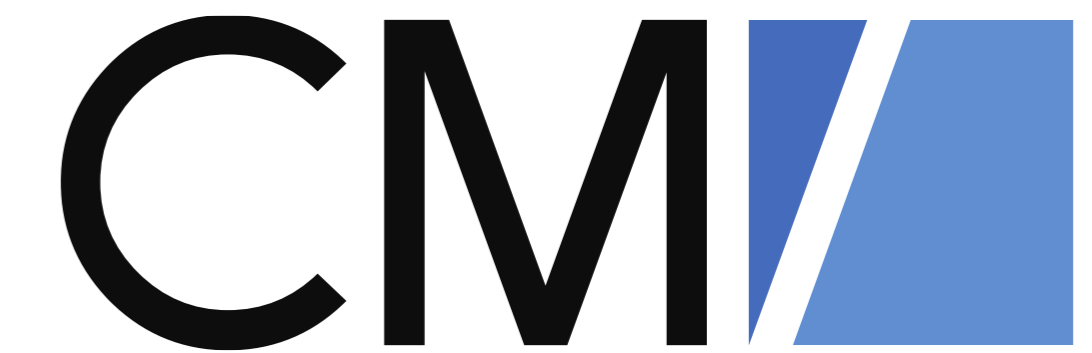


# ConSol CM/Resource Pool

Integrate and manage additional objects

*December 2022, Product management ConSol CM*



## Dear ConSol customers, dear ConSol CM customers,

We would here like to inform you about CM/Resource Pool, a ConSol CM add-on which allows you to add new object types to your ConSol CM database. Manage, for example, IT assets, contracts, products and / or pieces of information. Link the resource pool objects to cases, contacts and companies, thereby establishing a complete network of the objects you deal with in your every day business processes.

Use manual and automatic resource activities to fully integrate resources in your business processes.

In this way, you can speed up your service processes, bundle information and improve your customer service.

Please contact us for further information or a live demo.

*Your ConSol CM Product Management & Sales Team*



Jan  
Zahalka



Engelbert  
Tomes

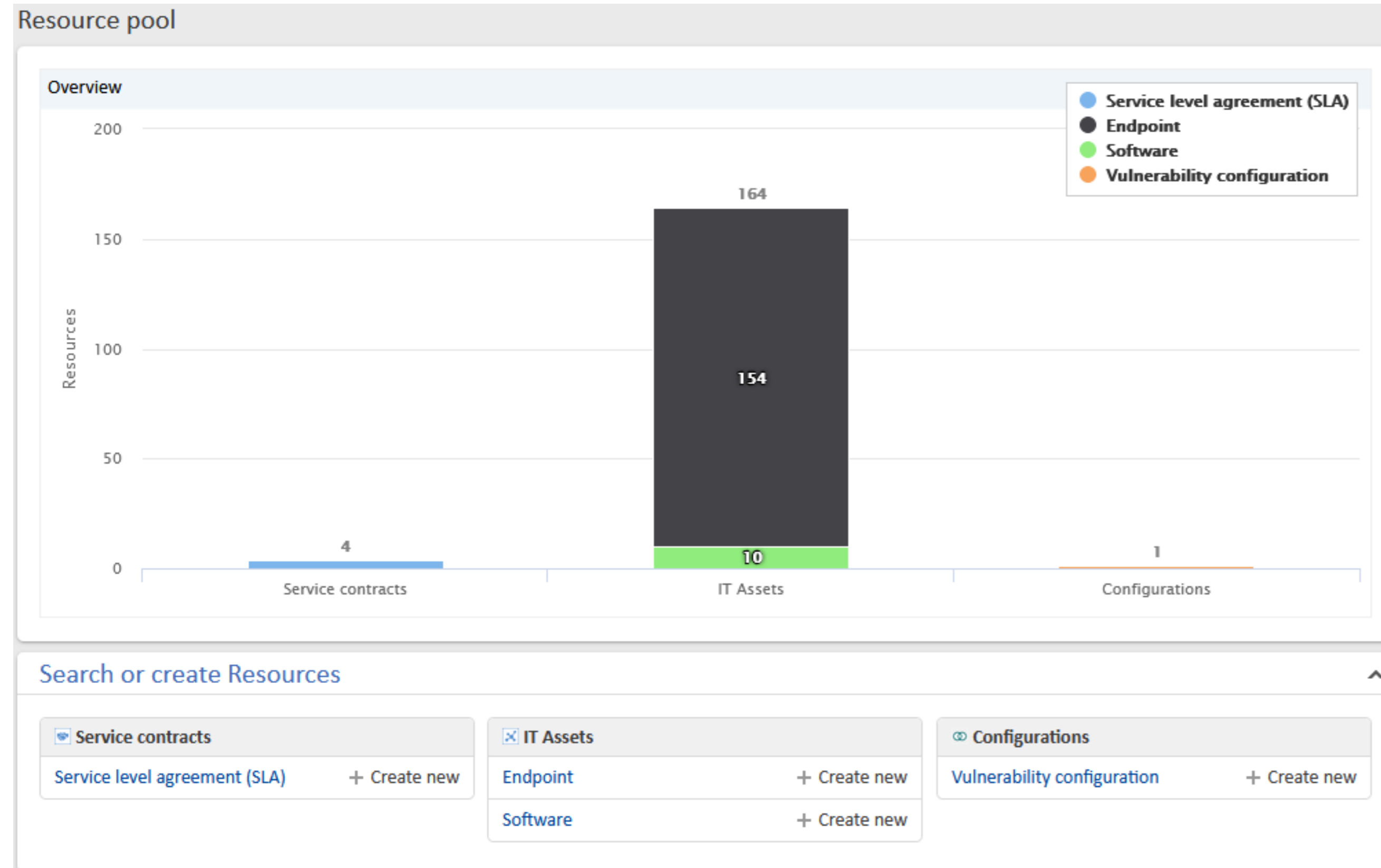


Florian  
Fiessmann



Kai  
Hinke

# CM/Resource Pool



- Overview
- Functions
- Use cases

# Overview about CM/Resource Pool

## Integrate additional objects

Manage your resources with CM/Resource Pool and include them in your processes. You can define any number of objects as resource types. Once this is done, you can create resources in the corresponding resource types.

CM/Resource Pool is the ideal solution for managing various different assets, for example:

- Licenses or contracts (e.g. SLAs)
- Software products
- Hardware products (e.g. PC, printers, servers)
- Buildings



# Functions of CM/Resource Pool

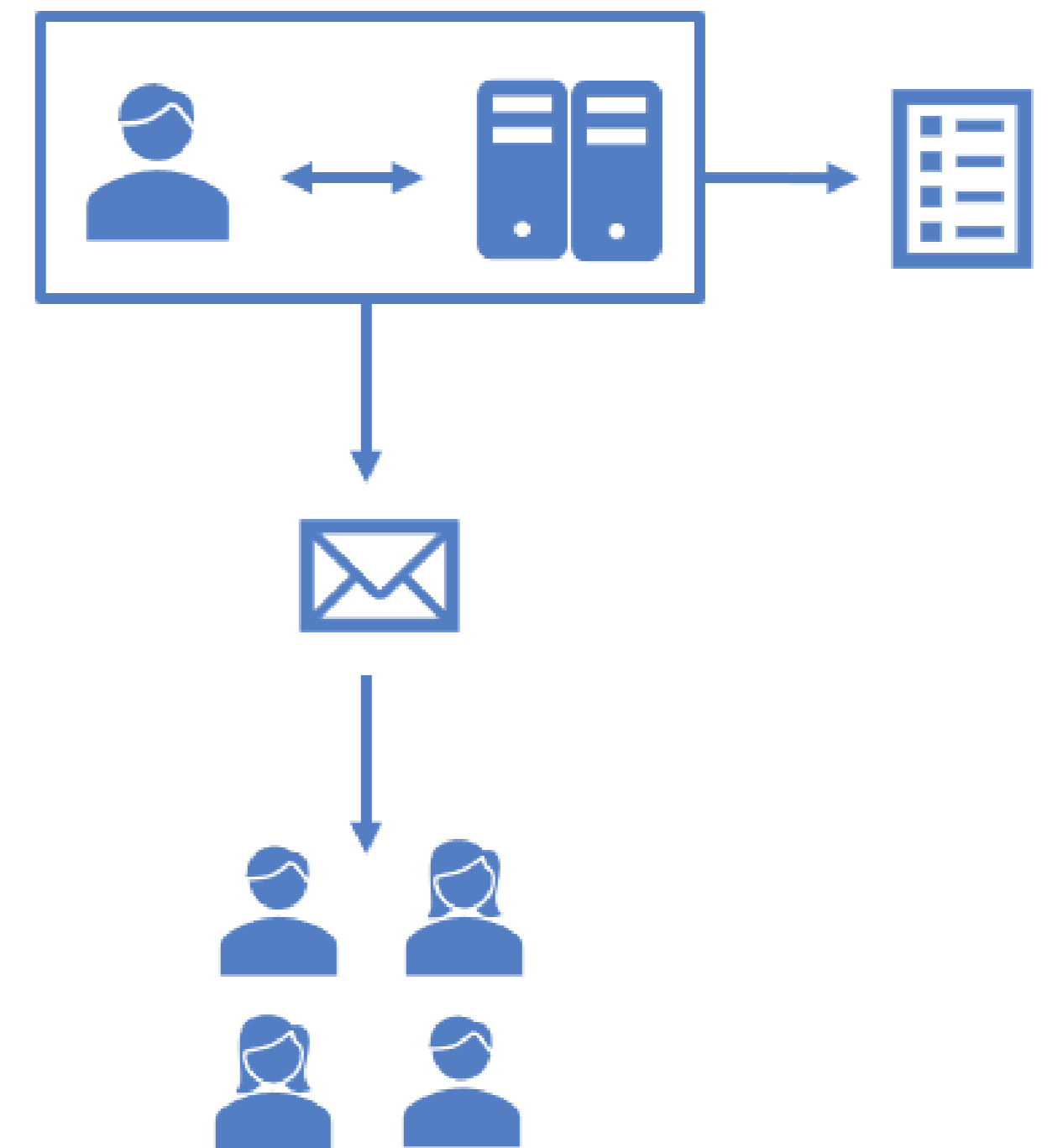
## Ideal overview with relations

In CM/Resource Pool, it is possible to link resources with each other, as well as to contacts and cases.

- Get a quick overview about the connections.
- Speed up your process time and increase productivity and customer satisfaction.

*Example:*

*A contact reports a server failure. Because of the relations in the CM system, you can immediately see which other contacts are affected by that failure. You inform the affected contacts immediately and coordinate the solution process.*

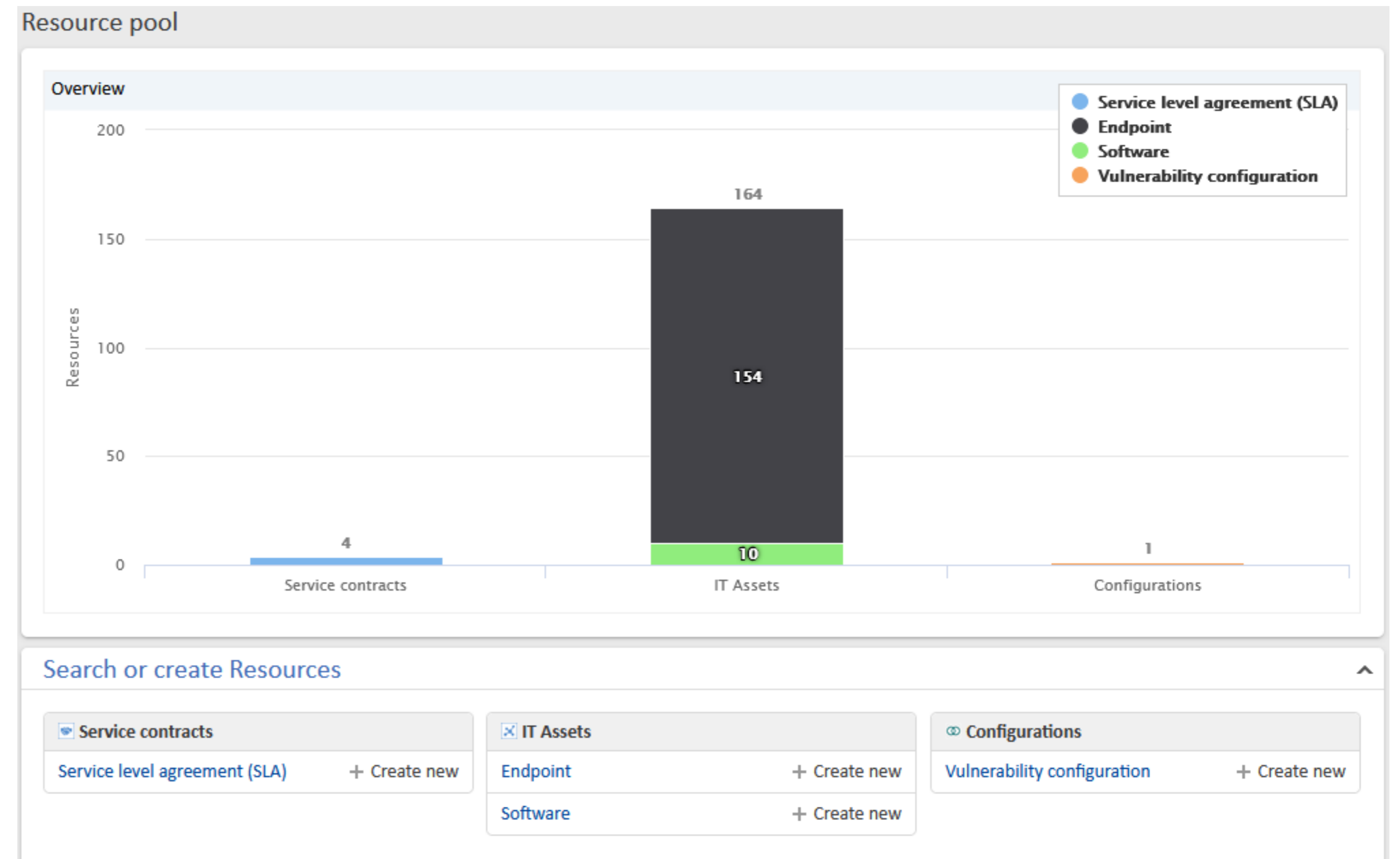


# Functions of CM/Resource Pool

## Appealing dashboard

In the Web Client, the resources are shown on a practical dashboard:

- Overview of defined resource categories and types
- Bar charts showing the number of resources for each resource type
- Convenient links for opening resource lists and creating new resources



# Functions of CM/Resource Pool

## Potential for further automation

With resource activities, you can add manual and automatic process steps to your resources, for example:

- Synchronize devices
- Create cases directly for affected resources
- Send notifications to the responsible users
- Adjust SLAs when a contract has changed

Resource activities can be completely personalized to your individual work with resources.

Resource

**HP5406-002 | Network endpoint**  
IT Assets ▶ Endpoint  
Internal | Created: 5/26/22, 12:53 PM

Displayname	Endpoint type	Model
HP5406-002	Network endpoint	Unset
Serial number	Host name	Primary MAC address
Unset	Unset	88:51:FB:2F:EE:00
Primary IP	Primary user	
10.0.1.221	Unset	
Comments		
[Redacted]		
Operating system	Last seen	
Unknown	November 21, 2022, 12:28 PM	

Activities

Synchronise endpoint

Workspace

Workspace is empty  
All unsaved changes are automatically stored here.

Favorites

Favorites are empty  
Drag tickets, persons, companies or searches into this space to save them as favorites.

Resource

**Printer XYZ - 0123456789**  
Product range ▶ Product  
Internal | Created: 12/15/22, 12:15 PM

name	Price (€)	
Printer XYZ	499.99	
Article number	Serial number	Warranty [months]
0123456789	9876543210	24

Activities

Duplicate resource...

Create new case for resource

Workspace

Workspace is empty  
All unsaved changes are automatically stored here.

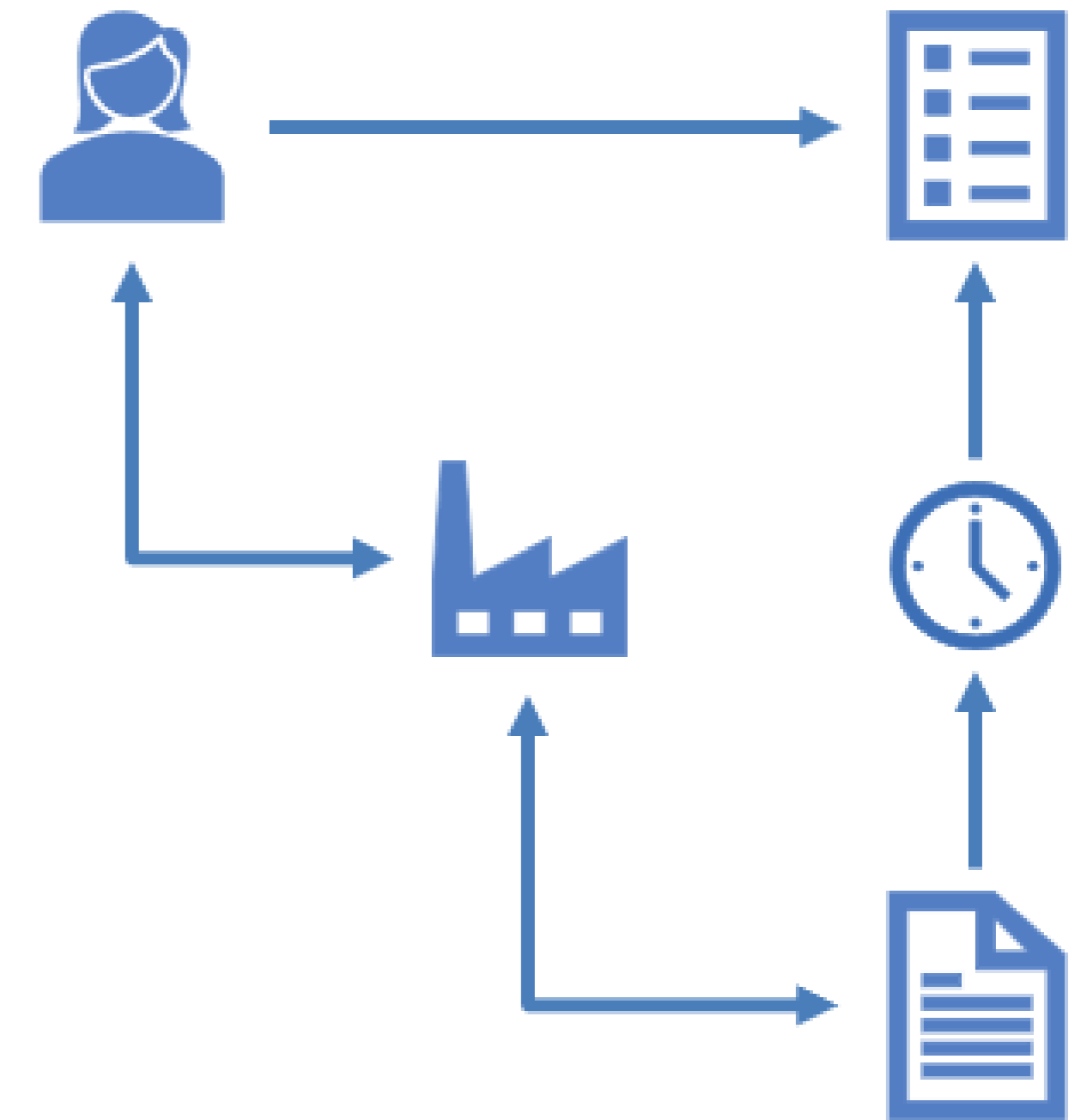
Favorites

# Use cases for CM/Resource Pool

## SLA management

Your contracts with your customers include specific solution times for cases. CM/Resource Pool allows you to easily manage the agreed solution times and link them to the cases:

- A customer creates a new case.
- The related company will be selected automatically.
- The SLA contract with the company will be analyzed and the reaction time for the new case will be set based on the SLA.





# Use cases for CM/Resource Pool

The screenshot displays a CRM interface for a claim titled "Claim - broken printer" (ID: 100064). The claim is currently in the "Initial analysis" stage of a four-step process. The interface includes a progress bar, a metadata section with fields like Priority (Normal) and Entry channel (Customer portal), and a detailed description of the problem: "Merchandise damaged" and "Printer does not work". Below the main details, there are sections for "Contacts (1)" and "Related resources (1)". The contact section shows "Mr Max Mustermann" as the business contact. The related resources section lists a "Printer XYZ - 0123456789" with a price of 499.99, article number 0123456789, serial number 9876543210, and a 24-month warranty.

**Claim** | Assign to me | Edit | Save as favorite | Clone | Print

**Claim - broken printer**  
100064 | Claims | Initial analysis | Unassigned | 12/15/22, 12:20 PM

1 Initial analysis | 2 Claim - legitimate? | 3 Fix | 4 Closed

Priority: Normal | Entry channel: Customer portal

**1D: Responsible**  
Responsible team: Main team

**2D: Problem**  
Reason for complaint: Merchandise damaged  
Problem description: Printer does not work

**Details** | Edit

**Contacts (1)** | Change main contact | Add

Mr Max Mustermann | Business contact | Action

Email: [redacted] | Phone: [redacted] | Mobile: [redacted]

Position: [redacted] | Department: IT

ConSol Software GmbH | Action

**Related resources (1)** | as List or Graph

Show: Only assigned relations

**Product range**

Products (1) | Add

Printer XYZ - 0123456789 | Action

name	Price (€)
Printer XYZ	499.99

Article number	Serial number	Warranty [months]
0123456789	9876543210	24

Date: 12/15/22, 12:20 PM | Note: [redacted] | Edit

## Products for complaints

You have a complaint process, which can affect different products. Link the affected products to the case. In this way, the user in the Web Client gets all relevant product information for the case immediately. No time-consuming research is necessary.



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!