

CAS Products x15.1.3

Product information



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Commercial Systems





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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 x15.1.3

2.1 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

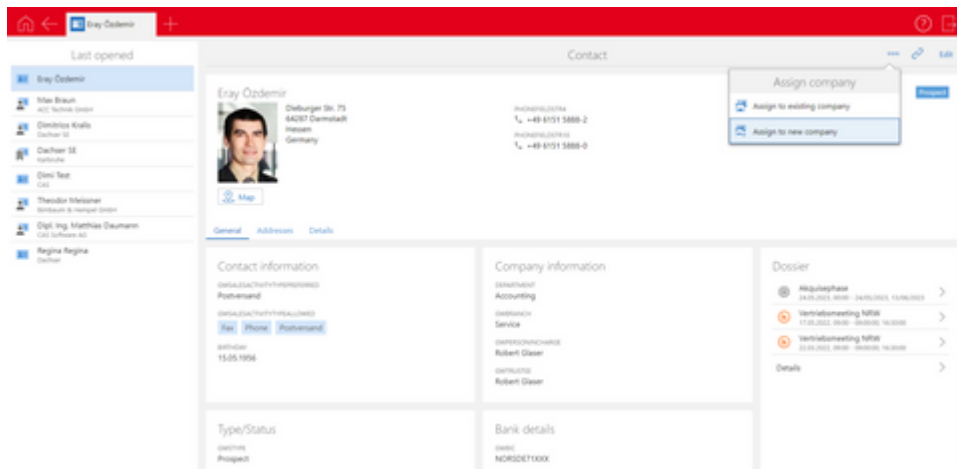
On the **Logon** tab of the Smart Add-on, under **Position** you can set your preferred positioning for an incoming call notification.

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

2.2 CAS genesisWorld Web

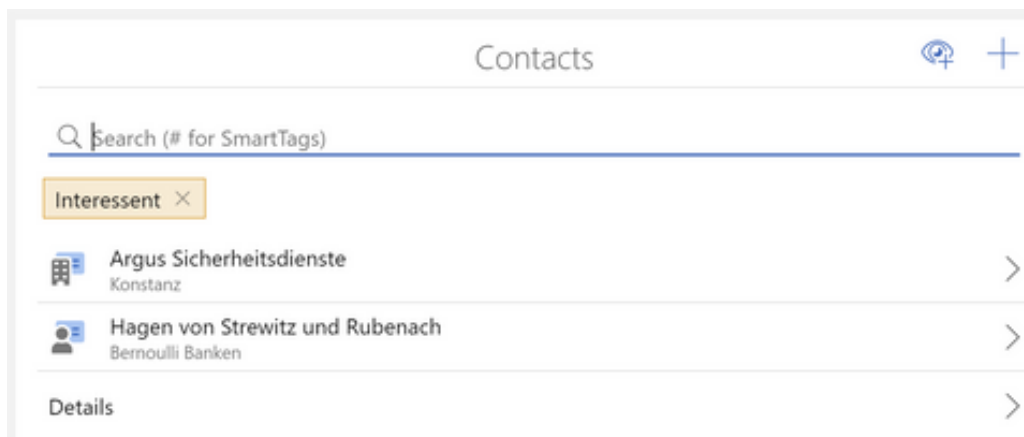
- Creating a company from an individual contact

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.

2.3 New module functions

2.3.1 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.


3 CAS genesisWorld x15.1.2

3.1 General

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

3.2 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.

3.3 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.

4 CAS genesisWorld x15.1.1

4.1 General

Two-factor authentication

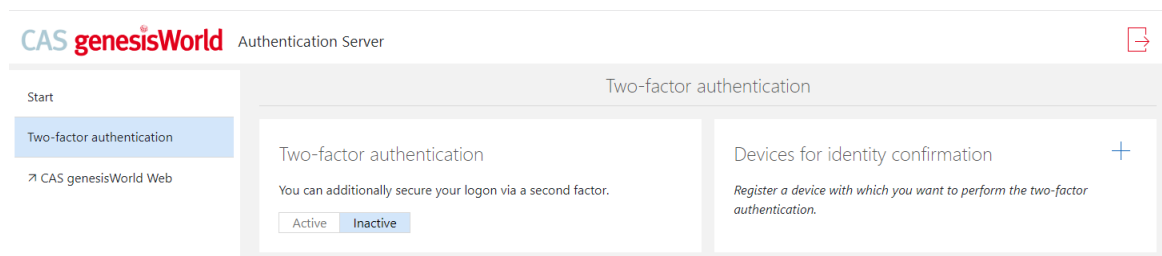
CAS genesisWorld users now have the option of choosing a second factor when logging on, this helps to secure the user account.

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.

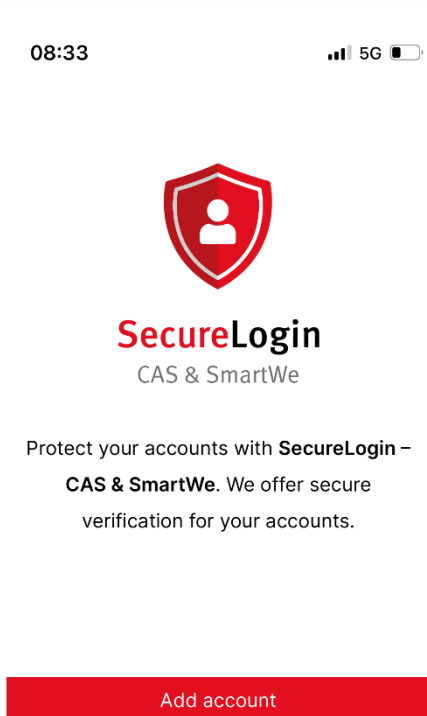
After scanning successfully, the app displays the product names, the tenant and the user name. When you use the **Save account** option, an overview of all the saved user accounts is displayed.

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.

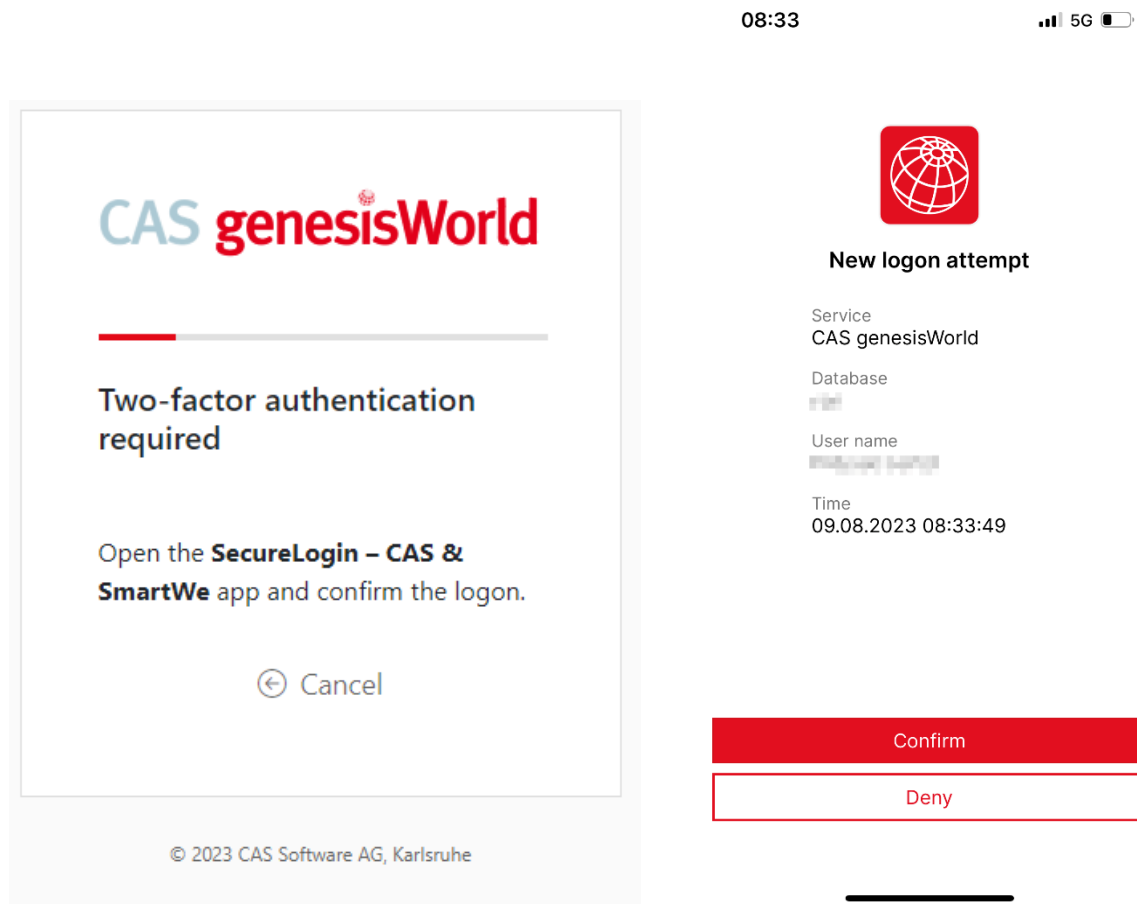
As the e-mail is sent over the notification and action service, this has to be configured accordingly.



- 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**.

4.2 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.

4.3 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.

4.4 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

4.5 New module functions

4.5.1 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" dialog box open. The "Display" tab is selected, showing various settings for the link list, including the name, view format, dossier, list height, navigator, and display 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

4.5.2 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.

4.6 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.

5 CAS genesisWorld x15.1.0

5.1 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.

5.2 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.

5.3 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.

5.4 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.

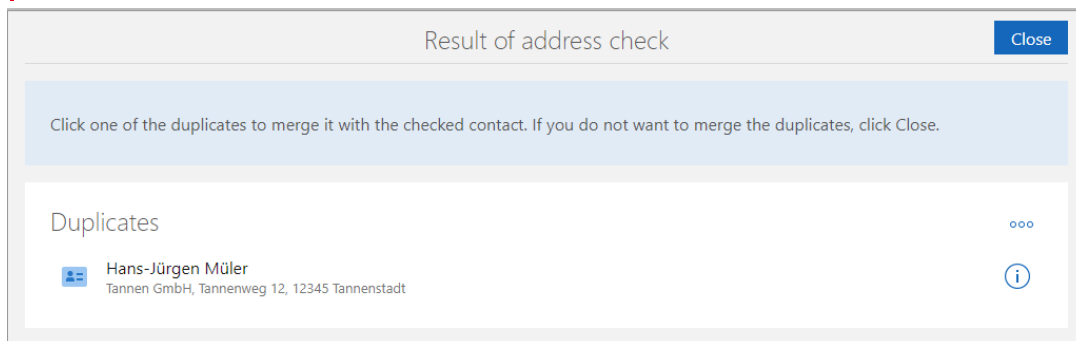
A number of different options have been used for the new layouts which the App Designer in the meantime also offers. A central element is the summary, which is usually positioned at the top and which displays the most important information for a data record.

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.

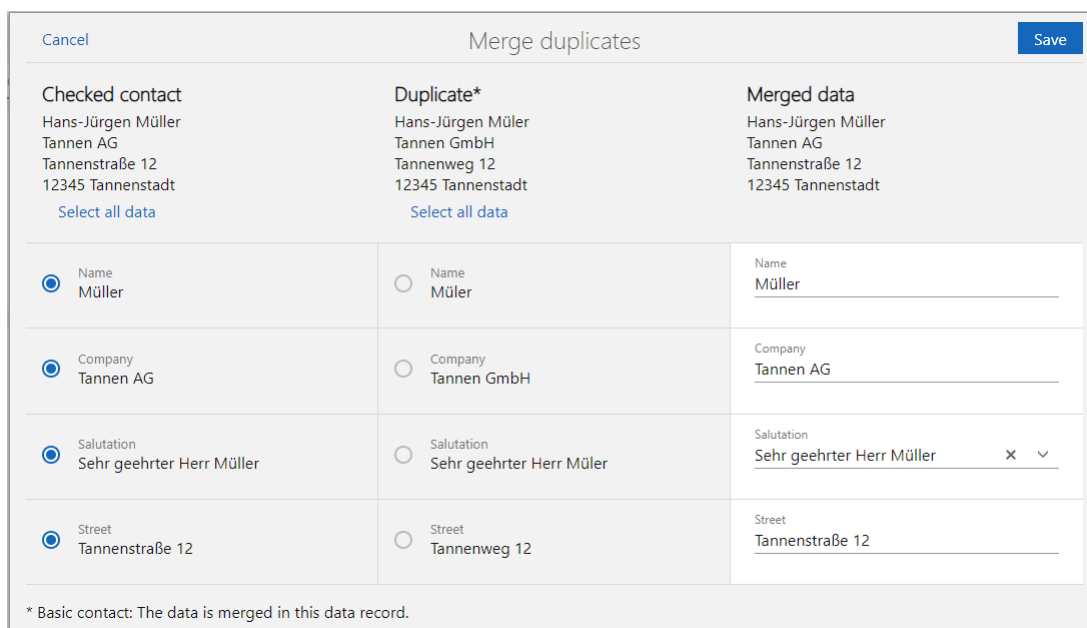
You can change the settings for duplicate checking in the Management Console, see the online help > Miscellaneous area > Addresses > Duplicate check tab.



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

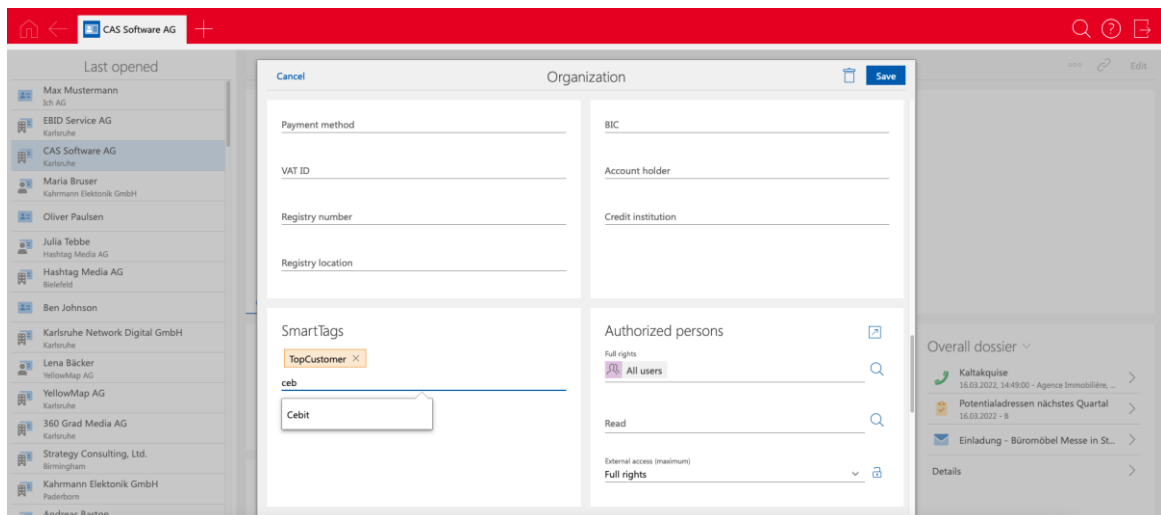
Using SmartTags you can design data records individually. This offers the option of tailoring your data precisely with important information.

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.



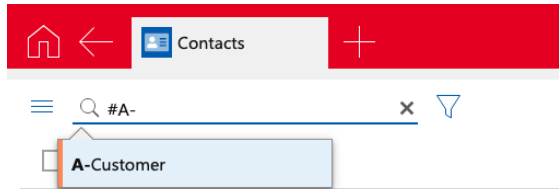
New SmartTags are created by entering a random string and confirming with a space or with enter.

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**.

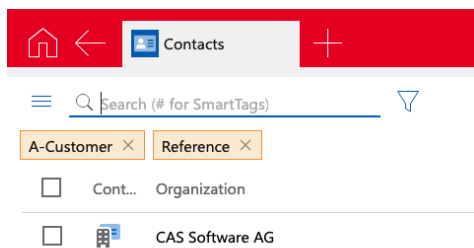
For actions you will require at least the additional **Create action (private)** right.

- 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.

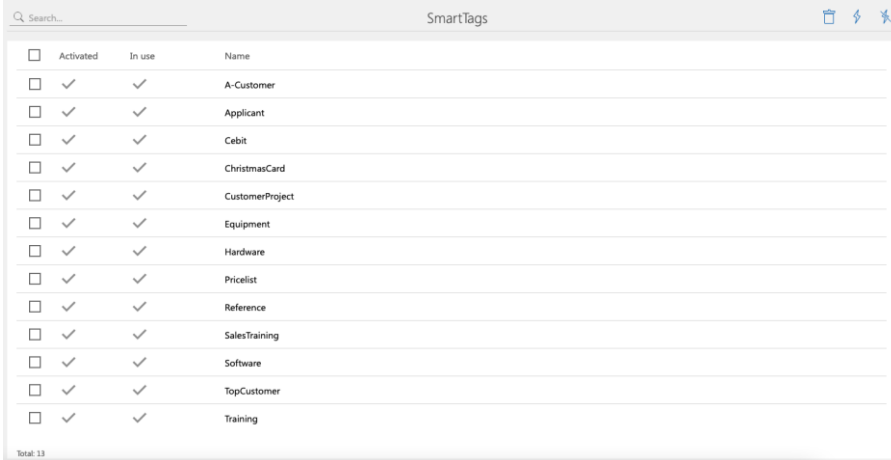
- Managing SmartTags

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](#).

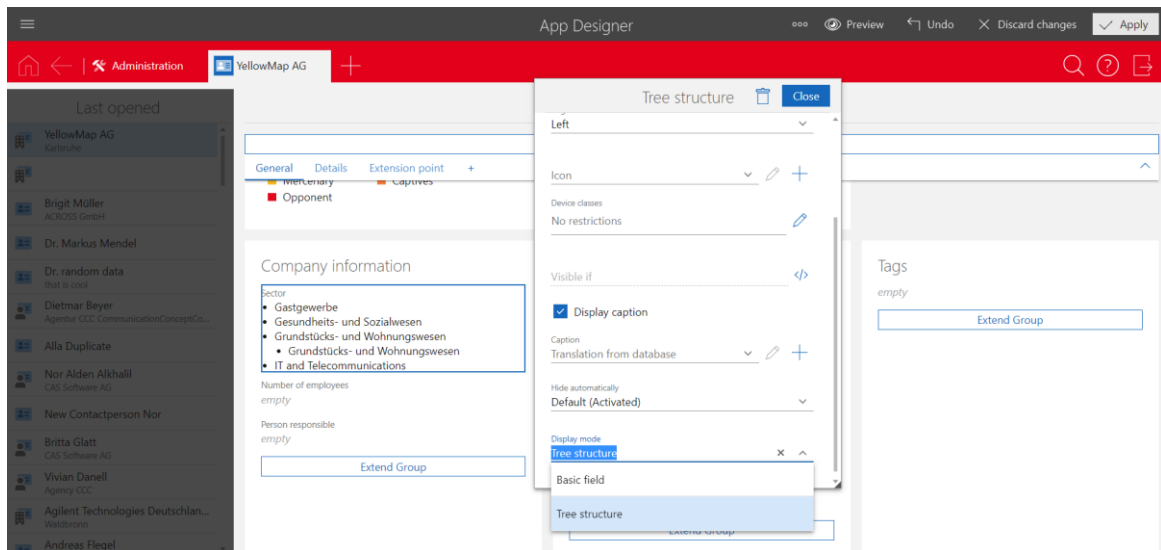
- Released views in the App Launcher

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

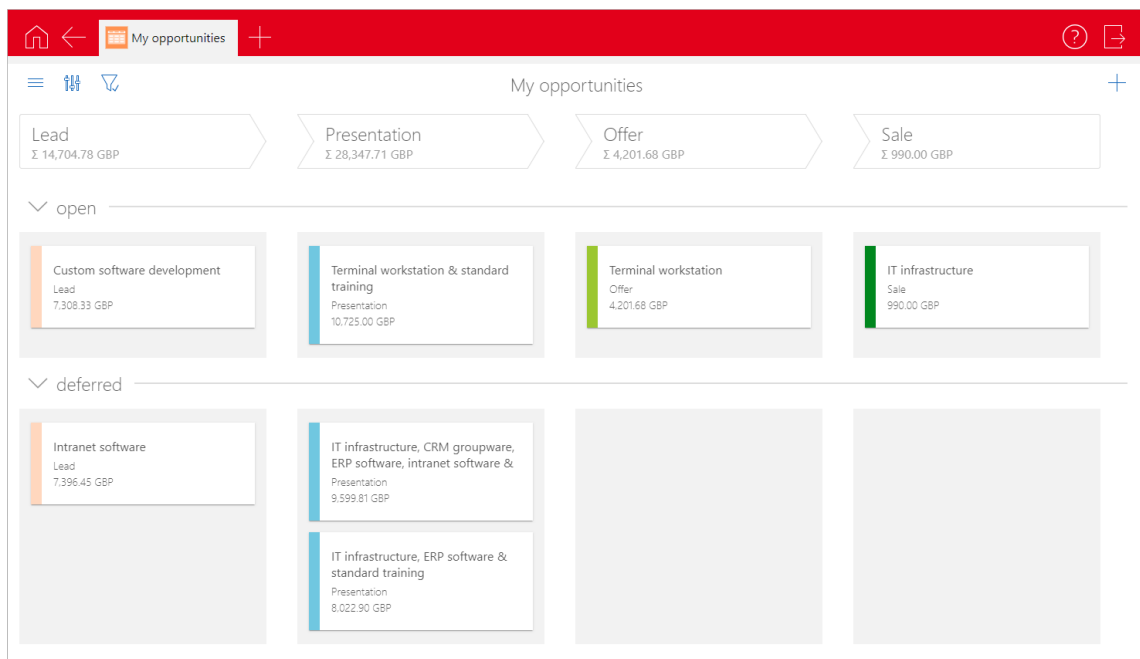


5.5 New module functions

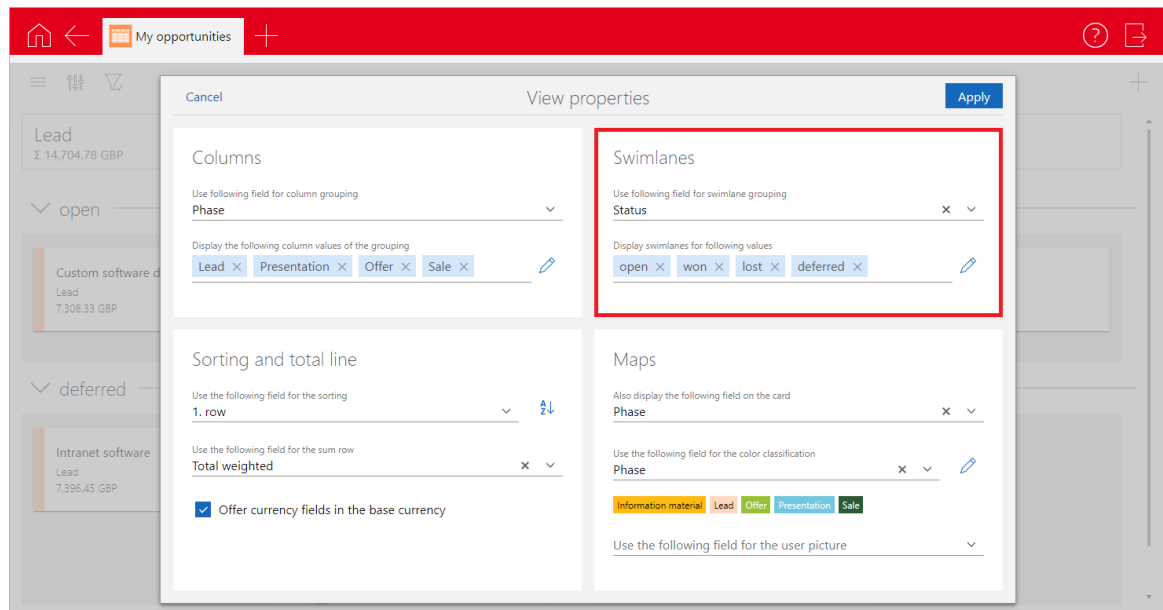
5.5.1 Report/Project/Helpdesk

- 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.

5.5.2 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](#).

5.5.3 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.

5.6 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.

5.7 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.

