

CAS genesisWorld

Configuring webhooks in the rule and action service

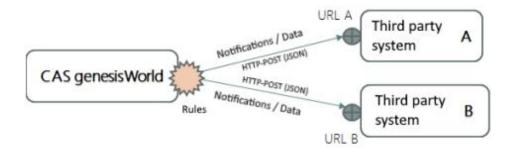


Intelligent networking of CAS genesisWorld with webhooks

Using webhooks, you can enable communications between CAS genesisWorld and a communication and information tool or IoT device of your choice to make team collaboration even more efficient with modern tools and channels. For instance, create a sales opportunity in CAS genesisWorld and automatically send all important information to a desired Microsoft Teams group instead of triggering an inefficient wave of e-mails.

Activate webhooks via the CAS genesisWorld rule and action service

Webhooks offer many options for easily networking CAS genesisWorld with other communication and information channels. Events can be defined in the CAS genesisWorld Management Console according to individual requirements. To this end, Post-Requests via HTTP are supported in CAS genesisWorld with a body in JSON format.



To define an action for a specific event via webhook, you can create rules in the CAS genesisWorld rule and action service. You can access the new option, **Call webhook** on the **Action** tab which is available via the drop-down list.

In the **URL** field enter the endpoint URL of the third-party system which you want the rule to call. We recommend you use **https** for security reasons.

You can define custom messages in the JSON input field. They can be enriched via placeholders for field values from the **Action field** tab and **Table field** of the respective data record. When executing the rules, the placeholders are replaced by the respective field values.



Please note: JSON has to meet two conditions

- JSON has to comply with the standards for RFC 8259 and ECMA-404
- The third-party requirements for the JSON structure have to be met.

Transmitting data via webhooks

After the event and associated rule have been created, the webhook can forward all the information from CAS genesisWorld to third-party systems, such as Microsoft Teams. In this way, you can ensure that whole teams or even external participants are provided with all the relevant information transparently, for instance when sharing a new opportunity. Thanks to the intelligent networking with CAS genesisWorld, you can access the respective data record in the CRM system quickly, easily and directly via a button function, assuming you have sufficient access rights of course.



Notes on configuration

Rules are usually configured by your administrator in the CAS genesisWorld Management Console.

lacksquare

Instructional video

Take a quick look at the CAS CRM instructional video: https://youtu.be/I1j2O570ewg



Microsoft Teams: Notes on creating webhooks

See the following pages for more information on creating webhooks in Microsoft Teams: <u>Creating webhooks and</u> <u>connectors</u>



CAS Software AG CAS-Weg 1 - 5 76131 Karlsruhe

Phone: +49 721 9638-188 E-Mail: info@cas-crm.com www.cas-crm.com







