

CAS Products x15.2.0

Product information





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August 2024

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1 Introduction

This document describes all the major and new features relating to CAS genesisWorld since the release of the x15.1.0 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 x15.2.0

2.1 New online help

[The Online help for users](#) for CAS genesisWorld Desktop has been completely revised.

2.2 General

Using the code to logon to CAS genesisWorld

If users have setup a second factor for logging on to CAS genesisWorld, then this will be confirmed, for example, via the **SecureLogin - CAS & SmartWe** App. **If the mobile device with this app is currently not available, users can also select another option during the log on process.**

After entering the e-mail address, which must correspond to the user's e-mail address, the user receives an e-mail with a six-digit code. This code is valid for 10 minutes and can only be used once.

To use two-factor authentication, you have to be using the CAS Authentication Server.

The e-mail is sent via the action- and notification service.

The functional overview brochure is now online

Our functions brochure which provides an overview of all functions is now available digitally and is also searchable under the following URL:
<https://hilfe.cas.de/Functions/EN/>.

You can also access this page via the **More information** section on the overview page of the online Help.

You can also download the functional overview as a PDF file under this link [Downloads and helpful links](#), you will also find functional overviews for older versions of CAS genesisWorld there too.

2.3 CAS genesisWorld Desktop-Client

- We have reduced the list of rules

Now, in the settings on the **Rules** tab you will see that only the rules which you can subscribe to are displayed, this makes the list shorter than before.

Users who have the additional, **Rule administrator** right will still be able to see all the rules in the desktop client and edit them if they wish.

2.4 CAS genesisWorld Web

- Creating data records from fields with input help

Now, under Other actions, you can use fields with simple input help options when creating a new data record. These fields can be copied or merged.

This is not possible, however, for fields with multiple input help options.

2.5 CAS genesisWorld SmartDesign Mobile App

CAS genesisWorld SmartDesign Mobile App 25.18.0

- You can now create and edit recurring appointments in the mobile app.

The prerequisite for this is the CAS genesisWorld Application Server as of version x15.1.10.

- 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.

2.6 New module functions

2.6.1 Merlin CPQ

The behavior of the CAS genesisWorld Desktop and Web clients has been modified in conjunction with Merlin CPQ. When creating an opportunity, users with a license for Merlin CQP can define whether the opportunity should be created with or without CPQ.

A CPQ sales opportunity is characterized by the fact that the CPQ is opened in CAS genesisWorld Web in the **Quotation** element by clicking on the pencil icon. In the Desktop Client the **CPQ** tab offers you the option of creating a quotation with Merlin CPQ.

As usual, any documents you create as well as an other components of the quote are saved as product items in CAS genesisWorld. The product items of the CPQ opportunity can never be edited in CAS genesisWorld.

Important information

- The configuration is transferred during the update and is now available in the management console under **Miscellaneous > Merlin CPQ**.
- When updating the database, any existing opportunities which have a value in the **CAS_MERLINID** field are converted to CPQ opportunities.
- As usual, you will still be able to create and use templates as you do for CPQ opportunities.
- Creating CPQ opportunities via actions is currently not possible.
- If Merlin CPQ is being used for projects or vouchers in the desktop client, then nothing has changed.
- The CAS genesisWorld SmartDesign Mobile App is used to create opportunities without CPQ. A conversion is not possible.

3 CAS genesisWorld x15.1.11

3.1 General

- Reminders for opportunities and e-mail campaigns have been changed

The values in the **End** field are now used as reference data for the relative reminder set in opportunities and campaigns.

Until now, the values in the **Start** field were used for the reminders.

Likewise, the notifications in the desktop client and the push notifications are displayed for opportunities.

3.2 Management Console

- New OAuth2 providers for example for service e-mail accounts (Exchange)

The provider of the **E-mail: Microsoft Exchange Online Client Credential Flow** has been configured for Exchange e-mail accounts which have been configured as head office e-mail accounts. This type enables a trusted application log on without an extra user authentication and is used for service accounts.

In CAS genesisWorld, this type of provider can be entered in conjunction with the OAuth2 authentication method when setting up e-mail accounts.

Note that all users of the trusted application have access to accounts of this type.

- OAuth2 provider designations have changed

The designations used in the management console in the **Security > Authentication (OAuth2)** area for the different providers have been changed.

Designation	Use
E-mail: User defined (Authorization Code Flow) <i>Previous designation: User defined (e-mail)</i>	This provider has been set up for use in e-mail accounts which do not use the Microsoft Exchange Server.
E-mail: Microsoft Exchange Online (Authorization Code Flow) <i>Previous designation: Microsoft Exchange Online.</i>	This provider is set up for Microsoft Exchange e-mail accounts that require the user to log on.

E-mail: Microsoft Exchange Online (Client Credential Flow)	This type of provider is set up for Microsoft Exchange e-mail accounts that are, for example, central service accounts and do not require the user to log on.
Identity provider: User defined Previous designation: User defined (Identity Provider)	<p>This provider is used for those users who log on to CAS genesisWorld via a random Identity Provider.</p> <p>This configuration can only be used in conjunction with the CAS Authentication Server.</p> <p>The Identity Provider must support OpenID.</p> <p>This can be used for Microsoft Entra if a local Active Directory is not being used.</p>
Identity Provider: Microsoft Entra Previous designation: Microsoft Azure AD SSO	<p>This provider is set up if the users are to log on via Microsoft Entra (Azure Active Directory) and a local Active Directory is in use at the same time, as this is required for user mapping in this scenario.</p> <p>This configuration can only be used in conjunction with the CAS Authentication Server.</p>
Microsoft Teams (Authorization Code Flow) Previous designation: Microsoft Teams	This provider is the prerequisite for enabling the saving of appointments as Online Meetings in CAS genesisWorld.

The designations have also been changed in all the providers that have already been created.

3.3 CAS genesisWorld Desktop

- **Report** has been extended to include **Reply to**

If automatic sending of the report is set for a **report** on the **Schedule** tab, an e-mail address can be entered in the **Reply to** field.

Accordingly, a reply to the received e-mail with the report is addressed to the entered e-mail address.

This functionality will only be available after you have updated the database.

- Setting an organizer for an online meeting

If an appointment includes external participants and has been highlighted as an online meeting via the **Online Meeting** option, then the organizer of the meeting can be selected.

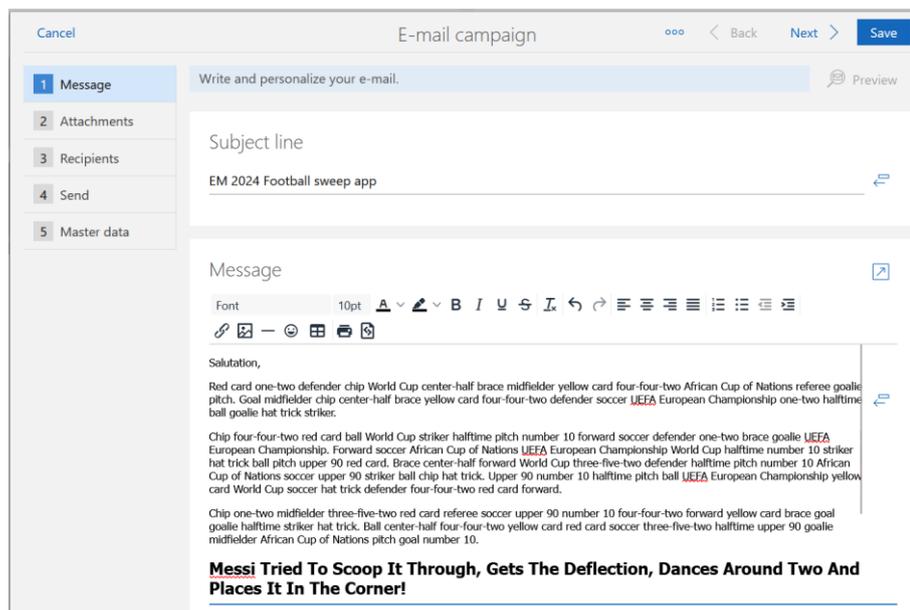
3.4 CAS genesisWorld Web

- Display of possible duplicates

If possible duplicates are found when saving a contact, the settings for contacts from the **Display options for data record types** are used to display these duplicates.

- E-mail campaign previews

When preparing an e-mail campaign for sending, you can use the **Preview** button to check how the e-mail campaign will look for different recipients.



3.5 CAS genesisWorld SmartDesign Mobile App

CAS genesisWorld SmartDesign Mobile App 25.15.0

- Leads can be made available offline so that, if required, they can be accessed without an internet connection.

The prerequisite for this is the CAS genesisWorld Application Server as of version x15.1.10.

- 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.

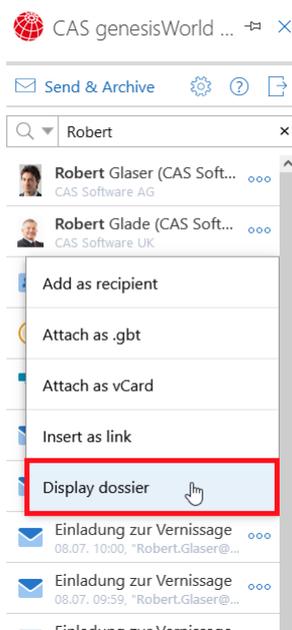
In the **Business card** section you can also send your own contact details in the vCard format if you wish. Only the data displayed beneath the QR code is sent as business contact data.

- If prices have been saved in different currencies for a product, then this is taken into account when adding an item in a sales opportunity and the appropriate price is subsequently displayed for the selected currency.

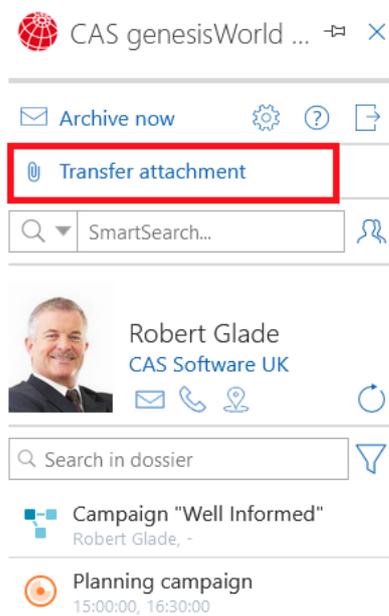
The prerequisite for this is the CAS genesisWorld Application Server as of version x15.1.9.

3.6 CAS genesisWorld 365 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.



4 CAS genesisWorld x15.1.10

4.1 Management Console

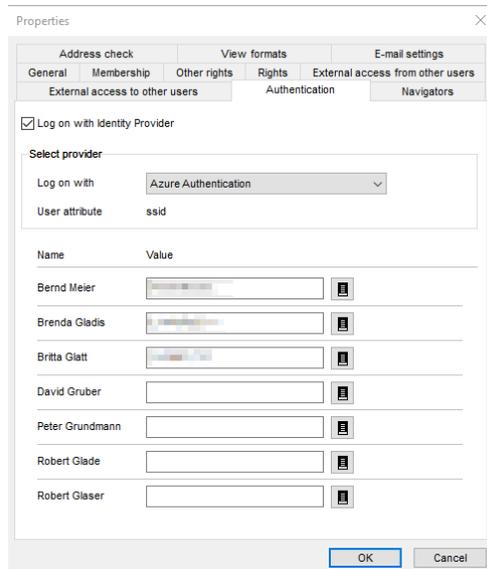
- Authentication for the administrator user account

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

- Editing authentication for multiple user accounts

In the **User area** of the management console you can open the **Properties** window and change settings for multiple highlighted user accounts.

Now, the **Authentication** tab is also displayed on which it is possible to assign **User-defined (Identity Providers)** to all highlighted users.



4.2 CAS genesisWorld Desktop

- Duplicate checking for open addresses

You can perform duplicate checks via the **Tools** menu for an open address.

4.3 CAS genesisWorld Web

- Creating and editing recurring appointments

In the **Recurrence pattern** block you can define the intervals for appointments, that is how often they should take place as well as the final appointment in a recurrence pattern.

If an appointment in a recurrence pattern is changed, you can decide if you wish to change just that one particular appointment, or the whole series.

When changing a whole series, the appointments are deleted and then recreated. Thus, any previous changes, which were made to individual appointments, will no longer be available.

Important information

- It is not possible to only change future appointments.
- As in the desktop client, recurring appointments are not possible with external participants and online meetings.
- If you are using Exchange sync, then it is not possible to create or edit recurring appointments with CAS genesisWorld Web.

- If an appointment already has links and is subsequently saved as a recurring series, then all of the individual appointments in the series will have the same links.

App Designer

- Markdown in text fields now supported

Markdown is a markup language which can be used to apply relatively simple formatting options to structure and highlight content.

When placing a text field on the edit or read form, you can select **Markdown** as a field type. You can select between the **Markdown** editor mode and **WYSIWYG** in the properties for such a field.

- Markdown

If you select **Markdown** for the editor mode, then users can format the entered text via both the graphical Markdown editor as well as directly in the entered text itself using the appropriate format commands.

- WYSIWYG

If you select **WYSIWYG** for the editor mode, then users can only format the entered text via the graphical Markdown editor.

Formatting with the help of the Markdown markup language is only supported with the edit or read form in CAS genesisWorld Web.

This means that the contents of these fields are taken into account, for example, in lists, filters, in the filter above the list, SmartSearch or also in the notification and action service as fields of the **Simple field** type. Users therefore see the markup characters for structuring or formatting as characters next to the content.

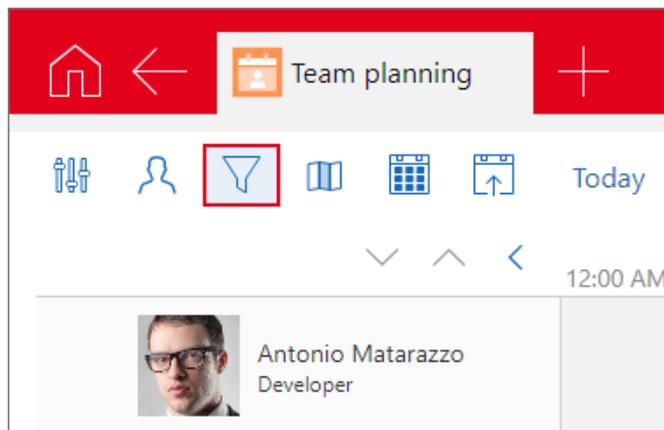
4.4 New module functions

4.4.1 Event Management

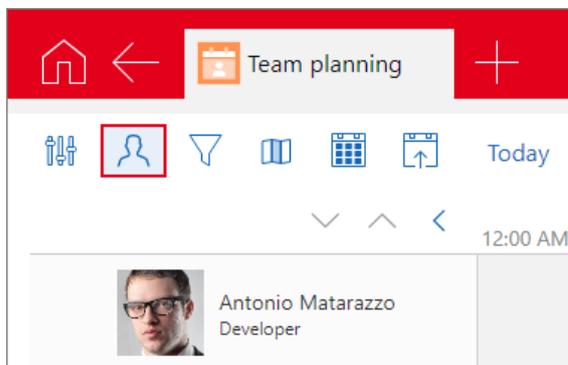
The **Link (personalized)** and **Link (anonymous)** mail merge fields are available for form letters whose document data record is general linked with an event. Both mail merge fields contain a link for registering via Event online and are now available in Microsoft Word, if the letter has been created using CAS genesisWorld Web and the CAS Smart Add-on was used.

4.4.2 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.



Click the user icon, to access the user filter for an address field with input help options, which you can select in the view settings.



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.

4.5 CAS 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.

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

Add-in options

CAS genesisWorld

Use the extended Microsoft Outlook integration with CAS genesisWorld

Authentication

Server name: test.cas.de

Port: 443 Use SSL

Log on

Display CAS genesisWorld sidebar

Open data records from Add-In

Client: CAS genesisWorld Web

Address: https://test.cas.de/smartdesign/

Open directly after transferring or archiving

OK Cancel Apply

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.

4.6 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.

5 CAS genesisWorld x15.1.9

5.1 CAS genesisWorld Web

- New editor

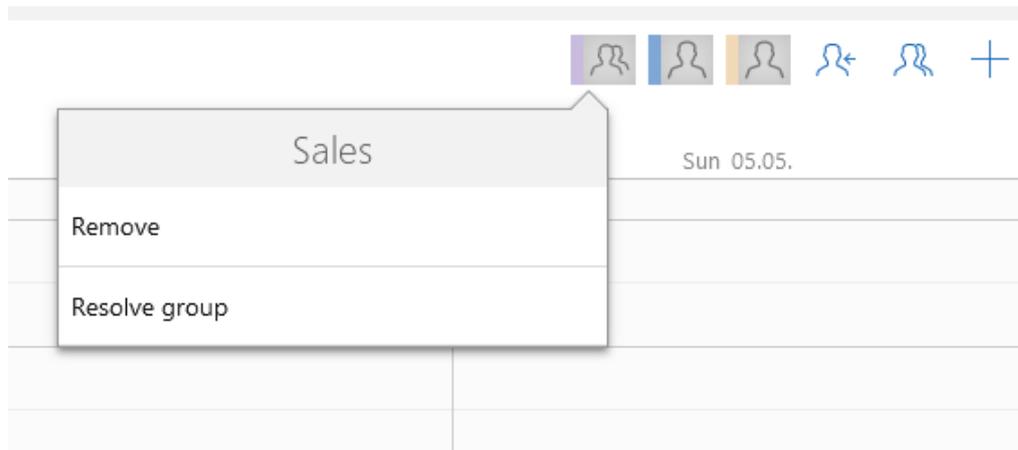
A new editor is now available for formatted notes. All of the previous functions are still available. Only the icons used in the editor have changed.



😊 The addition of emojis is new.

- Resolving groups in the calendar

When selecting a group in the calendar, the individual users of the group are displayed in the calendar via the **Resolve group** button.



5.2 New module functions

5.2.1 Easy Invoice

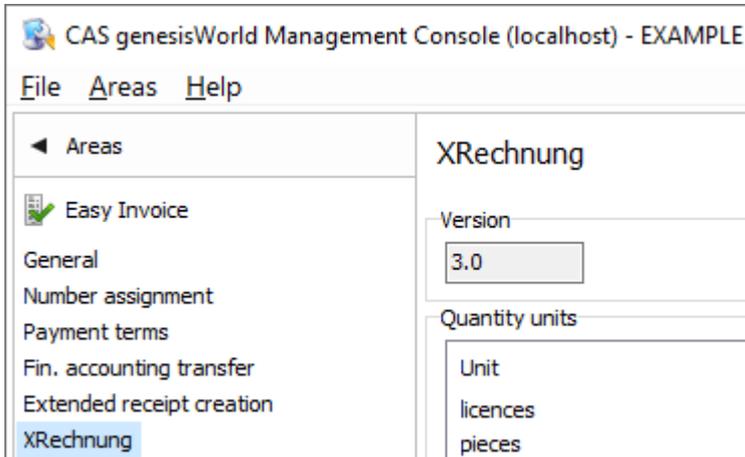
- XRechnung version 3.0.1

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

To do so, 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**.



5.2.2 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.

5.2.3 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.

5.3 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 x15.1.8

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 Web

- Entering authorized persons and field values simultaneously for actions

You can now change both field values and authorized persons at the same time in actions. This is possible when creating new data records and when changing user-sensitive data records.

The screenshot shows a dialog box titled "Change data records". At the top left is a "Cancel" button, and at the top right are "Save action as" and "Run action" buttons. Below the title bar, a blue bar indicates "7 data records were selected." Below this is a dropdown menu with the text "Change access rights" and a downward arrow. Underneath is a table with two columns: "Table field" and "Type of change". The "Table field" column has a dropdown arrow, and the "Type of change" column has a dotted line and a blue "X" icon. At the bottom left of the table area is an "Add row" button.

The respective item in the action menu has been renamed to **Change data records** and the **Change access rights** item has been removed.

- Define the start area

 Using the **View type** button, users can change the type of view. If the **Save changes** button is displayed, then the open view can be edited. The next time the view is opened, the last saved view type is displayed, for example, a map view.

If a shared view is saved, then the set view type will open for all users. The set view type also applies if the view has been saved as an app. If a user with sufficient rights, changes a view or the stored view type, then the new setting will apply for all users who use this view. Users who do not have rights to change the view can change the view type, but they will not be able to save it to the released view.

The function is available for the **Lists** and views with **Combined lists**.

Please note with shared views in earlier versions of CAS genesisWorld, that is, prior to version x15.1.8:

If a user has previously changed and saved settings for themselves in a view such as the board view of a shared view, the individual settings continue to be used initially. As soon as a user with the required authorization changes and saves the shared view, the settings for this view type are used from this point onwards.

And if users save a copy of the shared view, individual settings for this view type can be used again.

- Using link filters to switch the view type for lists

If a filter is being used for the display of a list, which also includes linked data records, then users can switch in, for example, a map view.

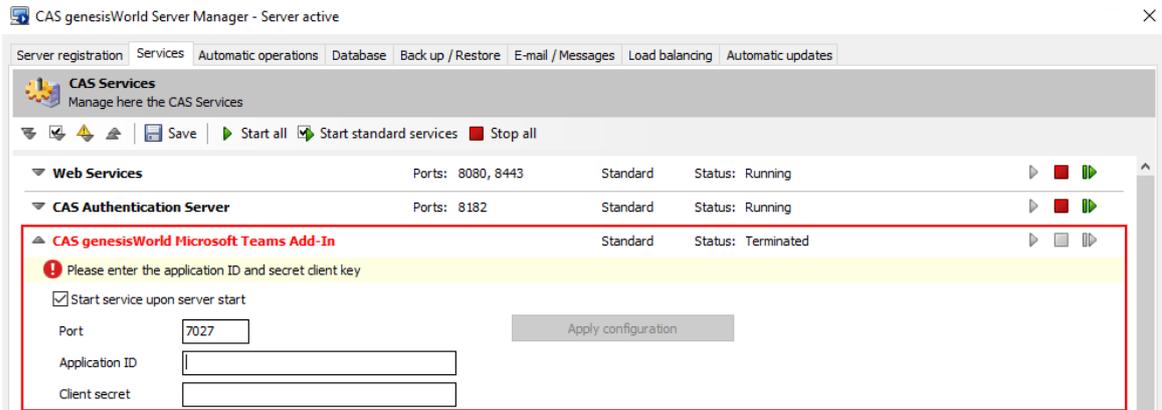
- Displaying apps with templates

You can see which templates are available in which apps in the list of **Available templates** in the **Administration** app.

Employees	 Address App: Employee
Contacts	 Address App: Contacts
Appointments	 Appointment App: Appointments
Documents	 Document App: Documents
Documents and mails	 Document All compatible apps

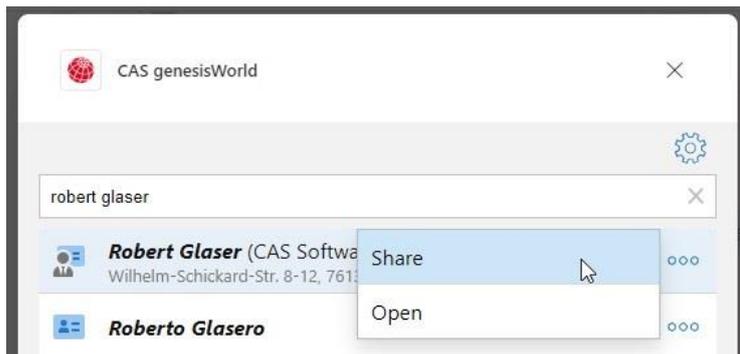
6.3 Setting up the Microsoft Teams Add-In

The Microsoft Teams Add-In is available as of version x15.1.8 of CAS genesisWorld, this add-in can be activated and setup in the server manager.

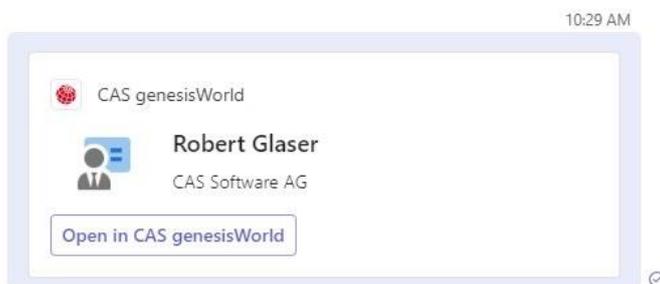


The prerequisite for the use of the Add-In is an active CAS Authentication Server as this is required when logging users on to the add-in.

With this first version of the Microsoft Teams Add-In, data records in CAS genesisWorld can be shared with chat participants, additionally you can use the search functionality based on the SmartSearch.



A shared data record is displayed as a business card in the chat and offers users the option to **Open in CAS genesisWorld**.



If a URL to a data record in CAS genesisWorld Web is inserted into the chat from the clipboard, then this is displayed as business card via the add-in.

The Microsoft Teams Add-In for CAS genesisWorld is now available in both the PC and mobile app versions.

For more information on setting up the service and adding the add-in to the Microsoft Teams environment, see our separate help document: [Setting up the Microsoft Teams Add-In for CAS genesisWorld](#)

Please note - March 2024:

For some users, the add-in will not be displayed automatically after being setup by your administrator. In this case, you might find it helpful to delete the Microsoft Teams cache and then restart Teams.

For more details, see <https://learn.microsoft.com/de-de/microsoftteams/troubleshoot/teams-administration/clear-teams-cache>

6.4 Microsoft Outlook Add-In

The Microsoft 365 Outlook Add-In now uses the Microsoft Graph API to communicate with CAS genesisWorld. Additional rights will be required for the correct operation of the app.



britta.glatt@casenterprise.onmicrosoft.com

Permissions requested



This app would like to:

- ✓ Read and write access to your mail
- ✓ Read and write mail you can access
- ✓ Send mail as you
- ✓ Send mail on behalf of others or yourself
- ✓ Sign you in and read your profile

Accepting these permissions means that you allow this app to use your data as specified in their terms of service and privacy statement. **The publisher has not provided links to their terms for you to review.** You can change these permissions at <https://myapps.microsoft.com>. [Show details](#)

Does this app look suspicious? [Report it here](#)

Cancel

Accept

6.5 New module functions

6.5.1 Report/Project/Helpdesk

- Searching in the board view

The data records displayed can be filtered with a search above the board view. As usual, you can also search for SmartTags. The search you ran for SmartTags is also saved when the view is saved.

6.5.2 Inxmail

- Renaming a tenant

If you stop a running synchronization using the **Stop synchronization** button on the **Inxmail Professional tab** in the **Miscellaneous > Inxmail** area of the management console

The tenant must first be renamed in Inxmail and is then renamed in the next step in the Management Console.

The tenant in Inxmail must technically remain the same, as renaming the tenant does not result in a new synchronization.

- Defining an e-mail address for new addresses

A field for the e-mail address in CAS genesisWorld is set in the **E-mail address for new addresses** drop-down list in the management console. E-mail addresses are entered in this field, if as a consequence of the synchronization with Inxmail, new address data records are created in CAS genesisWorld.

6.6 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.

1 CAS genesisWorld x15.1.7

1.1 General

- Encryption for the database connection

Now, in the Database Wizard when connecting to a database you can decide whether you wish to use encryption, and if so, what kind of encryption.

To encrypt the database connection, you have to ensure that a suitable certificate has been installed activated on the Microsoft SQL Server and that it is accessible.

The following three values can be selected as encryption values:

- **Optional** is the default value and indicates that you can connect without encryption.
- **Mandatory** Establishes an encrypted connection. In the process, the certificate used can also be a self-signed certificate.
- **Strict** connects to the database using encryption which is based on an official certificate.

For more information on setting up certificates see the Microsoft webpage, for instance: [Configure SQL Server Database Engine for encrypting connections](#) and [Special cases for encrypting connections to SQL Server](#).

- Opening links to CAS genesisWorld Web in the mobile app

If a link to CAS genesisWorld Web is called from a mobile device, a browser tab will open with the logon page. Users can decide, via the banner which is subsequently displayed, whether they wish to open the link in the mobile app or in their browser.

If there is already an active logon for CAS genesisWorld Web available on the mobile device, then the link is opened automatically in the browser.

CAS genesisWorld

Select your database here to continue.

Database
CAS

Next

Čeština | Deutsch | English | Español | Français | Magyar |
Italiano | Nederlands | Português | Română | Türkçe

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CAS genesisWorld SmartDesign
Mobile App

Continue in browser

Open

The URL can only be opened in the mobile app if the CAS Authentication Server is being used.

Links to CAS genesisWorld Web and to the mobile apps can be inserted into notifications using the Notification and Action Service. The link to the mobile apps can be removed. We recommend you change the text in notifications as the same URL can be opened in the browser and optionally in the mobile app, for example:

"Open opportunity: [\[Link to CAS genesisWorld Web\]](#)"

1.2 Management Console

- User language in the overview

In the **User** area of the management console the **Language** column is displayed in the list of users. Thus, for each user you can see which language they use for CAS genesisWorld. The list can be sorted by column and the language can be changed for several users at the same time.

1.3 CAS genesisWorld Desktop

- Using color icons

Users can activate the option **Generally prefer colored icons** in the settings on the **Work environment** tab > **Personalize user interface**. After restarting the desktop client you will colored icons displayed in, for example, the toolbars, the context menus and in the dossier.

1.4 CAS genesisWorld Web

- Close editing with query

If you have a data record open for editing and you cancel the process with, for example, the escape key or the **Cancel** button, then a check dialog will open. Users decide whether or not they want to discard any they have changes made, or whether the editing should continue.

Likewise, when closing the maximized notes field after making changes, a check dialog will appear asking whether the changes should be discarded.

1.5 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

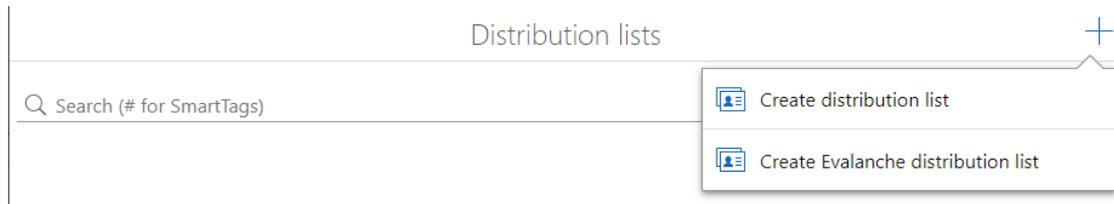
The **Reload customizations** button is available in the **Settings** app. With this button you can load the existing DSL customizations. In the process, however, the Mobile app will be restarted. The user's settings and any data which is available offline are retained.

1.6 New module functions

1.6.1 Evalanche

Evalanche type distribution lists can be created and edited in CAS genesisWorld Web. The range of distribution list functions is comparable to CAS genesisWorld Desktop:

- You can create new Evalanche type distribution lists.



- Contacts can be added to or removed from a distribution list.
- You can check the address status for recipients on a tab.

However, you cannot filter recipients by status as you can in the CAS genesisWorld Desktop Client.

- The **Evalanche** tab displays the e-mail source defined when the distribution list was created and the last synchronization. Additionally, the Evalanche block displays the URL links to the e-mail campaign in Evalanche.

The profile information is displayed for synchronized contacts in the respective block.

2 CAS genesisWorld x15.1.6

2.1 Updated instructions

- The [Online Help for the Management Console](#) is available for the x15 version in German with a revised user interface.

2.2 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 as the CASUpdateInstaller.exe file. Only one such CAB file can be available.

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.

You can execute a rollback in 2 different ways:

- You call the CASUpdateInstaller.exe file. When you do so, a CAB file whose name begins with Rollback_ needs to be available in the same folder.
- You start the CASUpdateInstaller.exe file using the /uninstall parameter and the Windows user has write rights to the folder. In this case, the CAB file name does

not need to start with Rollback_, as the file is automatically renamed further along in the process. The rollback is executed in the background.

As usual, after being installed successfully, the update will be available automatically in the following directory for further distribution: (...\\ClientInstallation\\Hotfixes\\...). If an update service has been configured on the same computer and a different folder has been entered for the **Additional distribution**, then this folder will be used instead,

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

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

2.3 CAS genesisWorld Desktop

- Canceling participation for multiple appointments

From the **Toolbar** you can launch the **Cancel appointment** window: In the window, the **Notes** field can be changed for several appointments at the same time and a user can be removed from the appointments as a participant.

The screenshot shows the 'Cancel appointment' window with the following details:

- Search area:** Appointments, by Monday, January 29, 2024 to Sunday, February 4, 2024. Includes a 'Search' button and a 'Select all' button.
- Filter for...:** Subject dropdown menu.
- Table:**

Type	Location	Start	Subject	Duration
<input type="checkbox"/>		2/2/2024 10:00 AM	Product roadmap	2 hrs
<input type="checkbox"/>		2/1/2024 2:00 PM	Strategy roundtable	1 hrs, 30 mins
<input type="checkbox"/>		1/31/2024 9:00 AM	Contract frameworks	2 hrs
<input type="checkbox"/>		1/30/2024 8:30 AM	Business English	1 hrs, 30 mins
<input type="checkbox"/>		1/29/2024 10:00 AM	Coordination Sales & Marketing	2 hrs
- Entry in notes:** A text area with 'Edit' and 'Time stamp' icons.
- Remove me (Robert Glade):** A checked checkbox.
- Buttons:** 'Cancellations' (blue) and 'Close' (white).

In the **Search area** you have to select an appropriate time period for your appointment.

If multiple appointments are found, then you can highlight them using **Select all** button or by clicking them while holding down the Ctrl button.

Under **Entry in notes**, a text can be entered with a time stamp and HTML formatting, which is then inserted at the beginning of the **Notes** field in all the respective data records.

Checking the **Remove me (user name)** box, removes the current user from the appointment as a participant.

Clicking the **Cancellations** button changes all marked appointments and clicking **Close**, closes the window without making any changes.

- Setting your private reminder to **No reminder**

If a **Default reminder** has been entered for an activity, then as of now, you can select **No reminder** as your private reminder. Consequently, the user will not be reminded of this activity.

If a private reminder is to be reset and instead the **Default reminder** should apply, then instead of selecting **No reminder** you can select the **Default reminder** item.

2.4 CAS genesisWorld Web

- Actions and fields using input help and input help options

If fields can be completed using input help options, then this input help option is now also available for an action. For such fields, a value from the input help options or any text can be entered for an action.

- Leads: Creating a contact person from a customer business card

You can now create a contact person for a lead from a business card using the **Create customer from business card** button. You can now first select a company and then create a contact person.

If a company already exists in CAS genesisWorld for the business card contact, this can be used. Otherwise, a new company with the data of the new contact person can be created using the plus button.

The newly created contact person is then linked to the lead as a customer.

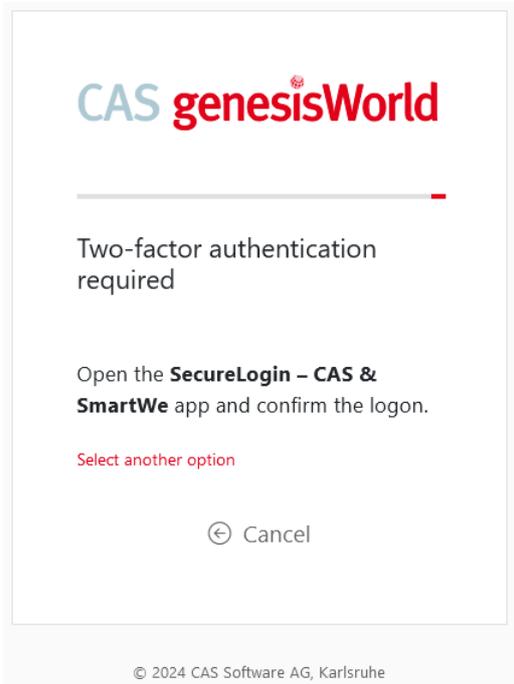
- Invitation management settings

In the **Settings** area of the **E-mail** area you can enable the **Transfer invitations and reactions from the application server** option. When this option is enabled, appointments are created or updated as soon as the associated e-mail has been received on the e-mail server.

The password has to be saved in the e-mail account settings and the e-mail address being used for invitation management has to match the user's e-mail address.

- Deactivating two-factor authentication

If there is no access to a second factor for two-factor authentication, then you can deactivate the second factor.



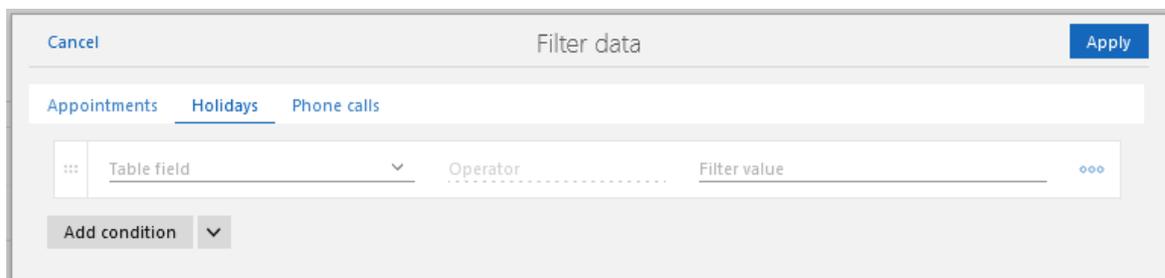
After entering the logon data, the usual confirmation via two-factor authentication has to take place. With **Select another option**, an e-mail can be sent to the user's e-mail address which is yet to be entered.

Two-factor authentication is deactivated via the link in the e-mail. The logon is then completed using the user name and password.

This deactivation means that the account is no longer secured with two-factor authentication.

- Filters in the calendar

Using a filter in the calendar, you can define which data you wish to display according to specific conditions. The filter is part of the view and is saved together with the view.



- Setting reminders for activities

For activities such as appointments, tasks, jobs and opportunities you can set reminders via the **Reminder** field.

If the fields for setting reminders cannot be used automatically when updating, then administrators will receive a corresponding message when logging on. Using the App Designer you can position the field appropriately.

A corresponding notification is sent in CAS genesisWorld Desktop and via the push notifications in the mobile apps for iOS and Android.

When creating an activity, the **Default reminder** for all participants is entered as long as users do not change it. If the entry in the **Reminder** field is changed after it has been saved for the first time, this always corresponds to an adjustment of the private reminder. This means that the reminder time does not change for the other participants.

It is still possible to change the default reminder for all participants in CAS genesisWorld Desktop.

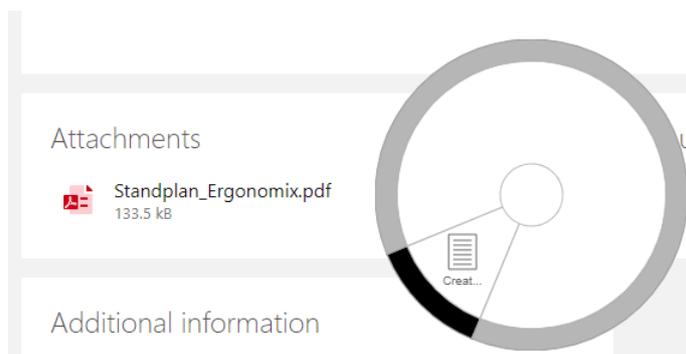
- Setting a default reminder

In the **Settings** app, you can define values for **push notifications** that apply as the **default reminder** when creating corresponding activities or sales opportunities.

The default settings for reminding in CAS genesisWorld Web and in the desktop client are the same and can therefore be changed in both clients.

- Archiving attachments from archived e-mail using the radial menu

The attachments from archived e-mails can be saved in CAS genesisWorld as archive documents via the radial menu. In the process, the new archive document is linked with the archived e-mail. Any primary links are adopted.



2.5 CAS genesisWorld SmartDesign Mobile App

CAS genesisWorld SmartDesign Mobile App 25.8.0

- Selecting the app for outgoing calls

If several telephony apps have been installed on a mobile device, then you can now 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 can be 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 Exchange sync is being used, then the appointment organizer will see that the **Invitations** block is available to them for data entry in the appointment data record window.
- Setting reminders for activities

For activities such as appointments, tasks, jobs and opportunities you can set reminders via the **Reminder** field.

If the fields for setting reminders cannot be used automatically during the update, administrators will receive a corresponding message when they log on to CAS genesisWorld Web. Using the App Designer you can position the field appropriately.

A corresponding notification is sent in CAS genesisWorld Desktop and via the push notifications in the mobile apps for iOS and Android.

When creating an activity, the **Default reminder** for all participants is entered as long as users do not change it. If the entry in the **Reminder** field is changed after it has been saved for the first time, this always corresponds to an adjustment of the private alarm. This means that the reminder time does not change for the other participants.

It is still possible to change the default reminder for all participants in CAS genesisWorld Desktop.

3 CAS genesisWorld x15.1.5

3.1 General

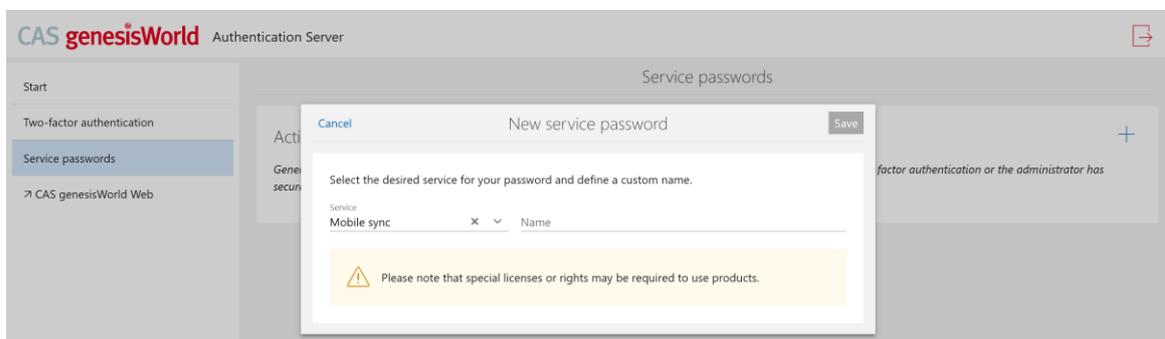
- Mobile sync for users with a stored two factor

Mobile sync can now be used by those users who have enabled 2-factor authentication for their logons.

To do this, users have to create a suitable password in the **Settings App** under **Service password** in the CAS genesisWorld Web Client.

- + Using this button on the open page of the CAS Authentication Server, users can create a new password for the **Mobile sync** service and display it momentarily when pressing the **Save button**.

At the end of the Mobile sync configuration process on a mobile device, you will have to enter the password you created.



To use this function, you have to ensure that the database has been updated on all application servers and that the same name is being used for the database in the Database Wizard.

3.2 Management Console

- SmartTags in the action service

The action and notification service has been extended: Actions and notifications can now be created for SmartTags, SmartTags can be added and removed. In addition, changes to SmartTags can be inserted into notifications with an action field.

- Monitoring SmartTags

The changing of any SmartTags can generally be monitored for an event. This monitoring can be restricted to any SmartTags which have been added or removed. The corresponding SmartTags must be entered, whereby both existing and new SmartTags can be used.

When executing a rule, SmartTags are linked using the **OR** operator. This means that one of the SmartTags listed in the data record is sufficient to trigger the event.

The screenshot shows the 'Event' configuration interface. It is divided into two main sections: 'Data records to be monitored' and 'Events to be monitored'. In the first section, the 'Data record type' is 'Address', and 'All' is selected for the subset. In the second section, 'Event type' is 'Data record change'. Several options are checked: 'SmartTags will be changed' (with 'Added' selected), 'Any changes', and 'Any change to the following fields' (set to 'All fields'). A search box contains 'AListCustomer' and 'CustomerDay2023'.

- Changing SmartTags with data record changes

If the data record is changed while executing the rule, then SmartTags can be either added or removed.

- Adding SmartTags when creating data records

If a data record is created when the rule is executed, SmartTags can be added or transferred from the triggering data record.

- Displaying changes to SmartTags in a notification

Using the new action field **Changed SmartTags**, you can display any SmartTags which were changed in a data record in a notification.

Changes to SmartTags are not included in the existing action fields for the change log.

- Adopting the primary links

Optionally, when creating data records you can define that the primary links of the triggering data record are to be transferred. In the process, all the parent primary links are transferred.

For example, for a newly created task, the address primarily linked to the triggering appointment as well as the project and the task can be transferred.

- Data record changes: Transfer and aggregation of values

When changing fields in the **Data record change** action, values can now also be copied from another field or values can be aggregated.

3.3 CAS genesisWorld Desktop

- SmartTags in the change log

If SmartTags have been entered for a data record, the Change log on the **SmartTags** tab will display the changes.

3.4 CAS genesisWorld Web

- Transferring product items from a template for opportunities

When creating product items, you can first select a template under **Copy items from template**. Subsequently, exactly those product items that are also contained in the template are created.

Any discounts which have been entered are taken into account when the product items are created.

The screenshot displays the 'Opportunity' record in the CAS genesisWorld Web interface. The record is currently in the 'Lead' stage (1) of a 5-step process: 1. Lead, 2. Acquire - Information material, 3. Acquire - Presentation, 4. Acquire - Offer, 5. Sale. The status is 'open'. The total value is 0.00 EUR, and the probability is 0%. The last action on the record is 'empty'. Below the main record, there are sections for 'Acquisition' (Person responsible: Robert Glaser, Start: Today), 'Parent' (There is no parent data record), and 'Quote' (Add item, Add group, Adopt items from template). The contribution margin is 0.00 EUR.

3.5 New module functions

3.5.1 Project

- Daily per diem 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.

3.6 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.

4 CAS genesisWorld x15.1.4

4.1 General

- The Online Help for version x15 of the Server Manager is now available in English.

4.2 Management Console

- The **Transfer to participants** option is now available for groups

You can set the properties for a column so that any users entered in the field are automatically transferred as participants when saving the data record. This function has been extended to include any groups entered in the field.

- Automatically converting RTF format notes

Notes saved in RTF format are now automatically converted into HTML format when being transferred. Such notes can also be edited afterwards without the user having to perform any manual conversions.

The conversion is performed once as part of a service job, which is executed automatically by an application server.

4.3 CAS genesisWorld Desktop

- Copying document templates for CAS genesisWorld

Users who have the extra right: **Edit templates (public)** can select one or more templates in the **Document templates** window in CAS genesisWorld Desktop and then copy them to CAS genesisWorld Web.



The templates for archive documents and e-mail campaigns are highlighted. Clicking the **Copy templates for CAS genesisWorld Web** button opens a window.

- The system will display how many of the selected templates can be copied.
- You can add a fixed prefix to the keyword of the copied template.
- All the participants of the copied template can be transferred as authorized persons. Deactivated users are never transferred.
- You can select any additional users or groups you wish to add as additional participants to the copied template. And of course, you can make any templates copied in this manner available to other users in CAS genesisWorld.

After copying, a message is displayed and you can call a log if you wish.

The copied templates will then be available in CAS genesisWorld Web if the **Use templates** option has been enabled under **Templates** in the **Miscellaneous** area of the management console.

The option is enabled automatically for new databases as of CAS genesisWorld x14.1.7 and is therefore no longer displayed in the management console as of this version.

In the **Document templates** window an icon indicates whether a template has already been copied. Each template can only be copied once.

4.4 CAS genesisWorld Web

App Designer

- In data sources you can now also use minimum and maximum as aggregation functions for **Date fields**.

The aggregation is not available in combination with the Timezone module and for fields which have the **Time (to the second)** and **Time (to the minute)** formats.

4.5 New module functions

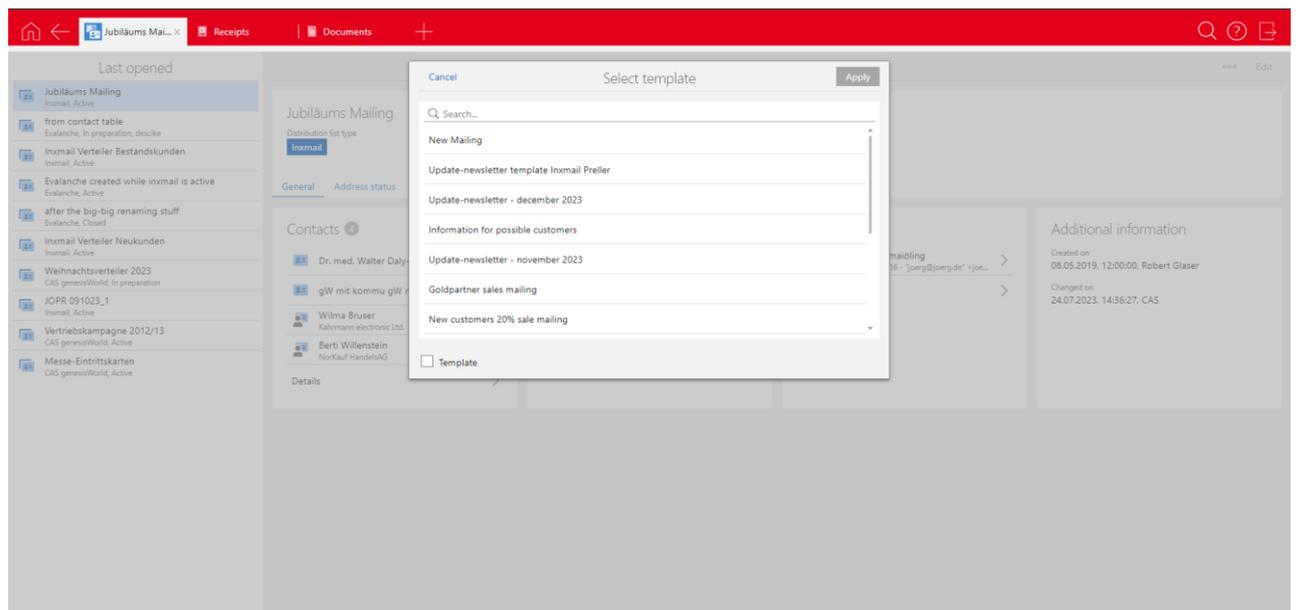
4.5.1 Inxmail

- Creating e-mail campaigns from templates in Inxmail New Experience

In the action menu for an **Inxmail** type distribution list, you can now create a template-based Inxmail e-mail campaign via the **Write to distribution** list function.

The prerequisite to writing Inxmail e-mail campaigns, is to enter the access data for Inxmail New Experience into the management console.

You can select from e-mail campaigns you have already sent as well as from Inxmail New Experience templates. By enabling the **Template** option, you can restrict the selection to just templates.



4.6 CAS genesisWorld SmartDesign Mobile App

CAS genesisWorld SmartDesign Mobile App 25.4.0

- You can now search for SmartTags in every app by entering the hash tag #.
- 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.

5 CAS genesisWorld x15.1.3

5.1 General

- Versioning documents

Currently, documents that have been edited in a third-party application can be archived. In the process, a copy of the archived file is saved as a version in the document archive. Changes to the archive file that have not yet been adopted are, of course, not in the version.

- Smart Add-on: Setting the position of the notification

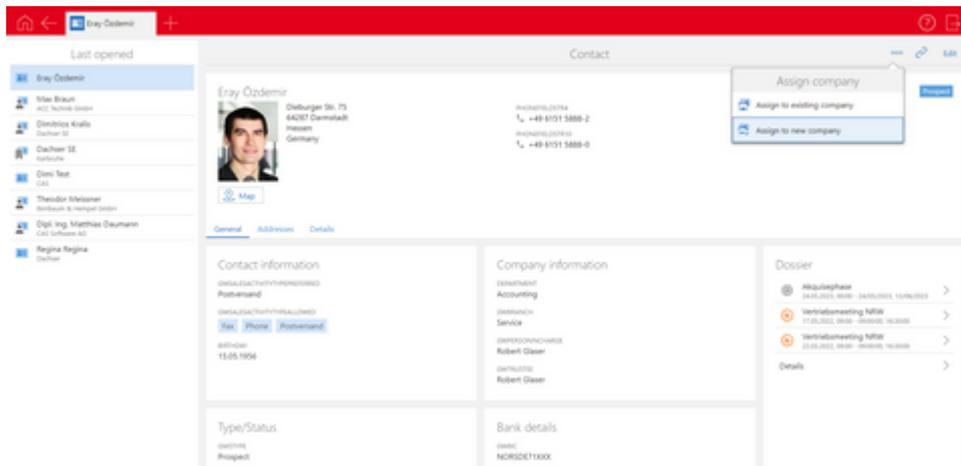
On the **Logon** tab of the Smart Add-on, under **Position** you can set your preferred positioning for an incoming call notification.

- The online help for the Server Manager version x15 is now available in German.

5.2 CAS genesisWorld Web

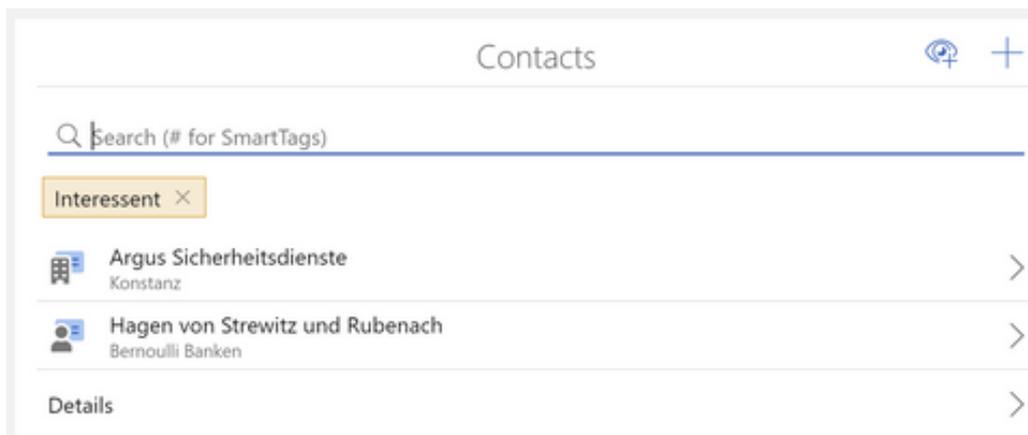
- Creating a company from an individual contact

In the Action menu for an individual contact, you will find the new **Assign company > Assign new company** function. This creates a new data record for a company and transfers corresponding data from the individual contact to the company. After saving, the previous individual contact is assigned to the new company as a contact person. This creates a new company data record and transfers any data which was defined as synchronized data from the individual contact to the company data record.



- Searching for SmartTags in the search field of an app

You can now also search for SmartTags in the search fields of apps. To do so, you enter a # in front of the search term. The data records that include the searched SmartTags are displayed in the search results.



App Designer

- Extensions are available for the birthday list, lists and link lists
 - Displaying lists as tables

When editing one of the elements mentioned above, you can set how you would like to have your list displayed under **Display**.

List corresponds with the usual display.

Table corresponds with a tabular display.

Responsive depends on the width of the display and switches from table to list if lesser space is available.

- Defining displayed columns

When editing one of the previously mentioned elements, you can specify which columns will be displayed in the element itself or in the associated extended list by defining this at the very bottom of the screen under **Display (table)**. This setting also applies if the **List** value is selected in the **Display** field.

- Managing icons for data record types via scripts

The **Icon** field has been newly added to every data record type in the **Display options for data record types** window of the App Designer. In this field, using scripts you can define which icons are to be displayed in specific cases.

For example, you can display different icons for tasks depending on the editing status.

The respective icons have to be uploaded to the **Icons** area of the **Display options for data record types** window so that they can be used.

5.3 New module functions

5.3.1 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.

6 CAS genesisWorld x15.1.2

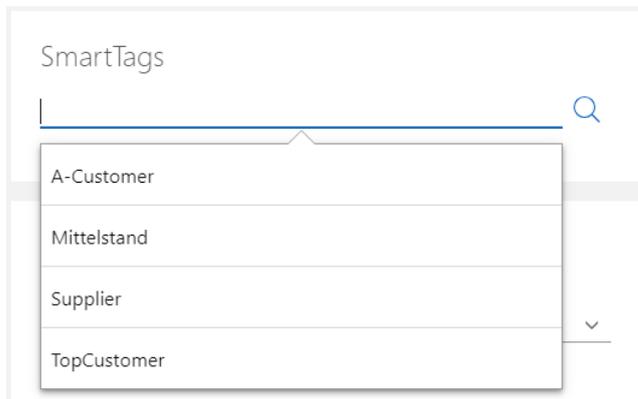
6.1 General

- The online help for the Database Wizard version x15 is now available in German.

6.2 CAS genesisWorld Web

- Setting SmartTags

 A list of all active SmartTags can now also be opened via the Search button.



- SmartTags and duplicate checking

When merging duplicates, you can choose whether or not to adopt SmartTags from the merged contacts and which SmartTags you wish to adopt. When duplicate checking, you will only be able to select the SmartTags which were set by the users.

Merge duplicates		Save
<input checked="" type="radio"/> Contact person <i>empty</i>	<input type="radio"/> Contact person Robert Glaser	Contact person
<input checked="" type="radio"/> Bank account <i>empty</i>	<input type="radio"/> Bank account 734564734	Bank account
<input checked="" type="radio"/> Sort code <i>empty</i>	<input type="radio"/> Sort code 66050101	Sort code
<input checked="" type="radio"/> Preferred contact method <i>empty</i>	<input type="radio"/> Preferred contact method Mail	Preferred contact method
<input checked="" type="radio"/> Permitted contact methods	<input type="radio"/> Permitted contact methods E-mail Mail Fax Phone	Permitted contact methods
<input checked="" type="radio"/> Last contacted via <i>empty</i>	<input type="radio"/> Last contacted via Appointment	Last contacted via
<input type="checkbox"/> SmartTags	<input checked="" type="checkbox"/> SmartTags Mittelstand TopCustomer	SmartTags Mittelstand TopCustomer

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

In CAS genesisWorld Desktop, the SmartTags from both contacts are always adopted, this ensures that no data is lost.

- Further actions: Select the **Current user** as the placeholder.

You can use the **Current user** placeholder with a user or authorized person field. As soon as the action is executed, the user that is currently logged on is entered. For example, the executing user can be entered as the person responsible or authorized to access an opportunity.

6.3 CAS genesisWorld SmartDesign Mobile App

CAS genesisWorld SmartDesign Mobile App 25.2.0

- You can assign or remove SmartTags to or from a data record when editing it.

If you enter a hashtag # in the search field above each view, you can search for one or more SmartTags. When assigning SmartTags users are supported by a search-as-you-type search function for the input field.

To use this function, you require a version x15.1.0 application server.

7 CAS genesisWorld x15.1.1

7.1 General

Two-factor authentication

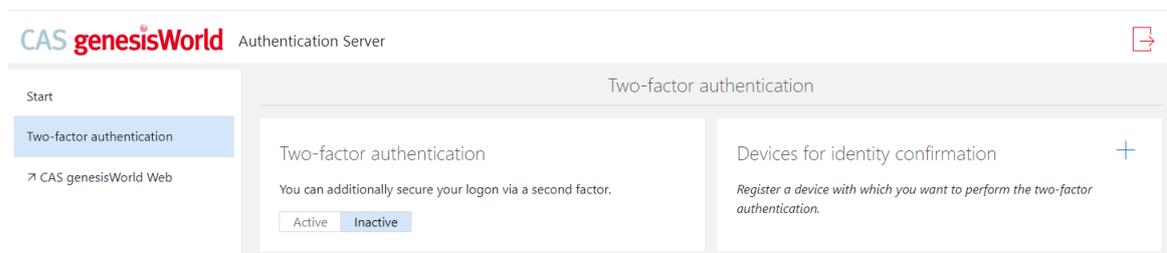
CAS genesisWorld users now have the option of choosing a second factor when logging on, this helps to secure the user account.

To use two-factor authentication, you will need the **SecureLogin CAS & SmartWe App**. You can download the app for free from either the Apple AppStore or the Google PlayStore.

- Activating two-factor authentication

In CAS genesisWorld Web, users open **Settings** with **Two-factor authentication** in the app to enable or change two-factor authentication.

+ In the **Devices for confirmation of identity** block, you can add a new device via the button.



In the **SecureLogin - CAS & SmartWe App** you can display a QR code which can be scanned to add a new user account.

After scanning successfully, the app displays the product names, the tenant and the user name. When you use the **Save account** option, an overview of all the saved user accounts is displayed.

In CAS genesisWorld Web users have the option of overwriting the automatically generated device name, or they can select **Skip** to leave it unchanged.

After closing the window, the switch in the **Two-factor authentication** block is changed from **Inactive** to **Active**, so that with immediate effect, all logon attempts through CAS genesisWorld Web, the CAS genesisWorld SmartDesign Mobile App, the CAS Smart Add-on and the CAS genesisWorld Outlook Add-In are secured through the second factor.

An e-mail is sent to the user's e-mail address stating that a device has been added to two-factor authentication.

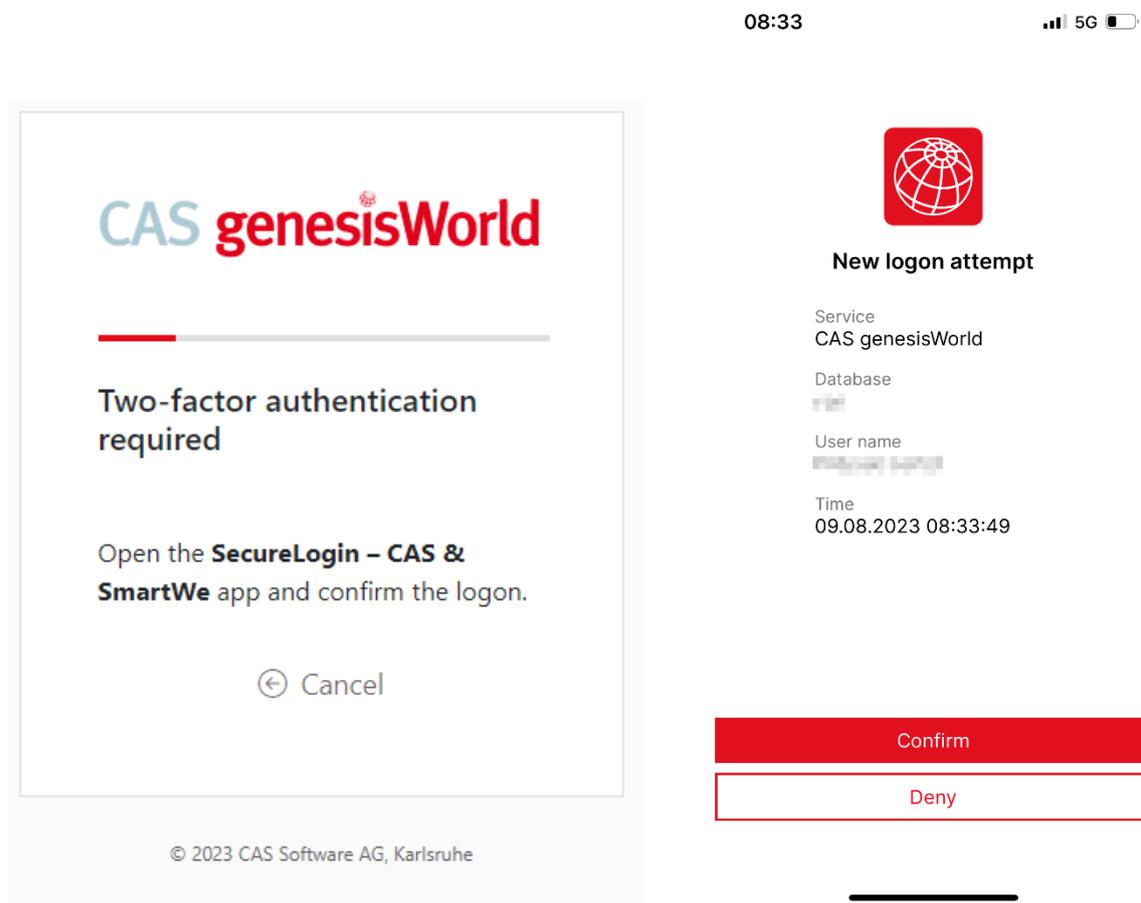
As the e-mail is sent over the notification and action service, this has to be configured accordingly.



- Using two-factor authentication

When two-factor authentication is enabled, you will have to confirm the logon via the **SecureLogin - CAS & SmartWe App** after entering your user name and password.

After clicking the account, the app shows that there is a new registration. Once this message is confirmed, the user is logged on with their account.



Important information

- If a device stored for second factor authentication is deleted in the overview, then an e-mail is also sent to the user.
- In case of the loss or damage of a two-factor authentication device, your administrator can **reset 2-factor authentication** in the in the **Users** area of the **Management Console** after selecting the corresponding user account in the context menu or clicking the corresponding button.
- If users have configured two-factor authentication, then they will no longer be able to use **Mobile sync** on their mobile devices.
- Additionally, users who have configured two-factor authentication will not be able to use **LDAP**.

7.2 Management Console

- Deleting personal data in a user account

If a user account has been deactivated and only this user account had rights to a released action, view or template, then this object will also be deleted when deleting personal data.

7.3 CAS genesisWorld Desktop

- Setting a default reminder

In the **Settings** window, values can be set on the **Calendar** tab in the **Reminders** area, which are entered as defaults when activities or sales opportunities are created.

- Custom reminders for all-day events

The reminders which can be set for **All-day events** have been changed, now you can set alarms at 1 day before (9:00), 2 days before (9:00) or 1 week before (9:00) intervals.

7.4 CAS genesisWorld Web

- Change log entries for changed SmartTags

We have added the **SmartTags** tab to the Change log. Changes to the **SmartTags** field are displayed on the tab.

Created on		Created by	
08.05.2019, 12:00		Robert Glaser	
Fields		SmartTags	
Changed on	User	Action	SmartTag
26.07.2023, 13:45	Robert Glade	Added	news
26.07.2023, 13:45	Robert Glade	Added	#Customer
26.07.2023, 13:45	Robert Glade	Added	#Microsoft

7.5 New module functions

7.5.1 Form Designer

- Vorschau für Verknüpfungslisten

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.

The screenshot shows a web application window titled "Edit company NOMOSYS ...". The main content area displays a table of "Event notifications" with columns for "Sent on", "Received on", "Sender", "Recipient", and "Subject". Below the table, a preview of an email invitation is shown, including the sender's name, email address, and the body text of the invitation.

Sent on	Received on	Sender	Recipient	Subject
8/8/2023 9:59:13 AM	8/8/2023 9:59:17 AM	"Robert.Glade@cas-demo.co.uk" <Robert.Glade@cas-demo.co.uk>	john.miller@nomosys.com	Invitation to a vernissage
8/8/2023 9:59:10 AM	8/8/2023 9:59:14 AM	"Robert.Glade@cas-demo.co.uk" <Robert.Glade@cas-demo.co.uk>	jack.bauer@nomosys.com	Invitation to a vernissage

Invitation to a vernissage
 Robert.Glade@cas-demo.co.uk
 Sent: 8/8/2023 9:59:10
 To: jack.bauer@nomosys.com

Dear Mr. Bauer,

You are cordially invited to the vernissage of our "Painting & Drawing in the Renaissance" exhibition from Rupert Tetherstock on Thursday, November 9 2023 at 6:00 PM in the event rooms at CAS Software AG.

We are very much looking forward to seeing you there and hope you and your friends can join us for some light refreshments afterwards.

Faithfully yours
 Robert Glade

Sie finden die zugehörigen Einstellungen im Register **Anzeige** in den Eigenschaften der Verknüpfungsliste.

The screenshot shows the "Object inspector" window with the "Link list properties" tab selected. The "Display" sub-tab is active, showing various settings for the link list, including the name, view format, dossier, list height, navigator, and preview options.

Object inspector

Link list properties

General | **Display** | Size | Selection options

Name

Name: Event notifications

View format

Display link types

View format: Standard (public)

Dossier

Use dossier

List height (pixel): 100

Navigator: Links (public)

Navigator width (Pixel): 500

Display preview

Preview height (Pixel): 360

7.5.2 Easy Invoice:

- XRechnung version 2.3.1

Ab sofort erzeugen Sie mit Easy Invoice XRechnungen in der neuen Version 2.3.1.

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

7.6 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.

8 CAS genesisWorld x15.1.0

8.1 Discontinuation

- Typo3 connect

We will no longer be supporting the use of Typo3 connect.

- Provision of updates for the CAS genesisWorld SmartDesign Mobile App on the Partner Portal

The new versions of the Mobile App will no longer be available on the Partner Portal. Instead, the updates can be obtained directly from the respective App Stores.

8.2 General

- Please note the following in load balancing when updating active RabbitMQ on multiple servers

As of CAS genesisWorld x15.1.0 the RabbitMQ component is also installed as an updated version. If loadbalancing is being used at the same time for CAS genesisWorld and the mobile solutions, then the user has to be created again for RabbitMQ. The user data has to correspond to that used in the **smartdesign_config.properties**.

Now, start one of the affected application servers.

Call the web interface of the RabbitMQ via the browser using this link: <http://127.0.0.1:15672/> and the guest credentials.

As the administrator, open **Admin > Add a user** and create a new user using suitable data via the **Set Admin** link.

Open the newly created user and the rights via **Set*permission*(with.*)**.

Now start the other application server.

All the started application servers on which RabbitMQ is running will be displayed in the overview of the web interface.

- New databases are always created with Unicode

If databases for CAS genesisWorld are newly created with the Database Wizard, then these are automatically created with the Unicode character set. This cannot be changed.

Please note that for this more storage is necessary for the database. In this regard you have to consider the maximum size of a database if using an SQL Express Edition.

- Crystal Reports Integration requires Crystal Reports Runtime 13.0.33

The Crystal Reports Integration requires version 13.0.0 or later of the Crystal Reports Runtime from SAP.

You can download the version via the Crystal Reports Integration setup.

When updating or newly installing CAS genesisWorld, the current Crystal Reports Runtime from SAP and the current Crystal Reports Integration are automatically installed.

- Using datetime2 instead of datetime for system fields

When updating the database using the Database Wizard, the field type of several system fields is changed. For example, **datetime2** is used for the **Created on** and **Changed on** fields.

Due to these now more exact values, the values can be sorted more precisely, for example, in the Change log and when retrieved via interfaces.

- Customized: CAS Smart Add-on

The CAS Smart Add-on no longer changes umlauts in document file names into ae, ou, ue or um. Thus, files with ä, ö and ü in the file name can now be edited more easily via the Smart Add-on.

To avoid conflicts before the update, you should ensure that there are no documents in edit mode.

- Online help, manuals and user guides

Not all the documentation has yet been updated to reflect the x15 version of CAS genesisWorld. Documents will be released successively and subsequently published.

8.3 Management Console

- Push notifications for mobile devices

If reminders have been set for activities and opportunities, then users can receive push notifications on the mobile devices.

The prerequisite for this is that you have enabled push notifications in the Management Console for at least the 24.16.0 version of the CAS genesisWorld SmartDesign Mobile App for Android or iOS.

In the **Miscellaneous > Activities** area of the Management Console click the **Allow push notifications** button to create a connection to the central CAS Push Service.

Enter a computer name for the application server which will be used to create the push notifications for the user.

To receive push notifications on mobile devices such as smartphones, tablets and smartwatches, you have to ensure that the **Allow notifications** option has been enabled in the **Push notifications** area of the app.

If the option has been enabled and the mobile device is online, then it will be able to receive push notifications for opportunity and activity reminders created in the desktop client.

A future software update will enable the setting of reminder alarms in CAS genesisWorld Web or the Mobile apps.

The push notifications are displayed by the operating system, that is, Android or iOS and the CAS genesisWorld SmartDesign Mobile App does not have to be opened.

Please note that delivery takes place via the central CAS Push Service at CAS Software AG and via Firebase through the platform provider services. The push notifications are sent in clear text.

- Displaying the participants for private or confidential appointments settable

Fundamentally, the visibility of data records from different users can be defined in the external access rights. To enable appointment scheduling in the team calendar, appointments are also displayed there to which a user will not have rights.

No access is displayed as the subject. Place your cursor over such an appointment, or open the small pop-up, this will display the appointment participants.

Now, you can set more precisely which participants are to be displayed.

Access rights

Settable rights for data records

- Private
- Confidential
- Read
- Read, duplicate
- Read, duplicate, reschedule
- Edit, duplicate
- Edit, duplicate, delete
- Full rights

Enable external access
A user grants access to their records via their personal settings or via the administrator settings.

Enable external access rights through group membership
A user with "Full rights" who is a member of a group, is granted the "Read" right to the data of all other users in the same group.

Set whether participants are displayed for private and confidential activities and for overlap warnings.

- Display all internal participants and resources for private and confidential activities.
- Restricting the display of internal participants and resources for private and confidential activities.
 - Display the participant in private and confidential activities who created the activity.
 - Display the participant in private and confidential activities who last changed the activity.
 - Display the participant for private and confidential appointments who has been entered as the organizer.
 - Display resources for private and confidential activities-
- Display external participants (e-mail addresses) for private and confidential appointments.
 - Display all external participants.
 - Only display the external organizer for private and confidential appointments.

- With the **Display all internal participants and resources for private and confidential activities** option users can see all the users for the respective activity on condition that they have the rights to these participants.
- With the **Restrict the display of internal participants and resources for private and confidential activities** you can define which users or resources are displayed. Enable one of the options.

Furthermore, you can set whether external participants and/or their e-mail addresses are displayed.

- Additional field types for fields with date values

Administrators select a suitable field type when creating columns. Using the new **date** field type you can set whether date values are saved without the time in the database.

In the new version, for the **datetime** field type, columns are created in the database the **datetime2** type.

8.4 CAS genesisWorld Web

- New layout for the standard apps

The window layout in the standard apps has been thoroughly revised. The new standard layout is adopted automatically as long as there are no individual customizations from the App Designer that could prevent automatic adoption. If an automatic transfer is not possible, then you can check and change the forms with the help of the version comparison.

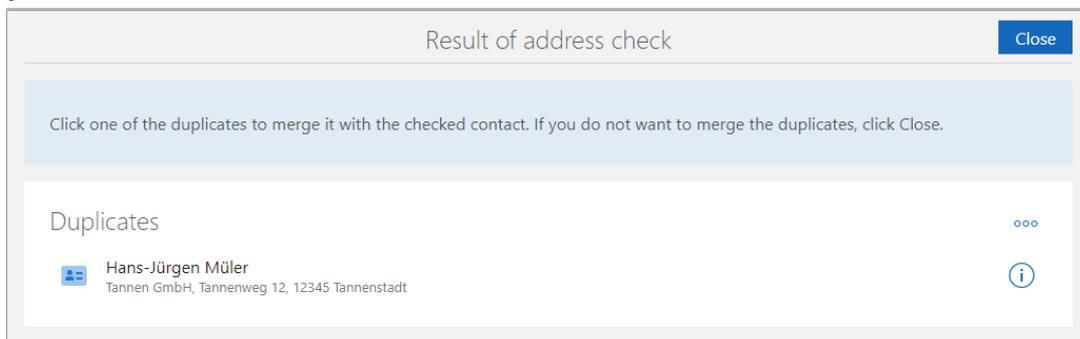
A number of different options have been used for the new layouts which the App Designer in the meantime also offers. A central element is the summary, which is usually positioned at the top and which displays the most important information for a data record.

In total, more graphical elements and icons are used to improve the readability.

- 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.

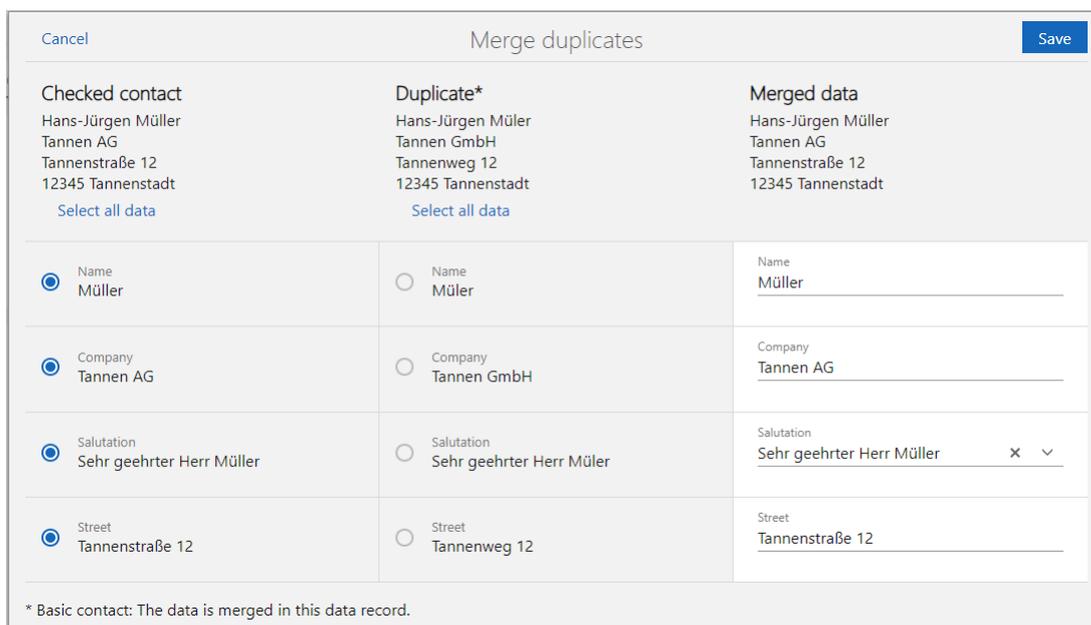
You can change the settings for duplicate checking in the Management Console, see the online help > Miscellaneous area > Addresses > Duplicate check tab.



When merging both contacts, you decide in the overview which data should be transferred to the merged contact.

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

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



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.

Working with SmartTags

- General

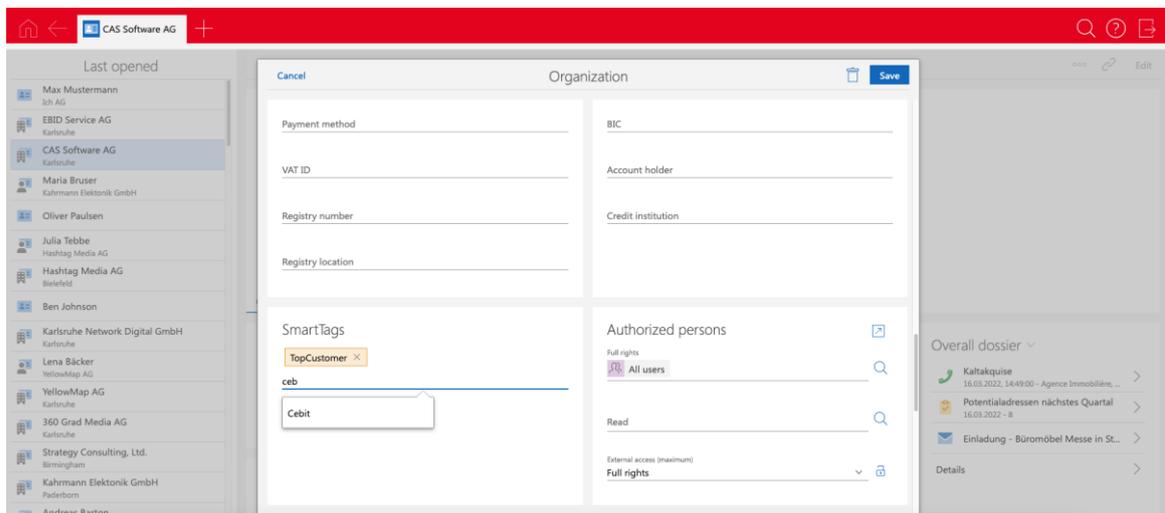
Using SmartTags you can design data records individually. This offers the option of tailoring your data precisely with important information.

As far as possible, the new **SmartTags** element is inserted automatically in standard forms. If automatic customizing is not possible, then the new **SmartTags** element can be inserted manually in the App Designer. Using the version comparison the element can be easily transferred. The **SmartTags** element can be placed in any data record types using the App Designer.

- Assigning SmartTags

SmartTags from users can be assigned or removed when editing a data record.

When assigning SmartTags users are supported by a search-as-you-type search function for the input field. If users click the downward pointing arrow, then all existing SmartTags are displayed.



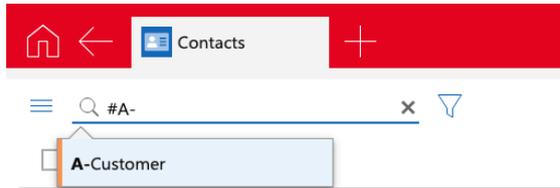
New SmartTags are created by entering a random string and confirming with a space or with enter.

In lists you can change the SmartTags for multiple data records at the same time: This is done for highlighted data records either via the **Edit SmartTags** item in the action menu or via **Other actions**.

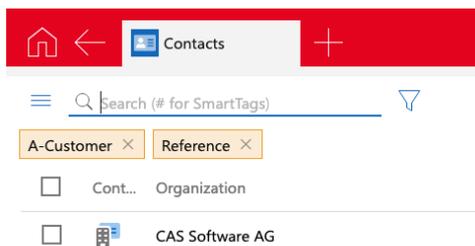
For actions you will require at least the additional **Create action (private)** right.

- Searching and filtering for SmartTags

In each view, at least 2 options are available for searching for data records with specific SmartTags. If you enter a hashtag # in the search field above each view, you can search for one or more SmartTags.



SmartTags are displayed below the search field if the view has been filtered for them. The search adds all SmartTags: Thus all the data records are displayed which contain all the selected SmartTags.



This SmartTag search can be saved as part of the view. Additionally, you can also filter for SmartTags. In the process, you can also search for data records, which do not contain a SmartTag.

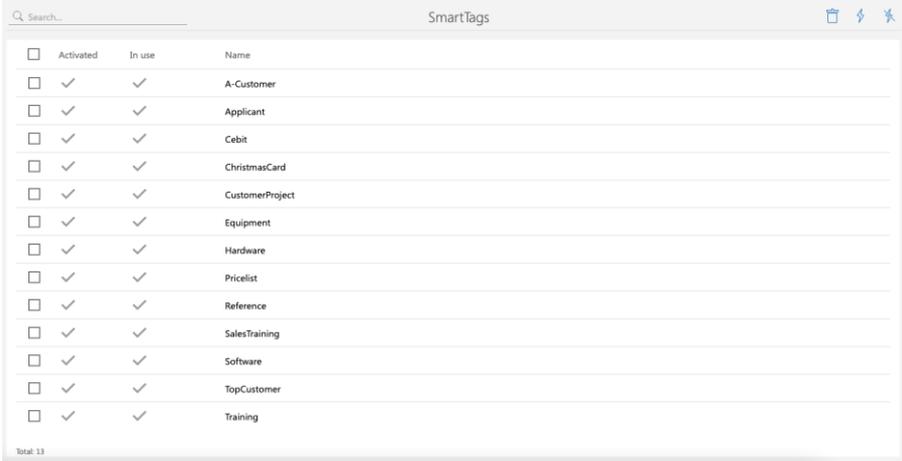
- Managing SmartTags

SmartTags created by users can be deactivated or deleted through the **Administration** App.

To manage SmartTags you will need the **Manage SmartTags** additional right.

Deactivated SmartTags are no longer displayed to users in the suggestion list when entering or searching for SmartTags. Deactivated SmartTags can be reactivated in the Administration App.

When deleting, the SmartTag is removed from all data records to which the SmartTag was assigned. The table of SmartTags displays whether a SmartTag has been assigned to at least one data record.



<input type="checkbox"/>	Activated	In use	Name
<input type="checkbox"/>	✓	✓	A-Customer
<input type="checkbox"/>	✓	✓	Applicant
<input type="checkbox"/>	✓	✓	Cebit
<input type="checkbox"/>	✓	✓	ChristmasCard
<input type="checkbox"/>	✓	✓	CustomerProject
<input type="checkbox"/>	✓	✓	Equipment
<input type="checkbox"/>	✓	✓	Hardware
<input type="checkbox"/>	✓	✓	Pricelist
<input type="checkbox"/>	✓	✓	Reference
<input type="checkbox"/>	✓	✓	SalesTraining
<input type="checkbox"/>	✓	✓	Software
<input type="checkbox"/>	✓	✓	TopCustomer
<input type="checkbox"/>	✓	✓	Training

Total: 13

App Designer

- Compare layouts

With this version and all other with changes to the layout of forms, administrators will be notified at start up. To compare or apply the changes, the corresponding version comparison can be opened directly or later.

In the open version comparison, the forms are displayed side by side, with the delivered (default) form on the left and the customized form on the right. Any new features or changes in the standard version are highlighted in red.

As usual, you can move the elements using drag and drop and adopt them by moving them from left to right.

You can use the binoculars icon (search icon) in element properties to search for the respective element in other forms and then display them directly.

You will find more information in the [Online Help](#).

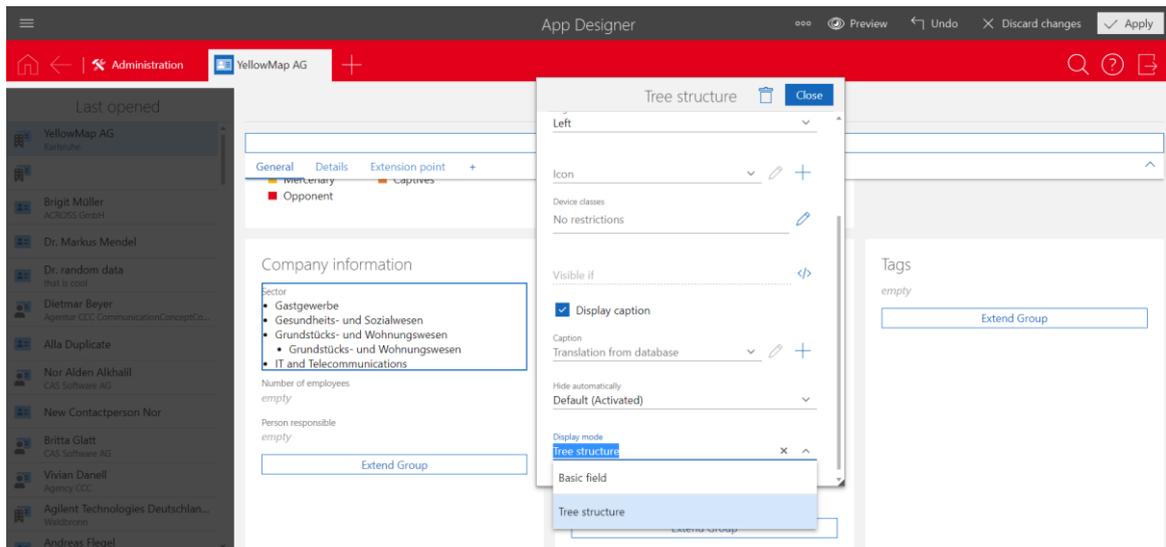
- Released views in the App Launcher

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 **Edit view (public)** right is required so that released views can be selected and then positioned using the App Launcher Element.

- Hierarchical display

For fields with **Selection tree** type input help options you can define a **Tree structure** as the display mode in the App Designer. Consequently, the entries will no longer be displayed separated by |, but instead they will be displayed in a list with bullets

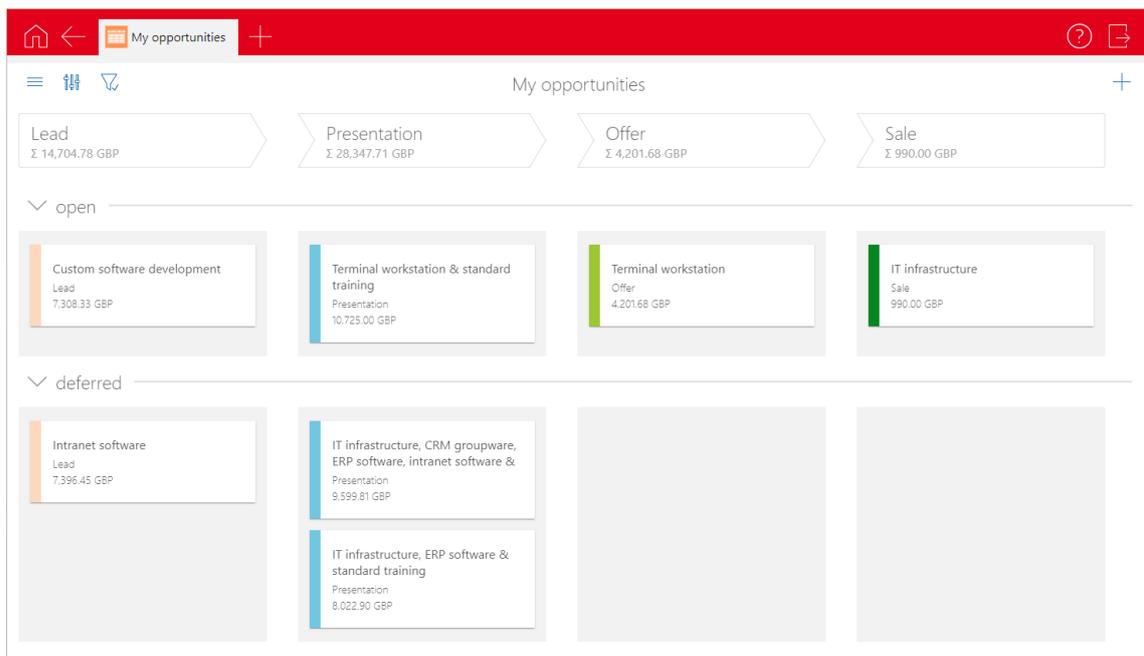


8.5 New module functions

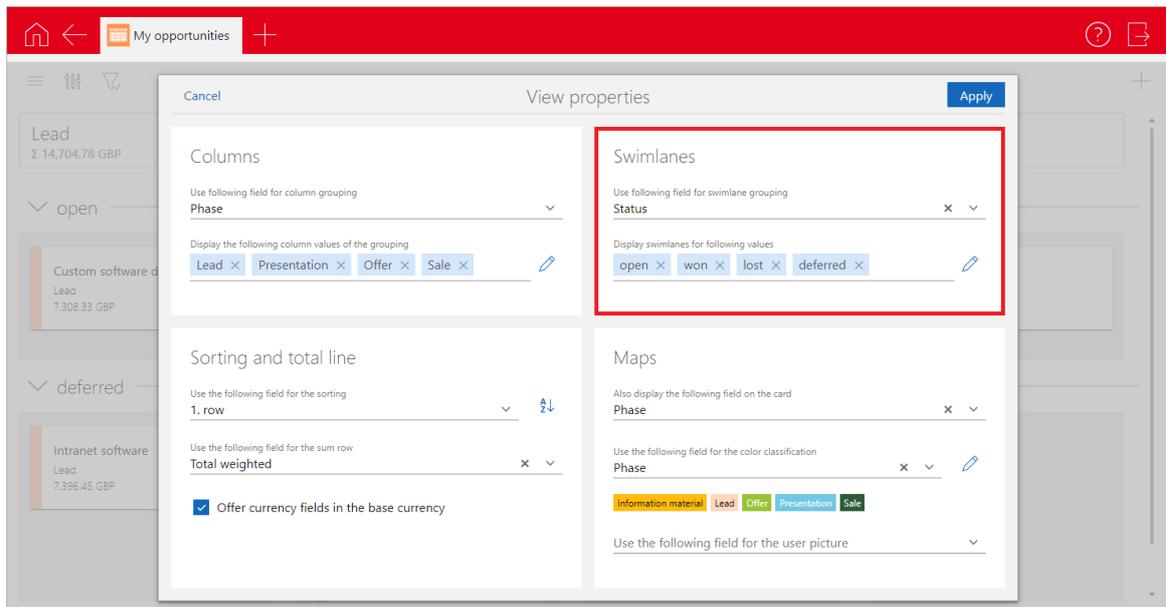
8.5.1 Report/Project/Helpdesk

- Swimlanes in the board view

With this additional dimension, the board view then groups the cards in addition to or as an alternative to arranging them in columns per row, for example **Opportunities** by **End** (columns) and **Phase** (swimlanes).



 You open the settings via this button.



Analogous to the columns, fields with input help options are available for selection. You can hide and display rows for specific values such as the rows for data records without a value (not assigned).

Unlike the columns, however, it is not currently possible to group by Type or Status such as grouping opportunities by end date but with swimlanes.

8.5.2 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](#).

8.5.3 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.

- Displaying and editing questionnaires in the new design

In the desktop client, questionnaires are now displayed in a neutral design as in CAS genesisWorld Web, that is, with a black font and white background.

This change affects the detail preview and the whole preview in the template editor, the display and editing on the **Questionnaires** tab for related data records, and the display and editing in the Questionnaires data record window.

8.6 CAS genesisWorld SmartDesign Mobile App

- CAS genesisWorld SmartDesign Mobile App 24.16.0
 - There are a number of options available for creating contacts from business cards:
 - Scanning of a QR code
 - Scanning of a NFC tag
 - Using a business card photo from the gallery
 - Basically, the contact information is extracted and inserted into the contact fields for a new contact with the help of the address wizard.
- To extract the contact information, the data has to be available in vCard format.
 - For leads, business card photos can be selected from the gallery of the mobile device and then stored.

8.7 Microsoft Outlook Add-In

- Displaying and opening appointments which have already been transferred to CAS genesisWorld

In the Microsoft Outlook calendar, appointments which have already been transferred to CAS genesisWorld are now displayed. Additionally, the appointments can be opened directly in the CAS genesisWorld client which was set in the Microsoft Outlook Add-In.

