

Reference



Planetroll

» CAS genesisWorld helps us make our communication more efficient. All information relating to the sales process is available at a glance. «

Hans Joachim Wunn, Managing Director

CAS **genesisWorld**

xRM and CRM for small and medium-sized companies



» Implementing CAS genesisWorld with Sage ERP b7 ensures automatic data exchange. Changes can be efficiently processed in the right system. «

Hans-Joachim Wunn, Managing Director



#### Industry sector

Industry, agitator and drive technology

#### Requirements

- Optimizing sales
- Show visit reports
- Access data from ERP in CRM
- Represent and structure communication
- Information available in one system
- Mobile CRM
- Integration with Sage ERP b7
- Replacement of Outlook organization

#### Benefits and Advantages

- Optimizing the sales process by use of filing systems in the CRM
- All information about a customer at a glance thanks to the comprehensive dossier
- Automatic synchronization of address changes in ERP and CRM thanks to ERP connection
- Efficient and cross-departmental teamwork with automated workflows and well-structured, centralized data
- Effective marketing through classification of company and contacts
- Access to all data on the go thanks to mobile CRM
- Easy recording of visit reports



#### Project data

- CAS genesisWorld Premium Edition
- Modules: Sales pro, Marketing pro
- Implementation in Sage ERP b7

#### Customer

- planetroll GmbH & Co. KG,  
[http://www.planetroll.de/en/ueber\\_planetroll/](http://www.planetroll.de/en/ueber_planetroll/)
- Experts for stirring or agitating technology, plant engineering and power transmission technology
- Founded 1976
- Customers worldwide with 21 international offices on five continents

#### CAS genesisWorld

- Professional customer management
- Supports internal processes, increases efficiency
- Specially designed for the requirements of SMEs
- Mobile CRM solutions with CAS SmartDesign for smartphones, tablets and browsers
- Safe data through mature, multi-stage legal system
- Very good price-performance ratio
- Flexible, easy to integrate, extendable
- Established product – winner of several awards
- Over 200 CRM specialists provide on-site support
- Being used successfully by more than 20,000

### Contact and Consulting



NEWA Systemhaus GmbH  
88521 Ertingen  
+49 7371 9594-50  
[www.newa.de](http://www.newa.de)



[www.cas-crm.com](http://www.cas-crm.com)