



# ConSol CM/Track

The ConSol CM customer portal

*June 2025, Product management, ConSol CM*



## Dear ConSol and ConSol CM customers,

we would like to present the customer portal CM/Track, a ConSol CM add-on that provides access to cases for your customers.

Your customers can log in and see the current status of all their cases. They can open a new case, ask questions, or attach additional documents. If configured, they can even move the case to the next step in the business process and provide additional information using forms.

In this way, you can improve your service for external and internal customers, provide an asynchronous method of customer communication and reduce the number of shorter customer calls. Your service team can focus on expert customer communication thus further improving the quality of service.

Enjoy reading this presentation. Please call us, should you want to know more about CM/Track: +49-89-45841-120

*Your ConSol CM Product management & Sales team*



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## Hello, how can we help you?

Access your requests, submit a new one or search in FAQs



### Create ticket

⚡ Incident ? Request

> Hardware

Dektop PC

Laptop PC

Mobile device

Server

> Software

> Network

> Communication

> Security

> User management

> Reporting

Printer

Monitor

### My latest tickets

News

# CM/Track

- Advantages
- Features
- Technical background

# Advantages of CM/Track as a customer portal

## Communicate with your customers via CM/Track

- **Proactive customer communication**  
Use FAQs and news to publish important information for your customers to reduce the number of created cases.
- **Close involvement of the customers in the business process**  
Integrate your customers into the processing of their requests by using workflow activities and forms to speed up work on the cases.
- **Numerous use cases**  
CM/Track can be used both for internal and external customers. For example:
  - Internal: IT helpdesk and service desk, procurement processes (LDAP integration is possible)
  - External: customer, reseller and partner portals





# Features of CM/Track – start page

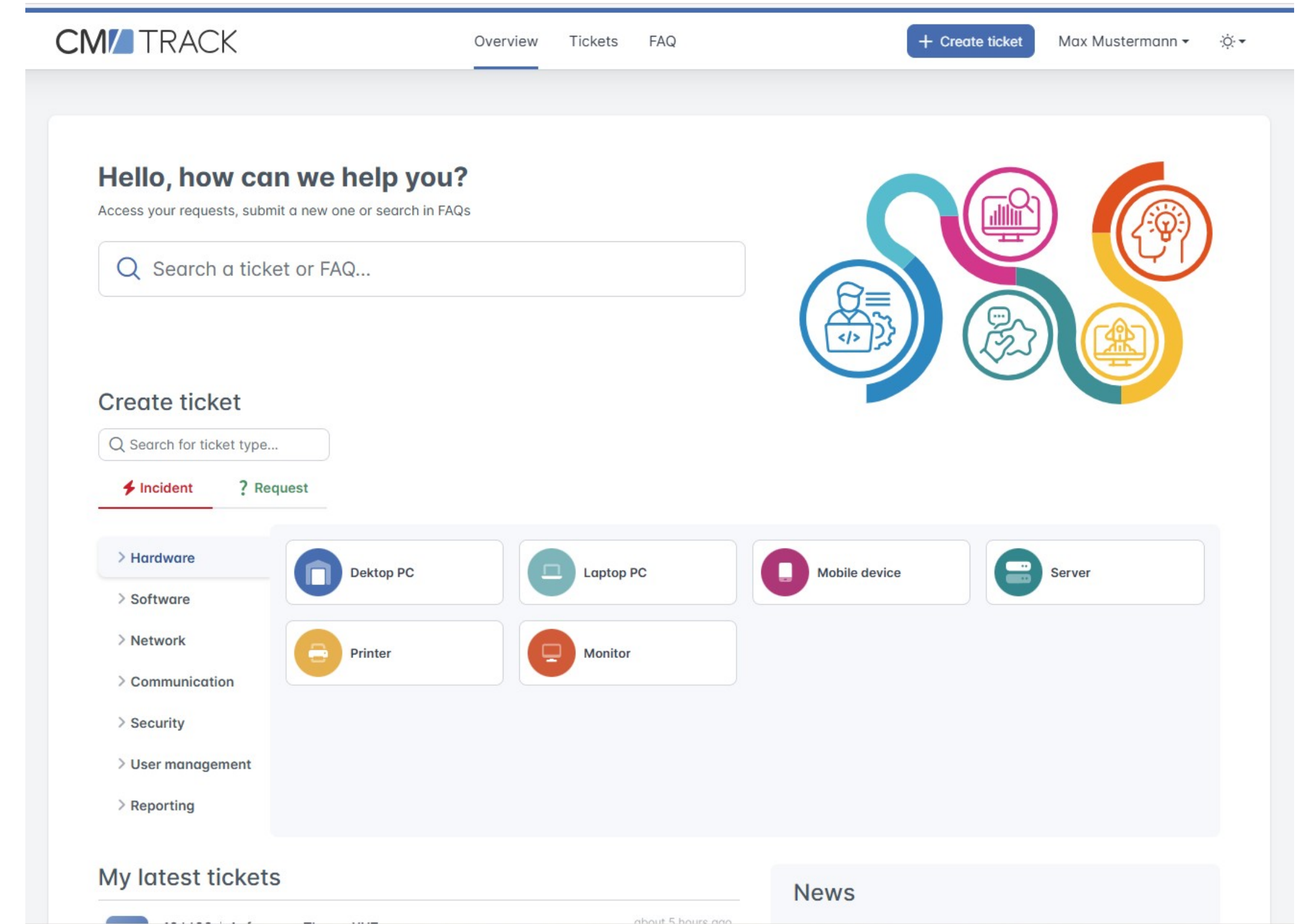
## Start page with everything your customers need

The new start page of CM/Track is intuitive and easy to use. Your customers can take advantage of several features:

- Direct case creation in specific queues
- Search feature covering all cases of the user and the FAQs
- News feature

Use the extensive configuration options regarding the layout and content of the start page:

- Determine the GUI texts
- Define your own tiles for various application areas.
- Set the color and displayed information for the news entries



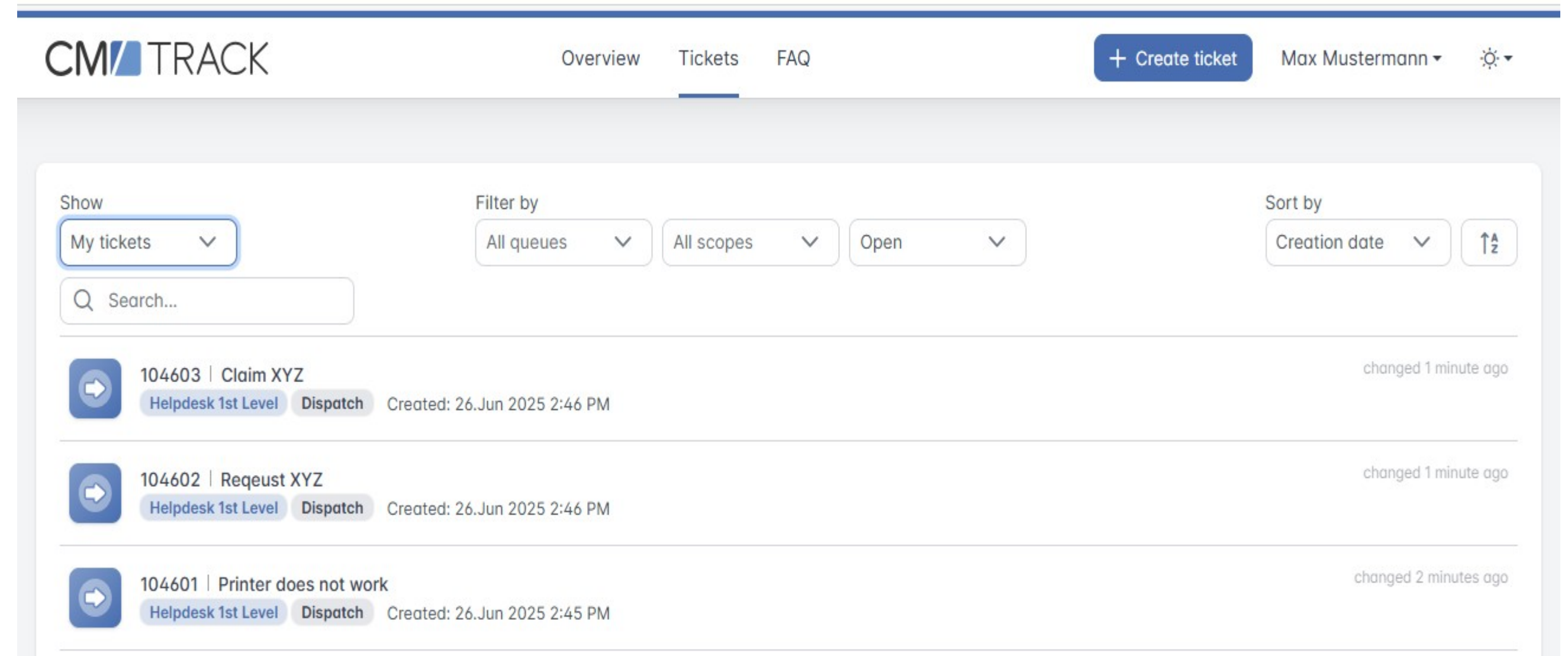
# Features of CM/Track – case list

## Keep an overview of all cases

The case list shows all the cases of the user. The processing status (scope) and the basic data, such as subject, queue and creation date, are directly visible. In addition, the case list provides the following features:

- Display the cases of the user or all cases of the user's company
- Search for cases
- Filter by queue and status (open / closed)
- Sort by different criteria

The user can click a case to see its details.



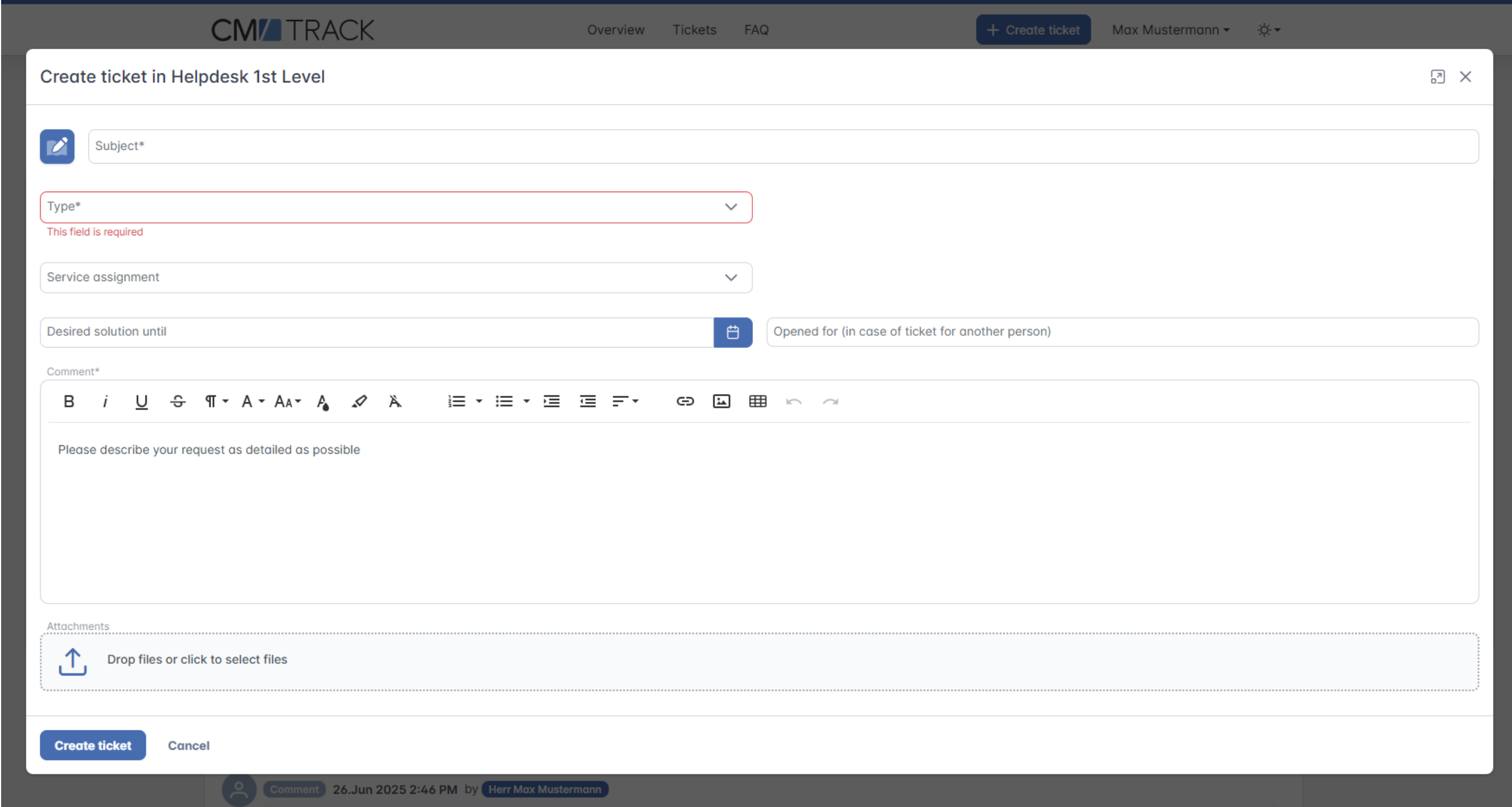
# Features of CM/Track – case creation

## Allow your customers to open cases

Give your customers the opportunity to create cases on their own. This way, you can save time because, instead of an email or phone call, you directly receive a case with all the required data.

- You define the queues in which the customers can create cases and the fields which they need to fill out.
- Your customers enter the respective data and write a comment.
- Optionally, your customers can attach additional documents.

You can then work on the cases as usual in the Web Client.



The screenshot displays the 'Create ticket in Helpdesk 1st Level' form within the CM/Track application. The interface includes a top navigation bar with 'Overview', 'Tickets', and 'FAQ' links, along with a 'Create ticket' button and a user profile 'Max Mustermann'. The form itself has a title bar and a close button. It contains several input fields: 'Subject\*' (with a pencil icon), 'Type\*' (a dropdown menu with a red border and a 'This field is required' error message), 'Service assignment' (a dropdown menu), 'Desired solution until' (a date picker), and 'Opened for (in case of ticket for another person)' (a text field). Below these is a 'Comment\*' section with a rich text editor toolbar and a placeholder text 'Please describe your request as detailed as possible'. At the bottom, there is an 'Attachments' section with a file upload icon and the text 'Drop files or click to select files'. The form concludes with 'Create ticket' and 'Cancel' buttons. A footer bar shows a 'Comment' action, the date and time '26.Jun 2025 2:46 PM', and the user 'Herr Max Mustermann'.

# Features of CM/Track – case details

## Allow your customers to track their cases

Your users see the current processing status of a case in the case details. This way, your customers can obtain information about their requests in a convenient way at any time. The following information is displayed:

- Comments
- Emails
- Fields filled by the engineer

The engineer in the Web Client decides which comments and emails should be shown in CM/Track.

In addition, the customer can add comments and attachments, which are then displayed in the Web Client.

The screenshot displays the CM/Track web interface for a specific case. At the top, the navigation bar includes the CM/Track logo, links for Overview, Tickets, and FAQ, a '+ Create ticket' button, and a user profile for Max Mustermann. The main content area shows the case details for ticket 104606, titled 'Request regarding Topic XYZ'. It includes a 'Helpdesk 1st Level' status, a 'Dispatch' button, and a creation timestamp of 26.Jun 2025 3:24 PM. The case type is 'Incident / Störung' and the service assignment is 'Hardware/Desktop PC'. A 'Workflow Activities' sidebar on the right contains a 'Discard - close ticket' button. The 'Communication and Attachments' section features a '+ Add a comment / attachment' button and a vertical timeline of three comments. The first comment, dated 26.Jun 2025 3:28 PM by Herr Max Mustermann, states: 'We will gladly send you the required documents.' The second comment, also dated 26.Jun 2025 3:28 PM by Herr Max Mustermann, contains a formal response: 'Dear Mr. Mustermann, Your inquiry (Inquiry regarding XYZ) has been received by us and is handled under processing number 104606. Please provide this processing number in all communication with us. For emails, please reference the number correctly in the subject line, as done in this confirmation email. The associated automatic update of your ticket allows us to process it faster. We will contact you if necessary, With kind regards, Your Service Team'. The third comment, dated 26.Jun 2025 3:24 PM by Herr Max Mustermann, reads: 'Please describe your request as detailed as possible I would like some information about XYZ.'



# Features of CM/Track – workflow activities

## Use additional features to interact with the customers

CM/Track provides workflow activities that the customers can click to move their cases to the next step in the business process. They can fill forms with data which is needed in the course of the process.

This new option to interact with customers, in addition to emails and comments, allows you to speed up case processing and improve customer satisfaction.

The screenshot displays the CM/Track web interface. At the top, the header includes the CM/Track logo, navigation links for Overview, Tickets, and FAQ, a 'Create ticket' button, and a user profile for Max Mustermann. The main content area shows a ticket titled '104606 | Request regarding Topic XYZ' with a 'Helpdesk 1st Level' status and a 'Dispatch' action. A warning message states: 'The ticket will be marked as spam and will be closed immediately.' with a 'Discard - close ticket' button. Below this, the ticket details include 'Type: Incident / Störung' and 'Service assignment: Hardware/Desktop PC'. The 'Communication and Attachments' section features a '+ Add a comment / attachment' button and a timeline of three comments from 'Herr Max Mustermann' dated '26.Jun 2025 3:28 PM'. The first comment says 'We will gladly send you the required documents.' The second comment is a detailed response to Mr. Mustermann, mentioning the processing number 104606 and providing instructions for future communication. The third comment says 'Please describe your request as detailed as possible I would like some information about XYZ.'

# Features of CM/Track – FAQs and news

## Communicate proactively with your customers by using FAQs and news

- Use the news feature to place important information directly on the start page. Ideal for general information and announcements.
- Create FAQs with solutions for frequently occurring problems and collect answers to common questions. Ideal for instructions and support.

Avoid the situation that several customers create cases about the same problem and support your customers in solving problems on their own.

### News

7

Nov 2024

**104544 Wartungsfenster**  
🕒 9:22 AM by Super Agent (changed 8 months ago)

7

Nov 2024

**104543 Nächste Woche kurze Downtime des CM-Systems wegen DB-Update**  
🕒 9:21 AM by Super Agent (changed 8 months ago)

CM/TRACK

Overview Tickets **FAQ**

+ Create ticket Max Mustermann ⚙

### Questions and Answers (Q&A)

Here you will find a list of frequently asked questions and described solutions for cases that have already been solved. Please search using keywords to get better results for your request.

All FAQ Lists

💡

**104593 | FAQ 2 extern**  
FAQ (external) Published Created: 28.Nov 2024 12:00 AM

7 months ago

💡

**104547 | Mein Notebook ist zu laut – Was kann ich tun?**  
FAQ (external) Published Created: 07.Nov 2024 9:33 AM

8 months ago

💡

**104541 | WLAN-Verbindung auf dem iPhone, iPad oder iPod touch herstellen**  
FAQ (external) Published Created: 07.Nov 2024 9:08 AM

8 months ago

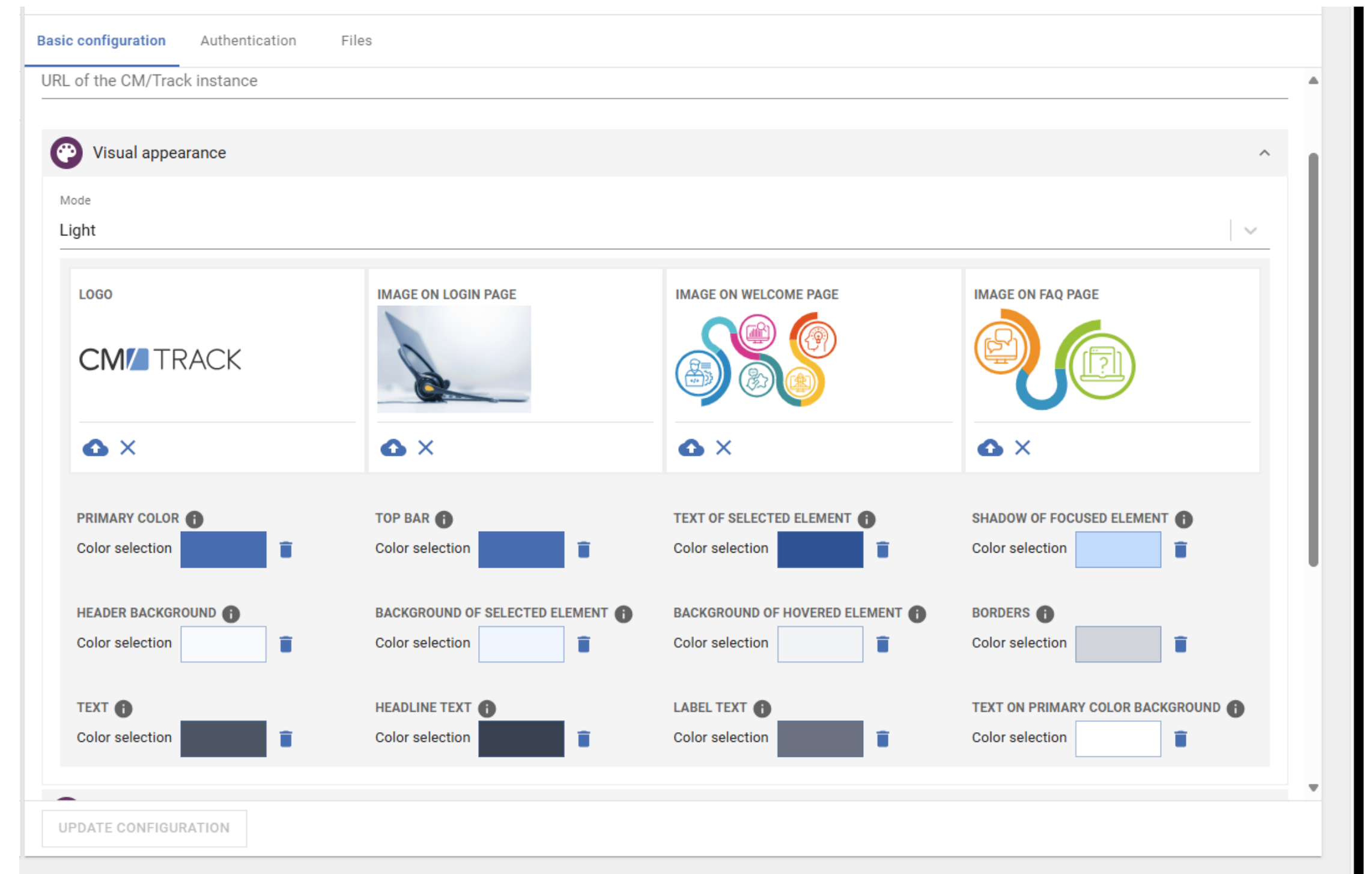
# Features of CM/Track – start page

## Simple configuration through the Web Admin Suite

With the help of the Web Admin Suite, you can easily adapt CM/Track to your own purposes. For example, the following can be changed with a mouse click:

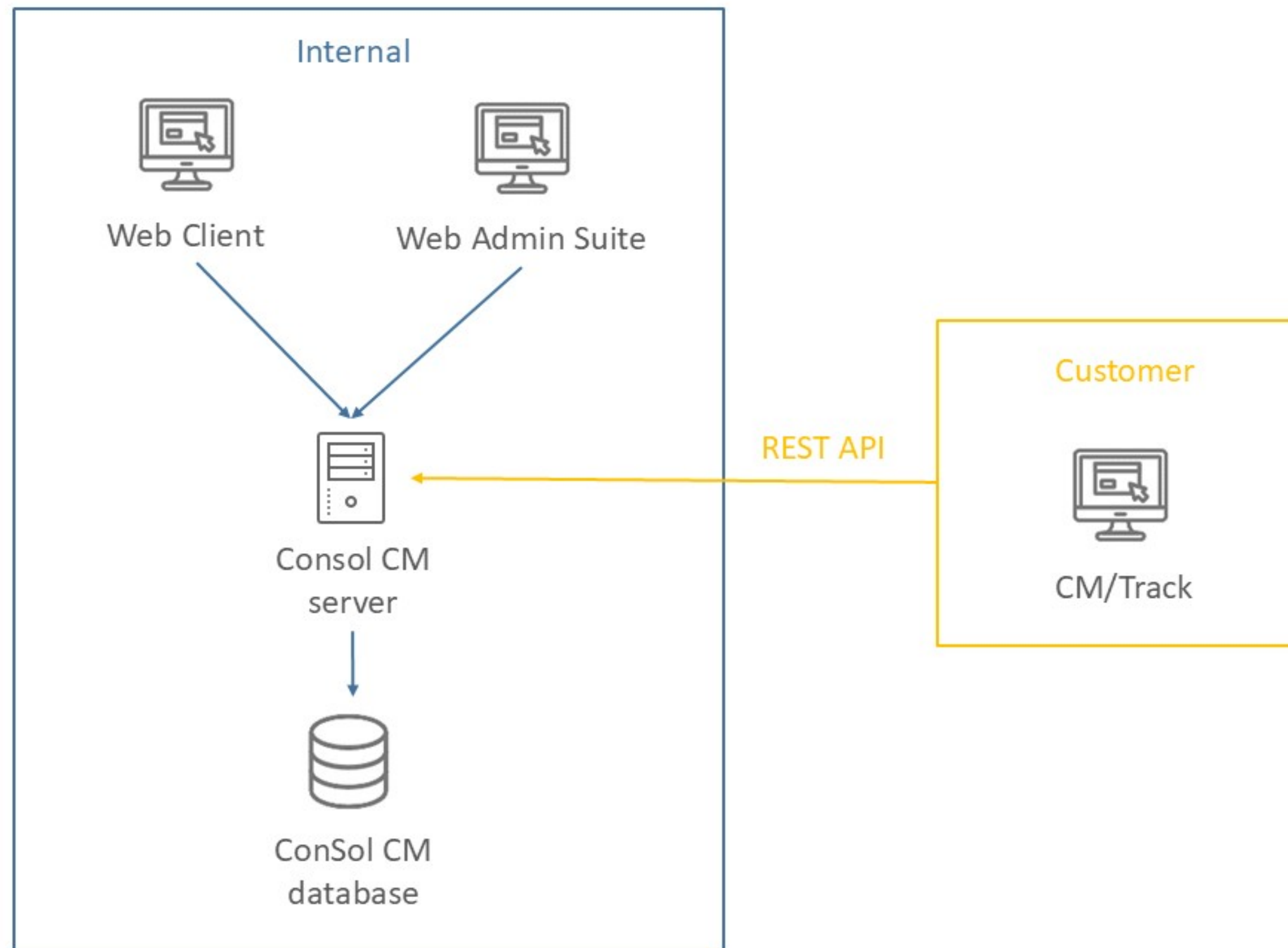
- Integrate your own logos and images
- Change colors
- Customize widgets on the homepage

With the HTML widget, you can display any content on the homepage.





# Technical background of CM/Track



## Technical key data about CM/Track

- All pages and entry masks of the modern web-based application have a responsive design and automatically adapt to the screen size.
- CM/Track can be used on PCs, laptops, tablets and mobile phones.
- The communication with the ConSol CM server is done via REST API.
- CM/Track includes an integrated proxy and can be deployed independently of the ConSol CM server. Thus, it meets the security requirements for external provision.



Manuals Release Notes / System Requirements Solutions Feature Presentations

**CM/TECDOC**  
ConSol CM Documentation

Here you will find the official manuals for the process management software [ConSol CM](#).

☐ PDF ☐ HTML ☐ English ☐ Deutsch

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

☒ Latest version ☐ Version 6.17 ☐ Version 6.16 ☐ Version 6.15.4 ☐ Version 6.15.3 ☐ Version 6.15.2 ☐ Version 6.15.1

☐ Version 6.15.0 ☐ Version 6.14.0.10 ☐ Older versions

User	Administrator	Process Designer
<div> <b>HTML</b> User Manual 6.17</div> <div> <b>HTML</b> Benutzerhandbuch 6.17</div>	<div> <b>HTML</b> Administrator Manual 6.17 (English)</div> <div> <b>HTML</b> Administratorhandbuch 6.17 (Deutsch)</div>	<div> <b>HTML</b> Process Designer Manual 6.13.0.3 (English)</div> <div> <b>PDF</b> Process Designer Manual 6.13.0.3 (English)</div>
DWH	Setup and Operation	CM/Outlook-Add-in
<div> <b>HTML</b> DWH Manual 6.17 (English)</div>	<div> <b>HTML</b> Setup and Operations Manual 6.17 (English)</div>	<div> <b>PDF</b> CM/Outlook-Add-in (English)</div> <div> <b>PDF</b> CM/Outlook-Add-in (German)</div>
CM/EBIA		
<div> <b>HTML</b> Metabase Reference Documentation (external)</div> <div> <b>HTML</b> Metabase Learning Guides (external)</div>		

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!