ConSol CM/Forms

Dear ConSol customers, dear ConSol CM customers,

We would like to present you the web forms for ConSol CM.

Web forms can be filled out by users who have not logged in. They allow you to offer additional functionality with ConSol CM:

- Registration forms
- Customer surveys
- Wizards for case creation

We hope that you enjoy reading this presentation and discovering web forms.

Please contact us to see a live demo. We are happy to help you with questions about your ConSol CM system.

Your ConSol CM Product management & Sales team

Jan
Zahalka

Engelbert
Tomes

Florian
Fiessmann

Kai
Hinke

Web forms

- Advantages
- Use cases and examples
- Creating a web form

Advantages of web forms

Extend your ConSol CM system with web forms

- Easily create forms and provide additional facilities for working with ConSol CM to your users, customers and partners.
- Increase the satisfaction of all stakeholders.
- Collect valuable data, as customer feedback, to optimize your services.
- Save implementation costs by using our comprehensive integrated form management features.
- Create new web forms within minutes.
- Reduce the workload of your users while offering a better service.

Use case examples for web forms

Web forms can be used in numerous situations

- Registration forms
  Allow your customers to self-register in CM/Track.

- Feedback forms
  Collect feedback and link it directly to a case.

- Application forms
  Provide a convenient way for the candidates to send a job application and upload their CV.

- Wizards for case creation
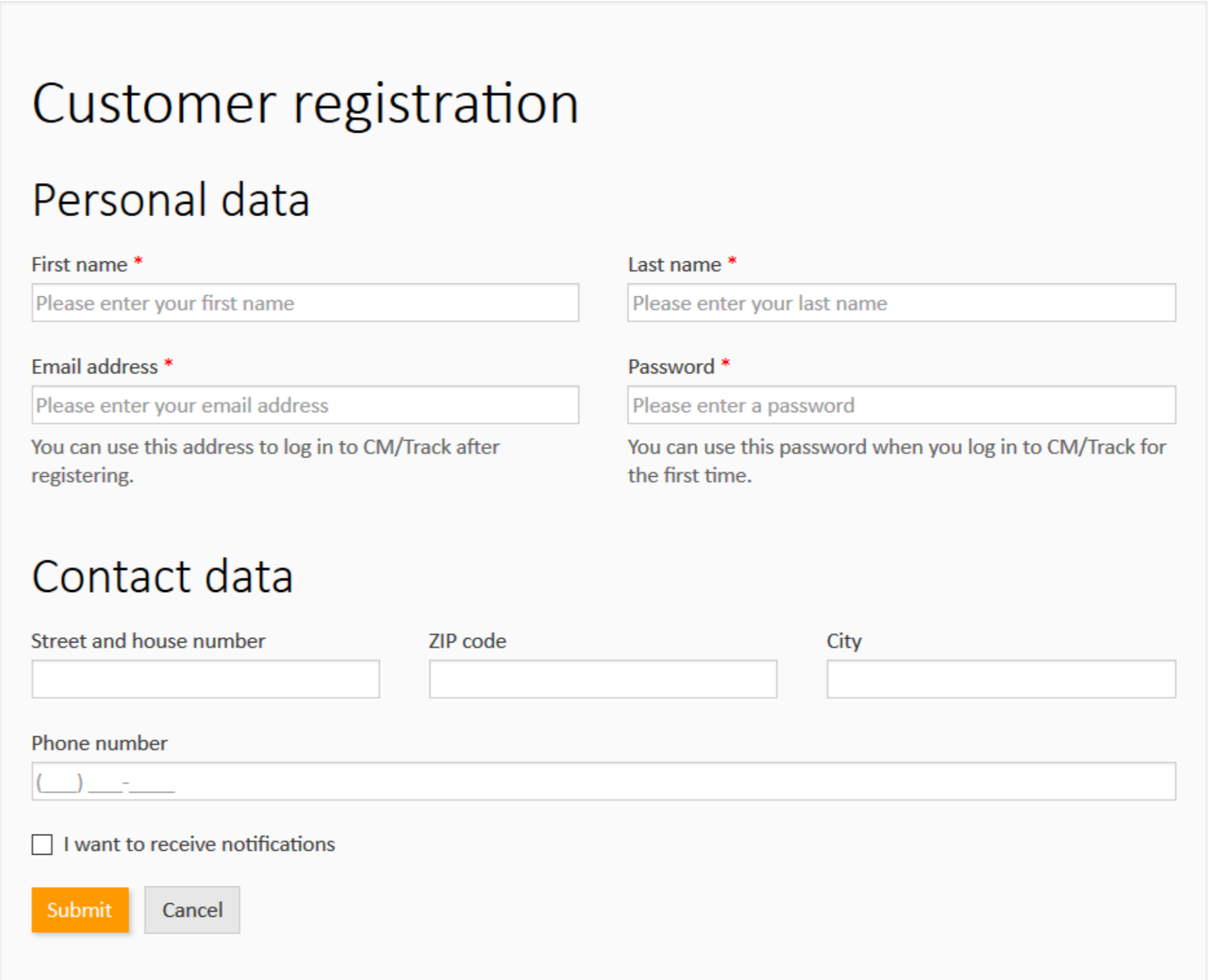 Offer a wizard which guides the users through the case creation process.

Use case examples for web forms

Example 1 – Self-registration form

Create a simple registration form for customers to register in CM/Track.

The users do not have to spend time for data entry anymore. Instead, they just need to verify the data which the customers provided by themselves.

You can automatically assign the correct CM/Track user profile, so the customers can log in to CM/Track directly after submitting the form.

Customer registration

Personal data

First name *

Please enter your first name

Last name *

Please enter your last name

Email address *

Please enter your email address

You can use this address to log in to CM/Track after registering.

Password *

Please enter a password

You can use this password when you log in to CM/Track for the first time.

Contact data

Street and house number

ZIP code

City

Phone number

(___) ___-____

☐ I want to receive notifications

Submit   Cancel

Use case examples for web forms

Example 2 – Form for customer feedback

Collect feedback from the customers by sending them a link to a customer survey. You can create the survey with a few clicks by using the *Survey* component.
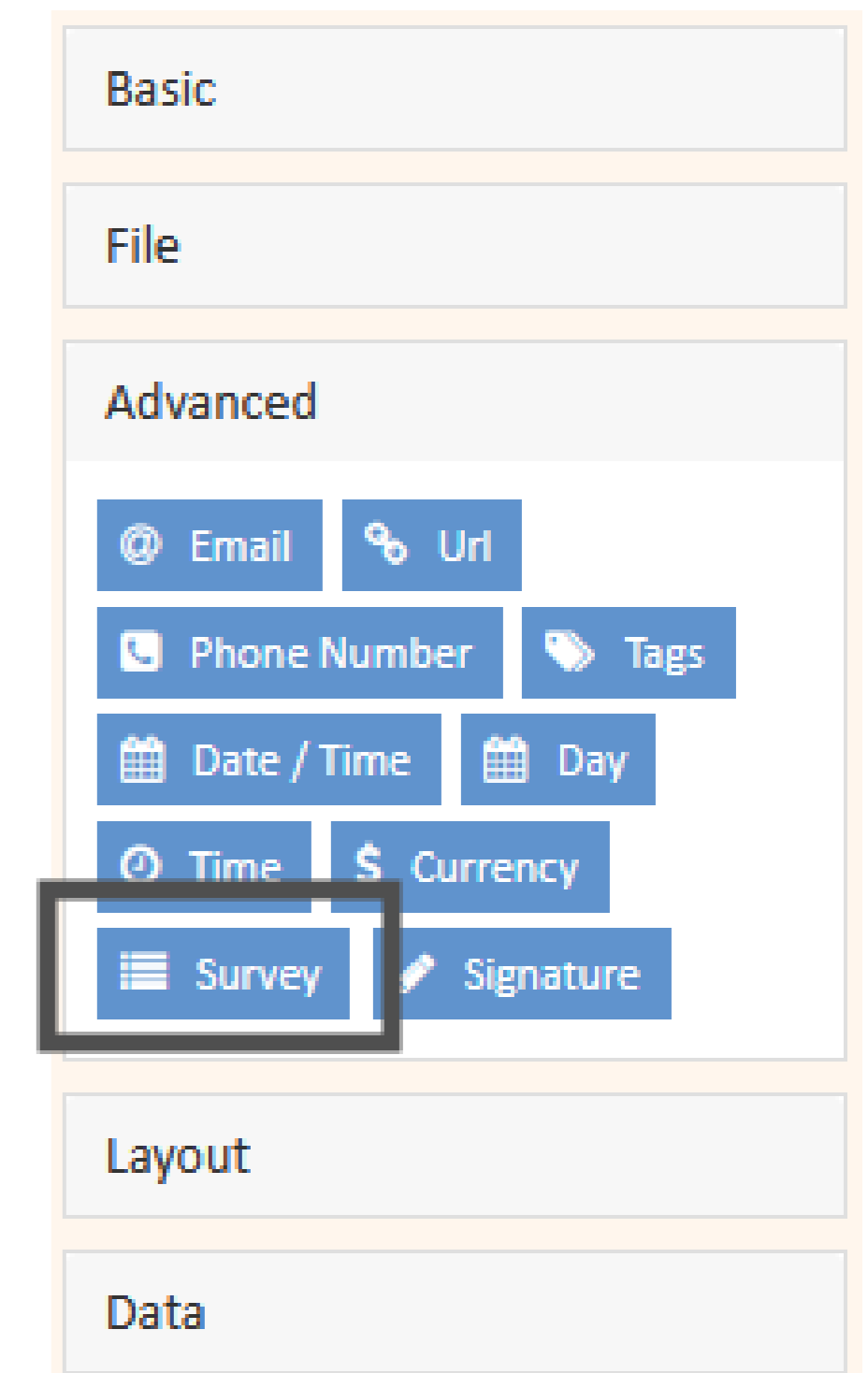
Use case examples for web forms

Example 3 – Application form

Publish an application form where the candidates can enter their data and upload their CVs.

The received job applications are linked to the job posting, so it is easy to track the applications.

Job application form

Last name: [   ] First name: [   ]

Gender: ○ Male ○ Female

Please list any additional skills you have that directly relate to the job you are applying for

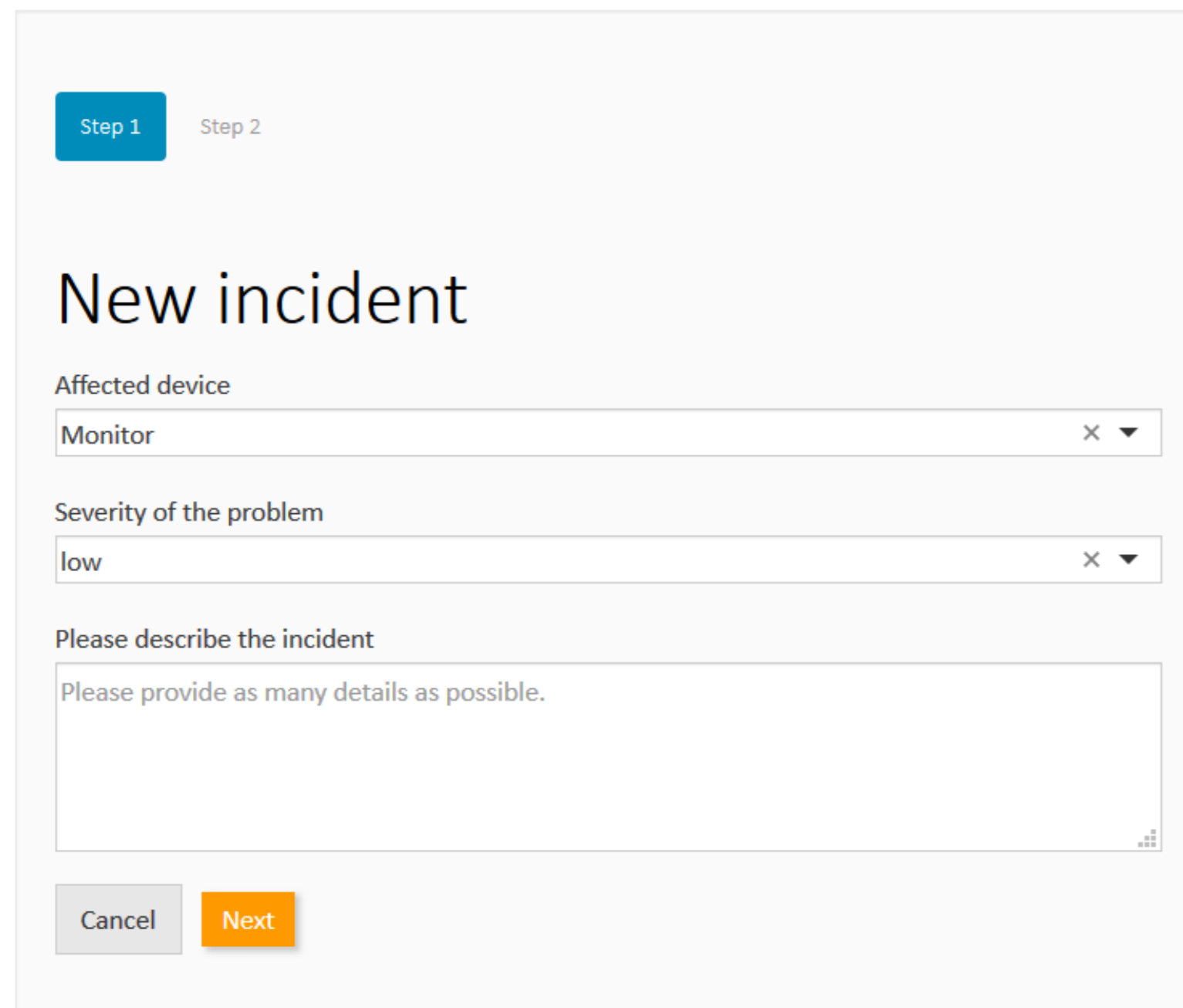[   ]

Add certifacates, etc.

Filename	Size
☁ Drop files to attach, or browse	

Use case examples for web forms

Example 4 – Wizard for case creation

Guide the user through the creation of a case using a wizard. A wizard can consist of several pages which helps to structure the content.
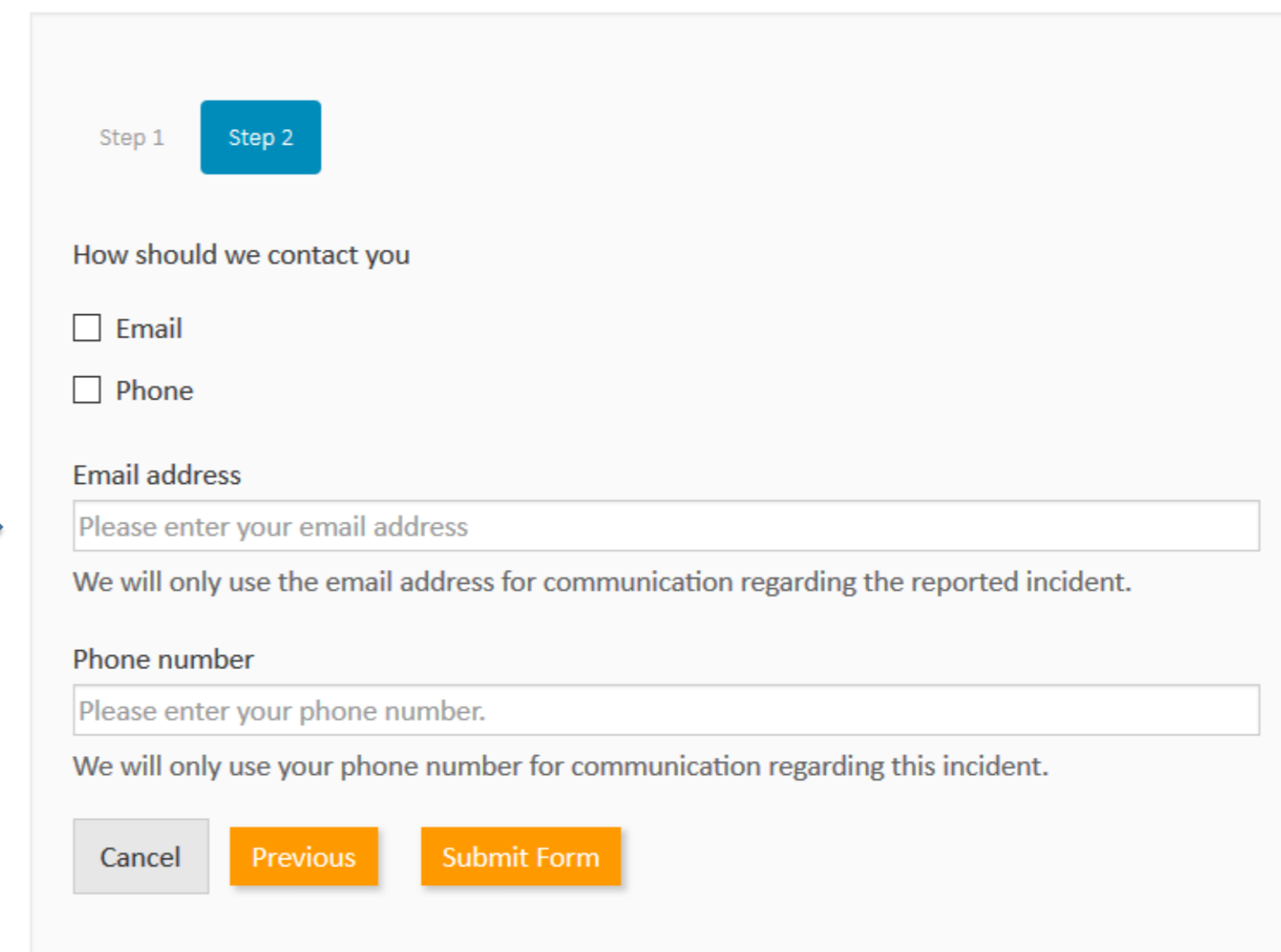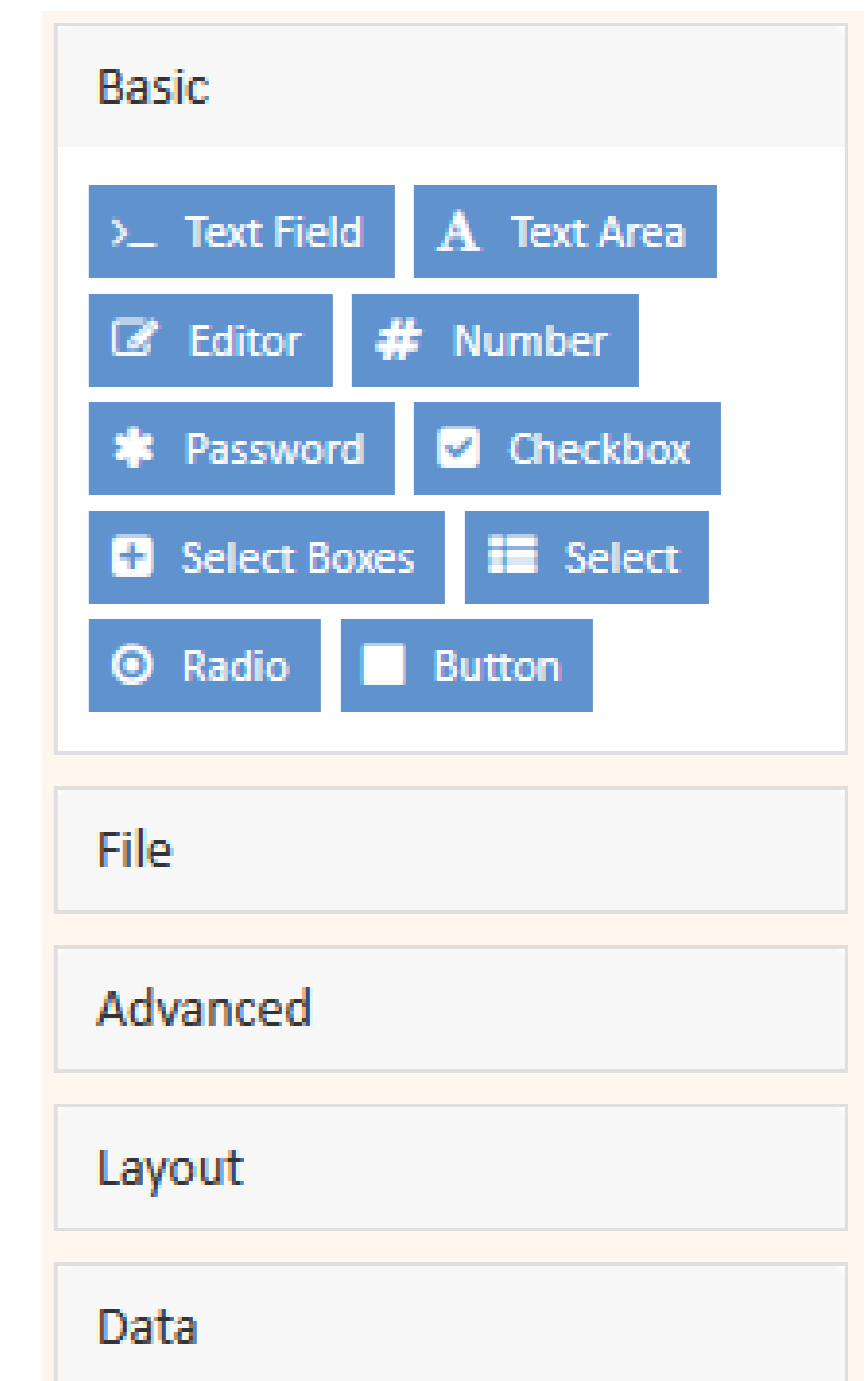
Creating a web form

Maximum flexibility when creating a web form

You can make numerous choices when creating a web form:

- **Publishing**
  On the ConSol CM instance ↔ on an own instance

- **Data processing**
  Direct processing of the submitted data ↔ saving data in the database for batch processing at a later point in time

- **Logic**
  The logic for processing the data can be customized completely in the integration script

- **Form components**
  Numerous form components, as input fields for different data types, selection fields, layout, buttons, file upload, extendable lists and tables

Basic

>_ Text Field	A Text Area
Editor	# Number
* Password	☑ Checkbox
+ Select Boxes	☰ Select
⊙ Radio	■ Button

File

Advanced

Layout

Data

CM

Create case   New contact   Resource pool   Text templates   **Forms**   Analytics
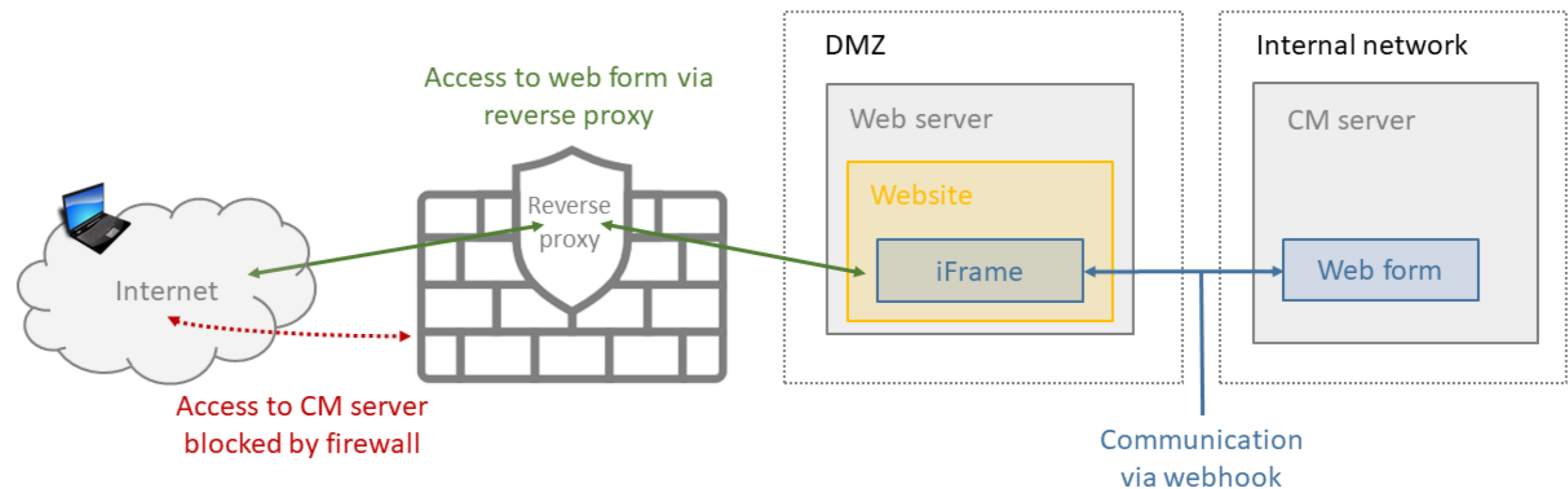
Creating a web form

Publishing a web form

There are two general options for publishing web forms:

- On the ConSol CM instance:
  - Access via URL in the CM domain
  - Access via iFrame embedded in an external website
- In a custom-build application

Example:
Usage as iFrame from the ConSol CM instance, external access allowed

Creating a web form
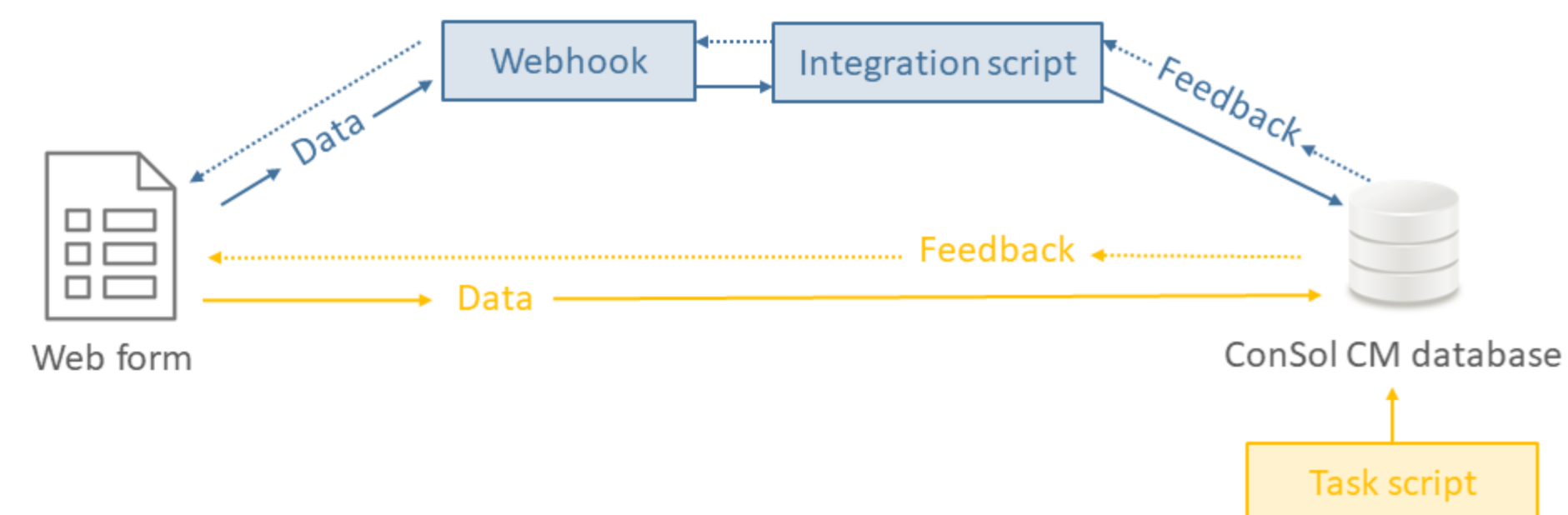
Data processing

There are two options for processing the form data:

a. Using a webhook

  - The data is sent to ConSol CM via webhook.

  - The related integration script processes the data.

b. Using the database

  - The data is stored in the ConSol CM database.

  - The data is processed subsequently, for example by a task script executed in regular intervals.

Web form · Webhook · Integration script · Data · Feedback · Feedback · Data · ConSol CM database · Task script

Schematic visualization of data processing

Important: With variant b (database), feedback means that the data has been saved successfully. The web form is not notified about the result of data processing in the task script!

12

Creating a web form

Implementation of the script logic

The data entered in the web form is transferred to ConSol CM in JSON format.

The data can be easily retrieved in the script:

- When creating the web form, you give a unique name to each field in the API tab.

- The script analyzes the JSON. The fields with their values belong to the "data" object.

- The ConSol CM API allows you to perform any desired action with the values, e.g. create a case or contact with the values, or update the values in an existing case.

Creating a web form

Form components

The form creator provides everything you need to create nice forms with simple means:

- Large choice of components: text, date, email, password, lists, checkboxes, file upload, buttons
- Easy arrangement using drag-and-drop
- Several layout options as columns, tabs, tables
- Extensive usability features: tooltips, descriptions, placeholders, entry masks, prefill with default values, validations
- Forms consisting of several pages
- Responsive design in the finished form

Customer registration

Personal data

First name *
Please enter your first name

Last name *
Please enter your last name

Email address *
Please enter your email address

Password *
Please enter a password

You can use this address to log in to CM/Track after registering.

You can use this password when you log in to CM/Track for the first time.

Contact data

Street and house number

ZIP code

City

Phone number
(___) ___-____

☐ I want to receive notifications

Submit   Cancel

CM/tecdoc
ConSol CM Documentation

Here you will find the official manuals for the process management software ConSol CM.

☐ PDF ☐ Online Help ☐ English ☐ Deutsch

☐ User ☐ Administrator ☐ Process Designer ☐ CM/Outlook-Add-in ☐ DWH ☐ Setup and Operation ☐ CM/EBIA

☑ Latest version ☐ Version 6.15.2 ☐ Version 6.15.1 ☐ Version 6.15.0 ☐ Version 6.14.0.10 ☐ Version 6.14.0.9

☐ Version 6.14.0.8 ☐ Version 6.14.0.7 ☐ Version 6.14.0.6 ☐ Version 6.14.0.5 ☐ Version 6.14.0.4 ☐ Version 6.14.0.3

☐ Version 6.14.0.2 ☐ Version 6.14.0.1 ☐ Version 6.14.0.0 ☐ Version 6.13.0.6 ☐ Version 6.13.0.5 ☐ Version 6.13.0.4

☐ Version 6.13.0.3 ☐ Version 6.13.0.1 ☐ Version 6.13.0.0 ☐ Version 6.12.1.3 ☐ Older versions

User
Online Help	User Manual 6.15.1 (English)	
PDF	User Manual 6.15.1 (English)	
Online Help	Benutzerhandbuch 6.15.1 (Deutsch)	
PDF	Benutzerhandbuch 6.15.1 (Deutsch)	

Administrator
Online Help	Administrator Manual 6.15 (English)
Online Help	Administratorhandbuch 6.15 (Deutsch)

Process Designer
Online Help	Process Designer Manual 6.13.0.3 (English)
PDF	Process Designer Manual 6.13.0.3 (English)

DWH
Online Help	DWH Manual 6.11.0 (English)
PDF	DWH Manual 6.11.0 (English)

Setup and Operation
Online Help	Setup Manual 6.15 (English)
PDF	Setup Manual 6.15 (English)
Online Help	Operations Manual 6.15 (English)

You want to learn more about ConSol CM?

Visit our TecDoc server

You can find:
- **Manuals**
  - **Administrator**
  - **User**
- **Release Notes**
- **System Requirements**
- **Feature presentations**
- **Solutions**

Discover the new ConSol CM version!