.

Settings		Profile
Profile	Desistration	Onen offer logen
_ Mobile logon	Current password	Select apps
Region	Last changed on 16.11.2018 Change password	E Dashboard 📅 Calendar
📞 Telephony		Opportunities to be reviewed
\$ Add-Ins		Picasso search
Actions		

The apps will be opened in the order you set.

Exporting multiple archive documents as a ZIP-file

From a list of documents you can select multiple archive documents and create a ZIPfile out of them, which can then be made available for download via the title line.



For this you require the additional **Export** right.

Search for available views

The list views available for an app can be found using **Display available views** from the View menu.

CAS genesisWor +	
Q Search	∇
Available views	on
Q part	×
Reference Service CAS genesisWorld Partner) >
SmartWe Development Partner	>

Additional icons for document types

Special icons are now available for the following documents: mp4, mp3, xml, log, csv, msg and gif.

Creating an e-mail campaign from an opportunity template

When creating an e-mail campaign from an opportunity only one template can be selected.

Extended use of views with date jokers from the desktop client In a filter you can now use the following jokers: First day of the current year, Last day of the current year, First day of the current month, Last day of the current month, This week.

If these jokers are used in a filter for a desktop client view, then the filter for a view in CAS genesisWorld Web can be temporarily changed or saved as a new view.
App Designer

Display of the dossier element

When creating via the App Designer you can select whether current data records or link lists are displayed. The display also be changed afterwards via the settings dialog.

Cancel	Dossier	Apply
Dossier type Dossier		x ~
Restrict data record types		
🔳 Addresses ×	\ge E-mails $ imes$	
 Appointments 	×	Ø
Header Communication		<u>× ×</u> Ø +
Display mode		
Data records		× ^
Data records		
Lists		

The number of displayed entries determines the maximum height of the element for both display options.

Dynamic input help options for a specific element

You can define individual dynamic input help options for fields, which if necessary overwrite existing global input help options. You can use data-linked data records as the input help option values.

Improved business metrics

Business metrics can now display a reference value which makes them more informative. The reference value can be created flexibly through a standalone data source.



In addition, if no data is available for the calculation you can set whether a business metric should be displayed. Business metrics are always displayed by default. If the data source does not contain any records and a mathematical function is to be calculated, then a hyphen is displayed as the result.



• Colors in user-defined groups for charts and the aggregated list

You can now define your own color for user-defined groups.



Group 1 FILTER_GROUP



Linked database fields from primary links

In the element for linked database fields, you can now select primary links as a link type.

18.5 New module functions

18.5.1 Report

Selecting a language for input help options in Crystal Reports

When exporting report views and templates via a Crystal Reports Design, you can now select the language you wish to use for the input help options on the **Crystal Report** tab of the desktop client properties.

🎯 Edit repo	rt template			-		×
lame	Address short info					
Participants	All (public)	^ 2 24 √	External access 🖨 🗌 private 🔒 🗌 confidential			
lotes				∥ <u>E</u> dit	샵 <u>T</u> ime s	stamp
Data record	s Additional fields Crystal Repo	orts				
◯ Crystal	Reports Viewer					
🗌 Dis	play group structure initially					
Docum	nent					
Optio	ons					
Doc	ument language English		~			
Doc	ument format		^			
	Archive document Français		_			
	Magyar Use template Italiano				QS	~
	Dutch					-
	Português		~			
	, ortugues					
	ort visualization					
	rt visualization first	Crystal Reports first				
	tal Reports Design	S erfamiliebourg inst				
Design	Address short info	Edit design.	Select different design			
Design		Luit designili	Select unrefent design			
			Savere	port template	Cap	cel

When exporting international input help options they are displayed automatically in the language you selected, as long as translations are available for them.

The language set when creating reports in CAS genesisWorld Web and when sending reports is only taken into consideration with input help options. Field names and other variables are not translated in default reports.

18.5.2 Easy Invoice

Assign customer number with administration rights

Users with administrator rights for the **Easy Invoice** area can now enter any value in the **Customer number** field on the **Billing** tab for a company or for an individual contact. However, the field has to be empty beforehand.

XRechnung purchase order reference (BT-13)

The XRechnung service now adopts the **Reference number** receipt field to the XRechnung under <cac:OrderReference><cbc:ID>, if this is available on the receipt.

Otherwise, the <cac:OrderReference><cbc:ID> structure is not applicable.

18.6 CAS genesisWorld SmartDesign Mobile App

- CAS genesisWorld SmartDesign Mobile App 24.10.0
 - Event appointments can be created if an Event Management license is available and it has been activated for a user account. You can also allocate event appointments to appointment groups.
 - Deactivated contacts are now also displayed in lists in the Maps category. To use this function, you require a version x14.1.6 application server.

18.7 CAS genesisWorld Add-Ins

18.7.1 Archived e-mails

In Microsoft Outlook, it is now possible to reply to or forward e-mails that have already been archived in CAS genesisWorld.



18.7.2 Displaying archived objects in Microsoft Outlook

Whether e-mails have already been archived can now be displayed in Microsoft Outlook in a list view via a field. To do this in Microsoft Outlook, you have to add the new **X-CAS-GW_ARCHIVED** field under **User inbox field**.

Show Columns		×
Maximum number of lines in co Select available columns from: User-defined fields in Inbc	mpact mode: 2	
All Task fields	Add ->	Importance
All Note fields User-defined fields in Inbc	<- Remove	Reminder Icon Attachment
Forms	New Column	From Subject
		X-CAS-GW-ARCHIVED
		Categories Mention
		Flag Status
Properties Delete		Move Lip Move Down
Delete		
		Cancel

You can select the name displayed for the column.

Format Columns		
Available fields: Importance	Format:	lcon 🗸
Reminder Attachment	Label:	CAS genesisWorld
Attachment From Subject X-CAS-GW-ARCHIVED Received Size	Width:	Specific width: 9,00 characters Best fit
Flag Status	Alignment	: 🔾 Left 💿 Center 🔿 Right
		OK Cancel

					Search Current Mail	
>					Search Current Main	10X
~	All Unread					
nbo	! 🏠 🗋 FROM	SUBJECT	CAS GENESISWORLD	SIZE	CATEGORIES	MENTION
- sma				49 KB		
Sent Ite				46 KB		
Drafts	Û		V	44 KB		
	Û		✓	49 KB		
	Û			48 KB		
	Û			48 KB		
	Û			48 KB		
	U		✓	53 KB		
				39 KB		
				40 KB		
				45 KB		
				39 KB		

19 CAS genesisWorld x14.1.7

19.1 General

In the Management Console multiple Active Directories are available for the allocation of CAS genesisWorld user accounts. The prerequisites for this are that these directories are available on the network and configured with trust relationships (see Microsoft Azure documentation for more information).

This allows user accounts from different Active Directories to be assigned to CAS genesisWorld user accounts, which for instance enables logins with Windows credentials beyond the boundaries of your own Active Directory.

19.2 Management Console Management Console

Replication of OAuth2 providers

When creating or editing a provider of the User defined type, you can define whether or not this is available in all CAS genesisWorld domains. For the other types the option is fixed.

The provider of the Exchange online type has been configured so that this is available on all domains. This means that users of the CAS genesisWorld Desktop Client can also use it on the notebook domain for their e-mail account, although a new logon is required.

The Microsoft Teams provider is not displayed on the CAS genesisWorld domains.

Defining decimal places for currencies

In the currency properties in the Management Console you can change the decimal places to 2, 3 or 4 just as with the product price fields. This enables, for example, currency conversions into Euros to be calculated more precisely in conjunction with the Report module.

Extended duplicate merging options

When merging duplicates, it is now possible to specify fields in the **Merging options** in the Management Console that will be ignored during the merging process. As a result, this reduces conflicts which would otherwise prevent automatic merging.

In the Miscellaneous > Templates area, you can enable the use of templates for data records in CAS genesisWorld Web.

As soon as this option has been enabled, any existing templates originating from the desktop client will no longer be available in CAS genesisWorld Web.

The option is set automatically for newly created databases.

New right - Edit templates (public)

You can grant this right for groups or user accounts on the **More rights** tab under **Properties**, this right allows you to approve templates in CAS genesisWorld Web. With this right, you can edit all approved templates from all users.

19.3 CAS genesisWorld Desktop

Changes to duplicates

Duplicates found during import are now displayed in existing lists of addresses for which duplicates were found. This reduces the amount of addresses displayed in the window for resolving duplicates.

The settings for color data record types have been extended

The personal setting **Data record types color** now also applies when displaying the **Parent** icons in the data record window.

19.4 CAS genesisWorld Web

Alignment of number fields in tables

Fields of the number data record type such as int or decimal are now displayed rightjustified in lists.

Ŵ	← Ostat opened +				Q	⊘ 🗗
=	Q Search		Last opened			••• +
	Customer	Start	Subject	Phase	Total Status	
	Rolf-Dieter Weber, Schüttler KG	Yesterday	CRM - 150 licences	Acquire - Information material	600.00 won	>
	CAS Software AG	17.01.2023	CRM - 10 licences	Lead	139.30 open	>
	CAS Software AG		Training for admins	Acquire - Presentation	16,998.00 open	>
	Rolf-Dieter Weber, Schüttler KG	Yesterday	Server, DB installation	Acquire - Presentation	14,400.00 open	>
	Rolf-Dieter Weber, Schüttler KG	Yesterday	Training - all users	Acquire - Information material	1,200.00 open	>
	CAS Software AG		Projects module - 5 licences		4,750.00 won	>
	CAS Software AG		Training - crm users		6,685.00 won	>
	Thomas Anderson, YellowMap AG	03.02.2023	Training - key users	Sale	1,337.00 lost	>
	Robert Glade, CAS Software UK	02.12.2022	Training administrators	Lead	695.00 open	>
	Dipl. Ing. Robert Glaser, CAS Software AG	17.02.2023	Reports module - 40 licences	Acquire - Information material	20,000.00 won	>
	Hanspeter Hoffmann, Kaiser Systeme AG	13.05.2022	CRM - 212 licences	Lead	1,500.00 open	>
	Franz Kauffmann, Bildprodukte GmbH	19.05.2022	Server, DB installation	Acquire - Presentation	5,400.00 open	>
	Franz Kauffmann, Bildprodukte GmbH	13.02.2023	Projects module - 35 licences	Lead	5,555.00 open	>
	CAS Software AG	11.11.2022	CRM cloud - 50 users	Lead	13,370.00 open	>
	CAS Software AG	11.11.2022	Server, DB installation	Lead	13,370.00 open	>

Creating contacts from business cards

By adding existing photos from a business card to a lead, you can create a customer data record. Clicking the **Create contact from business card** button transfers the data from the photo field to the respective fields in the contact data record.

		Lea	du très cleate	customer nom busines	s card create customer	create opportunity	
1 new		2 entered		3 qualified		4 converted	
Subject							
New lead Business fair Stuttgart							
General		Customer info	ormation		Authorized persons		
Person responsible Robert Glaser		Business card (Front)	I E R - front nago		Robert Glaser		
Entered by		JPG	LE B - Hom page	>			
Robert Glaser		Business card (Back) EAD MOBI	ILE B - back side	>			
Dossier		Additional info	ormation				
LEAD MOBILE B - front page Today, 13:10:19 - 100627	>	Created by Robert Glaser					
LEAD MOBILE B - back side Today, 13:10:08 - 100624	>	Created on 06.02.2023, 11:26:31	L				
Details	>	Changed by Robert Glaser					
		Changed on					

• Link lists in the dossier

In a data record dossier, you will now see that link lists are available in addition to the mixed list of all linked data records. These contain the linked data of a data record type.

Grim ← Opportunities +						Q (?) 🗗
Company dossier 🗸 🗸	Q Search	∇	Opportur	nities		000
Dossier	Start ⁴ 1	Subject	Phase	Status	Customer	
Addresses	17.01.2023	CRM - 10 licences	Lead	open	CAS Software AG	>
Appointments		Projects module - 5 licences		won	CAS Software AG	>
Distribution list		Training for admins	Acquire - Presentation	open	CAS Software AG	>
Documents		Training - crm users		won	CAS Software AG	>
E-mails						
참 Holidays						
🤹 Jobs						
 Opportunities 						
🧳 Phone calls						
Product uses						
Projects						
2 Questionnaires						
C Receipts						
😤 Tasks						

You can select the type of dossier in the company and contact person dossier.

ſ		ortunities —					
	Company	dossier 🖌	Q Sear	ch	∇		
	Dossier	Company dossier		Start [↓] 1	Subject		Phase
1 =	Addresses	Overall dossier		17.01.2023	CRM - 10 licences		Lead
۲	Appointments	Corporate group dossi	er		Projects module - 5 licence	5	
<u></u> 2=	Distribution list				Training for admins		Acquire -
Ľ	Documents				Training - crm users		
	E-mails						
Ť	Holidays						
	Jobs						
1	Opportunities						
J	Phone calls						
	Product uses						

In a displayed link list all of the following are now possible: Quick search, advanced filters and actions as well as exporting.

Data records which are linked via multiple link types are only displayed once.

When removing a link via a list action menu, all the associated links are removed.

New document type - Internet address

In the Documents app you can now create a document data record from an Internet address.



You can create new documents in CAS genesisWorld Web using URLs from other systems, which point to existing documents in those systems.

	Internet address		000	Edit
Project plan External link Thttps://casde.sharepoint.com/.wr/s/New	rCRM/EbVgFY7PQ3IGuZvPzU_eXmoBYV2HGhT0oj_OOniGEiP9ag?e=0E4a			
Number _{Number} 101336	Authorized persons	Parent There is no parent data re	ecord	8

Releasing Personal views and Actions

Users with sufficient rights to do so, can now also release personal views and actions for others, without having to resort to the **Administration** app.

Releasing is performed via the view properties or via an action.

Cancel	View properties	Save
List		
Name Sales Team - o	pportunities	
Release		
Private	Released	

Naming released views and actions

If users cannot edit released views and actions, they can name them via this icon.

Released views and actions are named via this icon, if the user has been granted the **Edit actions (public)** right.

Naming navigator views

This icon indicates views which have been created in the desktop client and which are thus not editable.

Data record templates

In CAS genesisWorld Web you can create and use templates for any data record types.

You can create templates in CAS genesisWorld if the **Edit templates (public)** right is active, see page 5.

Templates created in CAS genesisWorld Web will not be available in the desktop client and vice versa. A template is only available in the client in which it was created.

Creating templates

•••• Both newly created and existing saved data records can be saved as templates via the appropriate item in the action menu.

You can define field values and links in a template, which when using the template are available as default or preset values.

n here in the settings 🛛 🔁 Template 🛛 🗙	+		Q (?) 🗗
6	1	Task	ooo Edit
(i) Template Translations - Created on: 17.03.2023 Task for new translation jobs			
Subject Translation task			
Processed by Robert Glaser	Status Roting status Not started % Complete 0 Priority A Start 0910.2012,0000 End 12.10.2012,0000	Type/Status ⁷ pe Documentation	Authorized persons
Dossier Translations EN Today - Robert Glase.	Parent	Additional information Created by Robert Glaser	Tags English, product name

Every template requires a name and details on its availability. You also have the option of entering a description.

Cancel	Template 🗍 Save
General Name Translations Data record type Tasks	Details Description Task for new translation jobs
Release Private Released	Availability Display template in all compatible apps Display template in selected app Select app Tasks

You can change the properties after saving using the **Edit properties** function.

Templates and rights

No special rights are required to create and use private templates. Private templates can only be used by the user who created them.

Private templates are called and edited under **Templates** in the **Settings** app.

Users with the **Edit templates (public)** right, can release templates for other users. Optionally, they can define a validity period for a released template. If only an end date has been set, then the template can be used by authorized users up until this date. If only a start date has been set, then the template can only be used as of this date.

Cancel	Temp	blate	Save
General Name Company presentation 2023		Details Description for customer presentations, current CI	
Release		Availability	
Private Released		O Display template in all compatible apps	
Authorized users R Marketing	Q	 Display template in selected app Select app Documents 	~
Valid from Image: Control of the second			

Released templates are called and edited under **Released templates** in the **Administration app**.

Using templates

To create a data record from a template, the user selects an available template via the **Use template** action from the Action menu when editing a data record.

Using templates for documents and e-mail campaigns via **Create document from a template** or **Create an e-mail campaign from a template**.

E-mail campaigns	@ +
	Create e-mail campaign from template
	Create e-mail campaign

To only view the templates you created yourself, you can display your own private templates in the list.

When creating a data record from a template, the settings from duplication are used. Accordingly, fields are taken from the template for which the duplicable property is set in the Database area of the Management Console.

Car	Templates Apply
Q s	earch
\$	Personal template
\$	Prepare exhibition stand
\$	Prio A task This is a description
\$	Send contract Template for reminder task
\$	To Do template Template for my personal to dos
\$	Translations Task for new translation jobs
_ (Only display private templates

Naming templates

² If the user of the template cannot edit the template, then they can name the released template via this icon.

² If the user has been granted the **Edit template (public)** right, and can thus edit the template, then the released template can be named via this icon.

19.5 New module functions

19.5.1 Event Management

• E-mail campaign via registrations

On the **Registrations** tab for an event, you can now send form letters and e-mail campaigns to the contacts of the highlighted registrations, that is, to the registered person, registering person or the invoice recipient.

Customization - Duplicate merging with event registrations

If duplicates occur with event registrations, then the merging list is always displayed. This allows you to exclude duplicates or change the address. The list is also displayed if just two duplicates exist.

19.6 CAS genesisWorld SmartDesign Mobile App

- CAS genesisWorld SmartDesign Mobile App 24.9.0
 - If a license for Event Management is available and has been unlocked for a user, then events can be created, displayed and edited. Event registrations will also be displayed.
 - When saving tickets, the submitter can now be informed of any changes to the data record.

20 CAS genesisWorld x14.1.6

20.1 General

• The license for **OpenSync** is also included with the **Premium** license.

Using the **OpenSync** module you can create universal integrations to any third-party system, for example, ERP systems. The use of customized synchronization solutions is thus possible for all customers who already use the Premium license.

Speak to your partner if you would like to implement a synchronization solution.

• New online help for the Server Manager in German and English

New content has been added to the online help for version x14 for the following areas: the CAS Authentication Server, Loadbalancing for CAS genesisWorld Web and the Mobile Apps as well as the monitoring of CAS genesisWorld. In particular, we have

updated the pages covering an example configuration of the Internet Information Services (IIS) when deploying a reverse proxy for CAS genesisWorld Web.

The online help has been completely revised so that the page layout and the appearance have changed. However, you can still call the relevant **help** pages from the program using F1 or by pressing the Help button.

To further improve the help, we welcome your feedback via e-mail <u>Technical</u> <u>communication</u>, especially on any points which were unclear or errors you might find

New user guide for the Easy Invoice module in German

The user guide has been fully revised to reflect the content in version x14.1.4. The user guide is available as a both a PDF and in the usual online help format.

Changes to the installation files

Besides the usual setup.exe file in the CAS genesisWorld installation folder, you will now find additional files such as the .cab and .mst files. This is a consequence of the setup.exe file being too large, which resulted in the additional files. Installation behavior has not changed.

The CAS genesisWorld software update is not affected by these changes.

20.2 Management Console

The Do not notify participant when removed option

When defining a notification on the Action tab you will see the **Do not notify participant when removed** option. When this option is enabled, users do not receive a notification if they are participants to a data record and have subsequently removed from it.

20.3 CAS genesisWorld Desktop

 Fields names appearing under company data in address data records have been changed

The **Register number** field has been renamed to **Register of companies** and the **Register location** field has been renamed to **District court**.

Changing rights when invited to an appointment

Participants who have been invited to an appointment now have, by default, full rights to this appointment. Consequently, for example, an invited participant can write in the **Notes** field or invite other participants to the appointment.

20.4 CAS genesisWorld Web

Inserting and linking documents in lists using drag and drop

Any documents dragged to a dossier or link list using the drag and drop function are linked automatically to the master data record of the dossier or the link list. A general link is always entered for this.

<u>ہ</u>	\leftarrow	Dossier	+		Q	? ⊒
Q Sea	rch		_ 7	Dossier		000
			New product specs and sales st			>
	1					>
			per diem → Move			

Appointments edited by invited users

Invited users can edit an appointment on condition that they have sufficient rights to do so, and thus enter, for instance, a text in the **Notes** field or change the **Subject**.

As previously, participants can accept or decline an appointment without having **Write** rights.

Users who have been invited via CAS genesisWorld Web, always receive full access rights to the appointment.

Copying of pictures to HTML formattable notes fields

You can now copy pictures and other content to HTML formattable notes and then insert them elsewhere.

20.4.1 App Designer

Defining a filter when creating widgets

You can now define filters for the aggregated list, chart, and business metrics elements.

Copying widgets in the App Designer

Existing elements can be copied. Hold down the Ctrl key while dragging and dropping an element in the active App Designer mode. The widget will not be moved in this case, but a copy of the widget will be created. The settings of the original widget will also be copied. If a data source exists, a copy of the assigned data source is also created. This allows you to edit the copied widgets independently. The name of a newly created data source is extended by a numeric suffix.

Aligning fields

You can now also specify alignment for fields outside the summary.

20.5 New module functions

20.5.1 Event Management

Changes to the E-mail campaign window

The **Insert event link** button has been removed from the editor menu and can now be found on the right of the editor.



20.5.2 Survey

Displaying address data with personalized links to surveys

When creating a URL to a non-anonymous survey via the **Copy URL to Survey** button on the survey's **Addresses** tab. The company and first and last name of the previously selected address for which the link is valid, are now displayed.

CAS genesisWorld	×
URL for ACC Technics Ltd, Ruby Goldstein.	
The following URL has been copied to the cache: https://survey.example.com/Survey.aspx? contextID=62293bc46cd171ab44c822bc30c2fe17&c=mzdaAENUaToM1I3iz1yy0hXwGThJf38AG08ix1 wH%2BS14YCJxWvxg %2FMnitReUrQ5WsobBk70Pn2w4GetMQfDZlqma5TvEtUdDzOYZg4xjvbzPxoPgO9kdR&cid=XQ5H7 sCUQ%3D%3D	w7hnb8VYnGM nJCX7PAnnsY0W OK

20.5.3 Project

2023 per diem rates

The per-diem rates for Germany in 2023 are now online and also available through the installation of the desktop client.

You can enter them in the **Project** area of the Management Console under **Expenses**:

🕵 CAS genesisWorld Management	t Console (localhost) - EXAMPLE				-	×
File Areas Help						
 Areas 	Expenses					
E Project	General License plate number					
General Orders	Select expenses types		Cost per km (travel costs)			
Expenses	Type (per diem)	Per diem 🗸 🗸	Cost per km (internal)	0,30€		
Resource planning Skills	Type (lump sums)	Lump sum 🗸 🗸	Cost per km (external)	0,30€		
	Type (travel costs)	Travel costs \lor				-
	 Settings for per diem costs Preallocate per diem costs Always manually enter per Permit calculation per data Always automatically calcul Country settings for per dien Default country for New Year Country More than 8 hours 24 hours Breakfast deduction % Lunch deduction % Dinner deduction % 	diem costs record ate per diem costs fermany ✓ 2022 ✓ Germany ✓ 14,00 € 20 20 40 40	→ ⊞ Add new year			

Please note that the standard rates now apply for Lyon, Marseille and Strasburg instead of the previously special rates.

20.5.4 Helpdesk online

The favorite icon

In Helpdesk online you can now embed your own icon for the respective tab and specify the favorites. To do so, copy a file with the following name: favicon.ico, favicon.svg or favicon.png to the ...\Custom folder. The graphic is scaled automatically if necessary.

6 Helpdesk online x +	~	- 🗆 ×
← → C (▲ https://helpdesk.example.com/helpdesk/	₽ \$	* 🗉 😩 E
FAQ	English	~
Helpdesk online		
E-mail (business)		
1		
Password		
Log on		
Remember logon data Forgot Password?		
Activate account x14.1.6.14290		

20.6 CAS genesisWorld SmartDesign Mobile App

- CAS genesisWorld SmartDesign Mobile App 24.8.0
 - Data records can be duplicated with or without links.
 - Tickets can now be created directly out of a project context.
 - When deactivating a company, a hint text will be displayed, asking you whether or not you wish to deactivate the data records associated with the contact persons of that company.
 - Deactivated contacts can also be displayed in views.

Application server version x14.1.5 is the prerequisite for the first 3 functions. The display of deactivated contacts in views will, however, only be possible as of version x14.1.6.

21 CAS genesisWorld x14.1.5

21.1 CAS genesisWorld Web

• Controlling deactivated elements with your keyboard

You can switch the focus to deactivated elements using your keyboard. However, interactions are still not possible.

SMS				× ~
Permitted co	ontact methods			
$\mathrm{Fax} \times$	E-Mail \times	Postversand \times	Telefon \times	
sms $ imes$				Ø
First cont	act			
First cont	act			
First cont	act			
First cont First cont	act act date			
First cont First cont Contact per:	act act date			
First cont First cont Contact pers Robert G	act act date son laser			
First cont First cont Contact pers Robert G	act act date son laser			

More actions: Set upon execution

This **new type of change** enables the manual input of values into fields if the saved action is to be executed.

Cancel		New action		< Back	Next >	Save
1 General	Define the changes that will b	e made through the action.				
2 Action	New data record Data record type Appointment	~	Authorized po Full rights Provide the second secon	ersons	~	_Q _Q _ ================================
	Field values Table field Start Table field End Add row	Type of change Set upon execution Type of change Set upon execution	×			××

• We have renamed the view management and actions areas

The View and Actions areas in the Administration App have been renamed as **Released views** and **Released actions.**

Administration	n +		
Administration		Released views	
App Designer	O Search		
App access	Name 1	Ansichtstyp	Created by
Released views	Customers in postal code area 7	Addresses	ADMINISTRATOR
Released actions	Marketing events	Appointments	ADMINISTRATOR

21.2 New module functions

21.2.1 Survey

Print view

In Survey online, the same print view as in CAS genesisWorld Web is now available for questionnaires and surveys.

Additionally, in Survey online and in CAS genesisWorld Web, a **print** button appears on all pages where this feature is available.

ſ) 🔶 📑 Address qualific	+	? ⊒
	Last opened	Questionnaire	°°° Edit
ă:	Address qualification CRM NOMOSYS Inc. The Consulting Com		
ž.	Product use Ethan Miller, ACC Technics Ltd.	Address qualification CRM NOMOSYS Inc. The Consulting Company	
ž.	Product use Walter Miller, Devemit Ltd. Hydraulic	Questionnaire Master data Online status	
ž.	Product use Jack Bauer, NOMOSYS Inc. The Cons	Questionnaire read mode	17
ž.	Customer loyalty (B2B) Ruby Goldstein, ACC Technics Ltd.		-
¥:	Customer satisfaction Walter Miller, Devemit Ltd. Hydraulic	Address qualification CRM (75 of 100 points)	₽ ₩
		1 General information (10 of 20 points)	
		1.1 Sector	
		Consulting ~	•

The print view from Survey online will also open if the **print** function is called in the browser.

Please note that multipage questionnaires will be printed in full even if some of the questions have not been answered.

Please update Survey online to ensure that this function is available.

Limiting the validity of sent questionnaires

A link to a questionnaire can be inserted via the notification service. In the rule settings, the **validity** can now be specified as a fixed date or as a field of the questionnaire.

After the specified date, the questionnaire will no longer be available online.

🍘 Insert link for questionnaire							
Questionnaire template	Customer satisfaction	~					
Name	Customer satisfaction questionnaire	e					
Validity (Filter value 1/31/2023						
0) Table field	\sim					
	OK Car	ncel					

Please update Survey online to ensure that this function is available. Previous versions of Survey online ignore the new setting.

Participants of sent questionnaires from the notification service

Questionnaires of a questionnaire template can be created and sent via the notification service.

Now, using the **Select participants** button on the **Survey online** tab, you can define which participants you wish to enter into questionnaires which have been created in this manner. The preset value is **All (public)**.

Participants are entered when the recipient clicks the link to the questionnaire in the notification service e-mail, or in other words, fills out and submits the questionnaire.

E Edit questionnaire template										
Data record type	Addresses	Subject	Customer satisfaction							
Edit questions Q	dit questions Questionnaire preview Rating More options Survey Online									
Settings for questionnaires which are available online										
Select language	Select language for buttons and dialogs English \checkmark									
Select design template V Preview										
Sections per pag	ge									
○ One section	per page	e page								
Save IP addre	esses of the respondents									
Settings for ques	stionnaires sent automatically via	the rule service								
Enter the follow automatically se	ing users as participants for ent questionnaires		All (public)	Select participants						

Please note, to ensure that this function is available you have to update Survey online.

21.2.2 Helpdesk: Creating project tickets

Tickets for projects in CAS genesisWorld Web can now also be created in the read view of the project via the action menu.

G 🔶 🔚 Software delevo	+		? ⊒	
Last opened	I	Project	••• Edit	
Software delevopment		Create		
Consulting 4Front Ltd.	Subject Software delevopment for NOMOSYS Inc.	🗟 External services		
CAS genesisWorld for Pr22		dot 🐯		
User training for Smith Pr63	General	Lump sum for expenses	_	
CAS genesisWorld for Pr34	Number Pr15	C Per diem costs	_	
Software delevopment Pr46	Person responsible Peter Grayhound	E Questionnaire		
Software development Pr31	Deputy Robert Glade	C Receipt for expenses	_	
User training for Mafar Pr33		💍 Record time	_	
User training iNetVisio Pr29	Project status	🔂 Task	_	
Custom software delev Pr50	Project status	🖓 Ticket		
CAS genesisWorld for Pr9	- order	k I Iravel expenses bill		
Consulting project Sec		L	_	

21.3 CAS genesisWorld SmartDesign Mobile App

- CAS genesisWorld SmartDesign Mobile App 24.7.0
 - You can invite CAS genesisWorld users to appointments by simply entering them into the **Invited** field in the **Participants** block. Invited participants can then accept or decline the invitation.
 - Contacts can now also be deactivated and will subsequently be displayed as such in search results, lists and so on. Deactivated contacts can be activated again.
 - When starting a phone call from a contact data record or when creating an e-mail, you will now see the following hint if this contact method is not permitted.
 - We have improved the navigation between data records in a list. The previous position in a list is retained.

22 CAS genesisWorld x14.1.4

22.1 General

In the English version, the country name Turkey has been officially changed to Türkiye.

22.2 CAS genesisWorld Desktop

New date jokers

We have added the following values to the date jokers in the filter:

Last day of the current business year

If a business year which deviates from the calendar has not been configured in the Management Console, then the business year is set equal to the calendar year.

• Context menu has been changed in the recycling bin

The **Delete** menu item in the context menu for lists in the recycle bin had been renamed to **Delete permanently.**

22.3 CAS genesisWorld Web

Mandatory fields can be removed from actions

Mandatory fields are automatically displayed with the fields to be changed during actions. However, users can remove them if they have not been completed or changed.

$\bigcirc \leftarrow \mathbb{R}^{Administration}$ +							Q 🕐 🗗
Administration	Cancel	New	action	< Back Next >	Save]	
J App Designer	1 General	Define the changes that will be made thro	ough the action.				
Released views	2 Action					Created by	Created on
<u>2</u> Released actions		New data record	Authorized	persons		Peter Grundmann	22.11.2022, 10:25:37
		Data record type Appointment	Full rights ✓ 🌚 Robert Glz	ser	Q	Britta Glatt	19.10.2022, 11:00:49
						Britta Glatt	19.10.2022, 11:00:13
			Read		Q	Robert Glaser	21.11.2022, 09:38:33
			External access (max	imum)		Peter Grundmann	04.11.2022, 10:27:37
			Full rights		<u> </u>	Robert Glaser	02.11.2022, 09:55:32
						Robert Glaser	19.10.2022, 12:19:16
		Field values				Peter Grundmann	10.11.2022, 14:50:24
		Table field Type of chang Set time ✓	e New value (Date) alues V 06.12.2022	New value (Time) 06:00	×	Robert Glaser	04.11.2022, 09:11:12
		Table field Type of chang End Y Set field va	e New value (Date) alues V 07.12.2022	New value (Time) 10:00	×		
		Add row					

22.4 New module functions

22.4.1 Inxmail

Shorter synchronization Intervals

We have reduced the time between synchronization intervals from 10 minutes to 3 minutes.

View click behavior

You can now call the click behavior for an Inxmail e-mailing campaign which has already been sent and archived in CAS genesisWorld. For contacts who have given their permission to tracking, you can display the links the contacts clicked on within the context of the e-mail campaign.

22.4.2 Easy Invoice

• Embedding XML files in XRechnung

You can now embed as many associated documents as you wish in the XML file for an XRechnung.

The documents are embedded automatically as binary objects (Base64) according to the XRechnung standard, into the XML file of the XRechnung.

Supported file formats:

- PDF
- CSV
- PNG
- JPG/JPEG
- Excel-workbook (XLSX)
- Open Office work book (ODS)

Requirements

- Your database has been updated to version x13.1.2.4 or version x14.1.4. In the process, the new link type **Invoice-justifying document** is created between documents and receipts.
- The documents you wish to embed are available in CAS genesisWorld as document data records. Archive documents and file references are supported.
- The documents you wish to embed each have a supported file format (see above).
- A value will have been entered in the Number field on the General tab of the documents.

Procedure

- You can link the documents you wish to embed in the receipt object of the XRechnung (not the print document) using the **Invoice-justifying document** link type.
- You can save the receipt and update the print document.
- All linked documents, which meet these requirements, are embedded as base64 binary objects in the XRechnung XML file. Any potential errors are recorded in the "%temp%\ genesisWorld\Error.log" file.

XML structure

For each document a tag with the following structure is created <cac:AdditionalDocumentReference> directly below <ubl:Invoice>:

```
<cac:AdditionalDocumentReference>
```

```
<cbc:ID>[Document number in CAS genesisWorld]</cbc:ID> <cac:Attachment>
```

```
<cbc:EmbeddedDocumentBinaryObject mimeCode="[File type, e.g.
'image/jpeg']" filename="[Filename.Ending]>[Binary
data]</cbc:EmbeddedDocumentBinaryObject>
```

</cac:Attachment>

</cac:AdditionalDocumentReference>

XRechnung version 2.2.0

After updating to version x13.2.4 or x14.1.4 you can create XRechnungen in the new version 2.2.0 using Easy Invoice.

To use this function, the current version of the Crystal Report Integration has to be installed.

22.5 CAS genesisWorld SmartDesign Mobile App

- CAS genesisWorld SmartDesign Mobile App 24.5.0
 - You can now see all the active user logons in the settings. If required, you can log
 off individual users or all users apart from the current logon.

This function requires the CAS genesisWorld x14.1.2 Application Server or higher.

22.6 CAS genesisWorld Add-Ins

In the CAS genesisWorld Outlook Add-In you now have the option of logging on via OAuth.

If the **OAuth** option is selected, click **Logon** to open a browser window and log on to the **CAS Authentication Server**.

Add-In-Optionen			×
CAS genesisWorld			
Erweiterte Anbi	ndung von Microsoft Outlo	ok an CAS genesisWorld verwenden	
Authentifizierung			-
Servername	demo.cas.de	~	
Port	443 ≑ 🗹 5	SL verwenden	
Datenbank	DEMODB	~	
() Windows	OAuth	○ Anmeldedaten	
Benutzername			
Kennwort			
Domäne			
		Anmelden	
CAS genesis	Norld Sidebar anzeigen		
🗸 Datensätze a	us Add-In öffnen		
Client	CAS genesisWorld Web	~	
Adresse	https://demo.cas.de/sm	artdesign/	
🗌 Nach den	n Übertragen oder Archivie	ren direkt öffnen	
		OK Abbrechen Überneh	men

23 CAS genesisWorld x14.1.3

23.1 General

 CAS WebServices now supports the OpenAPI standard for the documentation of the RESTful API.

For more information, click this link: <u>https://partnerportal.cas.de/WebServicesSDK/x14/pages/rest/operation.html</u>

The number of decimal places for product prices fields is now variable

In the Management Console, in the **Miscellaneous** > **Products** area, you can set whether two, three or four decimal places should be used for product price fields.

In the process, the following fields will be changed:

- Product (BSPRODUCT): Purchase price, Price, Gross amount, Contribution margin, Net amount, Discount amount, Tax amount.
- Product item (BSVOUCHERSPOS): Offer price, Contribution margin, Price, Discount, Sum

- Opportunity (GWOPPORTUNITY): Contribution margin, Weighted contribution margin, Total, Weighted total, Offer price, Contribution margin, Price, Discount, Sum
- Product use (ITDPRODUSAGE): Contribution margin, Purchase price, Price
- Items (ITDTRANCHE): Offer price, Contribution margin, Weighted contribution margin, Price, Discount, Sum, Weighted volume

If, for example, 3 decimal places have been set, then all of the fields named above will be displayed rounded to 3 decimal places. This applies to all clients, that is the: CAS genesisWorld Desktop, CAS genesisWorld Web and CAS genesisWorld SmartDesign Mobile Apps.

23.2 Management Console

- In the Licenses area, you can now also import licenses that may only become relevant after an update of CAS genesisWorld.
 For example, update licenses of an upcoming major version can be imported and assigned to users before the update. This means that users can continue to use CAS genesisWorld directly after an update, without the administrator first having to import the appropriate licenses.
- You can now save color, monochrome and inverse PNG files in the database for your own data record types. These are used, for example, in the CAS genesisWorld Desktop Client, in the navigator and in the menus.
- In the Miscellaneous area > Business year, you can define a start date for the business year which deviates from the calendar year. A business year automatically has a duration of a year. This configuration affects the date wildcards offered in the filter of the application.



23.3 CAS genesisWorld Desktop

E-mail presets

The default format for new e-mails has now be set to HTML for newly created users.

New date joker

We have added the following values to the date jokers in the filter:

- This business year
- This business year +?
- This business year -?
- First day of the current business year

Unless a different fiscal year has been configured in the Management Console, the fiscal year is set equal to the calendar year.

23.4 CAS genesisWorld Web

Displaying additional fields in the Lead report app

The **Preferred contact method** for the assigned contact is now directly displayed in the **General** block.

The new **Additional Information** field group displays the following information as usual: **Created by, Created on, Changed by** and **Changed on**.

ĥ) 🔶 🛃 Subject 🛛 🛛	Contacts	+						Q (?)	\square
	Last opened				Lead		000 (Create customer 💌	Create opportunity	Edit
	Subject converted	Source								
	Lead for the fair converted	Volume Volume Timeline short term Action Telephone call	ichedule appointment							
		Dossier ① Opportunity ① Opportunity	23423 23523	>		Additional Created by Robert Glaser Created on 30.09.2022, 07:	inform 56:19	ation		
		Details		>		Changed by Robert Glaser Changed on Today, 12:52:41				

We changed the heading for the Extended list

If a link list contains seven or more elements, the extended list can be opened via **More elements**.

If the list contains less than seven elements, the button is labeled Details.

Open tasks		Scheduled phone calls	
Information	>	Interest in flooring 11.11.2022, 00:00 - 00:00	>
Introduction Staff Thorsten Jung	>	Interest in furniture making 14.11.2022, 00:00 - 00:00	>
Presentation Not started	>	Details	>
Presentation Not started	>		
Business English course deepening Not started	>		
Prepare conversation with Mrs. Silvana Not started	>		
Read through cooperation agreement	>		
More elements	>		

• New distribution list icons in the actions menu

New icons are now in use for the following action in distribution lists: **Add to distribution list**, **Close distribution list** and **Remove distribution list**.

Moving columns in a list using drag and drop

You can move columns in a list using drag and drop. This kind of change can be saved, as usual, directly in the view or as a new view.

ŝ	Con	tacts	+	-						(Q (?	$[\rightarrow$
=	Q Search			7	7		Con	tacts		000		1 +
	is Company	Form	• Title	⊕ Title	First na	Name	Туре	Company	Street	Postal code	Town	
		Mrs.		- 110	Elisabeth	Crown	Customer	Westautomatics Ltd	Drayton Road	OX14 5HX	Abin	> ^
		Mrs.			Vivian	Danell	Dealer	Agency CCC	Granville Street 27	BS5 9SP	Brist	>
		Mr.			Brian	Mc Donald	Dealer	Agency CCC	Granville Street 27	BS5 9SP	Brist	>
		Mr.			Dylan	Fitzwilliam		NorBuy	Eliot St	B7 5LB	Birm	>
		Mr.			Jack	Michaels	Customer	Westautomatics Ltd	Drayton Road	OX14 5HX	Abin	>
	20	Mr			Billy	Gordon	Customer	Gordon Ltd.	20 Trinity Street	CB2 1TY	Cam	>
	20	Mr			Marcus	Boyle	Lead	William Maine Ltd.	Gibb Street	B9 4AA	Birm	>
	22	Mr	Dr.		Max	End	Prospect	Power for you	56 Virginia St	AB11 5AY	Aber	>
	20	Mr			Martin	Fraser	Supplier	Access inc.	1 Gelliwastad Road	CF37 2BP	Pont	>
	20	Mr			Harry	Nicholson	Supplier	Young & partner	53-62 South Bridge	EH1 1YS	Edinl	>
		Mr			Peter	Gray	Partner	CAS Software UK	Verdant Lane 164	SE1 9RT	Lonc	>
												×

Displaying the sort order

The number displayed for sorted columns has been moved to the right-hand side of the arrow.

ŵ	<- ○ ○	oportunities +					Q (?	€ו
=	Q Search		∇		Opportunities		0	•• +
	Status	Salesperson 🕈 2	Salesperson 2 🕹 1	Salesperson 3 🕹 3	Customer	Total	Person responsible	Produ
	won	ACC Technik GmbH	Robert Glaser, CAS	Thomas Vogt, CAS	Andreas Luckas, Bonding Studenteninitiative e.V.	3,797.75	Robert Glaser	> *
	won	ACC Technik GmbH	Robert Glaser, CAS	Thomas Vogt, CAS	Andreas Luckas, Bonding Studenteninitiative e.V.	21,750.00	Peter Grundmann	>
	open	Agentur CCC	Robert Glaser, CAS	Matthias Daumann	Franz Kauffmann, Bildprodukte GmbH	3,782.50	Robert Glaser	>
	open	Agentur CCC	Robert Glaser, CAS	Matthias Daumann	Franz Kauffmann, Bildprodukte GmbH	5,400.00	Peter Grundmann	>
	lost	Birnbaum & Hemp	Robert Glaser, CAS	Peter Grundmann,	Holger Sandig, DHC Computer GmbH	660.25	Robert Glaser	>

New date joker

We have added the following values to the date jokers in the filter:

- Current business year,
- Current business year +?
- Current business year -?
- First day of the current business year
- Last day of the current business year

If a business year which deviates from the calendar has not been configured in the Management Console, then the business year is set equal to the calendar year. • Changed order when creating e-mail campaigns

We changed the order of the pages in the wizard when creating e-mail campaigns. This now starts with the page for composing a message. Attachments and recipients can be added during steps 2 and 3.

- 🖪	E-mail campaign	ns 🕂			
			Cancel	E-mail campaign < Back Next	t > Save
			1 Message	Write and personalize your e-mail.	
tacts	Employee		2 Attachments 3 Recipients	Subject line	
	7		4 Send		_ €
ments	Unternehmens- verzeichnis	E-mails	5 Master data		
p					
ngebote	Opportunities	Phone calls			Ę
					₩ ₩₩
cts and ripts	Project management	Service and support			

23.5 New module functions

23.5.1 Report/Project/Helpdesk

Board view - Extended display and editing

The board view now displays the first line of the cards (as a rule the keyword) - as a double line if necessary. If there is still not enough space, then the text is shortened as was previously the case. In this case, the full text is displayed in the hint text when you hover your cursor over the associated card.

My opportunities +				? ∃
	Му ор	portunities		+
Lead Σ 15,839.23 GBP	Presentation Σ 17,622.71 GBP	Offer Σ 10,725.00 GBP	Sale Σ 16,289.14 GBP	
Custom software development Lead 7.308.33 GBP	IT infrastructure, CRM groupware, ERP software, intranet softw IT infrastructure, CRM groupware, ERP software, intranet software & standard training	Terminal workstation & standard training Offer 10.725.00 GBP	IT infrastructure Sale 990.00 GBP	
Intranet software Lead 7.396.45 GBP	IT infrastructure, ERP software & standard training Presentation		Mobile workstation Sale 776.52 GBP	
IT system sales and installation Lead 1.134.45 GBP	8.022.90 GBP		Office software Sale 1.100.00 GBP	

In addition, a button for editing the associated data record is now available on each card.

$\widehat{\square} \leftarrow \blacksquare$ My opportunities +			?	
≡ 1H V	Му ор	pportunities		+
Lead Σ 15,839.23 GBP	Presentation Σ 17,622.71 GBP	Offer Σ 10,725.00 GBP	Sale Σ 16,289.14 GBP	
Custom software development Lead 7.308.33 GBP	IT infrastructure, CRM groupware, ERP software, intranet softw Presentation 9.599.81 G8P	Terminal workstation & standard training Offer 10.725.00 GBP	IT infrastructure Sale 990.00 GBP	
Intranet software Lead 7.396.45 GBP	IT infrastructure, ERP software & standard training Presentation		Mobile workstation Sale 776.52 GBP	
IT system sales and installation Lead 1.134.45 GBP	8.022.90 G8P		Office software Sale 1,100.00 GBP	

If you do not have editing rights, then an error message is displayed when you click the button.

23.5.2 Project

• Entering effort in the project planner

If you have enabled **manual resource planning** under **Resource planning** in the **Project** area of the Management Console, then you can now also enter effort in the project planning view manually per interval, as was already the case, in the **Resource planning** app.

To do this, click in the desired interval, enter the effort and confirm with the [Return] key or by clicking the checkmark.

						<u> </u>
Today		Project	planning			
	▼ Time budget	ETC	CW 41	CW 42	CW 43	CW 44
Software delevopment for NOMOSYS Inc. 07/18/2022 - 11/04/2022, NOMOSYS Inc.	36 PD	33.5 PD	3 PD	8.5 PD	11 PD	11 PD
3 Services	21 PD	21 PD	1 PD	5 PD	7.5 PD	7.5 PD
3.3 Installation	6 PD	6 PD	1 PD	5 PD		
Antonio Matarazzo	6 PD	6 PD	1 PD	5 PD		
3.4 User training	15 PD	15 PD			7.5 PD	7.5 PD
Robert Glade Project manager	5 PD	5 PD			2.5 PD	2.5 PD
Peter Grayhound	10 PD	10 PD			5 PD	s
4 Project management ABY15/2022 - 11/04/2022 Project management	15 PD	12.5 PD	2 PD	3.5 PD	3.5 PD	3.5 P
Robert Glade Project manager	10 PD	8.5 PD	1 PD	2.5 PD	2.5 PD	2.5 PD
Michael Green	5 PD	4 PD	1 PD	1 PD	1 PD	1 PD
Project closure 11/04/2022, Milestone						•
Robert Glade						
Peter Grayhound Sales manager						
Michael Green GEO						
Antonio Matarazzo						1

The entries can be reset per resource plan and overwritten again with the automatic planning. This distributes the remaining effort proportionally to the remaining working time for the duration of the process, taking into account the personal working time and holidays of the assigned user.

To do this, click the respective user in the first column. A resource plan overview will open. Clicking the **Reset manual distribution** button in the **ETC** row, you overwrite your planning with the automatic even distribution values.

$igcap_{ extsf{h}} \leftarrow ert$ eroj	jects	Project planni $ imes$	+				
î\$} ™ [↑] To		Project planning					
			▼ Time budget	ETC		CW 41	
Software delevop	Software delevopment for NOMOSYS Inc.			33.5 PD		3 PD	
→	3 Services 98/15/2022 - 11/04/2022 Programming			21 PD		1 PD	
→ 🗱 3.3 Install	lation - 10/24/2022 Service		6 PD	6 PD		1 PD	
5	Cancel	Edit resour	ce plan		Save	1 PD	
→	3.4 Use 10/24/2 Image: F Image: F Image: F Image: F						
• • • • • • • • • • • • • • • • • • •	ette 6 PD 00 hr	s 00 mins 00 secs			٥ راس	2 PD	
Robe Projec	User				Re	set the manual distribution	
Mich CEO	Antonio Mataraz	ZO				1 PD	
◆ Project clo 11/04/2022, №							
Robert Glade Project manager			_	Details >	Edit		
Peter Grayhound Sales manager	d						

23.5.3 Inxmail

ŵ) 🔶 🔚 Share It	+								?	\Box
	Distribution list					Distribution list				000	Edit
21	Vernissage invitations CAS genesisWorld, Active	General /	Address status	Inxmail							
21	Trade fair tickets 2020 CAS genesisWorld, Active	Company	Form of a	First name	Name	E-mail	Locked	Undelivera	Status	Subscribed on	Un
41	Trade fair tickets CAS genesisWorld, Active	Inxmail Sh	Mrs	Zoe	Mercedes	zoe.mercedes@cas.de	\checkmark		Logged on	07.09.2022, 14:31	
122	Share It Inxmail, Active	Inxmail Sh	Mr	Wolfgang	Kralmann	wolfang.kralmann@cas.de			Logged on	07.09.2022, 14:40	
21	Sales campaign 2019/20 CAS genesisWorld, Active	Inxmail Sh	Mr	Julian	Obert	julian.obert@cas.de			Logged on	22.09.2022, 12:30	
21	Newsletter - New Prospects Inxmail, In preparation	Inxmail Sh	Mr	Kevin	Malfed	kevin.malfed@cas.de		\checkmark	Logged on	07.09.2022, 14:31	
21	Newsletter - CRM News Inxmail, In preparation	CAS Softw		Max	Mustermann	business@cas.de			Logged on	07.09.2022, 14:31	
11	Distribution list marketing ca CAS genesisWorld, Active	Inxmail Sh	Mrs	Rubi	Glaser	rubi.glaser@cas.de			Logged on	07.09.2022, 14:40	
	Anniversary mailing list Inxmail, Active										
											•

In the desktop client, the **General** tab for a distribution list of the **Inxmail** distribution list type displays all recipient addresses even for distribution lists in the **Closed** distribution list status.
Distribution lists of the **Inxmail** distribution list type can be created and edited in CAS genesisWorld Web. The range of functions is comparable to CAS genesisWorld Desktop:

Adding and removing contacts to and from suitable distribution lists.

You cannot remove contacts from distribution lists of the **Inxmail** distribution list type as these contacts have to be unsubscribed.

- Displaying an Address status tab with a detailed view of the recipient addresses in the distribution list.
- If your administrator has configured OpenSync, then your Inxmail synchronizations will be performed at regular intervals through OpenSync.
- The Validity can also be customized in CAS genesisWorld Web in the contact. To this end for authorized users, there is the Inxmail block for contacts.

Note: In CAS genesisWorld Web you will not be able to check the contacts of a distribution list (that is whether the e-mail address exists or is correct).

23.6 CAS genesisWorld SmartDesign Mobile App

- CAS genesisWorld SmartDesign Mobile App 24.4.0
 - The data record dossier can now be searched offline.
 - Configuring locked columns in the Management Console also affects the Mobile App. This function requires a CAS genesisWorld x14.1.1 application server or higher.
 - Searching for product items in opportunities is no longer limited to five results.

23.7 CAS genesisWorld Add-Ins

We have revised the window for entering logon credentials in the CAS genesisWorld Outlook Desktop Add-In.

dd-in options		
CAS genesisWorld		
Use the extend	ed Microsoft Outlook integration with CAS genesisWorld	
Authentication —		
Server name	demo.cas.de 🗸	
Port	443 🔶 🗸 Use SSL	
Database	DEMODB ~	
○ Windows	Logon data	
User name	Robert Glaser	
Password	•••••	
Domain	Demo	
	Log on	
Display CAS	genesisWorld sidebar	
🗸 Open data re	cords from Add-In	
Client	CAS genesisWorld Web $$	
Address	https://demo.cas.de/smartdesign/	
🗌 Open dir	ectly after transferring or archiving	
	OK Cancel App	ly

24 CAS genesisWorld x14.1.2

24.1 Updated instructions

- We have updated the online help "Working with several modules" in both English and German for the new x14 main version.
- The administrator manual "CAS genesisWorld installation and set-up manual" is now available in English for the x13 version.

24.2 General

Postal code data has been updated.

24.3 CAS genesisWorld Desktop

Changed: Synchronization preset for company formation

Yes, is now activated by default for the synchronisation of address fields in company formation.

• Completed in % field for tasks

If the **Editing status** field value is changed to **In progress** in a list of tasks, then a value of **50** is entered automatically for the **Completed in %** field.

24.4 Management Console

Creating an OAuth2 provider

In the **Miscellaneous** area > **Authentication (OAuth2)** section, you can enter any provider you like in addition to **Microsoft Exchange Online** and **Microsoft Teams**. For example, Google Workspace (Google for business customers) can now be used as an OAuth2 provider for e-mail accounts in CAS genesisWorld.

The window for creating or editing an OAuth2 provider has been expanded to include information on **Endpoints** (authorisation and token) as well as **Scope** and **Forwarding URI**.

The required information can be found in the documentation of the respective OAuth2 provider, where it is first necessary to register a corresponding application.

Note on Google: First, a new project must be created and configured on the Google Cloud Platform.

Please note that according to the standard, only one call is made with all scopes entered. Normally, these are to be entered with spaces, whereby details depend on the provider.

Even if the forwarding URI is sometimes to be entered with ports, the ports must also be entered in the corresponding field for correct saving.

Imported users now receive the additional rights under the **Default** user account

If **Active Directory** user accounts are imported, then the settings for the **Default** user account on the **Other rights** tab are applied, in addition to the settings on the **Membership** tab and the **Rights** tab.

24.5 CAS genesisWorld Web

More actions: Entering the current user

You can use the **Current us**er value for a user field. As soon as the action is executed, the user that is currently logged on is entered. A user field is, for example, the **Person responsible** field in an opportunity.

Cancel			New action			< Back	Next >	Save
1 General	Define the changes	that will be	e made through the actic	on.				
2 Action								
	Table field Processed by	~	Type of change Overwrite field value	~	New value	ser	^	\times
	Add row				R Brenda Gl Secretary	adis		
				-	Conference 15 places	e Room		_
					Reter Gray Sales / Train	er		
					Robert Gla Sales Mana	a de ger		
				This	vi Car	n		

Adding contacts via a distribution list

Contacts from another distribution list can be added to the open distribution list via a new button in the **Contacts** block.



Creating and editing receipts

Using the suitable app in CAS genesisWorld you can create and edit receipts. Rights set in the Management Console are taken into account.

Receipts created with Easy Invoice cannot be edited.

To work with receipts you need to have ERP connect, OpenSync or Easy Invoice running.

24.6 CAS genesisWorld SmartDesign Mobile App

- CAS genesisWorld SmartDesign Mobile App 24.3.0
 - External participants in appointments can be edited if you have invitation management enabled.
 - In contact data records opened for editing, you can search for company data through the Unternehmensverzechnis.org service.
 - Holidays can be created and edited.

25 CAS genesisWorld x14.1.1

25.1 Releases

Azure SQL database

The database has been released under the following conditions:

• An Azure SQL database cannot be created via the CAS genesisWorld database.

Create an empty Azure SQL database in Azure, then transfer the structure and data from an existing CAS genesisWorld database to the new Azure SQL database you just created.

You can do this using the Data Migration Assistant from Microsoft. For more information, please see <u>https://docs.microsoft.com/de-de/sql/dma/dma-overview?view=sql-server-ver16</u>

- Please note, it is not possible to change a character set or switch to Unicode afterwards with an Azure SQL database.
- Cloning a domain for a laptop is neither possible from or to an Azure SQL database.

25.2 General

We have updated the process for updating the CAS Smart Add-on and CAS Word Add-In.

As of this version, updating is usually only essential when updating to a new main version, for example, from CAS genesisWorld x13 to CAS genesisWorld x14.

25.3 CAS genesisWorld Add-Ins

The logic for creating primary links for archived e-mails has been changed.

Archiving e-mails you received using drag and drop

The first time you archive an e-mail you received using drag and drop, a primary link is created to the data record to which you dragged or dropped the e-mail. If this data record already contains primary links, then the existing primary links are also adopted for the archived e-mail.

If the e-mail has already been archived and a primary link was entered, then a general ink is entered in addition to the existing primary link. An existing primary link is therefore not overwritten.

Archiving e-mails with the Send & one-click archiving function

If an e-mail is one-click archived during sending, then a primary link is now also (as far as possible) suggested for the first data record selected.



25.4 New module functions

25.4.1 Report/Project/Helpdesk

Changing filter conditions in views

Now, when opening board views, reports views and timeline views from a list, you can change the filter conditions directly in the view.

The filter always applies equally to the list, board, report and timeline views, and remains intact even after being changed and switching between these views, even if the changes are not saved.

After closing and re-opening a list view from the home page of the associated app, an unsaved changes to the filter are no longer available.

You can save changes to the filter for your own views by clicking Save changes.



For public views, changes to the filter can only be saved in the view in the corresponding navigator in the desktop client.

26 CAS genesisWorld x14.1.0

26.1 Discontinuation announcements for CAS genesisWorld x14

Planner view in CAS genesisWorld Desktop

The planner view displaying the activities of multiple users is no longer available.

However, the **Planner (interactive)** view will continue to be available, you will find this, for example, in the Project module.

Only ActiveSync capable recurrences

Recurrences, for example, for appointments or tasks can only be created in ActiveSync capable formats. With this, the option will no longer be available in the Management Console.

Reports can no longer be exported as XLS files

It is no longer possible to select .xls as the format for exporting reports using the Report module. You can use the .xlsx format instead.

26.2 General

New language version: Polish (PL)

As of this version CAS genesisWorld is also available in the Polish language

The SmartSearch index has been rebuilt

When first starting the **ElasticSearch** service in the Server Manager after installation, the SmartSearch index is rebuilt. Depending on the size of your database this can take some time.

Only ActiveSync capable recurrences

Up until now, you could also create recurrences which were not ActiveSync capable, if your administrator had enabled this. In this case, the following changes apply for users:

- The order of the elements has to remain the same, so that for example, a later appointment cannot be moved before an earlier one in the recurrence.
- In the scheme for a month, only a day of the week can be selected. Accordingly, two series must be created if entries are to be present on 2 days in the month.
- In addition, a fixed day can be selected in the scheme for a month, for example, every 10th day of a month.
- The Skip days automatically (maintain length of recurrence pattern) exception, is no longer possible.

Series with a repeating scheme that no longer fits can still be edited.

Crystal Reports/Reports

Crystal Reports or reports are available in the new design. Individually customized reports remain the same.

Adapted installation

The .NET Framework 4.8 is now included in the installation. The previously installed .NET Framework 4.6.2 is not deinstalled and remains on the computer.

26.3 CAS genesisWorld Desktop

Essentials of the new design

General

Rounded corners play a big role in the design language of Windows 11, which has been consistently taken up as a design element.

The new icons concentrate on the essentials.

CAS genesisWorld (Robert's PC) - Robert Glade Q Search S							
File Edit View Insert	Search Tools ?						
🔏 New 🗸 🕞 Write e-mail	🚀 Address wizard 🛛 🛱 Globa	search \vee					
⊙ View	< My Opportuni	ties +					
🖂 E-mail							
LE Address Public)	Subject	✓ Filter for					
C Appointment		D charter the SO card	Children G				
😋 Campaign	-> Action	Short notes < Send		o New link ~ 🔳 Repo	rt		
Distribution list endar	To group	the coloumn headers, drag them to this	area				
Document endar	Start 🗸	Subject	Phase	Probability	Status		
Event lar Deputy	12/10/202	20 Server, soft	Lead	60	Open		
:ở: Holiday Ialendar	12/10/20	20 Conjunt coft	Lord	60	Mon		
🗂 Job r for Plann	ned Visit	Servel, Solt	Leau	60	Woll		
Ce Lead t Activities	12/10/20	20 Server, soft	Lead	60	Won		
Opportunities y Overview	v Sales 12/10/20	20 Server, soft	Lead	60	Won		
Phone call ities	12/10/20	20 Server, soft	Lead	60	Won		
ළි Product group tunities: C	urrent 12/10/20	20 Server, soft	Lead	60	Won		
Product portuniti	ies 12/10/20	20 Server, soft	Lead	60	Won		
Project r of All Op	portunities	· · · · · · · · · · · · · · · · · · ·					
 Registration ner 	12/10/20.	20 Server, sort	Lead	60	won		
Report Progress	12/10/20	20 Server, soft	Lead	60	Won		
Survey	12/10/202	20 Server, soft	Lead	60	Won		
ask Task	12/10/20	20 Server, soft	Lead	60	Won		
> 🖻 Marketing Material	12/10/20	20 Server, soft	Lead	60	Won		
> Marketing	12/10/20	20 Server, soft	Lead	60	Won		

Numerous separator lines have been removed from the program window, such as around the menu bar.

SmartSearch

SmartSearch is displayed centrally in the title bar of the program window. The background color of the icon is red and can no longer be customized by users.

If CAS genesisWorld is started on a remote desktop and the window is displayed in full screen, SmartSearch is placed at the height of the menu.

Navigator

The gaps in the navigator are larger. The active view is highlighted by a red bar on the left side of the navigator, by a different background color and a colored icon.



You can configure the navigator to display color icons.



Font colors for list overviews

The font colors for list headings have been extended to include the **dark gray (CAS)** option and defined as a new standard.

Icons

The icons for data record types and the tool and menu bars have been completely revised. These new icons are now displayed in monochrome in the tool and menu bars.

For data record types a **colored** display can be selected in the **settings**.



Colors

The colors of the light and dark color schemes have been adapted.

Robert Glade	Customer	Robert Glade	Customer
ය Dashboard	^	යි Dashboard	
✓	Name Company Town 👻 Filter for	✓	Name Company Town 👻 Filter for
✓ ☐ Contacts	🦊 🖏 – 🗹 – 🗟 Create documen	✓ ☐ Contacts	📫 🖏 – 🖾 – 🗟 Create docume
🔲 Customer	To group the column headers, drag the	🗾 Customer	To group the column headers, drag th
🗊 Supplier	I Type Company 🗛 🚺	🗊 Supplier	i Type Company \land 🜖
Prospect	EN Custome 4FRont GbR	Prospect	EN Custome 4FRont GbR
Partner		🗊 Partner	
Employees	B ^{III} Custome Bimbaum & Hempel UK	Employees	III ⁹ Custome Birnbaum & Hempel UK
同 Companies	Oustome Bimbaum & Hempel UK Ok	🗊 Companies	🖉 Custome Bimbaum & Hempel UK
圖 Contact person	🖉 Custome Bimbaum & Hempel UK	鋼 Contact person	🖉 Custome Bimbaum & Hempel UK
Individual contacts	Custome Bimbaum & Hempel UK	Individual contacts	🖉 Custome Birnbaum & Hempel UK

Lists

We have increased the size of the line spacing in lists.

To group the column headers, drag them to this area.						
Company 🔨	Country	Sector	Postal code	Town	Phone (switchboard)	
ACC Technics Ltd	Großbritannien	Transport	M15 5PN	Manchester	+44 161 359-0	
ACC Technics Ltd	Großbritannien	Transport	M15 5PN	Manchester	+44 161 359-0	
ACC Technik GmbH	Germany	IT and Telecommunicat	68167	Mannheim	+49 621 359-0	
ACC Technik GmbH	Germany	IT and Telecommunicat	68167	Mannheim	+49 621 359-0	
Agency CCC	Großbritannien	Consulting	BS5 9SP	Bristol	+44 117 5456456	

In the Settings you can select a compact display for lists.

List settings	
Display	
Color of data area:	default color
Color of the free section:	default color
Font color in lists without adjustable view format:	black
Color every second line with the following color:	default color
🗌 Draw grid	
Compact display	

Dashboard

The dashboard has also been revised. For example, the gray bar at the headings of the blocks has been removed and the blocks also have rounded corners.

CNN Europe
US woman tries to track down owners of Soviet-era album in Ukraine, but has few
Images of the war in Ukraine have inspired people worldwide to search for ways to try to help.
Canada Mavico
Poilo
Task deadlines This view does not contain any data.
· · · · · · · · · · · · · · · · · · ·

26.4 CAS genesisWorld Web

New online help

The online help has been revised and has a new design. You can access the online help by pressing F1.

Selecting multiple distribution lists as recipients simultaneously

As the recipient of an e-mail campaign, you can add the contacts of multiple distribution lists in one go.

🕥 🤶 🖪 Sales campaign 🕂			Q 🕑 📑
Last opened Sales campaign 2021/22 CdS genetisWorld, Active CdS genetisWorld, Preparation CdS genetisWorld, In preparation CdS genetisWorld, In preparation CdS genetisWorld, In preparation	Subject Sales campaign 2021/22 Contacts C Peter Scheer C Peter Scheer C C Subject Scheider C C Subject Scheider C C Subject Scheider C C Subject Scheider C C Subject Scheider C C Subject Scheider C C Subject Scheider C C Subject Scheider C C Subject Scheider C C Subject Scheider C Subject Scheider C Subject Scheider C Subject Scheider C Subject Scheider C Subject Scheider C Subject Scheider C Subject Scheider C Subject Scheider C Subject Scheider C Subject Scheider C Subject Scheider C Subject Scheider C Subject Scheider C Subject Scheider C Subject Scheider C Subject Scheider C Subject Scheider C Subject Scheider Sc	Cancel Add distribution list Apply Q. search Last opened Image: CAS genesative of RL in preparation Image: CAS genesative of RL in preparation	Authorized persons Image: Comparison of the second secon

Adding and subtracting distribution lists

Using the action menu, the opened distribution list can be subtracted from or added to another distribution list.

Distribution list	000	Edit
	Add distribution list	
	🕗 Display change log	
	d[] Display report	
	Duplicate >	
pe rld	C ² Link with >	
atus	Remove distribution list	
	Send e-mail to authorized persons	
	₩ Write to distribution list >	

Writing to contacts with the default e-mail client

The **Write e-mail > Write to contacts** function is available for highlighted addresses in a list.



The default e-mail addresses present in the contacts can be entered into the To, CC or BCC fields of the default e-mail client used.



In some cases, the e-mail addresses cannot be automatically transferred to the e-mail client as the number of characters that can be copied automatically, for example by the browser, is limited. Then a window will open to allow you to copy the addresses manually in one go.

Your selection contains too many e-mail addresses and can thus not be automatically transferred to the e-mail client. Copy the e-mail addresses displayed below to the dipboard and insert them as e-mail recipients. Press Ctrl + C to copy the contact data into the clipboard. electronic.co.uk/info@ferani.it/sabine.honigwachs@penthesilea.de:SabineMueller@muster.cas.de:info@bernoulli.de/ zaehringer@jago.de/MarkusKlass@muster.cas.de:pawlak- kuhlmann@pape.de/AntonioMatarazzo@muster.cas.de:pasquale.borromeo@SecuriT.de/Alessandro.Pellicano@yello whouse.it/info@cas.de/info@ikonodienste.de/info@smartsoftware.de/elega.wohrt@schmidtsoehne.de/BerndMeier @muster.cas.de/annamaria.detmold-tenne@penthesilea.de/ansgar.usedom@lancelot- enterprises.de/Hammersfield@LeedsLeading.co.uk/info@coctonergie.de/Frank.Rowinsky@argus- sicherheitsdienst.de/BrittaGlatt@muster.cas.de/HarryNicholson@YandP.co.uk/KarinKruse@muster.cas.de/info@kra merica.de/Summer@plymouth.co.uk/fuss@vossnet.at/wilhelm.seicht@smartsoftware.de/walter.berger@devemit.de/	Cancel	Copy into clipboard Open e-mail cl	ient
Press Ctrl + C to copy the contact data into the clipboard. electronic.co.ukinfo@ferani.it;sabine.honigwachs@penthesilea.de;SabineMueller@muster.cas.de;info@bernoulli.de; zaehringer@jago.de:MarkusKlass@muster.cas.de;pawlak- kuhlmann@pape.de;AntonioMatarazzo@muster.cas.de;pasquale.borromeo@SecuriT.de;Alessandro.Pellicano@yello whouse.itinfo@cas.de;info@ikonodienste.de;info@smartsoftware.de;helga.wöhrt@schmidtsoehne.de;BerndMeier @muster.cas.de;annamaria.detmold-tenne@penthesilea.de;ansgar.usedom@lancelot- enterprises.de;Hammersfield@LeedsLeading.co.uk:info@ctonergie.de;Frank.Rowinsky@argus- sicherheitsdienst.de;BrittaGlatt@muster.cas.de;HarryNicholson@YandP.co.uk;KarinKruse@muster.cas.de;info@kra merica.de;Summer@plymouth.co.uk;fuss@vossnet.at;wilhelm.seicht@smartsoftware.de;walter.berger@devemit.de;	(j)	Your selection contains too many e-mail addresses and can thus not be automatically transferred to the e-mail client. Copy the e-mail addresses displayed below to the dipboard and insert them as e-mail recipien	ts.
electronic.co.uk;into@ieranit.tsabite.nongwach.sopertriesitea.de;sabitervideler@indster.cas.de;into@berrobilit.de; zaehringer@jago.de;MarkusKlass@muster.cas.de;pawlak- kuhlmann@pape.de;AntonioMatarazzo@muster.cas.de;pasquale.borromeo@SecuriT.de;Alessandro.Pellicano@yello whouse.it;info@cas.de;info@ikonodienste.de;info@smartsoftware.de;helga.wöhrt@schmidtsoehne.de;BerndMeier @muster.cas.de;annamaria.detmold-tenne@penthesilea.de;ansgar.usedom@lancelot- enterprises.de;Hammersfield@LeedsLeading.co.uk;info@octonergie.de;Frank.Rowinsky@argus- sicherheitsdienst.de;BrittaGlatt@muster.cas.de;HarryNicholson@YandP.co.uk;KarinKruse@muster.cas.de;info@kra merica.de;Summer@plymouth.co.uk;fuss@vossnet.at;wilhelm.seicht@smartsoftware.de;walter.berger@devemit.de;	Press Ct	trl + C to copy the contact data into the dipboard.	^
PeterGrundmann@muster.cas.de;Schimmer@schwarzdruck.de;info@argus.de;info@nomosys.de;flegel@fum.de;karl heinz.scherer@westautomatik.de:phillip-	electro zaehrii kuhlm whous @mus enterp sicherf merica PeterC heinz.	onic.co.uk/info@refani.it/sabine.honigwachs@pennesilea.de;SabineMueiler@muster.cas.de;info@bernoulli.de nger@jago.de;MarkusKlass@muster.cas.de;pasquale.borromeo@SecuriT.de;Alessandro.Pellicano@yello se.it.info@cas.de;info@ikonodienste.de;info@smartsoftware.de;helga.wöhrt@schmidtsoehne.de;BerndMeier ster.cas.de;annamaria.detmold-tenne@penthesilea.de;ansgar.usedom@lancelot- prises.de;Hammersfield@LeedsLeading.co.uk/info@octonergie.de;Frank.Rowinsky@argus- heitsdienst.de;BrittaGlatt@muster.cas.de;HarryNicholson@YandP.co.uk/KarinKruse@muster.cas.de;info@kra a.de;Summer@plymouth.co.uk/fuss@vossnet.at:wilhelm.seicht@smartsoftware.de;walter.berger@devemit.de; Srundmann@muster.cas.de;Chimmer@schwarzdruck.de;info@argus.de;info@nomosys.de;flegel@fum.de;karl scherer@westautomatik.de;phillip-	
thomas.marinetti@mafarkag.de:YannisSahin@muster.cas.de:info@TrimAG.de:Smith@westautomatics.co.uk:EllenBa um@muster.cas.de:Fiona.Braun@birnbaumundhempel.de:asdfghj@asddfgh.xyz:SimonMackee@muster.cas.de:broc khoff@uni- konstanz.de;richard.zuetron@schuettler.de:gut@zachmann.de:MatthiasDaumann@muster.cas.de;FrankShreeve@ muster.cas.de:info@reisig.de:gertrud.beninski@futurAG.de:info@acc.co.uk;MichaelGrün@muster.cas.de;KatjaSchmi dt@muster.cas.de;info@horizon.de;info@westautomatics.co.uk	thoma um@r khoff@ konsta muste dt@m	as. marinetti@mafarkag.de; YannisSahin@muster.cas.de; info@TrimAG.de; Smith@westautomatics.co.uk; EllenBa muster.cas.de; Fiona. Braun@birnbaumundhempel.de; asdfghj@asddfgh.xyz; SimonMackee@muster.cas.de; broc @uni - anz.de; richard.zuetron@schuettler.de; gut@zachmann.de; Matthias Daumann@muster.cas.de; Frank Shreeve@ er.cas.de; info@reisig.de: gertrud.beninski@futurAG.de; info@acc.co.uk; Michael Grün@muster.cas.de; Katja Schmi uster.cas.de; info@neisig.de: gentrud.beninski@futurAG.de; info@acc.co.uk; Michael Grün@muster.cas.de; Katja Schmi uster.cas.de; info@norizon.de; info@westautomatics.co.uk;	~

26.4.1 App Designer

Scripting in the Premium Edition

Scripting is now available with the Premium Edition and unlocked accordingly in the App Designer. This allows CAS genesisWorld Web to be customized even more individually.

♦. You can open the script editor in many different locations where you see this icon, for example, with fields or input help options. In the editor simple and complex scripts

can be created based on TypeScript or JavaScript and thus used to define appropriate logic.

Speak to your partner for more advice on how to create suitable solutions. Please note that CAS Software cannot provide support for your own scripts.

Discontinuation of the business card element

<u>×13</u>		
Kahrmann Elektronik GmbH Dieselstrasse 176 76275 Ettlingen	+49 7243 8800-0 switchboard	Customer 🦻
Germany	info@kahrmann-elektronik.de central http://www.kahrmann-elektronik.de	
Kahrmann Elektronik GmbH	Switchboard 🐛 +49 7243 8800-0	Partner
Farmann Elektor Germany	Central ⊠ news@kahrmann-elektronik.de Homepage ^w w http://www.kahrmann-elektronik.de	
🗶 Мар		

We have removed the **business card** element. The new **Summary** element contains all the same content as the previous business card element. On the new **Details** tab you will see additional information on the contact, which previously was only displayed via a popup.

Discontinuation of **Document information**

The **Document information** element has also been removed and replaced by the new **Summary** element. Additionally, we have improved the graphics of actions for the display and editing of documents.



Automatic hiding of tabs

Registers with empty fields only are not displayed, because automatic hiding can be set for registers.

Automatically hiding the tab bar for just one tab

The whole tab bar is not displayed, if just one tab is available in a data record window.

Tab layout for data record windows for standard apps

The tab layout is now operational for all data record windows. Previous content can be found on the **General** tab, as long as a tab layout has not yet been used. The name of the tab is however only displayed, if content is available on several tabs. The display for users therefore remains the same for the time being.

Each register has an extension point for SDK extensions.

Assistant layout also in read mode

The layout option has been removed from the App Designer toolbar for standard apps, as the option is set automatically. The tabs have been extended so that the assistant layout can also be used in read mode.

Tab layout

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₽ R	Kahrmann electronic Ltd. Landon			-
Ħ	Tungsten Failsafe	Kahrmann Elektronik GmbH Dieselstrasse 176	Switchitourd	Factor
R	Blackwater Solutions	76275 Ettlingen Baden-Württemberg Germany	Na +49 7243 8800-0 Cantral	
a:	Direwolf Mining Technologies		CD news@kahrmann-elektronik.de Honepage	
Ξ.	Colin Sizemore		2* http://www.kahrmann-elektronik.de	
88	Cubed - Industrial Analysis	🔮 Map		
×	Harrison Alloys & Sinter Tech Contact			
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×	Arkansas Systems KA	Max Kahumane Geschäftsführer	Permitted contact methods Black Diamond Analysis Report E-mail Mail Fax Phone Bhone	s >
	Wilma Bruser Kahrmann electronic 1bd.	📑 Thomas Leutner	Sales support Today, 0000 - A, Not started	>
A	Kahrmann electronic Ltd. London	Kai Rahner Technischer Leiter	Let contacted via Thank you note Tuday, 0000 - A, flux started	>
A	CasaTujo SA Medrid	Brigitte-Sabine Rudołf	> Call Mr Blam Today, 0000 - A, Not started	>

Assistant layout

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	Direwolf Mining Technologies	Communication	76275 Ettingen Baden-Württemberg Germany			% +49 7243 8800+0 Central		
11	Colin Sizemore	Tickets	Gernary			52 news@kahrmann-elektron	nik.de	
33	Cubed - Industrial Analysis					Thimpage The Strange S		
12	Harrison Alloys & Sinter Tech Contact		🖉 Мар					
12	Borrelson Machining							
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₽	Kahrmann electronic Ltd. London		Max Kahrmann Geschäftsföhrer	>	Permitted contact methods E-mail Mail Fax Phone		Black Diamond Analysis Reports Today, 00:00 - A, Not started	>
H *	Kahrmann Elektronik GmbH Ettlingen		Thomas Leutner	> Contact person	Sales support Today, 00:00 - A, Not started	Sales support Today, 00:00 - A, Not started	>	
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周期	Kahrmann electronic Ltd. London		Brigitte-Sabine Rudolf	>	Appointment	1	Call Mr Ellam Today, 00:00 - A, Not started	>
雨	CasaTujo SA Madrid		Extended list	>		1	EMP contigencies Today, 00:00 - A, Not started	>

You can still edit the layout for apps you create yourself. Here you can define the position and display of the tab bar in the tab layout.

	App Designe	r	000	Preview	← Undo	× Disc
			Ū	Copy edit mode		
				Edit layout		
Cancel	Edit layout		_			_
Default layout	Tab	ayout				
The default layout allows you simple form using the standa elements,widgets and fields.	u to create a The ard layout com elen diffe whic area	tab layout allows you to create a more plex form with the standard layout ents by aligning widgets and fields on rent tabs. You can also select a widget h will be displayed in all tabs in the upper of the window.				

• Adjustable height of the progress bar

You can define the height in pixels for the progress indicator.

80 %	80 %	80 %
------	------	------

Icon for data record type in the summary

In the upper left-hand corner of the summary, you have the option of displaying the icon for the data record type.

Mercantile software, training status: won		Gold customer
Total 17,000.00 EUR Probability 25 % Total weighted 4,250.00 EUR	Customer Dr. Emma Welsh Technical solutions Person responsible Robert Glade	>

Automatic update for lists

You can choose how long you want the interval to be in minutes for list updates.

Frequent updates can influence the performance of the Application Server, particularly when there are a lot of users.

Background color for fields

You can define a background color for database, script and link fields as well as for linked database fields.

The color can be defined using scripts and is thus independent of field values and aggregations.

Status	Custome	r Dr. Emma Welsh Technical solutions	>
Editing status In progress			
% Complete			
Priority A			
Start Today, 15:00			
End 16.08.2022, 10:00			

26.5 New module functions

26.5.1 Inxmail Professional

The synchronization with Inxmail is now based on the OpenSync framework. Accordingly, after the update, the credentials for the REST API of Inxmail and other data must be entered in the Management Console in the **Miscellaneous** > **Inxmail area**.

Before updating, make sure you have appropriate credentials available.

After entering and saving the data, a synchronization task is automatically created which can then be started by the administrator. During the first synchronization run, all

addresses that are included in active Inxmail distribution lists are synchronized with the dedicated Inxmail mailing list. This initial synchronization can take some time.

For more information on the settings please see the user guide at <u>CAS genesisWorld</u> <u>knowledge hub</u>

Several points have changed for users.

The synchronization automatically runs every 10 minutes and all changes to addresses in distribution lists are transferred. In the Last synchronization field, you can review when a distribution list has last been updated.

Users currently cannot manually transfer addresses.

- Removing addresses from distribution lists in CAS genesisWorld corresponds to unsubscribing. This means that if an address has been removed from the distribution list, it will be marked with the **Unsubscribed** status in the distribution list after the next synchronization.
- You can no longer define in the distribution list how new addresses in Inxmail are processed in CAS genesisWorld.

Addresses are synchronized from Inxmail to CAS genesisWorld as soon as they are added to the general list, for example, by an action. If addresses are only added to distribution lists at Inxmail, they will not be synchronized.

Addresses are considered to be known addresses if they can be clearly assigned to an address in CAS genesisWorld via the e-mail addresses or, if applicable, additionally via first and last names. Then this address will be added by the synchronization also in the corresponding distribution list.

If the e-mail address in CAS genesisWorld is unknown or could be assigned to multiple addresses, a new address is created in CAS genesisWorld. In this case, **Inxmail** is entered as the **First contact**, the current date as the **Date of first contact**, and **E-mail** as the **Permitted contact type**. Likewise, values are entered in all fields that are also synchronized.

 Reports or analyses of click behavior in e-mail campaigns can no longer be accessed in CAS genesisWorld, but only in Inxmail Professional.

For more information, please see our user guide at CAS genesisWorld knowledge hub.

26.5.2 Report

Displaying report views for combined lists

In the action menu for a combined list, you can select **Report view** and switch to a report display.

Customers and +				? ⊇
\equiv <u>Q</u> Search	Z Custome	rs and projects	5	
🔞 Display available views	. Name (Customers)	Town (Customers)	Subject (Projects)	
edit view >	Jones	Liverpool	Consulting 4Front Ltd.	>
D Report view	Smith	Manchester	CAS genesisWorld for Computeam Inc.	>
Save view as app	Miller	London	CAS genesisWorld for Devemit Ltd.	>
Select columns	Miller	London	Software delevopment for Devemit Ltd.	>
Devemit Ltd. Walter	Miller	London	Custom software delevopment for Devemit	Ltd. >

In the report view, all fields of all data records from the combined list as well as the **Number** and **Link type** for the associated links are available in the **Field selection**.



Save changes will open the view using these settings for the report view, until you change them, these settings will continue to apply.

The configuration is saved per view and user. So different users can save different reports to the same public view.

Multiple selection in the table and filtering of the list

In report views, you can select multiple cells or remove a cell from the selection by clicking on it while holding down the Ctrl key.

G 🔶 📑 Cust	tomers and			? [-]	
\equiv \bigcirc Field sele	ection Cust	omers and prospects by	000 X		
Move filter fields to the	his location		Addresses 🗳		
Count	Туре † Т			Edwin-Ralf Baldur	
Country 1	Customer	Prospect	Total	Franke Unternehmensber >	
country				Fuss OHG	
Austria	3	1	4	Julia Schneider >	
Denmark		1	1	Penthesilea Wuppertal	
Germany		1	1	Werner Klein	
Italy	1		1	Michael Schirin	
Spain		2	2	Schirin Mediadesign	
Switzerland	1	1	2		
United Kingdom	6	10	16		
Total	12	16	28	Total: 7	

The list of records on the right side of the view shows all records of all selected cells.

For performance reasons the list will only display a maximum of 500 data records. Clicking the button with the arrow in the upper right-hand corner opens an extended list, which as before can display up to 9,999 data records.

Microsoft Excel export in XLXS format in the desktop client

You can now switch the export in the analysis table from XMLS to XLSX, if you have sufficient rights to do so.

26.5.3 Report/Project/Helpdesk

Switching quickly between views

You can now switch directly between the individual views via the view menu in the board view, the report view and the timeline view.

Additionally, you can open the respective card view.

My opportunities +		? ₽
	My opportunities	+
III Map view	Presentation	Offer
Report view	Σ 17,622.71 GBP	Σ 10,725.00 GBP
Timeline view	ERP software & standard	Terminal workstation & st

Board view for opportunities grouped by the **End** field



You can now group board views for opportunities after the opportunity has ended. A column is displayed for each month.

Select End (month) as the grouping field in the settings to activate this function.

My opportuniti	es 🕂	? ⊒
≡ î\$	Cancel View properties Apply	
Until July 2022 Σ 13,422.62 GBP	Use the following field for grouping End (Month)	
Office software Sale 2.700.00 GBP	Display the following column values of the grouping Until × From × Number of columns months	Apply
Office software & standa Sale 10.317.62 GBP	Use the following field for the sorting 1. row \checkmark $\overset{2}{}\downarrow$ Until	
Office software & standa Sale 405.00 GBP	Use the following field for the sum row Total weighted × · · From	
		• • •

The columns **To** and **From** are available as additional columns besides **Not assigned** for opportunities which do not have an end. These each show all the opportunities in the view, whose end date is before the current month or after the last month that was set.

Use **Number of columns months** to select the number of monthly columns. The first monthly column is always the one for the current month.

You can change the end date for the displayed opportunity using drag and drop in the board view. When moving to the **To** column, the end date is set to the previous month, when moving to the **From** column, it is set to the first month of the column.

As a rule, only the month changes. If the day is after the last day of the new month, it will also be changed to the next earliest day of the new month. For example, moving from August 31 to September will set the end date to September 30.

Quick unfolding in team planning and in the timeline

In the team planning and time line views, you will now see buttons available for the quick unfolding and folding of groups.

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>	Lead		E	xpand all	3 Opportu	nities				
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>	Sale				3 Opportu	nities				
										Ŧ
<	July 2	022		Augu	st 2022	September 2022	October 2022	November 202	2 December 2022	>

26.5.4 Survey online

Secure links to online questionnaires and surveys

As of version x14, the IDs of questionnaires, surveys and addresses in links to online questionnaires and surveys are encrypted with a database-dependent code that is generated when the database is updated to version x14.

This makes it difficult for potential attackers to read the IDs from the links or the data from questionnaires via manipulated links.

All new links created in version x14 contain the IDs of the questionnaires, surveys and addresses only in encrypted form: This applies to the publication of questionnaires, e-mails about surveys or corresponding e-mails from the notification service.

Links to questionnaires and surveys created before the update are still valid, provided that the publication period in the questionnaire or survey has not yet elapsed. Such links for questionnaires or surveys will be accepted by Survey online until the next but one major version.

For security reasons, we recommend that you no longer use the previous links. To set the encryption, publish the questionnaires again and send the new link to the addressees.

26.6 CAS genesisWorld SmartDesign Mobile App

- CAS genesisWorld SmartDesign Mobile App 23.15.0
 - Now, you can use the tab layout function when mobile to order different data record fields and elements on to diverse tabs.
 - From now on, analogous to CAS genesisWorld Web, new data records can also be created when creating or editing data records - for example, via link fields. The editing mode can now be retained.