

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

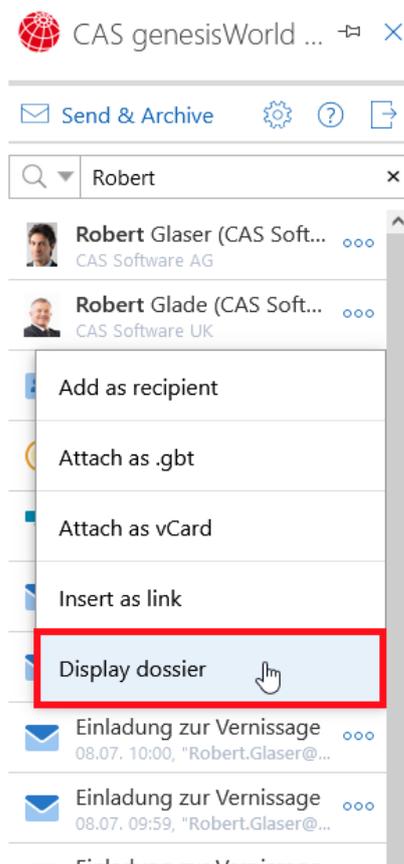
- Sending business cards in vCard format

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.

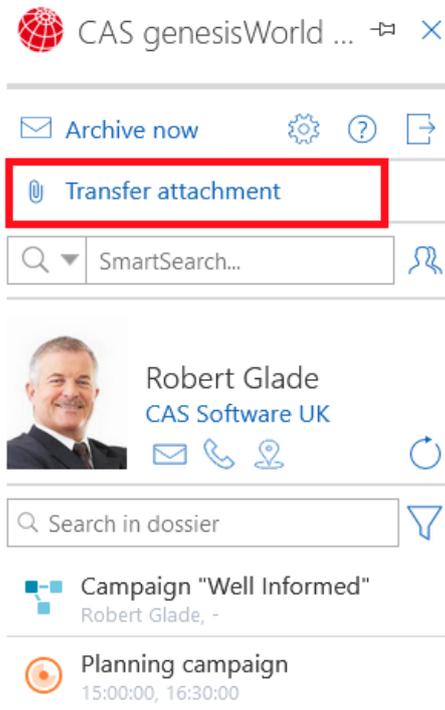
In the **Business card** section you can also send your own contact details in the vCard format if you wish. Only the data displayed beneath the QR code is sent as business contact data.

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.



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.

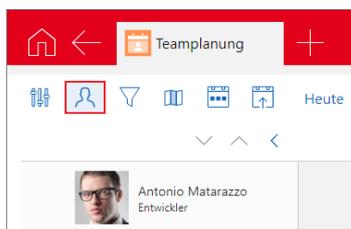
4.2 New module functions

4.2.1 Project/Helpdesk

- Appointments filter in the Team Planning app

🔍 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.

The image shows two side-by-side screenshots of the 'Add-in options' dialog box for CAS genesisWorld. Both windows have a title bar with 'Add-in options' and a close button (X). The left window (Figure 1) is titled 'CAS genesisWorld' and has a checked checkbox 'Use the extended Microsoft Outlook integration with CAS genesisWorld'. Under 'Authentication', there is a 'Server name' dropdown set to 'test.cas.de', a 'Port' dropdown set to '443', and a checked 'Use SSL' checkbox. A 'Log on' button is present. Below this, there are more options: 'Display CAS genesisWorld sidebar' (checked), 'Open data records from Add-In' (checked), a 'Client' dropdown set to 'CAS genesisWorld Web', an 'Address' text box containing 'https://test.cas.de/smartdesign/', and an unchecked checkbox 'Open directly after transferring or archiving'. At the bottom are 'OK', 'Cancel', and 'Apply' buttons. The right window (Figure 2) is also titled 'CAS genesisWorld' and has two radio buttons: 'Windows' (unselected) and 'Logon data' (selected). Below the radio buttons are a 'Database' dropdown set to 'DEMODB', a 'User name' text box containing 'britta glatt', a 'Password' text box with masked characters, and an empty 'Domain' text box. A 'Log on' button is at the bottom right. At the bottom of the window are 'OK', 'Cancel', and 'Apply' buttons.

Figure 1 Settings with a deactivated CAS Authentication Server

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

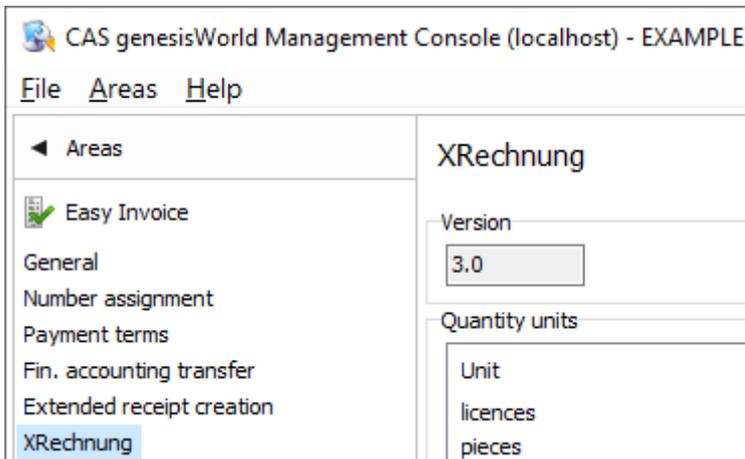
- XRechnung version 3.0.1

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.

- 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**.



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	x	x	x
WhatsApp	x	x	x
Skype	x	x	x
FaceTime	x	-	-

- 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.

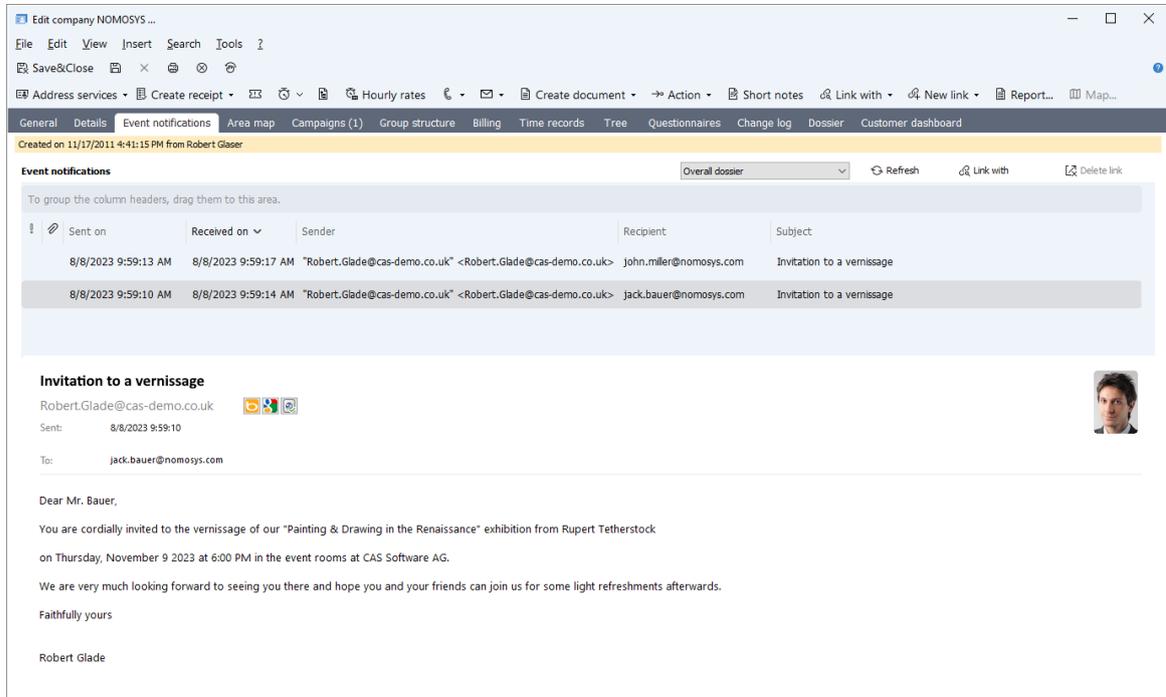
13 CAS genesisWorld x14.2.1

13.1 New module functions

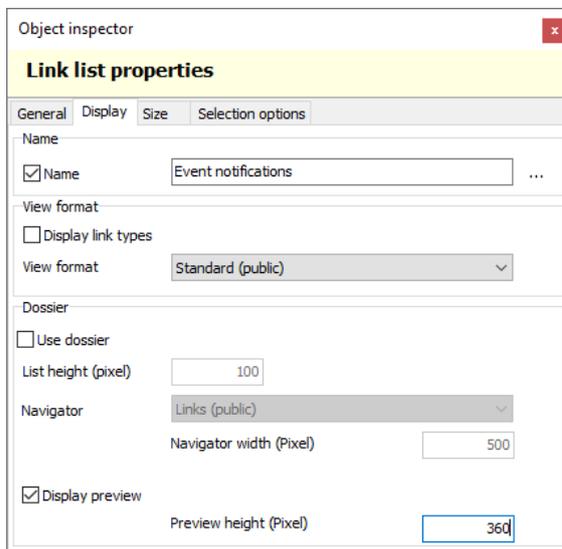
13.1.1 Form Designer

- 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.



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



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.

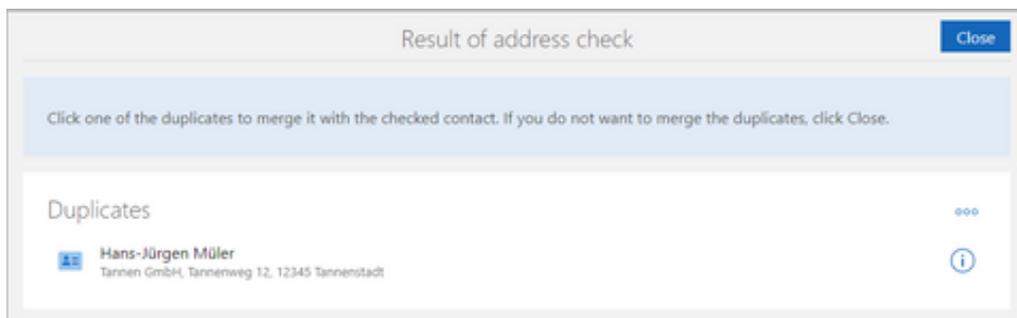
14 CAS genesisWorld x14.2.0

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 [Online Help](#)



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.

Checked contact	Duplicate*	Merged data
Hans-Jürgen Müller Tannen AG Tannenstraße 12 12345 Tannenstadt Select all data	Hans-Jürgen Müller Tannen GmbH Tannenweg 12 12345 Tannenstadt Select all data	Hans-Jürgen Müller Tannen AG Tannenstraße 12 12345 Tannenstadt
<input checked="" type="radio"/> Name Müller	<input type="radio"/> Name Müller	Name Müller
<input checked="" type="radio"/> Company Tannen AG	<input type="radio"/> Company Tannen GmbH	Company Tannen AG
<input checked="" type="radio"/> Salutation Sehr geehrter Herr Müller	<input type="radio"/> Salutation Sehr geehrter Herr Müller	Salutation Sehr geehrter Herr Müller X ▾
<input checked="" type="radio"/> Street Tannenstraße 12	<input type="radio"/> Street Tannenweg 12	Street Tannenstraße 12

* Basic contact: The data is merged in this data record.

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 [User guide Report](#).

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>
```

15.4 CAS 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.

The screenshot displays the 'Edit e-mail account' dialog box. At the top, there are buttons for 'Cancel', 'Send test e-mail', and 'Apply'. Below this is an information section titled 'Information on OAuth 2.0' with a warning icon. The main form is divided into several sections: 'Name' (Andrew), 'E-mail address', 'Access data' (User name, Authentication method: OAuth 2.0, Provider), 'Outbox server' (E-mail server, Port, Encryption), and 'Inbox server' (E-mail server, Port, Encryption). A checkbox 'Default account, e.g. for sending e-mail campaigns or appointment invitations' is checked. A status indicator shows '+ Authorization' and 'Status Pending'. A red error message indicates 'Provider' is mandatory.

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 Services** 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?onenumber=<number>
```

For example:

```
https://demo.cas.de/smartdesign/#type/address?onenumber=+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

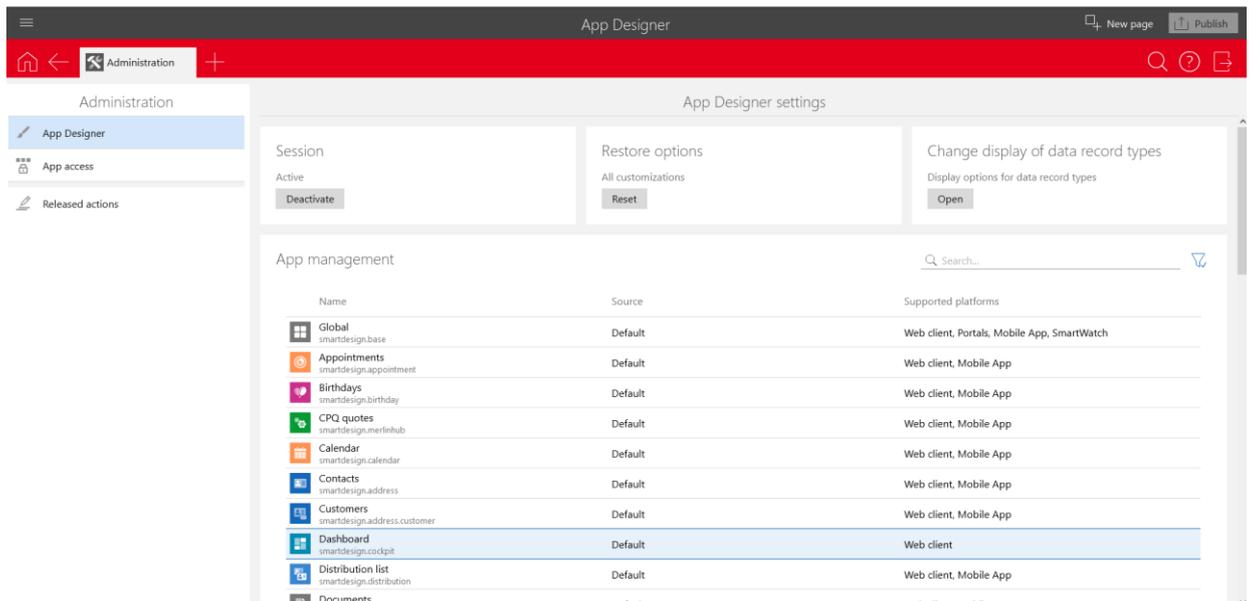
- Managing apps

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.



You will find more information in the documentation under:

<https://partnerportal.cas.de/SmartDesignSDK>

- 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:

<https://partnerportal.cas.de/SmartDesignSDK>

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.

- ✓ 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.

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

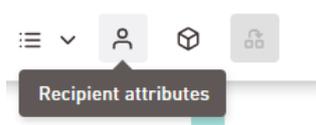
The user guide has been fully revised to reflect the content in version x14.1.4. The user guide is available as both a PDF and in the usual online help format.

- 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 be 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.svc/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.

The screenshot shows a dialog box titled "Properties of the OAuth2 provider". It contains the following fields and controls:

- OAuth2 provider:** A dropdown menu set to "Microsoft Azure AD SSO".
- Title:** A text input field containing "<<Any title >>|".
- Endpoint (authorization):** A text input field containing "https://login.microsoftonline.com/common/oauth2/v2.0/authorize".
- Endpoint (token):** A text input field containing "https://login.microsoftonline.com/common/oauth2/v2.0/token".
- Tenant ID:** An empty text input field.
- Application ID:** An empty text input field.
- Client secret:** An empty text input field.
- Scope:** A text input field containing "openid".
- Valid in all CAS genesisWorld domains:** An unchecked checkbox.
- Buttons:** "Save in file", "OK", and "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.

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 e-mails.

- 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.

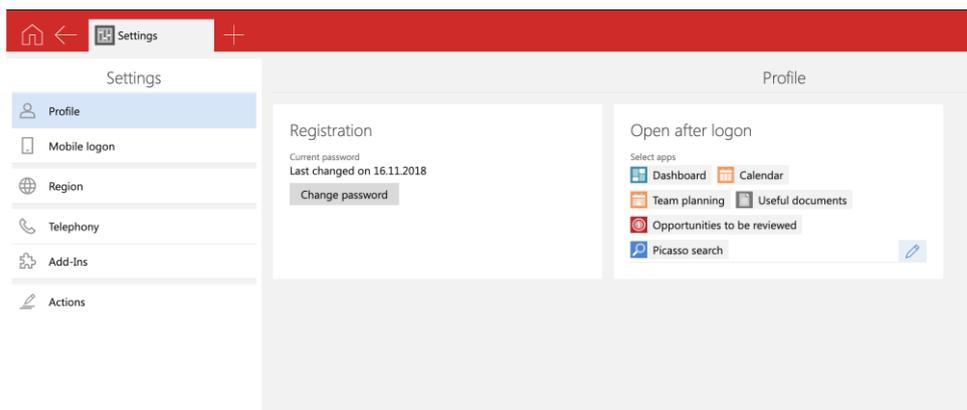
- Removed query regarding recipients for e-mail campaigns

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

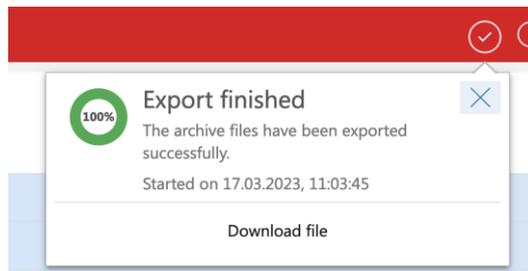
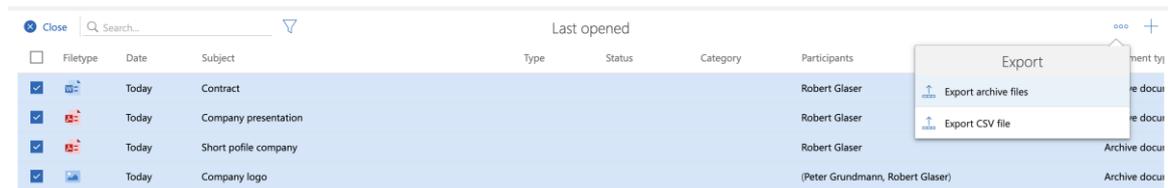
Now, in the **Profile** menu of the **Settings** app you can define up to 10 apps which will open automatically at the start up of CAS genesisWorld Web. You can select apps and views which have been saved as apps.



The apps will be opened in the order you set.

- Exporting multiple archive documents as a ZIP-file

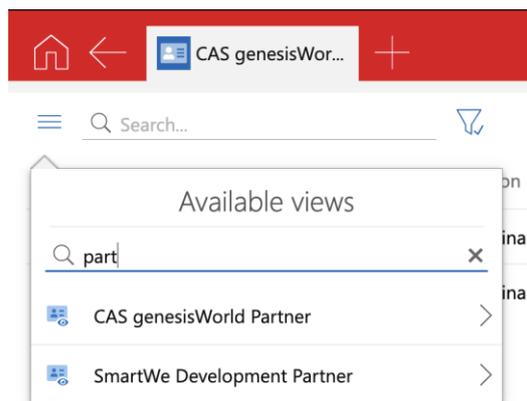
From a list of documents you can select multiple archive documents and create a ZIP-file out of them, which can then be made available for download via the title line.



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.



- 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

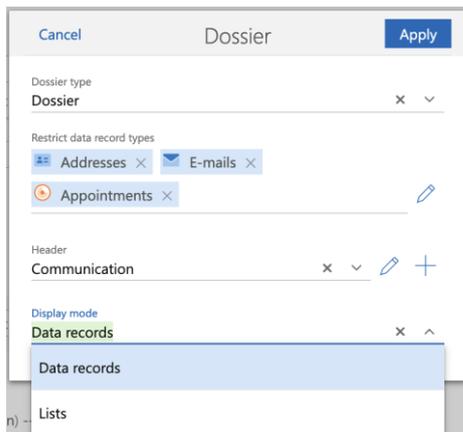
In a filter you can now use the following jokers: **First day of the current year, Last day of the current year, First day of the current month, Last day of the current month, This week.**

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.



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.

Grouping



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 report template

Name Address short info

Participants All (public)

External access private confidential

Notes Edit Time stamp

Data records Additional fields **Crystal Reports**

Crystal Reports Viewer
 Display group structure initially

Document

Options

Document language English

Document format English

Archive document

Use template

One document per record

Use Report visualization
 Report visualization first Crystal Reports first

Use Crystal Reports Design

Design Address short info Edit design... Select different design...

Save report template Cancel

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.

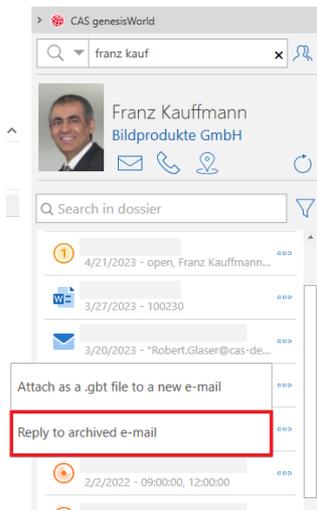
18.6 CAS genesisWorld SmartDesign Mobile App

- 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

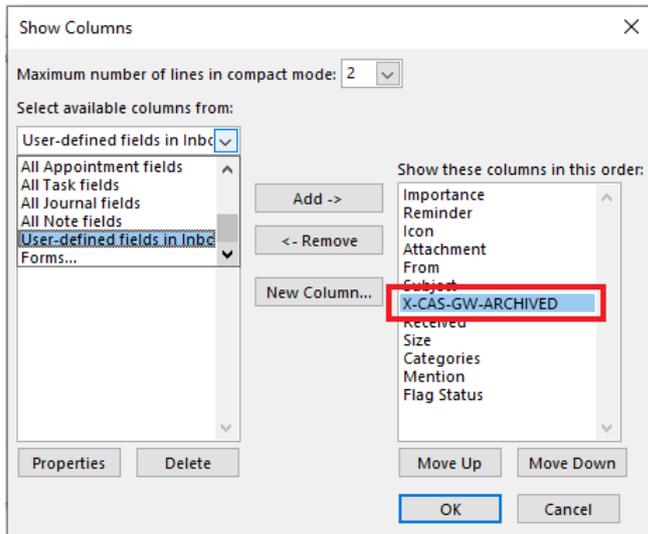
18.7.1 Archived e-mails

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

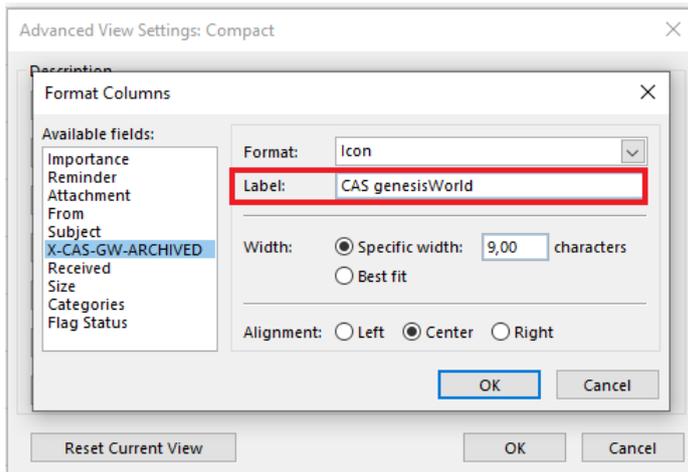


18.7.2 Displaying archived objects in Microsoft Outlook

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**.



You can select the name displayed for the column.



	FROM	SUBJECT	CAS GENESISWORLD	SIZE	CATEGORIES	MENTION
			<input type="checkbox"/>	49 KB	<input type="checkbox"/>	
			<input checked="" type="checkbox"/>	46 KB	<input type="checkbox"/>	
			<input checked="" type="checkbox"/>	44 KB	<input type="checkbox"/>	
			<input checked="" type="checkbox"/>	49 KB	<input type="checkbox"/>	
			<input type="checkbox"/>	48 KB	<input type="checkbox"/>	
			<input type="checkbox"/>	48 KB	<input type="checkbox"/>	
			<input type="checkbox"/>	48 KB	<input type="checkbox"/>	
			<input checked="" type="checkbox"/>	53 KB	<input type="checkbox"/>	
			<input checked="" type="checkbox"/>	39 KB	<input type="checkbox"/>	
			<input checked="" type="checkbox"/>	40 KB	<input type="checkbox"/>	
			<input type="checkbox"/>	45 KB	<input type="checkbox"/>	
			<input type="checkbox"/>	39 KB	<input type="checkbox"/>	

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.

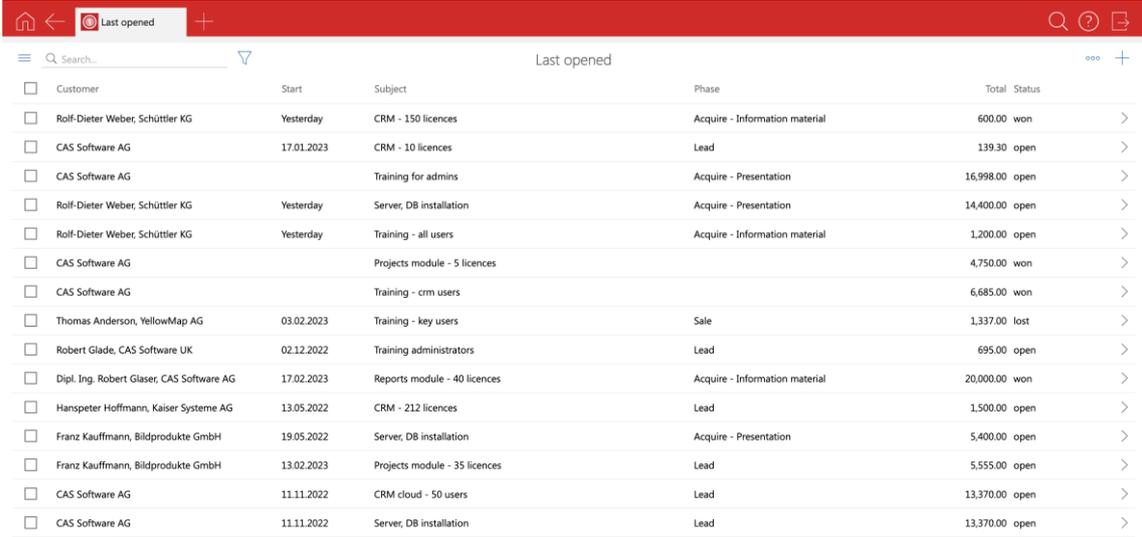
- The settings for color data record types have been extended

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

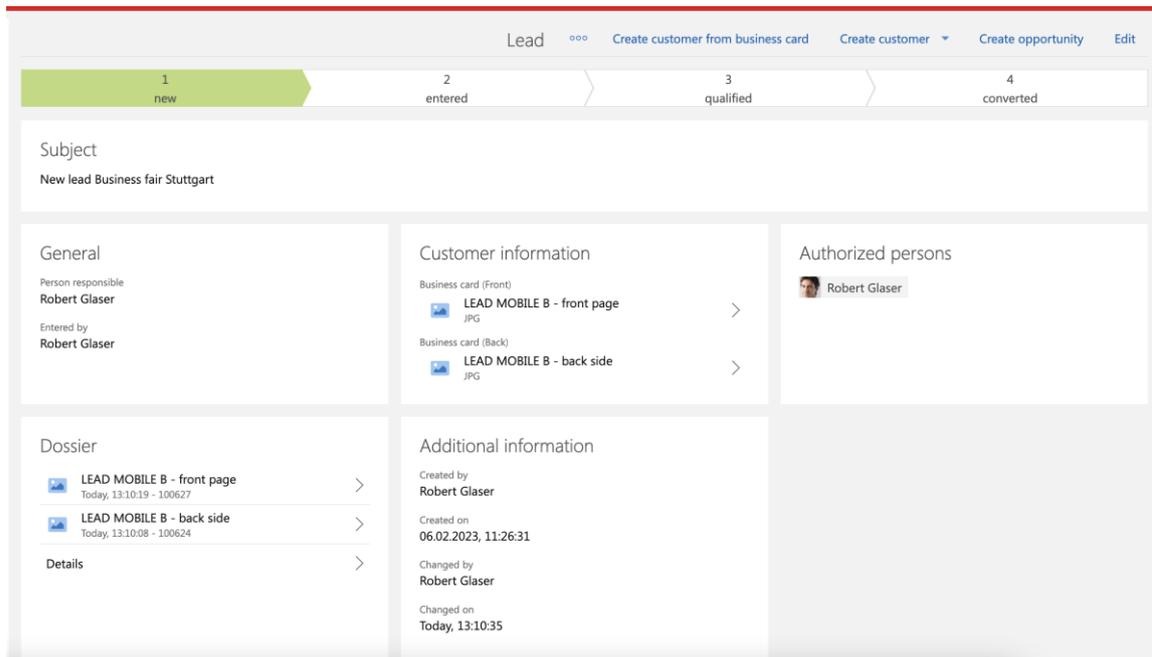
Fields of the number data record type such as int or decimal are now displayed right-justified in lists.



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

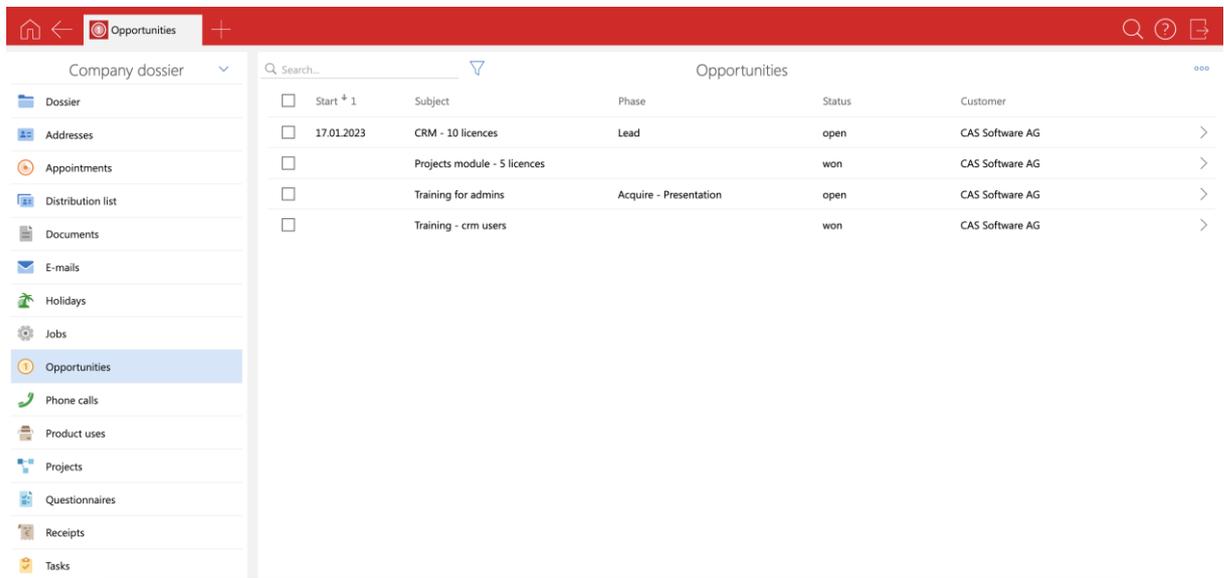
- Creating contacts from business cards

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.

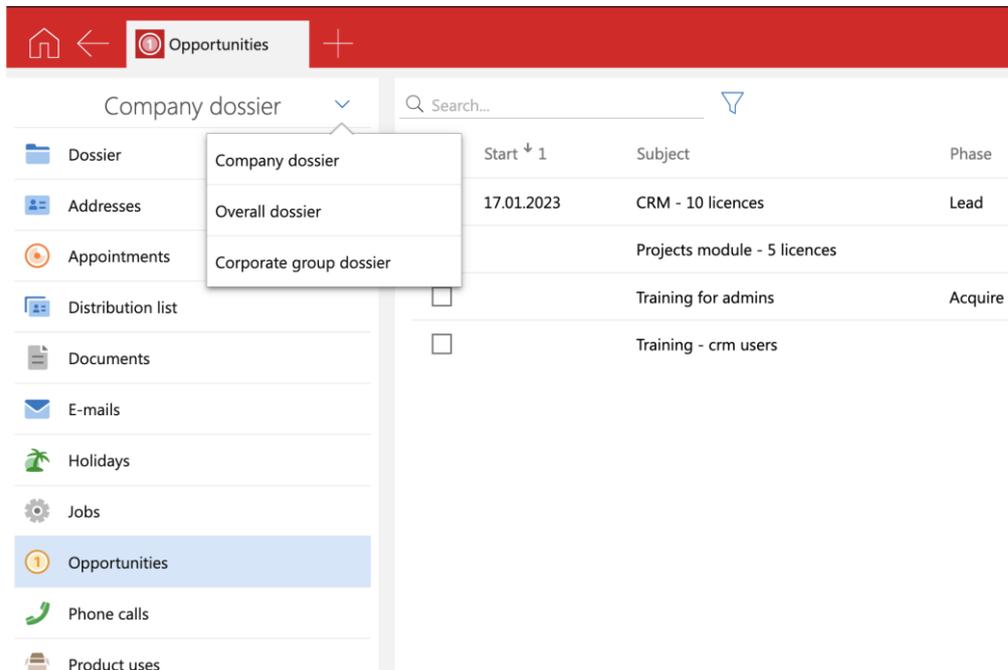


- Link lists in the dossier

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.



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



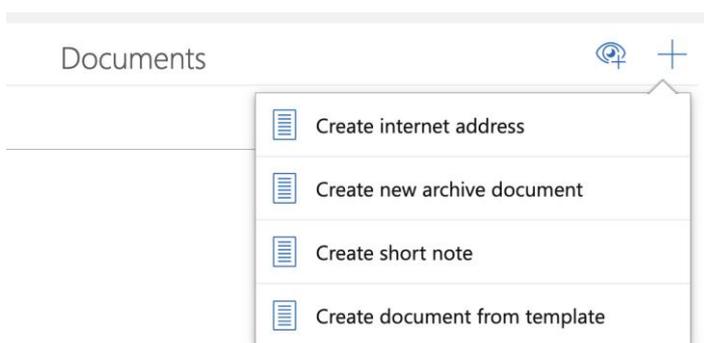
In a displayed link list all of the following are now possible: Quick search, advanced filters and actions as well as exporting.

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

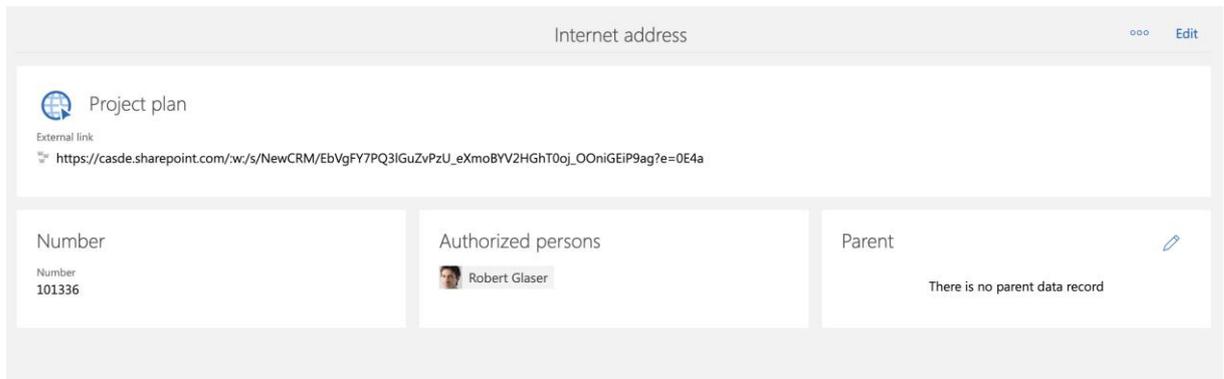
When removing a link via a list action menu, all the associated links are removed.

- New document type - Internet address

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



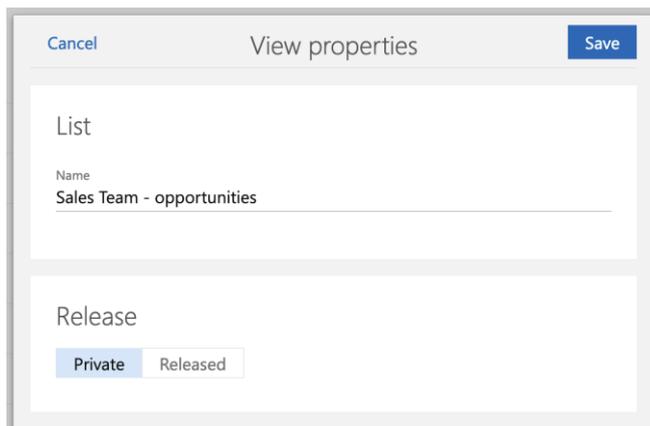
You can create new documents in CAS genesisWorld Web using URLs from other systems, which point to existing documents in those systems.



- 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.



- 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.

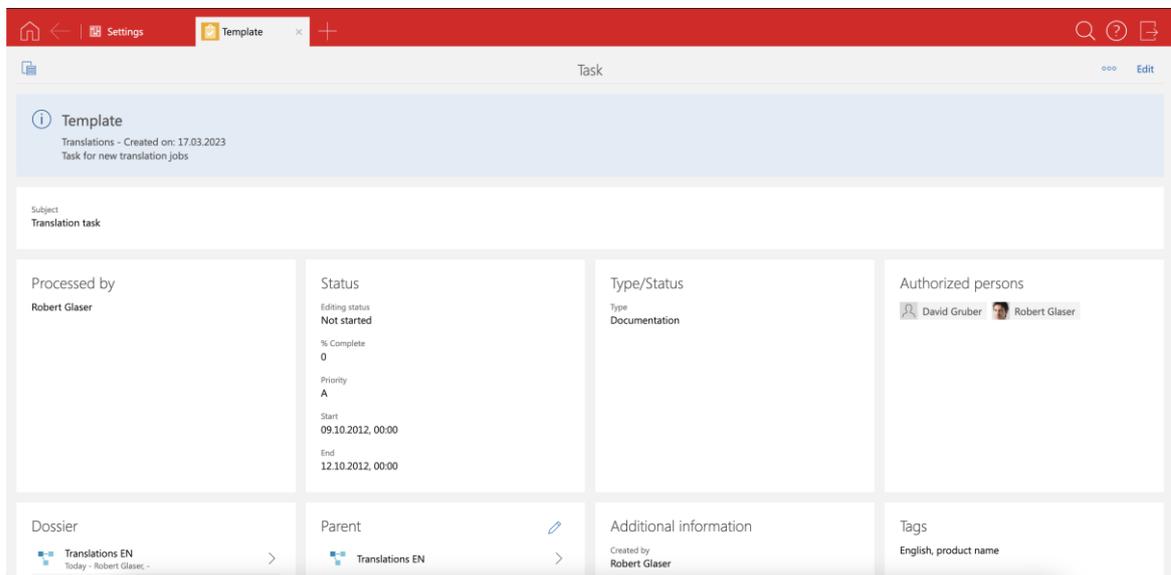
You can create templates in CAS genesisWorld if the **Edit templates (public)** right is active, see page 5.

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.

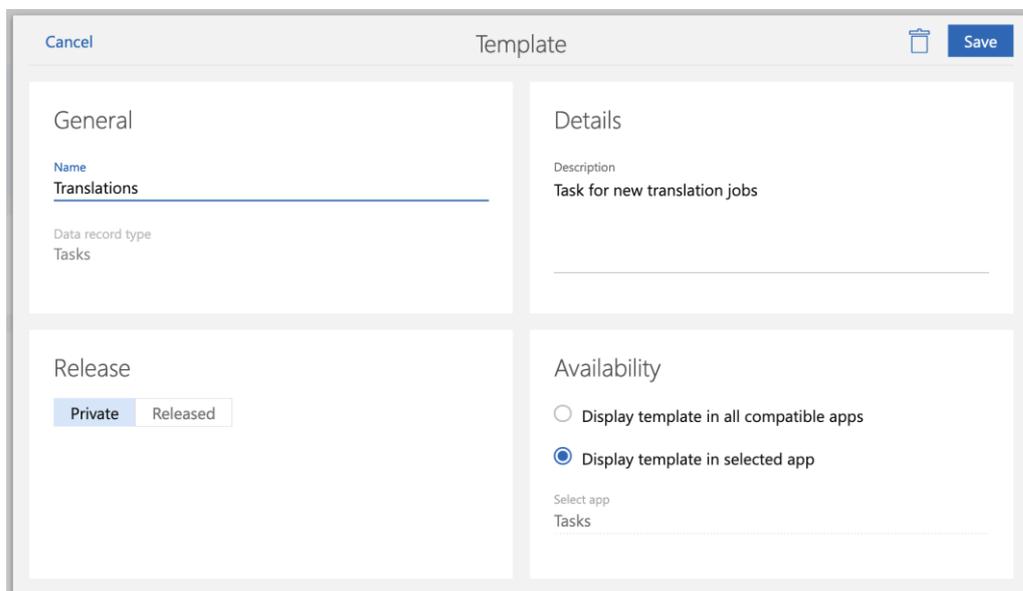
- Creating templates

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.



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





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.

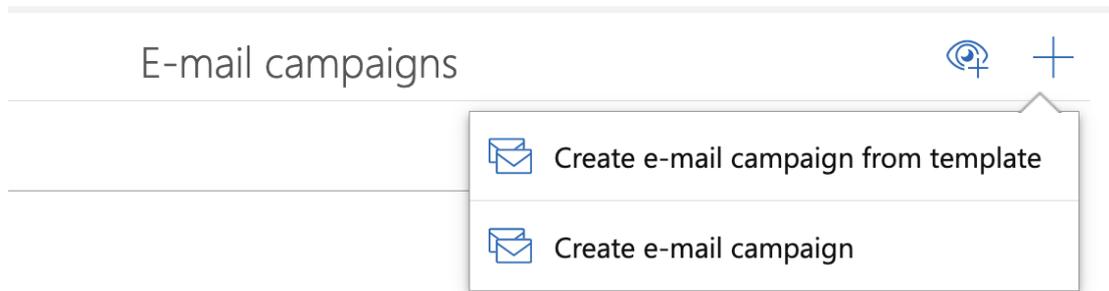
Users with the **Edit templates (public)** right, can release templates for other users. Optionally, they can define a validity period for a released template. If only an end date has been set, then the template can be used by authorized users up until this date. If only a start date has been set, then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

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

- **Using templates**

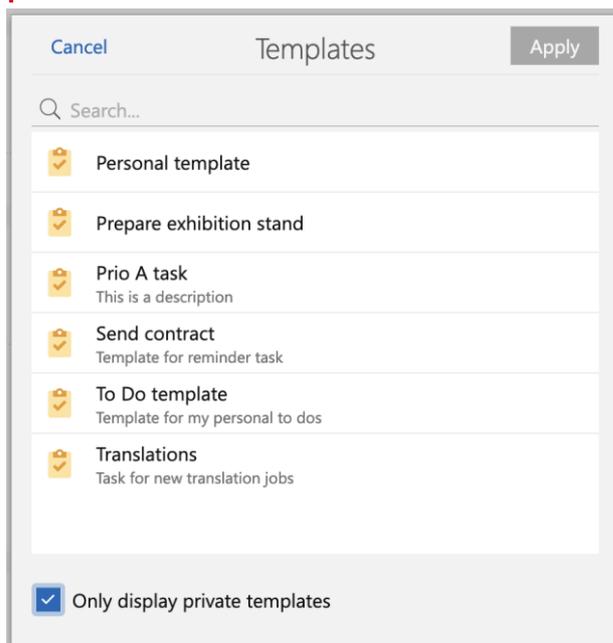
○○○ To create a data record from a template, the user selects an available template via the **Use template** action from the Action menu when editing a data record.

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



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.



■ Naming templates



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



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 [Technical communication](#), 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 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**.

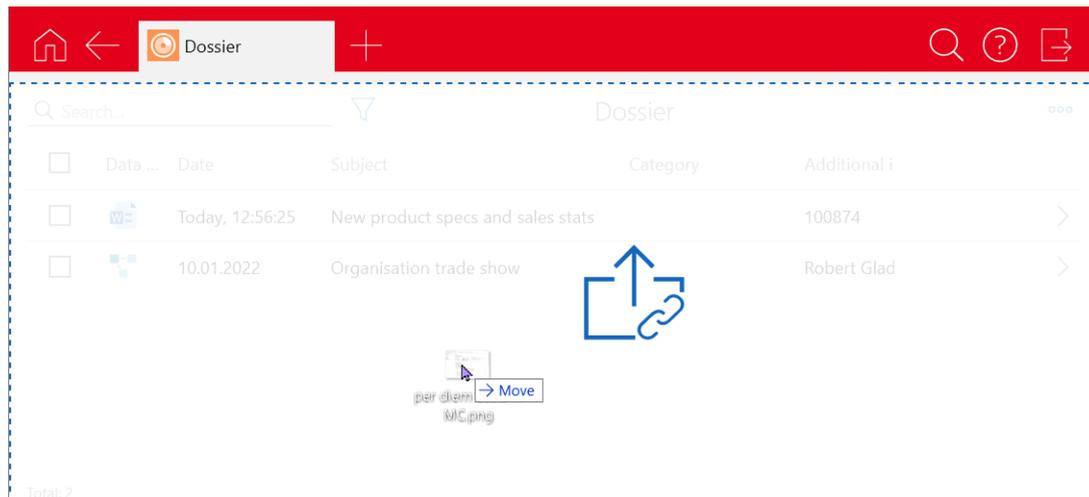
- Changing rights when invited to an appointment

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.



- 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

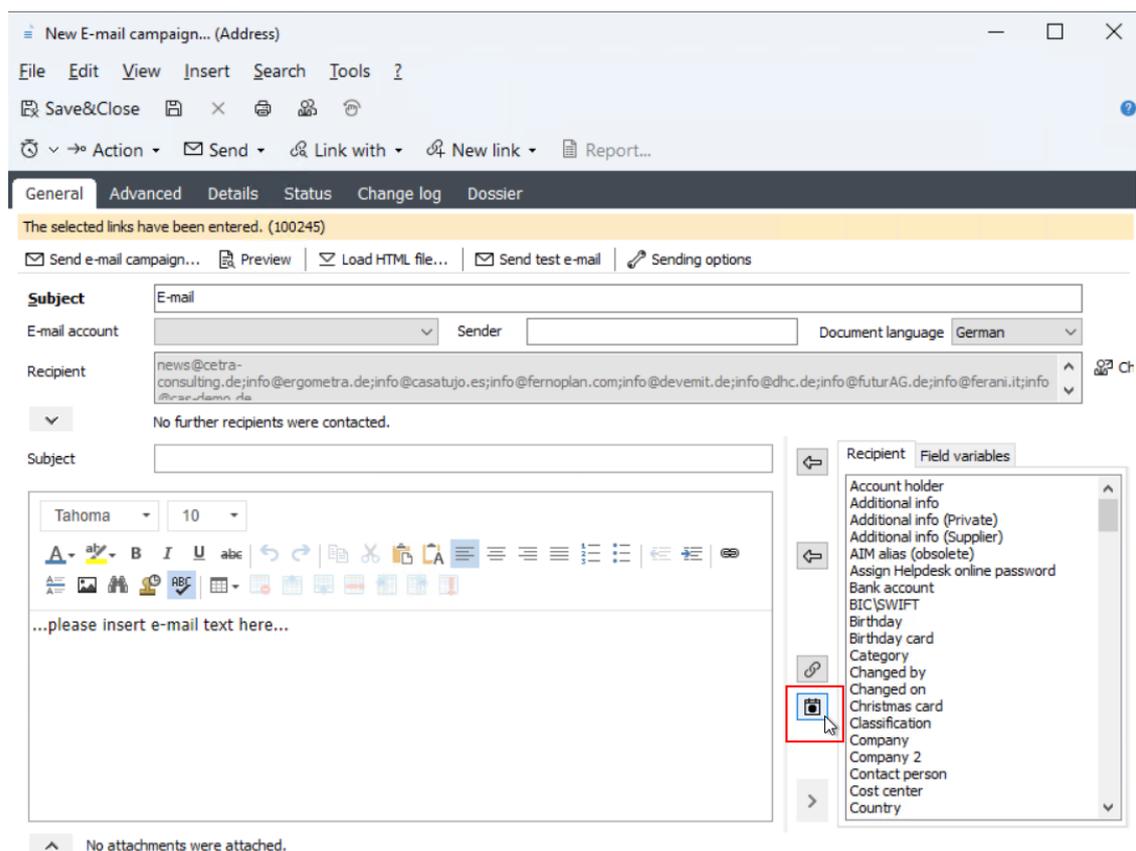
You can now also specify alignment for fields outside the summary.

20.5 New module functions

20.5.1 Event Management

- Changes to the **E-mail campaign** window

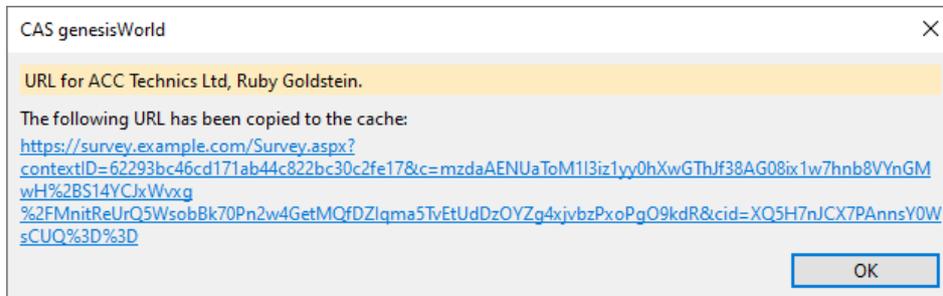
The **Insert event link** button has been removed from the editor menu and can now be found on the right of the editor.



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.

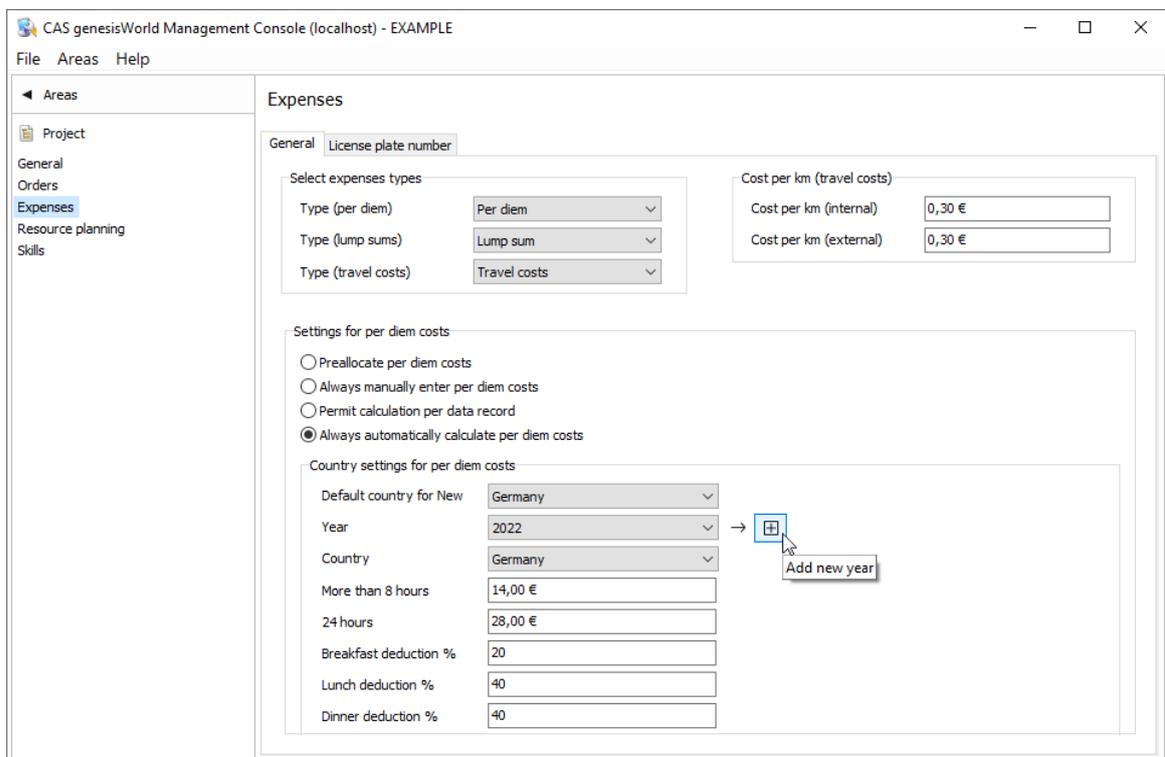


20.5.3 Project

- 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**:

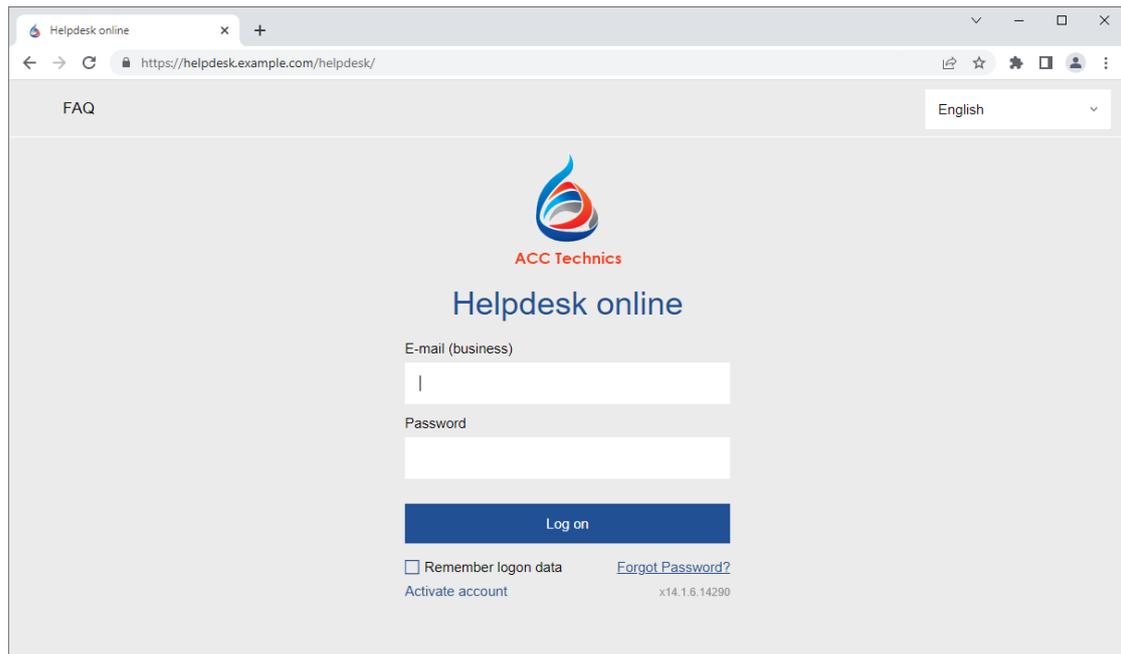


Please note that the standard rates now apply for Lyon, Marseille and Strasburg instead of the previously special rates.

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.



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.

Contact information

Preferred contact method
SMS

Permitted contact methods
Fax × E-Mail × Postversand × Telefon ×
SMS ×

First contact

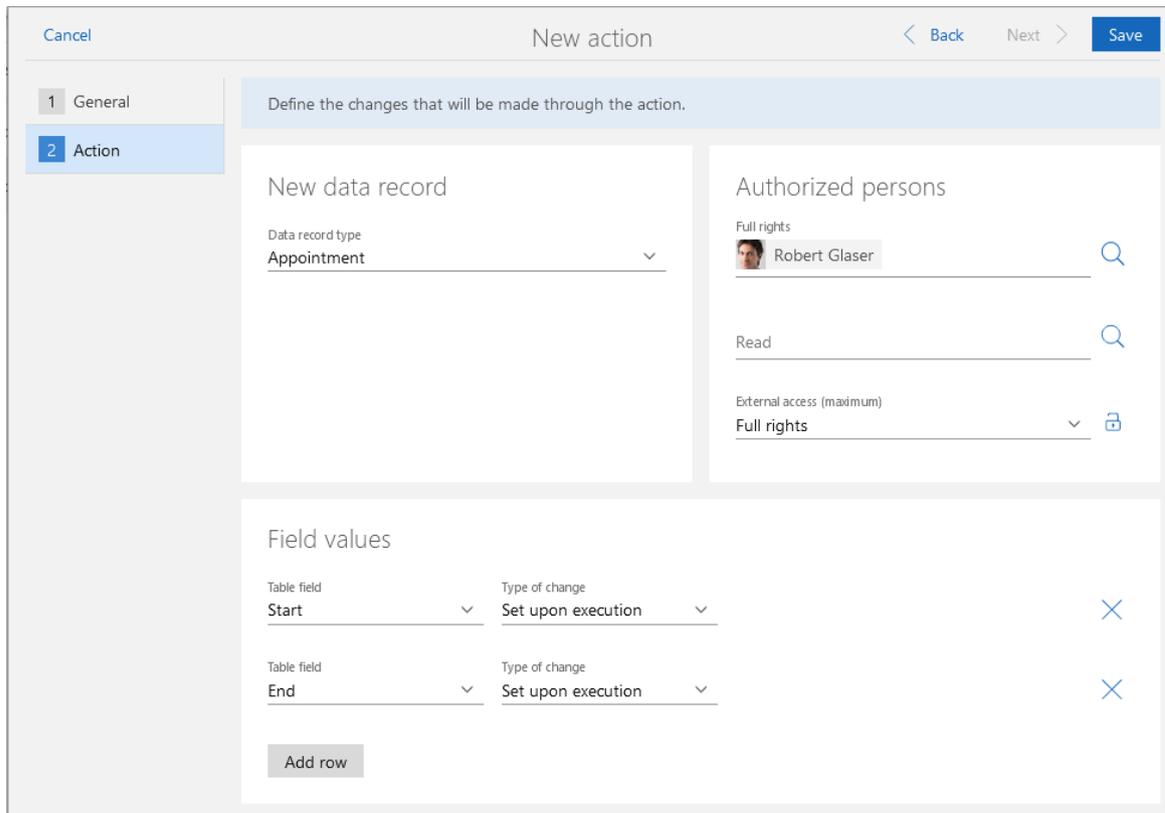
First contact date

Contact person
Robert Glaser

Last contacted via
Phone call

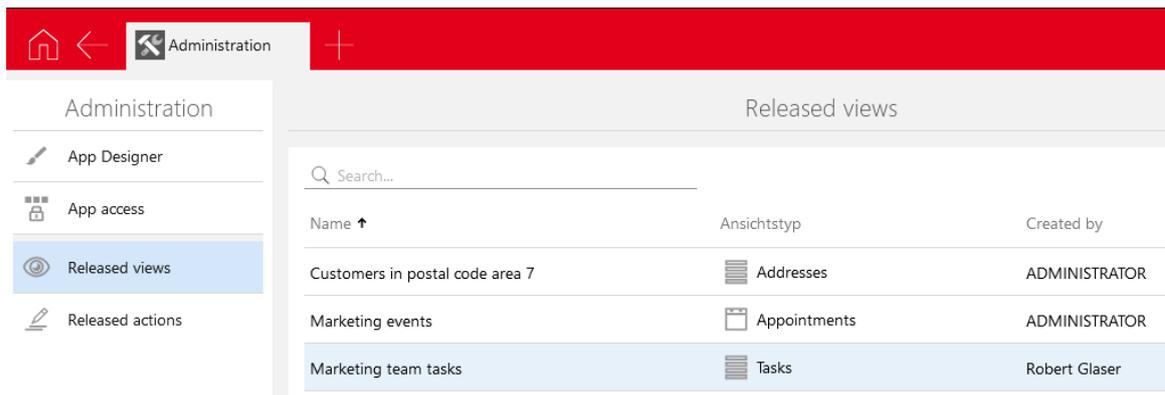
- More actions: **Set upon execution**

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



- 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**.



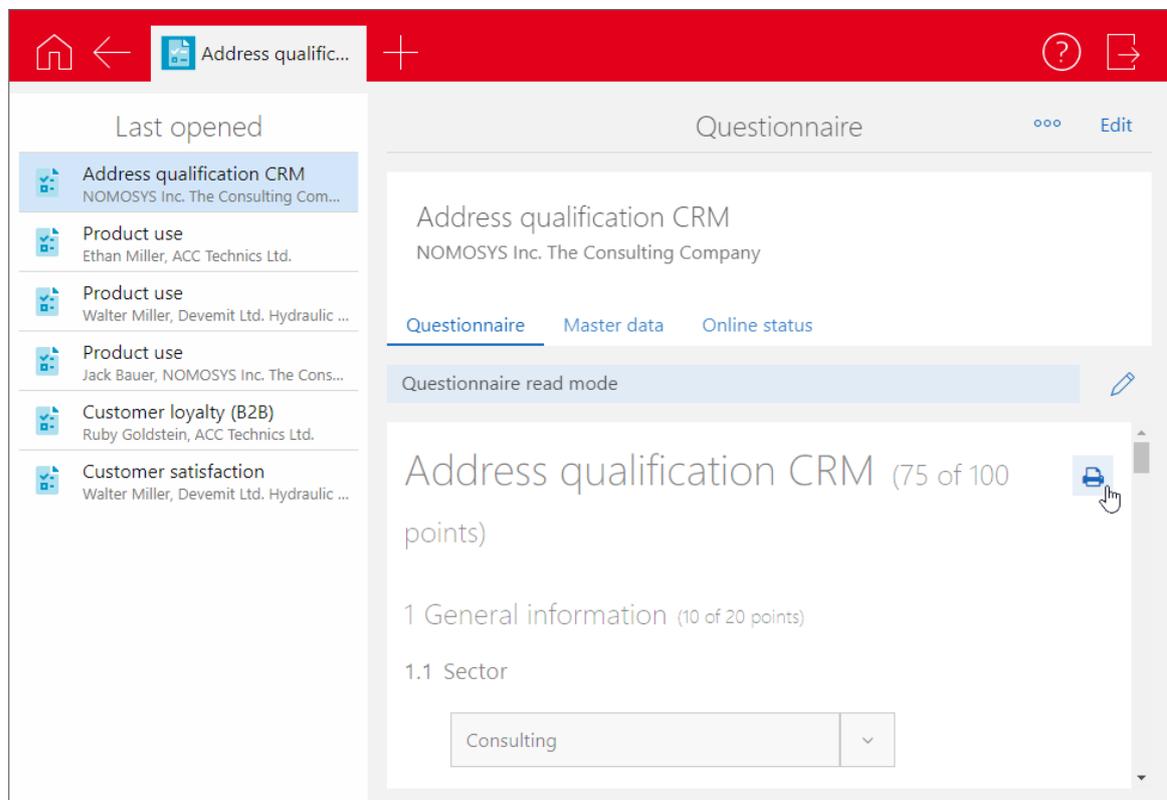
21.2 New module functions

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.



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.

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.

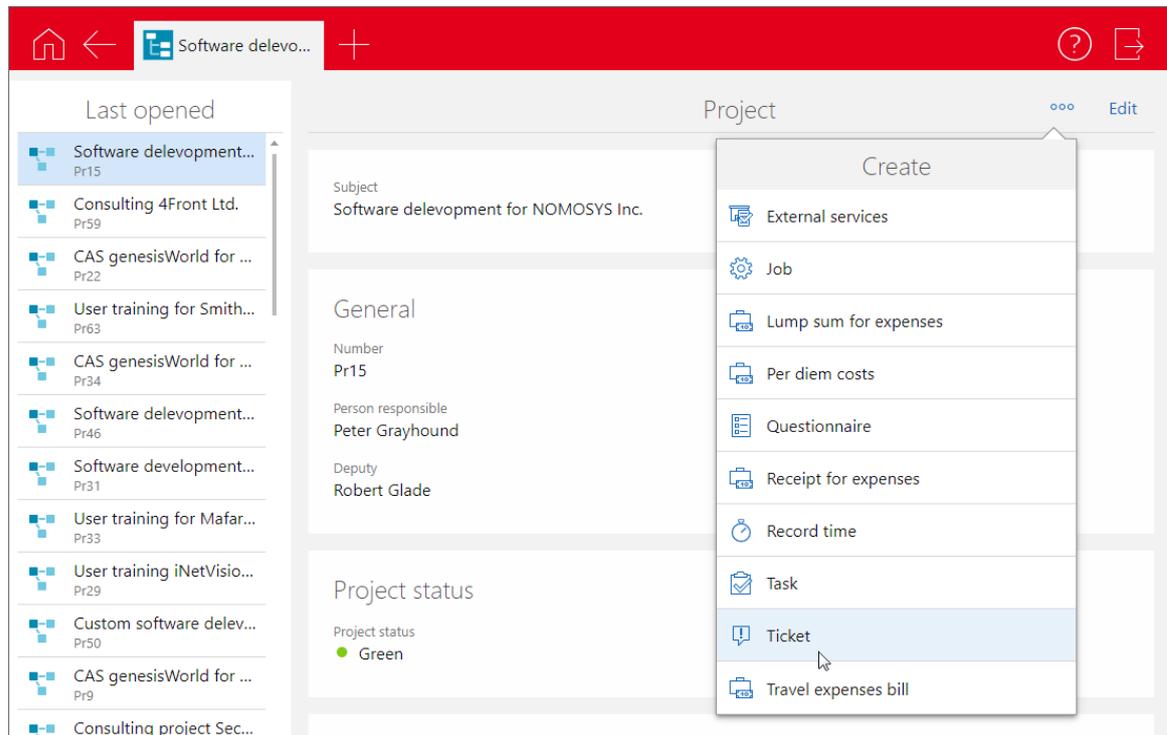
Now, using the **Select participants** button on the **Survey online** tab, you can define which participants you wish to enter into questionnaires which have been created in this manner. The preset value is **All (public)**.

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.

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.



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.

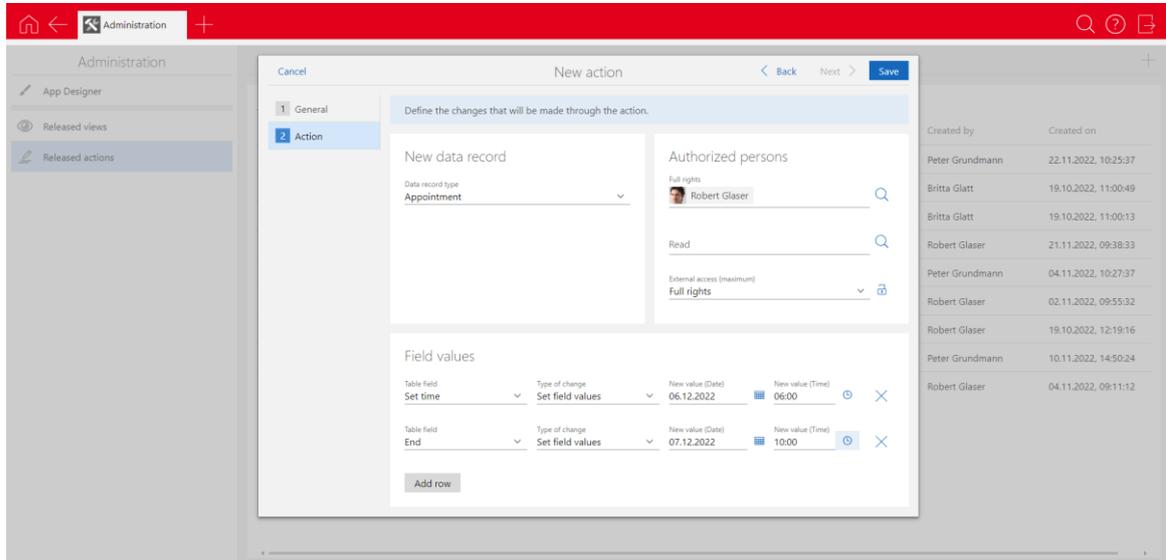
- Context menu has been changed in the recycling bin

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.



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 mimeType="[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**.

The screenshot shows the 'Add-In-Optionen' dialog box for CAS genesisWorld. The 'Authentifizierung' section is highlighted with a red box, indicating that 'OAuth' is the selected authentication method. Other visible fields include 'Servername' (demo.cas.de), 'Port' (443), 'Datenbank' (DEMO DB), and 'Client' (CAS genesisWorld Web). The 'Anmelden' button is also visible.

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:

<https://partnerportal.cas.de/WebServicesSDK/x14/pages/rest/operation.html>

- 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:

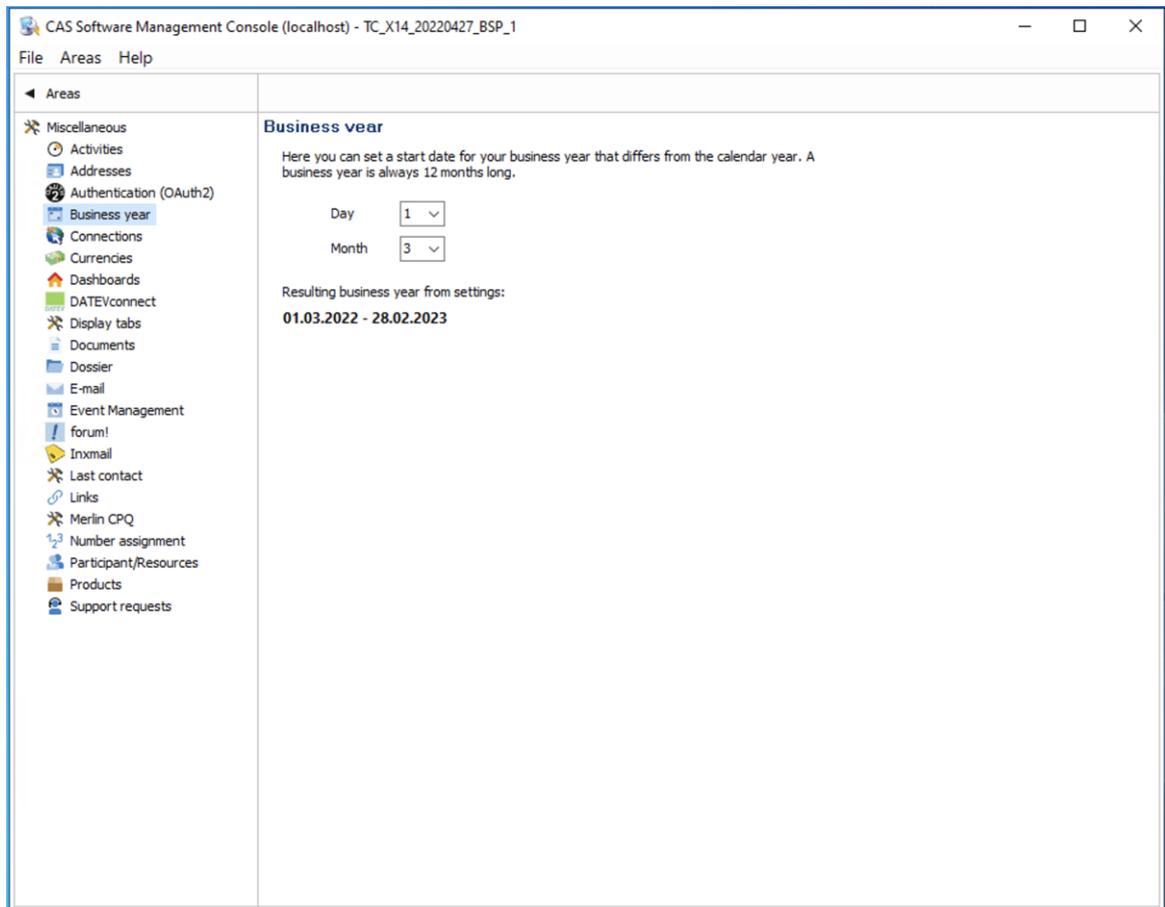
- Product (BSPRODUCT): Purchase price, Price, Gross amount, Contribution margin, Net amount, Discount amount, Tax amount.
- Product item (BSVOUCHERSPOS): Offer price, Contribution margin, Price, Discount, Sum

- 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**

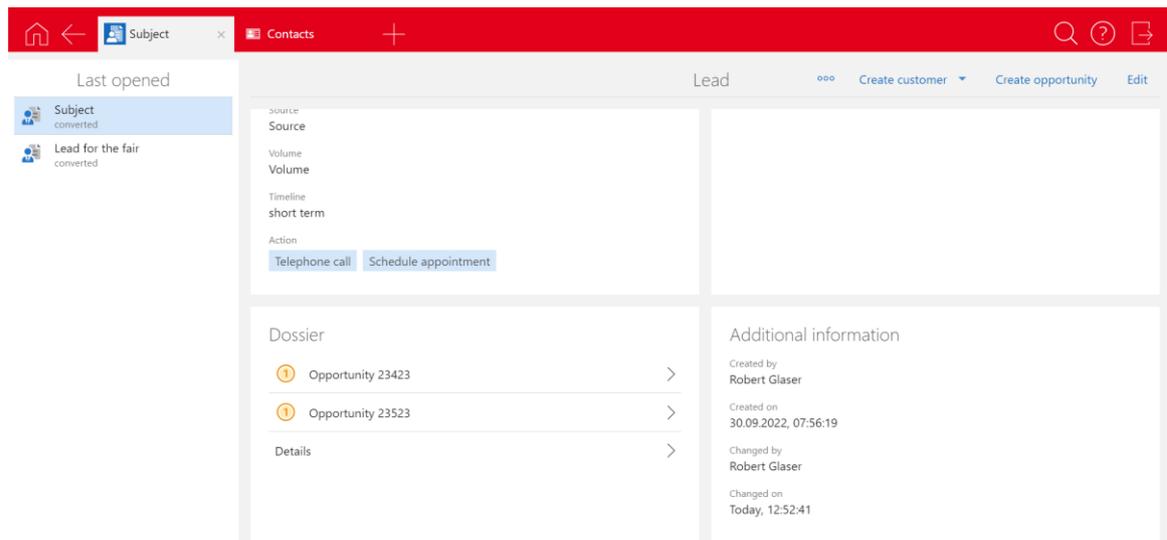
Unless a different fiscal year has been configured in the Management Console, the fiscal year is set equal to the calendar year.

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.

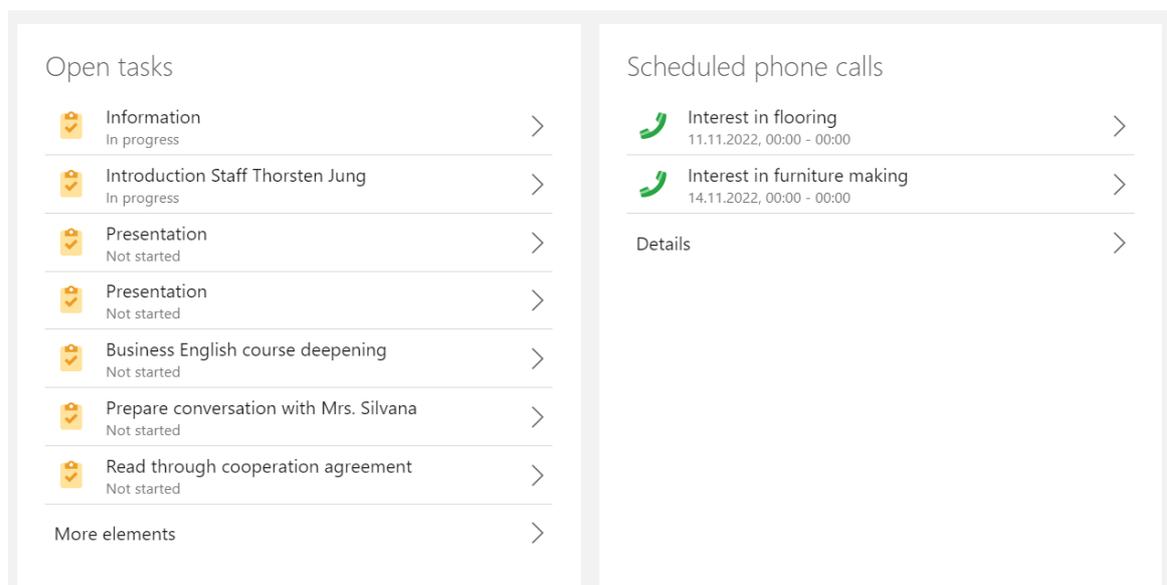
The new **Additional Information** field group displays the following information as usual: **Created by, Created on, Changed by and Changed on.**



- 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**.



- 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.

is Company	Form...	Title	first na...	Name	Type	Company	Street	Postal code	Town
<input type="checkbox"/>	Mrs.	Elisabeth	Crown	Customer	Westautomatics Ltd	Drayton Road	OX14 5HX	Abin	
<input type="checkbox"/>	Mrs.	Vivian	Danell	Dealer	Agency CCC	Granville Street 27	B55 9SP	Brist	
<input type="checkbox"/>	Mr.	Brian	Mc Donald	Dealer	Agency CCC	Granville Street 27	B55 9SP	Brist	
<input type="checkbox"/>	Mr.	Dylan	Fitzwilliam		NorBuy	Eliot St	B7 5LB	Birm	
<input type="checkbox"/>	Mr.	Jack	Michaels	Customer	Westautomatics Ltd	Drayton Road	OX14 5HX	Abin	
<input type="checkbox"/>	Mr	Billy	Gordon	Customer	Gordon Ltd.	20 Trinity Street	CB2 1TY	Cam	
<input type="checkbox"/>	Mr	Marcus	Boyle	Lead	William Maine Ltd.	Gibb Street	B9 4AA	Birm	
<input type="checkbox"/>	Mr	Dr.	Max	End	Power for you	56 Virginia St	AB11 5AY	Aber	
<input type="checkbox"/>	Mr	Martin	Fraser	Supplier	Access inc.	1 Gelliwastad Road	CF37 2BP	Pont	
<input type="checkbox"/>	Mr	Harry	Nicholson	Supplier	Young & partner	53-62 South Bridge	EH11 1YS	Edinl	
<input type="checkbox"/>	Mr	Peter	Gray	Partner	CAS Software UK	Verdant Lane 164	SE1 9RT	Lonc	

Total: 1692

- Displaying the sort order

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

Status	Salesperson	Salesperson 2	Salesperson 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

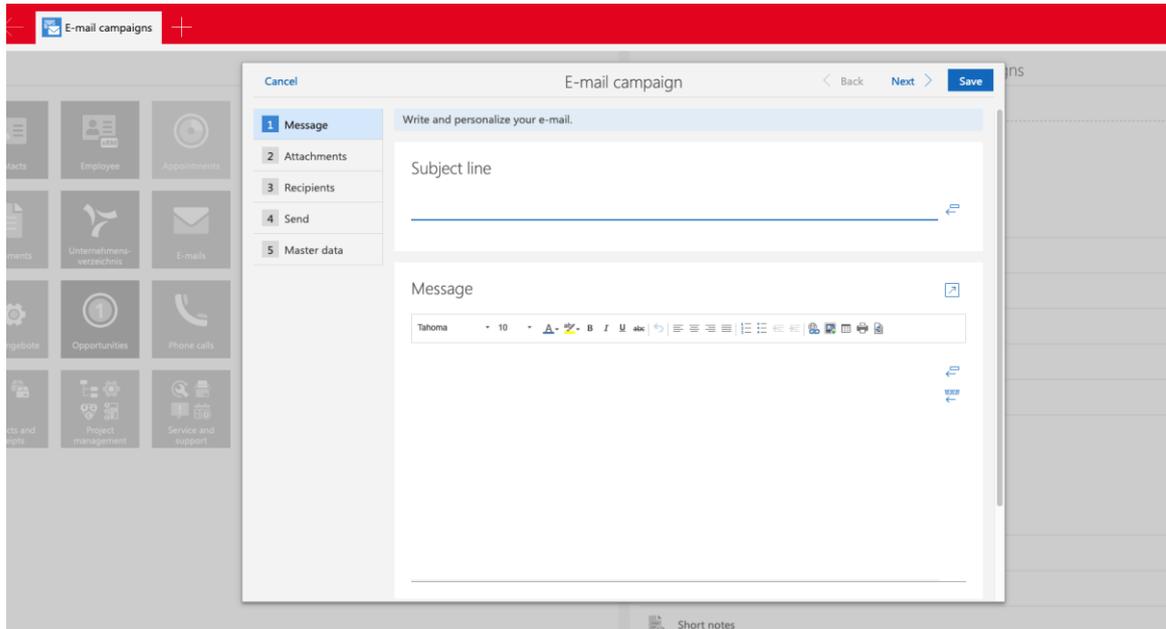
We have added the following values to the date jokers in the filter:

- **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.

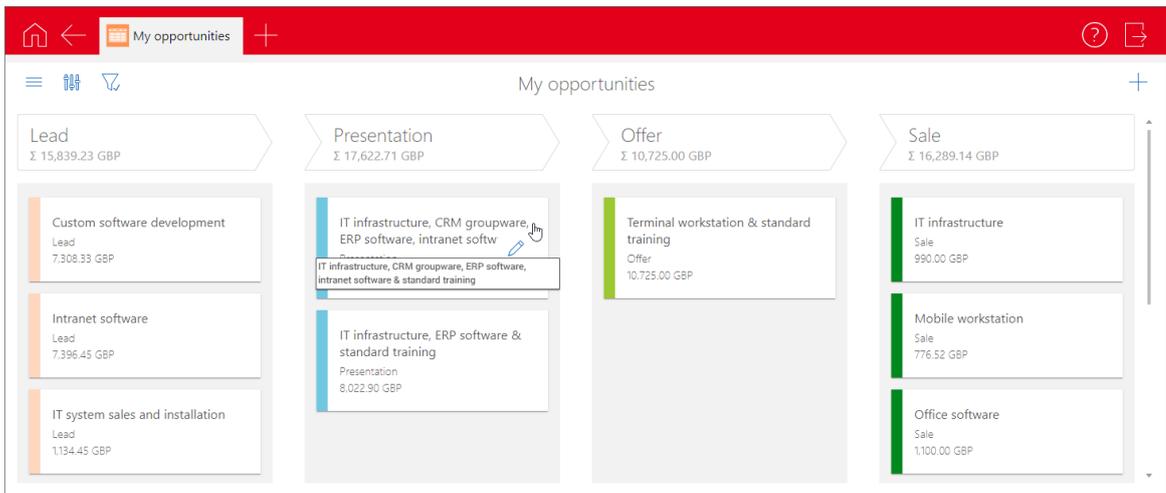


23.5 New module functions

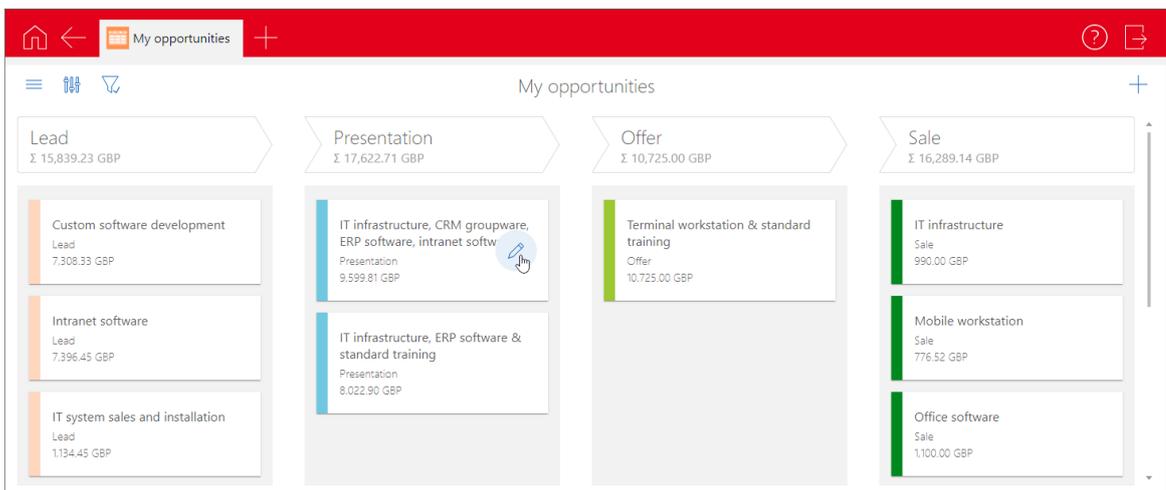
23.5.1 Report/Project/Helpdesk

- 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.



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



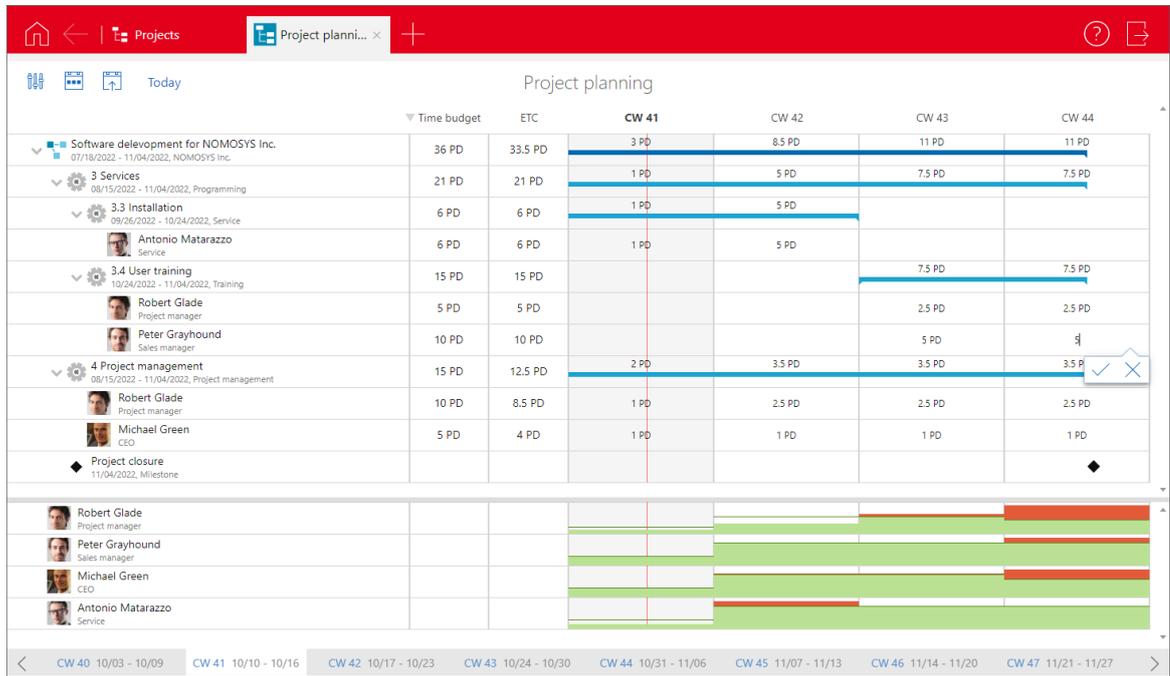
If you do not have editing rights, then an error message is displayed when you click the button.

23.5.2 Project

- Entering effort in the project planner

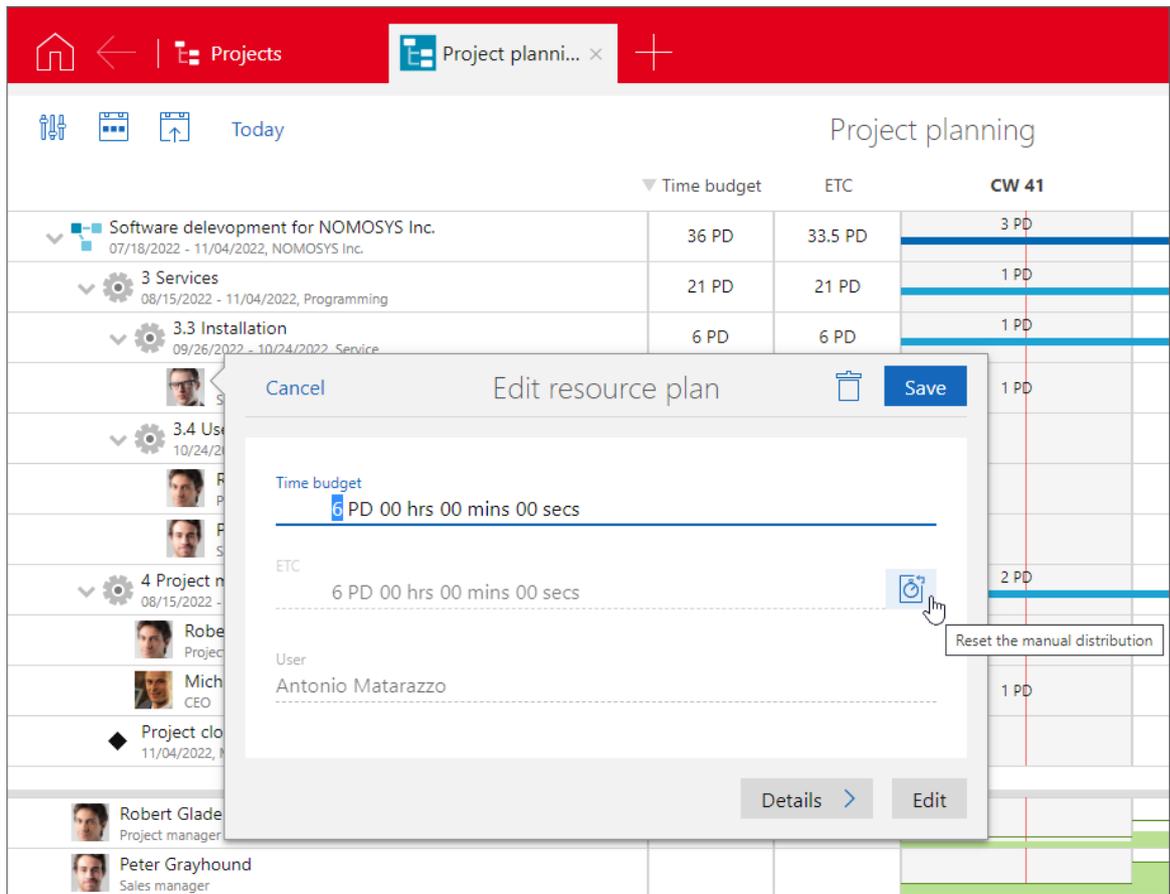
If you have enabled **manual resource planning** under **Resource planning** in the **Project** area of the Management Console, then you can now also enter effort in the project planning view manually per interval, as was already the case, in the **Resource planning** app.

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

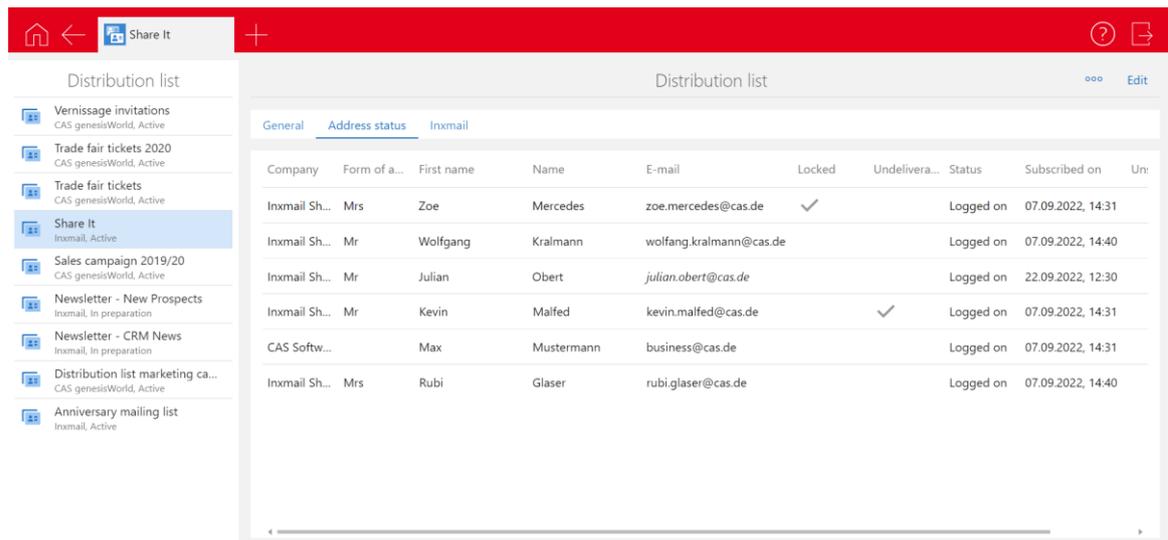


The entries can be reset per resource plan and overwritten again with the automatic planning. This distributes the remaining effort proportionally to the remaining working time for the duration of the process, taking into account the personal working time and holidays of the assigned user.

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.



23.5.3 Inxmail



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.

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.

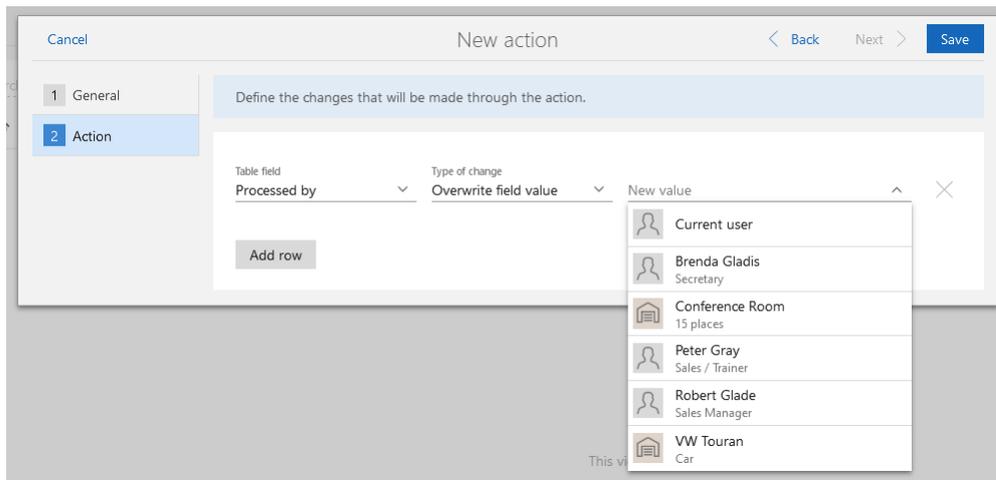
- Imported users now receive the additional rights under the **Default** user account

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

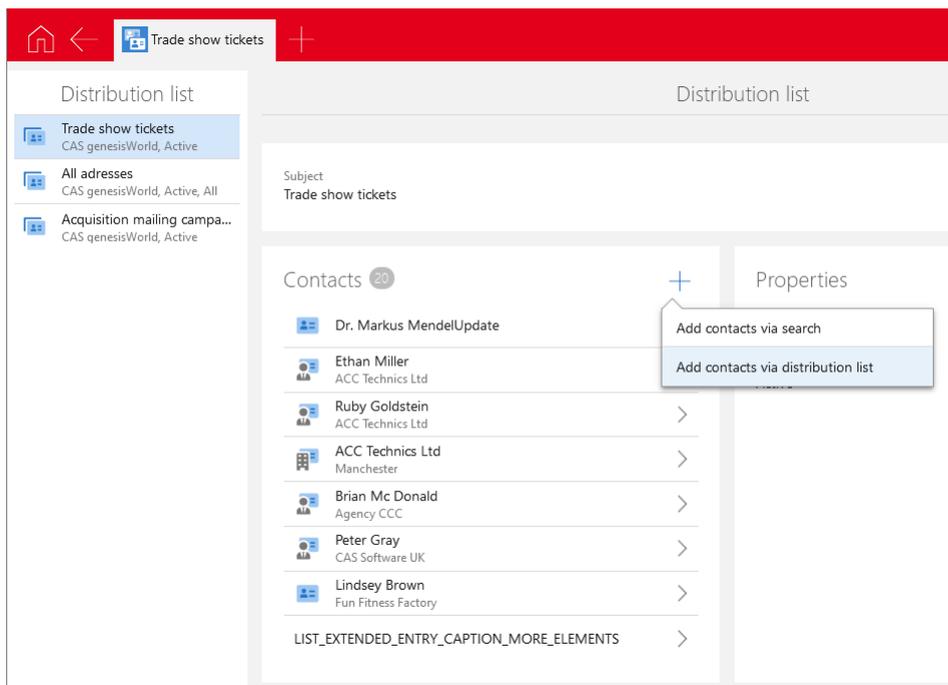
- More actions: Entering the current user

You can use the **Current user** 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.



- 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 Unternehmensverzeichnis.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 <https://docs.microsoft.com/de-de/sql/dma/dma-overview?view=sql-server-ver16>

- 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 link 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

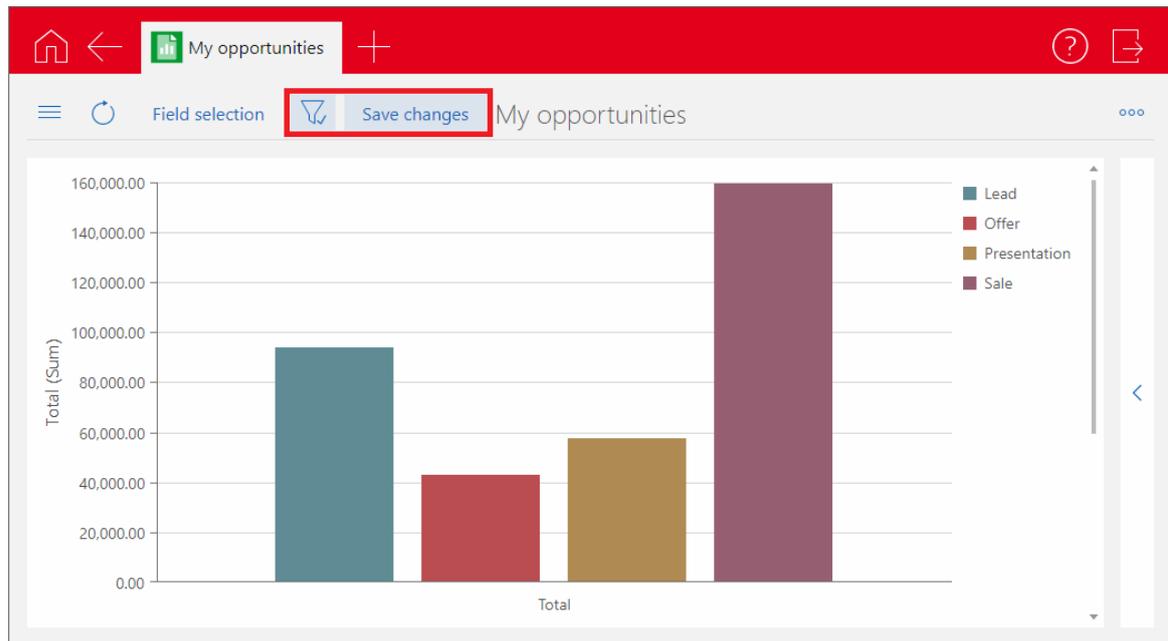
- Changing filter conditions in views

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

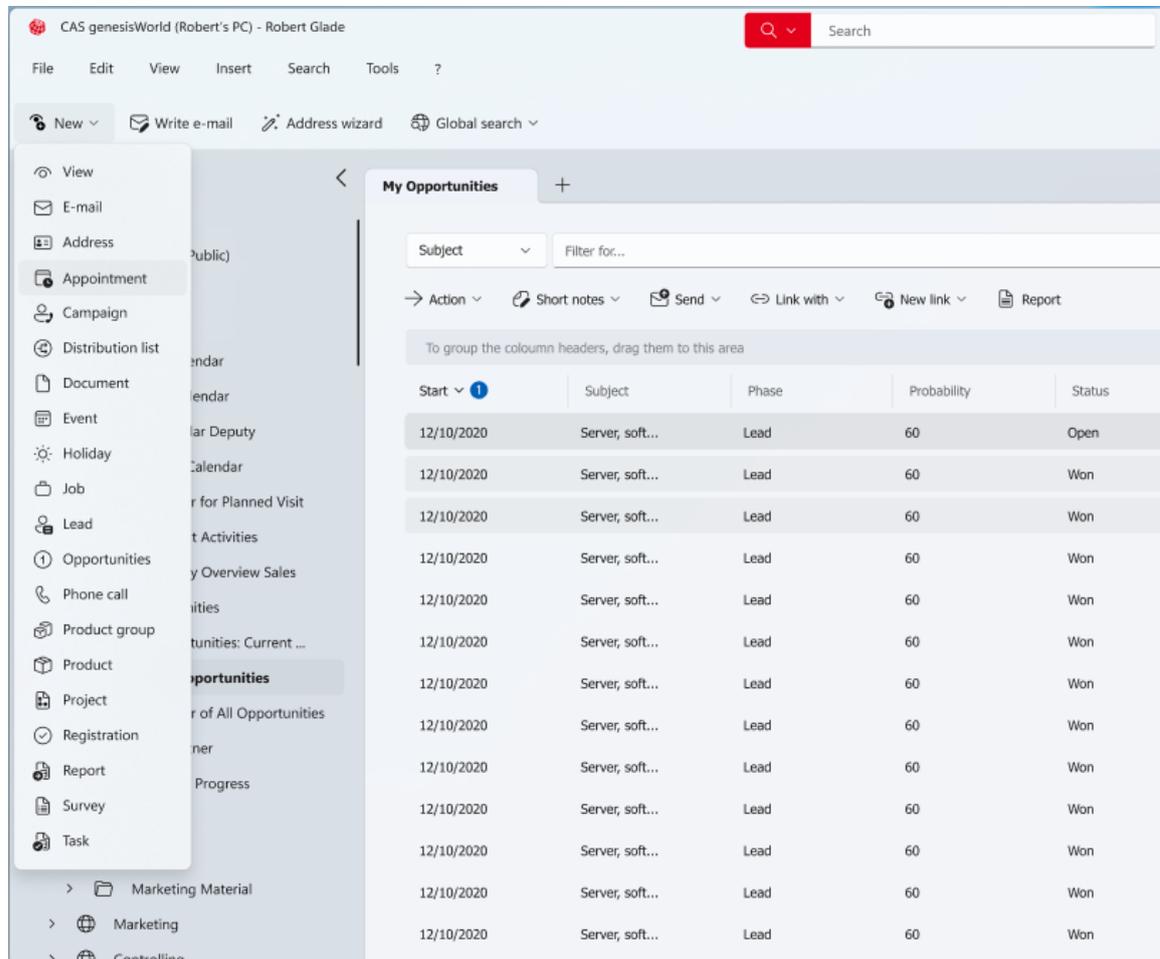
Essentials of the new design

- 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.

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



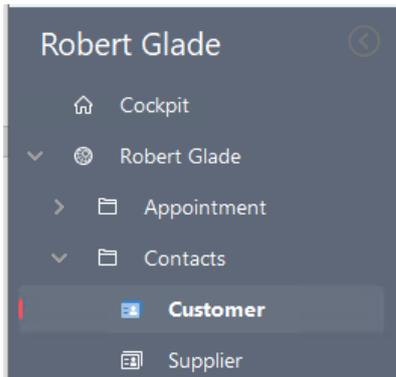
- SmartSearch

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.

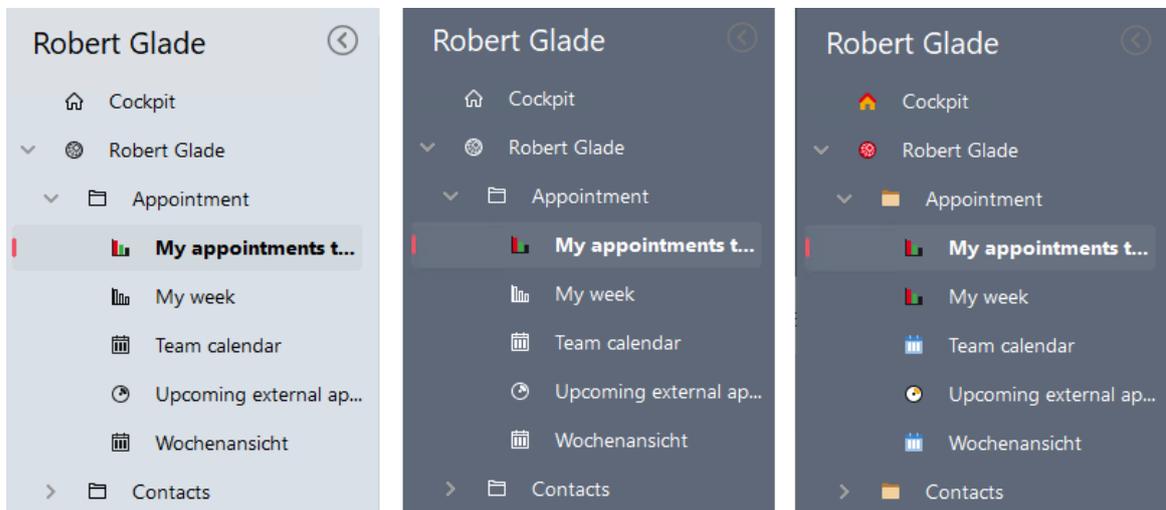
If CAS genesisWorld is started on a remote desktop and the window is displayed in full screen, SmartSearch is placed at the height of the menu.

- 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.



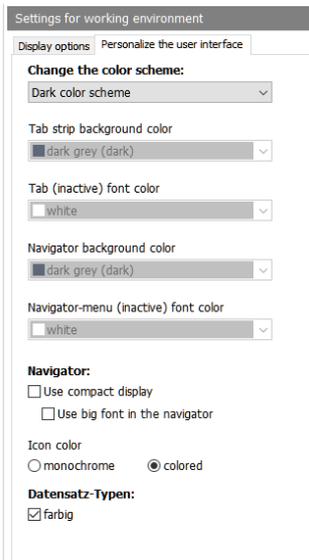
- Font colors for list overviews

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

- Icons

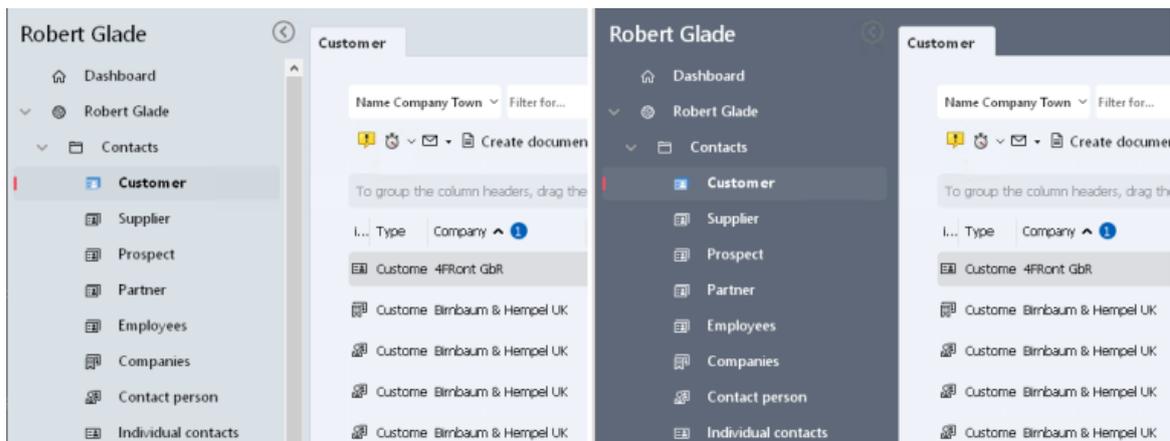
The icons for data record types and the tool and menu bars have been completely revised. These new icons are now displayed in monochrome in the tool and menu bars.

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.



■ 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	B55 9SP	Bristol	+44 117 5456456

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

List settings

Display

Color of data area:

Color of the free section:

Font color in lists without adjustable view format:

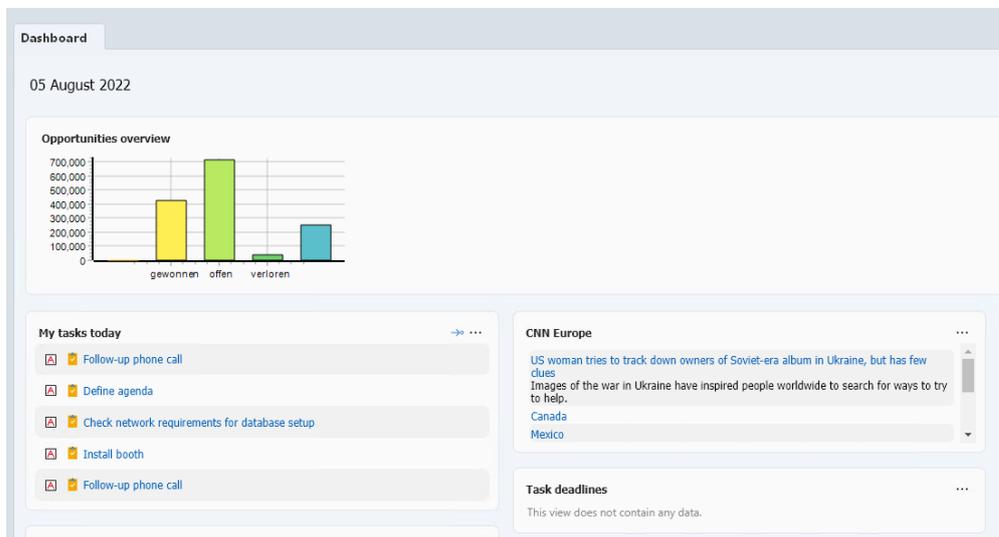
Color every second line with the following color:

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.



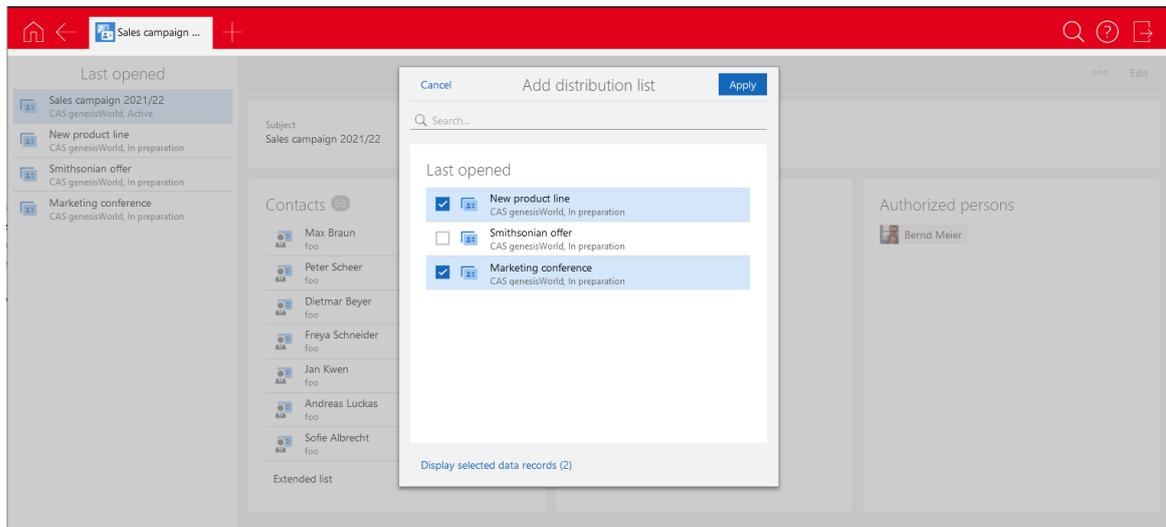
26.4 CAS genesisWorld Web

- New online help

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

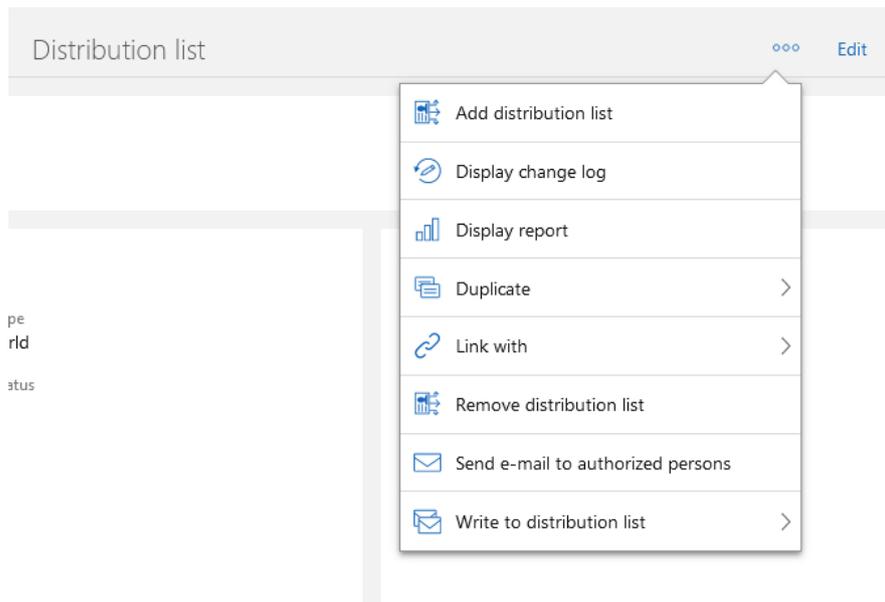
- Selecting multiple distribution lists as recipients simultaneously

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



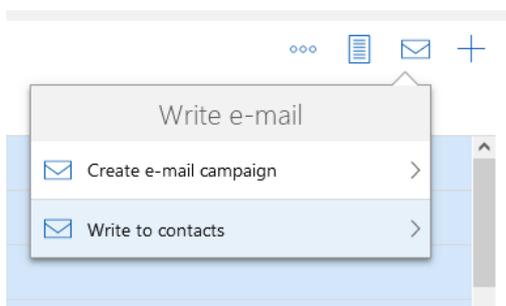
- Adding and subtracting distribution lists

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

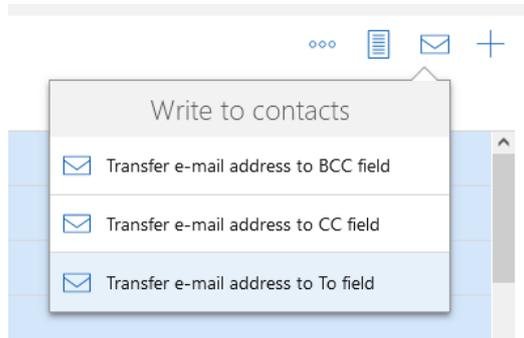


- Writing to contacts with the default e-mail client

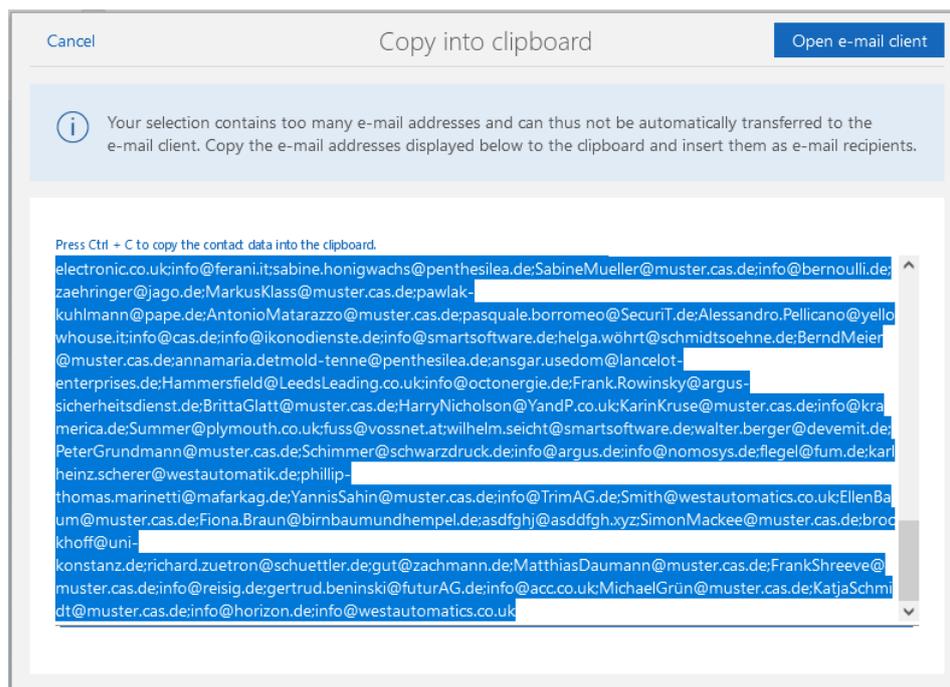
The **Write e-mail > Write to contacts** function is available for highlighted addresses in a list.



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.



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**



Kahrmann Elektronik GmbH Customer [↗](#)



Dieselstrasse 176
76275 Ettlingen
Baden-Württemberg
Germany

+49 7243 8800-0
switchboard

info@kahrmann-elektronik.de
central

http://www.kahrmann-elektronik.de

[Map](#)



Kahrmann Elektronik GmbH Partner



Dieselstrasse 176
76275 Ettlingen
Baden-Württemberg
Germany

Switchboard
+49 7243 8800-0

Central
news@kahrmann-elektronik.de

Homepage
http://www.kahrmann-elektronik.de

[Map](#)

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.



Subject
Offer

Date
Today

File type
Microsoft Word (98.8 kB)

 [Display](#)  [Edit](#)



Offer

Microsoft Word (98.8 kB)

Date
Today

 [Display](#)  [Edit](#)

- 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

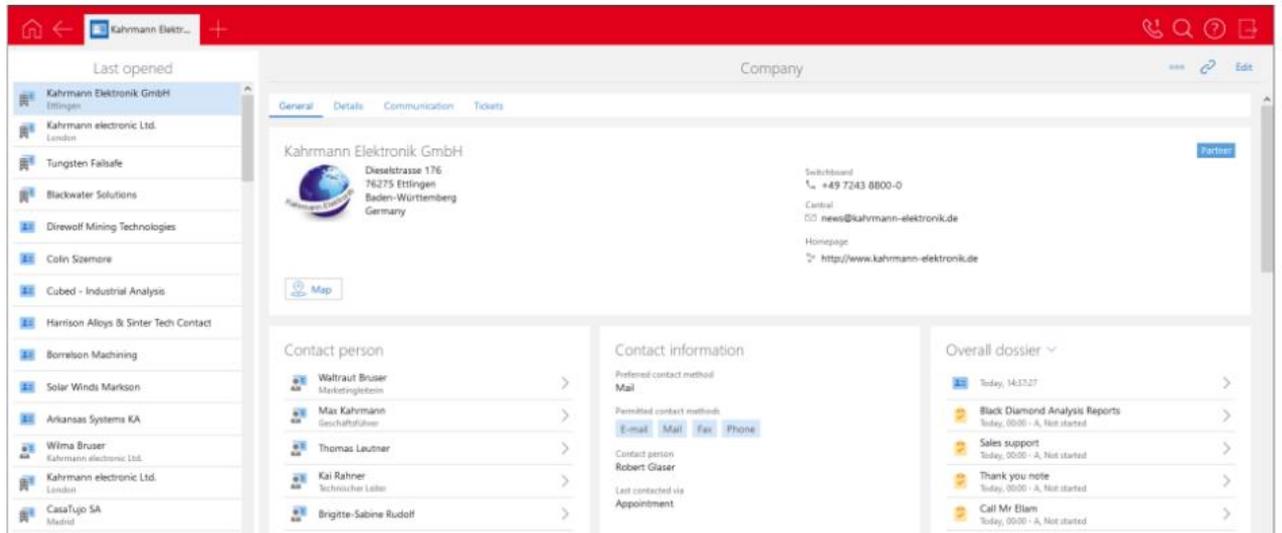
The tab layout is now operational for all data record windows. Previous content can be found on the **General** tab, as long as a tab layout has not yet been used. The name of the tab is however only displayed, if content is available on several tabs. The display for users therefore remains the same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

Each register has an extension point for SDK extensions.

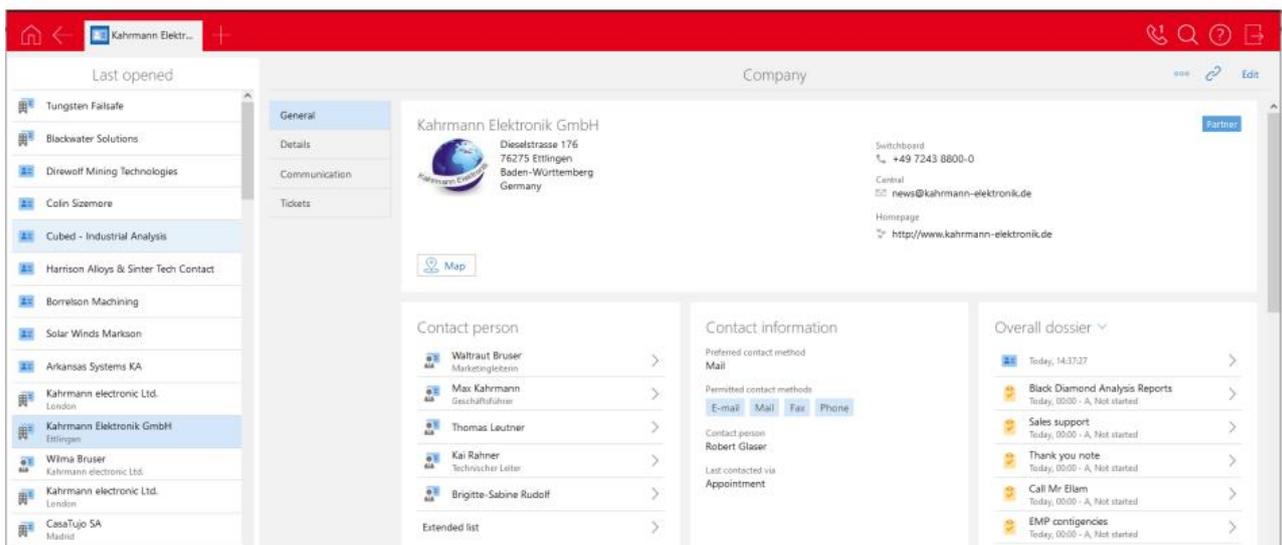
- Assistant layout also in read mode

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.

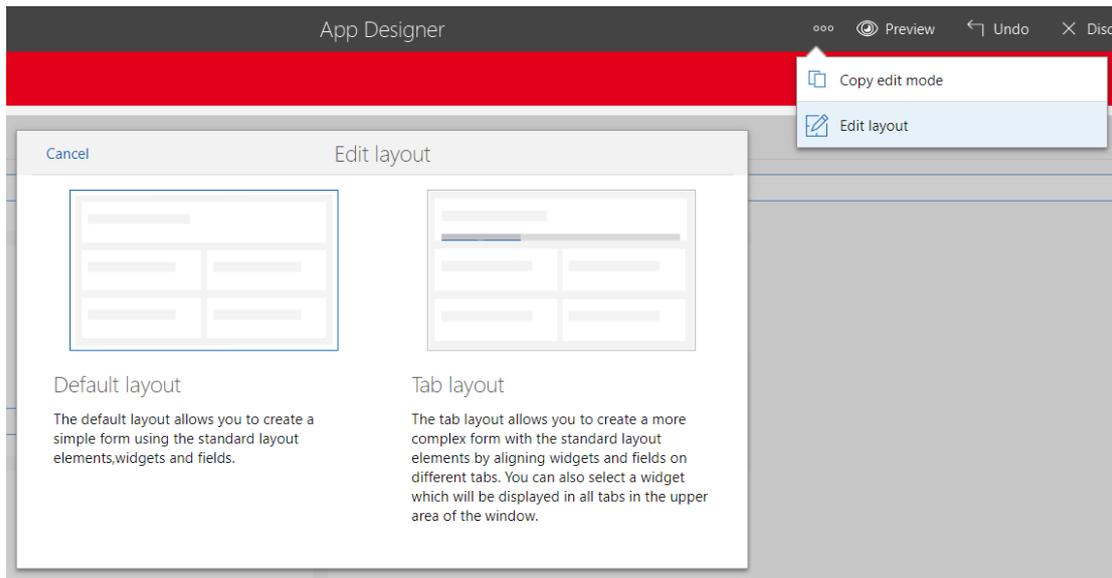
Tab layout



Assistant layout

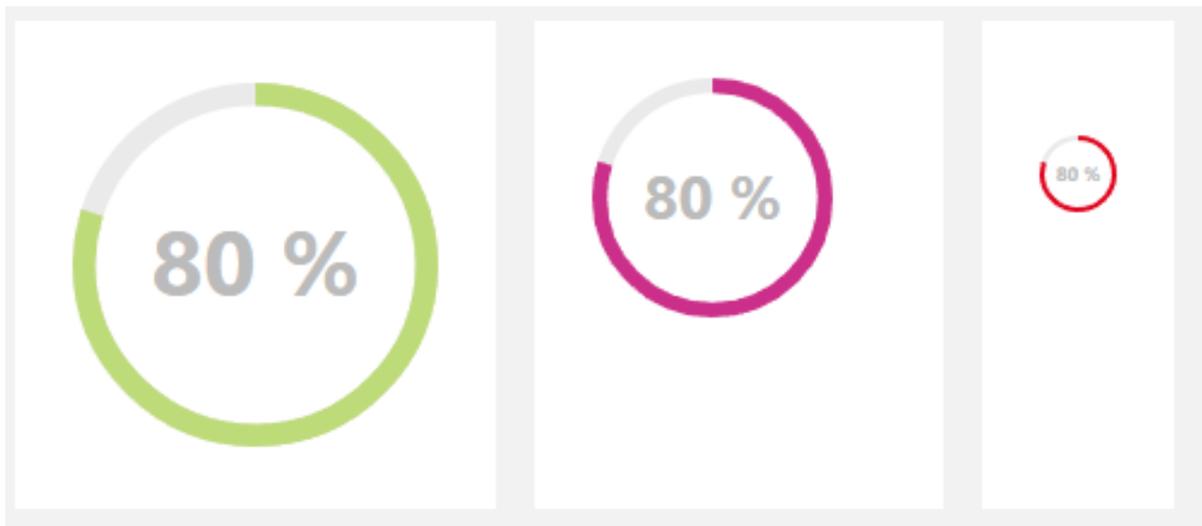


You can still edit the layout for apps you create yourself. Here you can define the position and display of the tab bar in the tab layout.



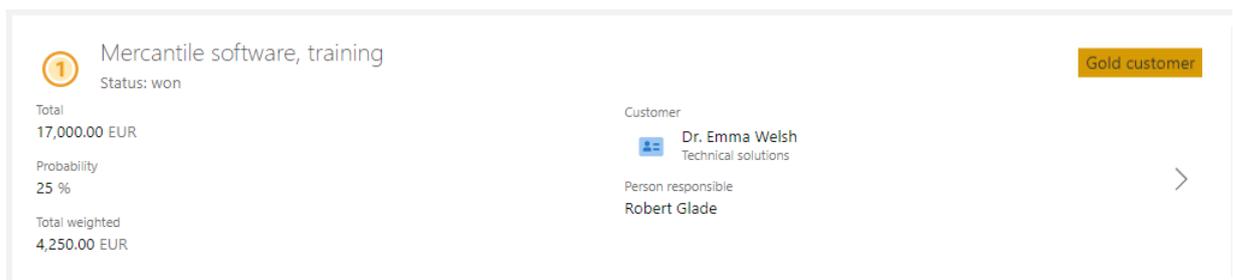
- Adjustable height of the progress bar

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



- 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.



- 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.



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 [CAS genesisWorld knowledge hub](#)

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.

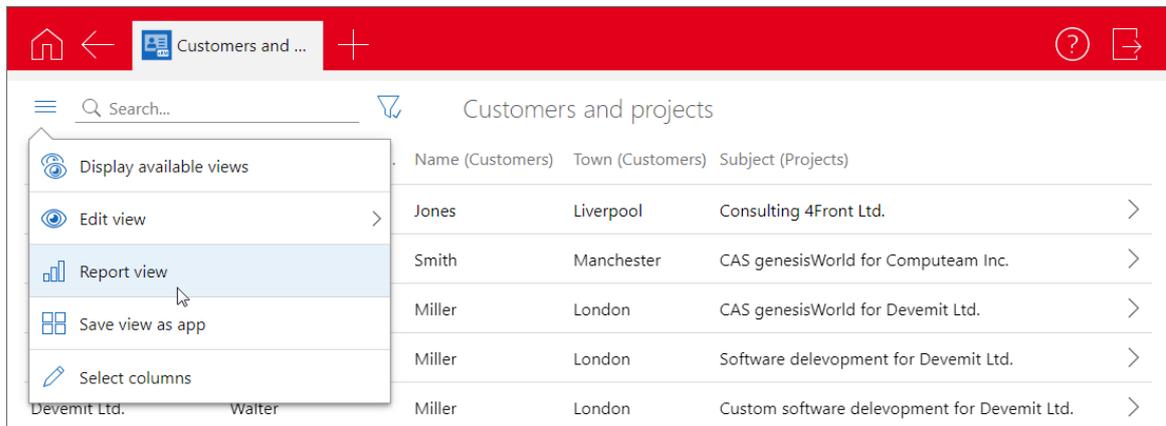
- Reports or analyses of click behavior in e-mail campaigns can no longer be accessed in CAS genesisWorld, but only in Inxmail Professional.

For more information, please see our user guide at [CAS genesisWorld knowledge hub](#).

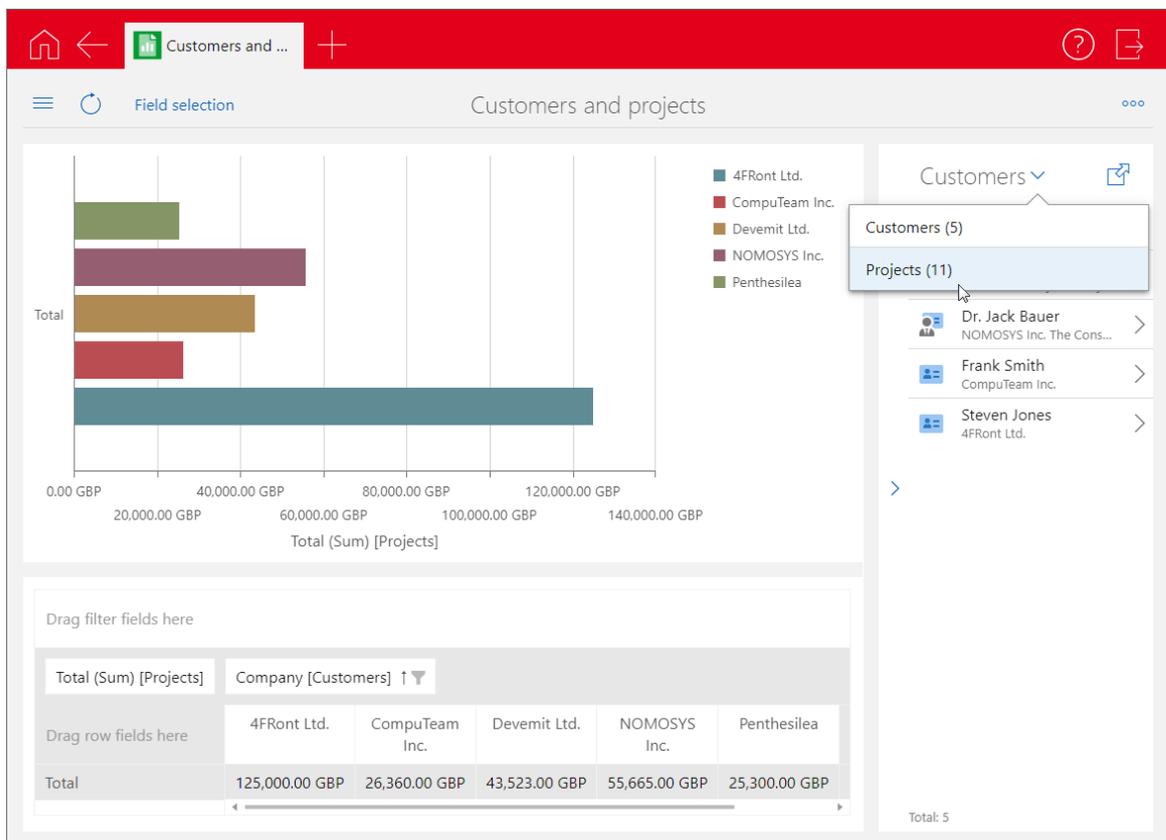
26.5.2 Report

- 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.



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.

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

The screenshot shows a software interface with a red header bar. The main content area is titled "Customers and prospects by country". On the left, there is a pivot table with the following data:

Country	Customer	Prospect	Total
Austria	3	1	4
Czech Republic	1		1
Denmark		1	1
Germany		1	1
Italy	1		1
Spain		2	2
Switzerland	1	1	2
United Kingdom	6	10	16
Total	12	16	28

On the right side, there is a list of addresses under the heading "Addresses". The list includes:

- Edwin-Ralf Baldur
- Tobias Bau Franke Unternehmensber...
- Tobias Fuss Fuss OHG
- Julia Schneider Huber und Hilfiger GmbH
- Penthesilea Wuppertal
- Werner Klein Robert Bürkle GmbH
- Michael Schirin Schirin Mediadesign

At the bottom right of the address list, it says "Total: 7".

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 XLSX format in the desktop client

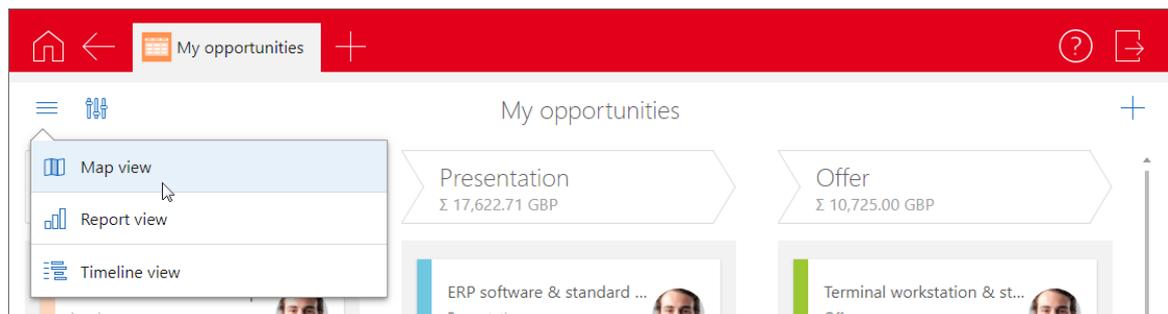
You can now switch the export in the analysis table from XMLS to XLSX, if you have sufficient rights to do so.

26.5.3 Report/Project/Helpdesk

- Switching quickly between views

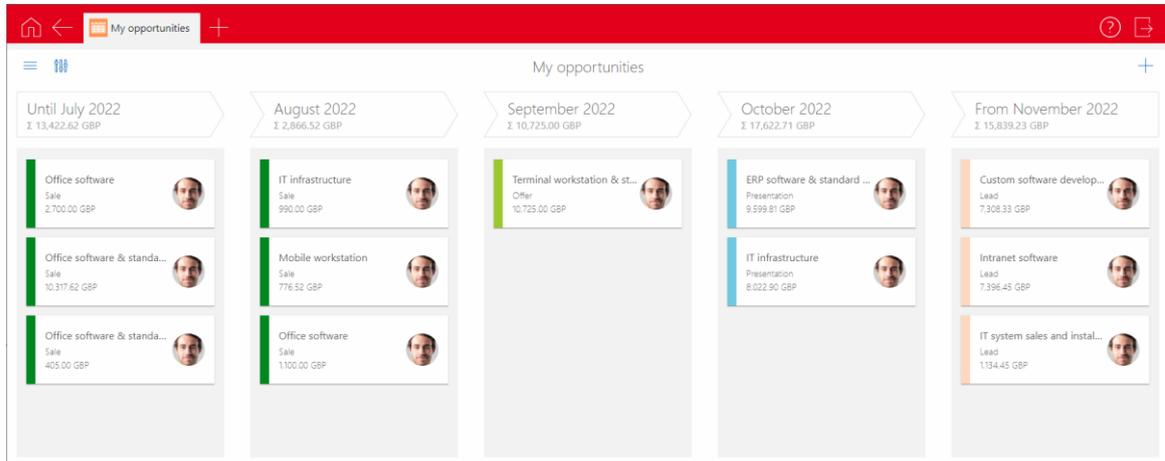
You can now switch directly between the individual views via the view menu in the board view, the report view and the timeline view.

Additionally, you can open the respective card view.

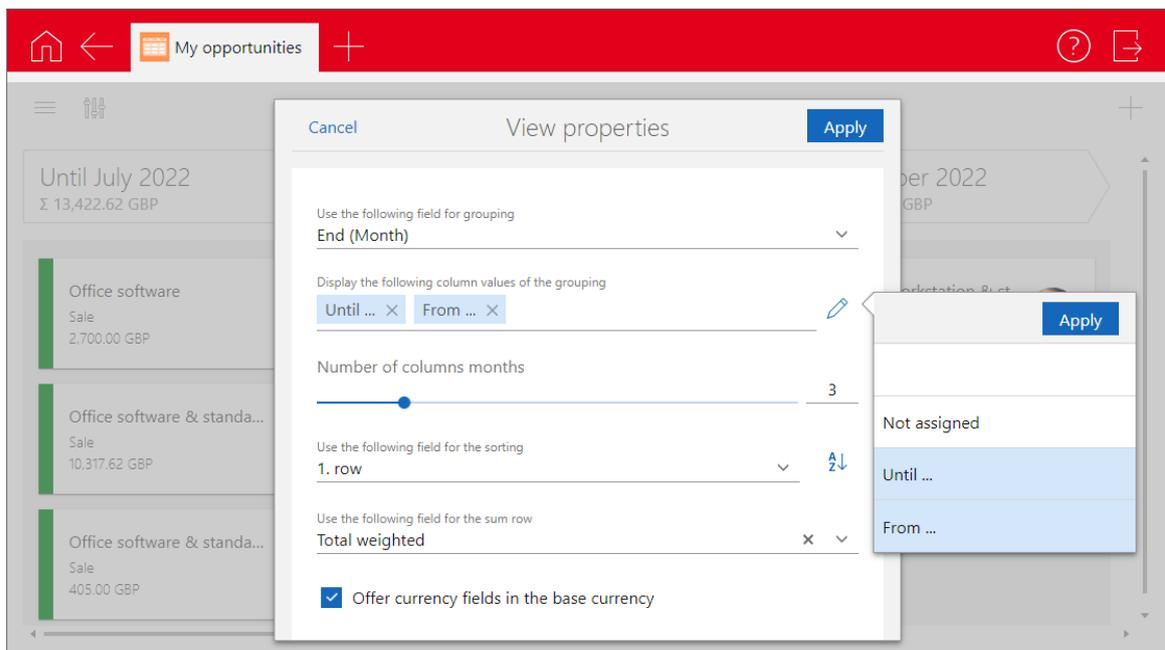


- Board view for opportunities grouped by the **End** field

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.



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.

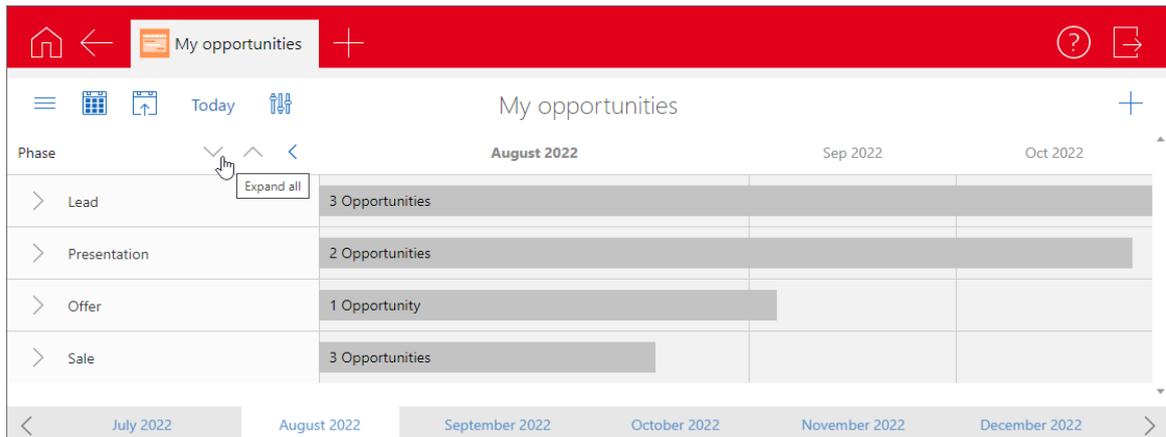
Use **Number of columns months** to select the number of monthly columns. The first monthly column is always the one for the current month.

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.



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.