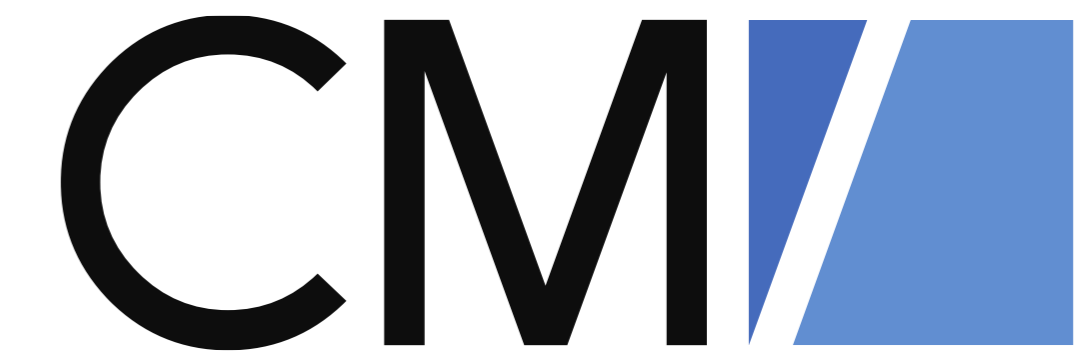




# ConSol CM/Track

The ConSol CM customer portal

*December 2022, Product management ConSol CM*



## Dear ConSol customers, dear ConSol CM customers,

we would like to present the customer portal CM/Track, a ConSol CM Add-On which provides access to cases for your customers. The customers can log in and see the current status of all of 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 way of customer communication and reduce the number of shorter customer calls. Your service team can focus on expert customer communication thereby further improving the quality of service.

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

*Your ConSol CM Product management & Sales team*



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# CM/Track

The screenshot shows the CM/Track web application interface. At the top, there is a navigation bar with the logo 'CM/Track', links for 'Cases', 'Create case', and 'FAQ', and a user profile 'Mr Max Mustermann'. The main content area starts with a greeting 'Hello, how can we help you?' and a sub-header 'Access your requests, submit a new one or search in FAQ's'. Below this is a search bar labeled 'I am looking for...' with a magnifying glass icon and the placeholder text 'Type search term(s)'. There are two large buttons: an orange 'Claims' button and a green 'Requests' button. Each button has a person icon, the title, and the text 'Please enter claim/request details in following' followed by a 'Create' button. At the bottom, there is a 'News' section with two entries. The first entry is dated '05 Dec 2022' and titled '100069 Serverupdate at 6 pm', posted at '1:43 PM' by 'Fritz FAQ-Ersteller' and changed a few seconds ago. The second entry is also dated '05 Dec 2022' and titled '100068 New version of the user manual available', posted at '1:41 PM' by 'Fritz FAQ-Ersteller' and changed 2 minutes ago.

- 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 in order to reduce the number of created cases.
- **Close involvement of the customers in the business process**  
Integrate your customers in 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

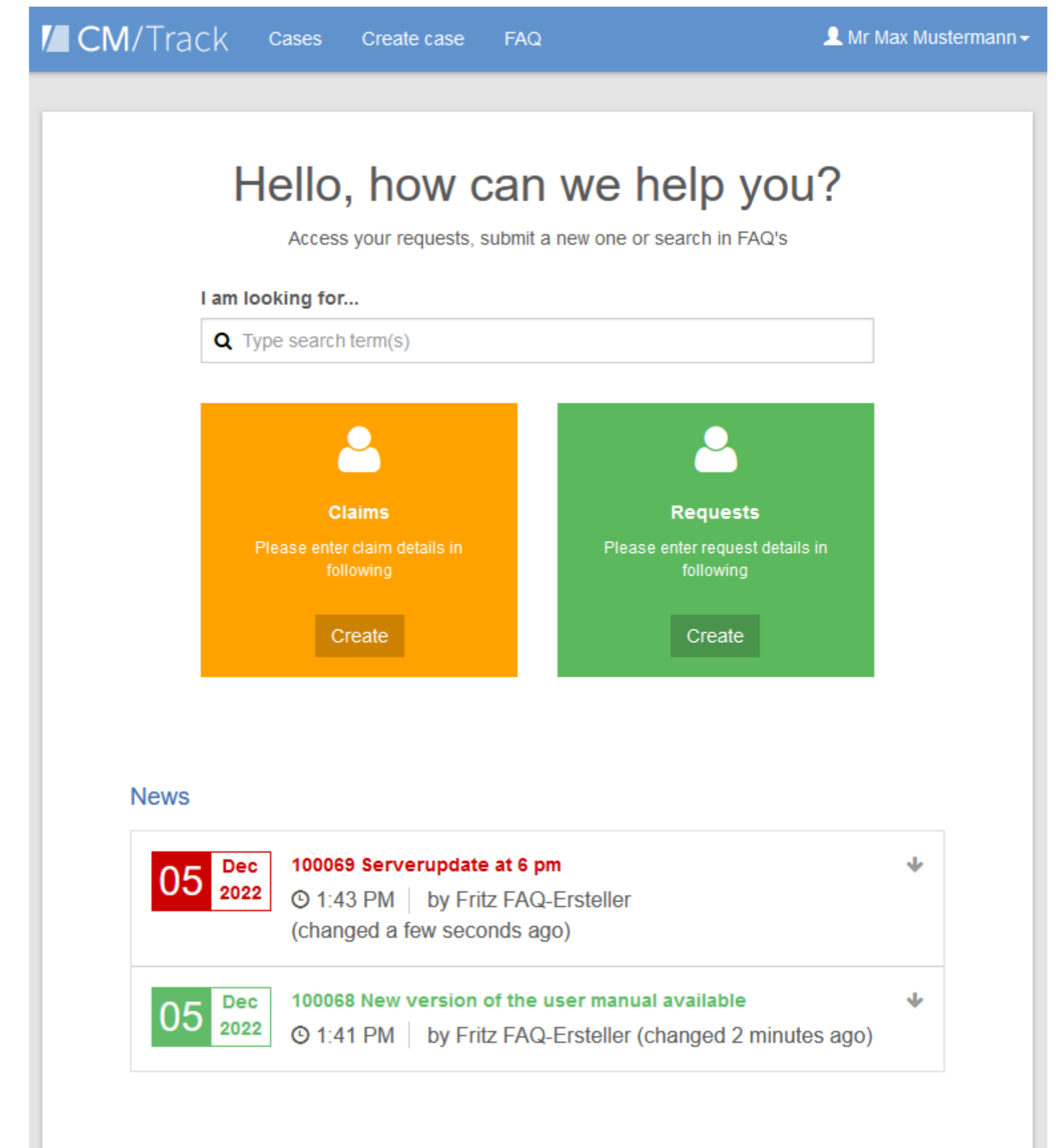
## Start page with everything your customers need

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
- Choose an icon for each queue
- Set the color and displayed information for the news entries



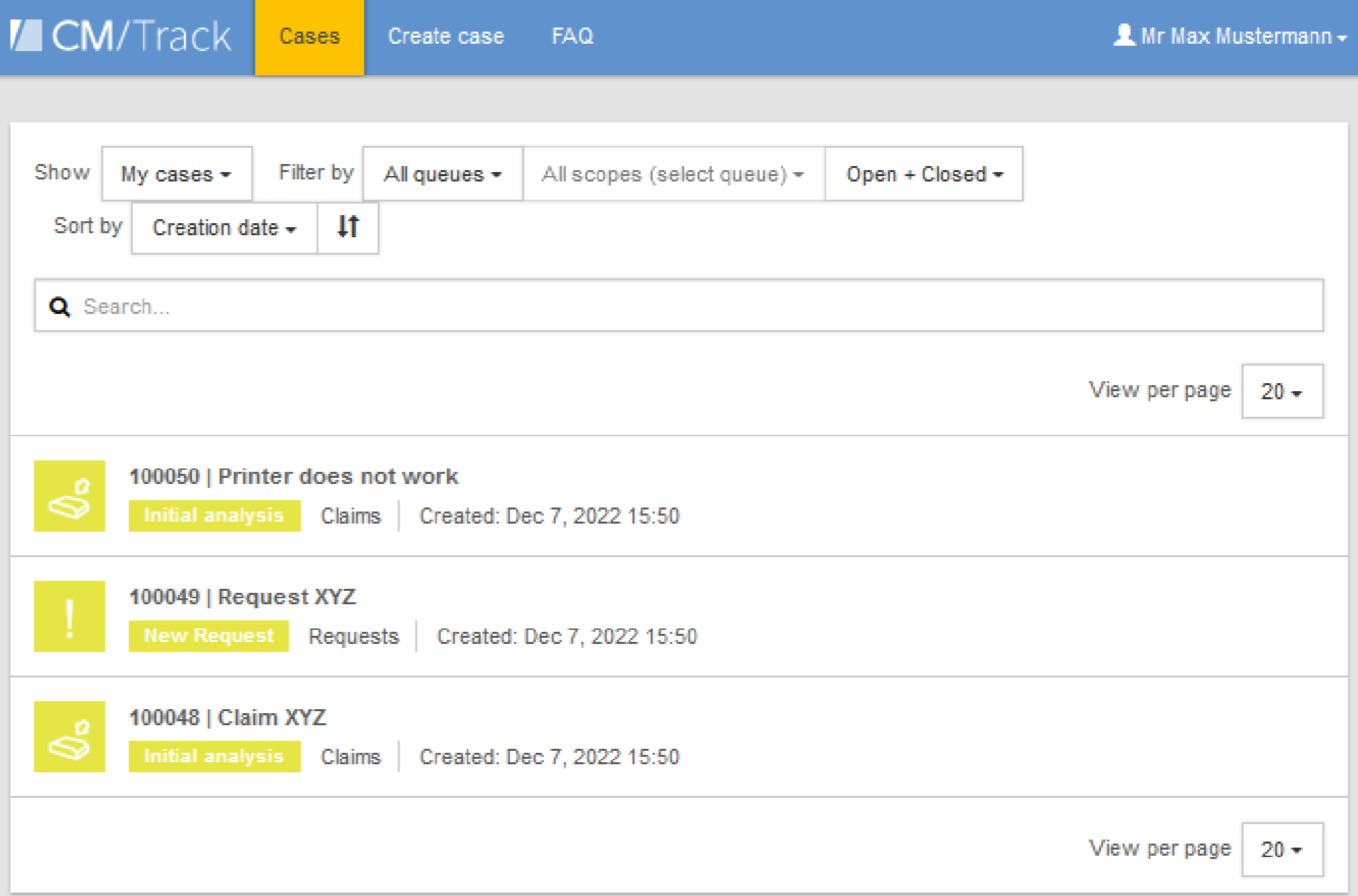
# Features of CM/Track – case list

## Keep on overview of all cases




The case list shows all the cases of the user. The processing status (scope) and the basic data, 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.



The screenshot displays the CM/Track user interface for the 'Cases' section. The top navigation bar includes the CM/Track logo, a 'Cases' tab, and links for 'Create case' and 'FAQ'. The user's name, 'Mr Max Mustermann', is visible in the top right corner. Below the navigation bar, there are several filters and controls: 'Show' set to 'My cases', 'Filter by' set to 'All queues', 'All scopes (select queue)', and 'Open + Closed'. The 'Sort by' dropdown is set to 'Creation date' with an ascending/descending toggle. A search bar is present with the placeholder text 'Search...'. On the right side, there is a 'View per page' dropdown set to '20'. The main content area displays a list of three cases:

	<b>100050   Printer does not work</b> Initial analysis   Claims   Created: Dec 7, 2022 15:50
	<b>100049   Request XYZ</b> New Request   Requests   Created: Dec 7, 2022 15:50
	<b>100048   Claim XYZ</b> Initial analysis   Claims   Created: Dec 7, 2022 15:50

At the bottom right of the list, there is another 'View per page' dropdown set to '20'.

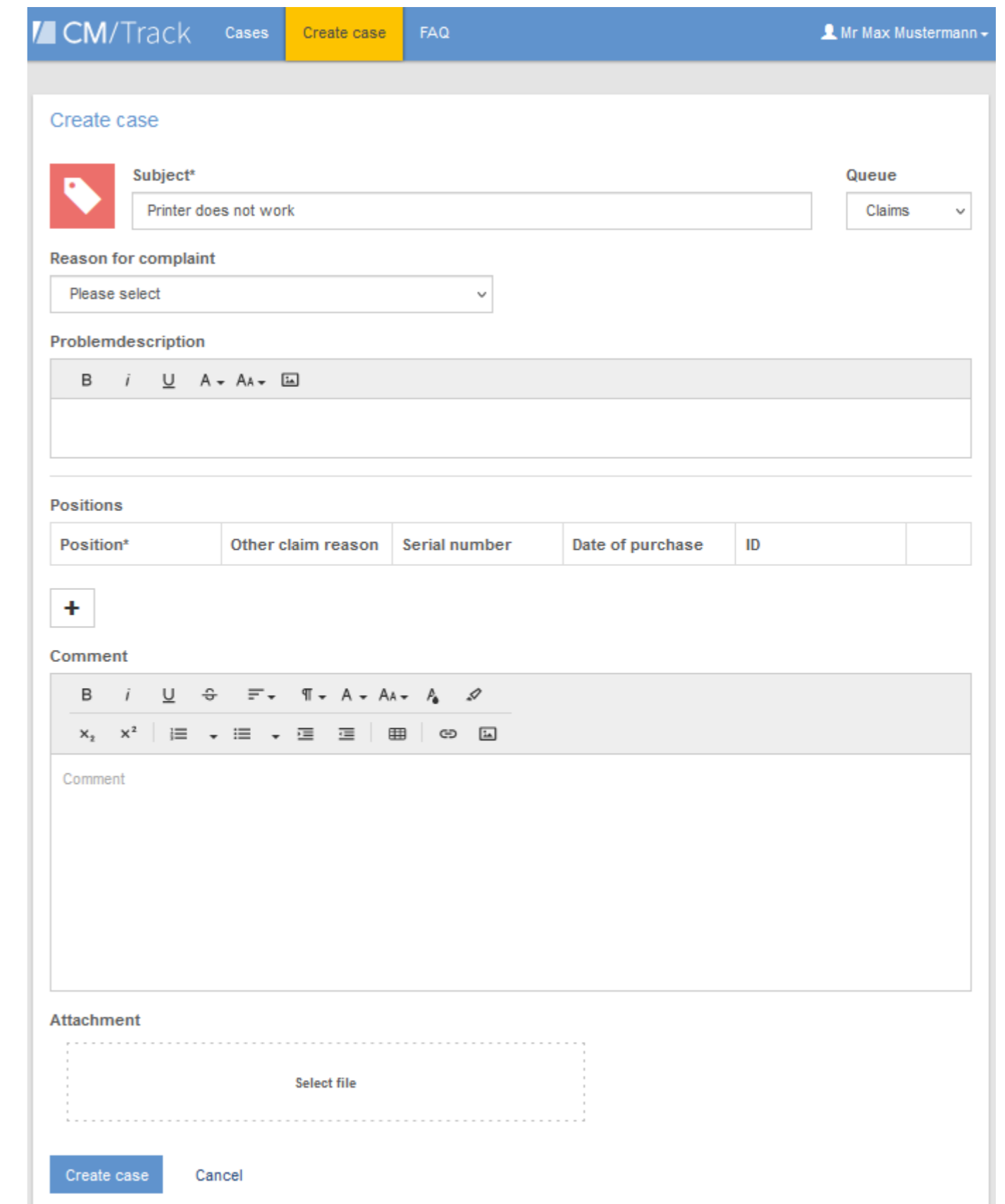
# Features of CM/Track – case creation

## 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.
- The customers enter the respective data and write a comment.
- Optionally, the customers can attach additional documents.

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



The screenshot shows the 'Create case' form in the CM/Track web client. The form is titled 'Create case' and is located under the 'Cases' menu. The user is logged in as 'Mr Max Mustermann'. The form contains the following fields and sections:

- Subject\*:** A text input field containing 'Printer does not work'.
- Queue:** A dropdown menu with 'Claims' selected.
- Reason for complaint:** A dropdown menu with 'Please select'.
- Problemdescription:** A rich text editor with a toolbar containing bold (B), italic (i), underline (U), and font size (A, A+) options.
- Positions:** A table with columns: Position\*, Other claim reason, Serial number, Date of purchase, and ID. A plus sign (+) is visible below the table.
- Comment:** A rich text editor with a toolbar containing bold (B), italic (i), underline (U), strikethrough (ABC), text color (A), background color (A), font size (A, A+), and link (A) options.
- Attachment:** A dashed box with the text 'Select file'.

At the bottom of the form, there are two buttons: 'Create case' and 'Cancel'.

# Features of CM/Track – case details

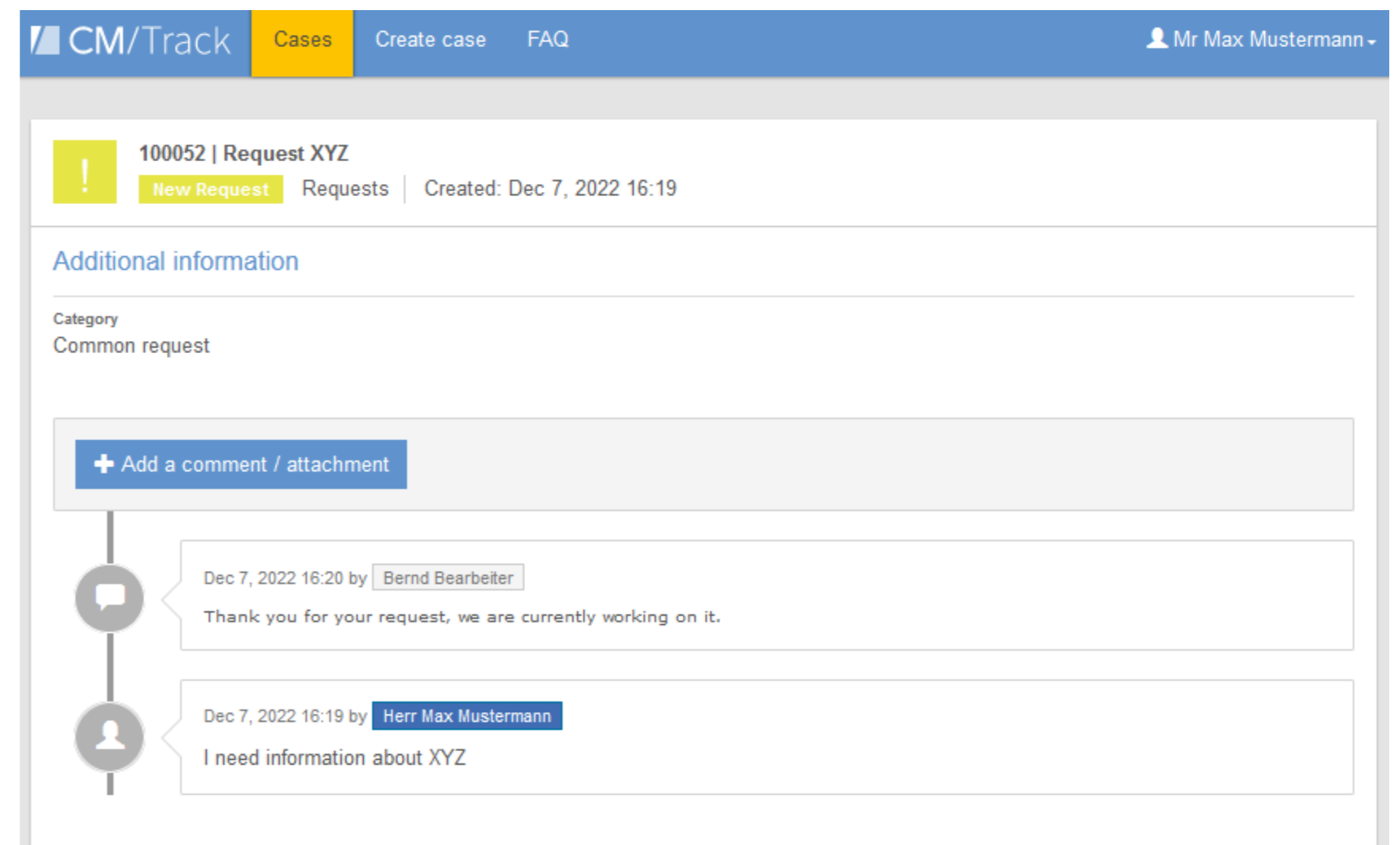
## Allow your customers to track their cases

The users see the current processing status of a case in the case details. This way, the 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 client interface. At the top, there is a navigation bar with the logo 'CM/Track', a 'Cases' tab, and links for 'Create case' and 'FAQ'. The user 'Mr Max Mustermann' is logged in. The main content area shows the case details for '100052 | Request XYZ', which is marked as a 'New Request'. It includes a 'Category' of 'Common request' and a creation date of 'Dec 7, 2022 16:19'. Below this, there is a section for 'Additional information' with a button to '+ Add a comment / attachment'. A vertical timeline of comments is shown, with the most recent comment from 'Bernd Bearbeiter' at 'Dec 7, 2022 16:20' stating 'Thank you for your request, we are currently working on it.' Below that is a comment from 'Herr Max Mustermann' at 'Dec 7, 2022 16:19' stating 'I need information about XYZ'.



# Features of CM/Track – workflow activities

## Use additional features to interact with the customers

CM/Track provides workflow activities which 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 image displays two screenshots of the CM/Track web application interface. The left screenshot shows the main case view for '100052 | Request XYZ', which is a 'New Request' created on Dec 7, 2022 at 16:19. The category is 'Common request'. A blue button labeled '>> Discard request' is visible in the top right of the case details area. A yellow arrow points from this button to the right screenshot. The right screenshot shows a modal dialog box titled '100052 | Request XYZ' with a yellow warning icon. The dialog contains a 'Reason why ticket is dismissed\*' dropdown menu with 'Please select' as the current option, and a text area for 'Note on why ticket is dismissed\*' containing the text 'Problem already solved.'. At the bottom of the dialog are 'Save' and 'Cancel' buttons.

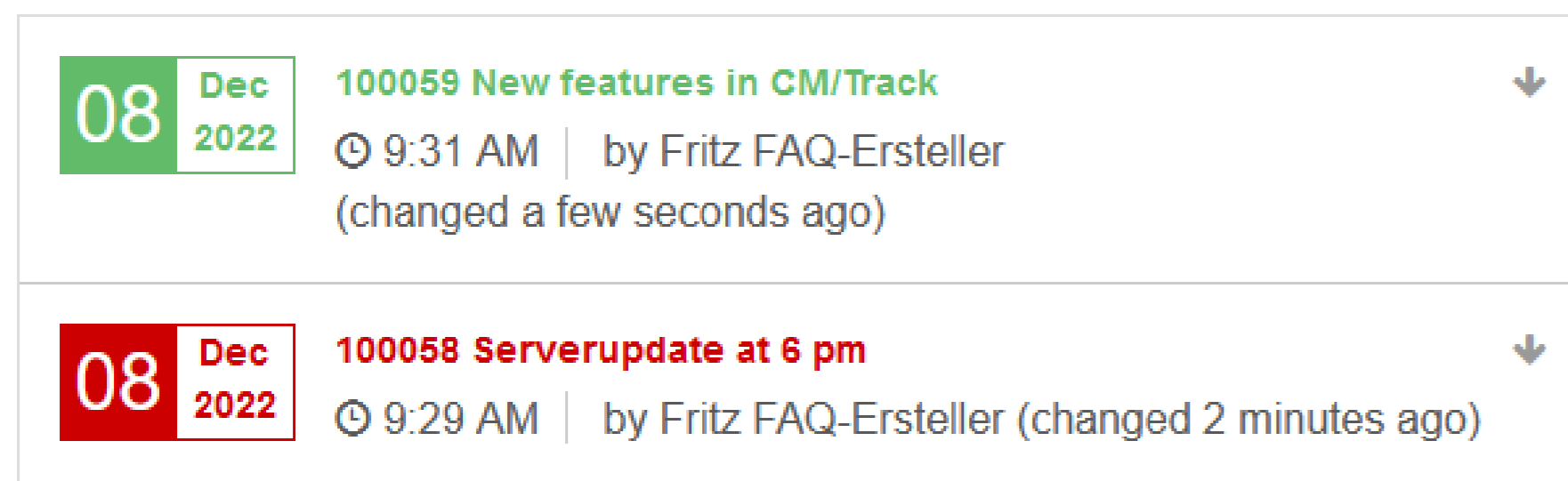
# Features of CM/Track – FAQs and news

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

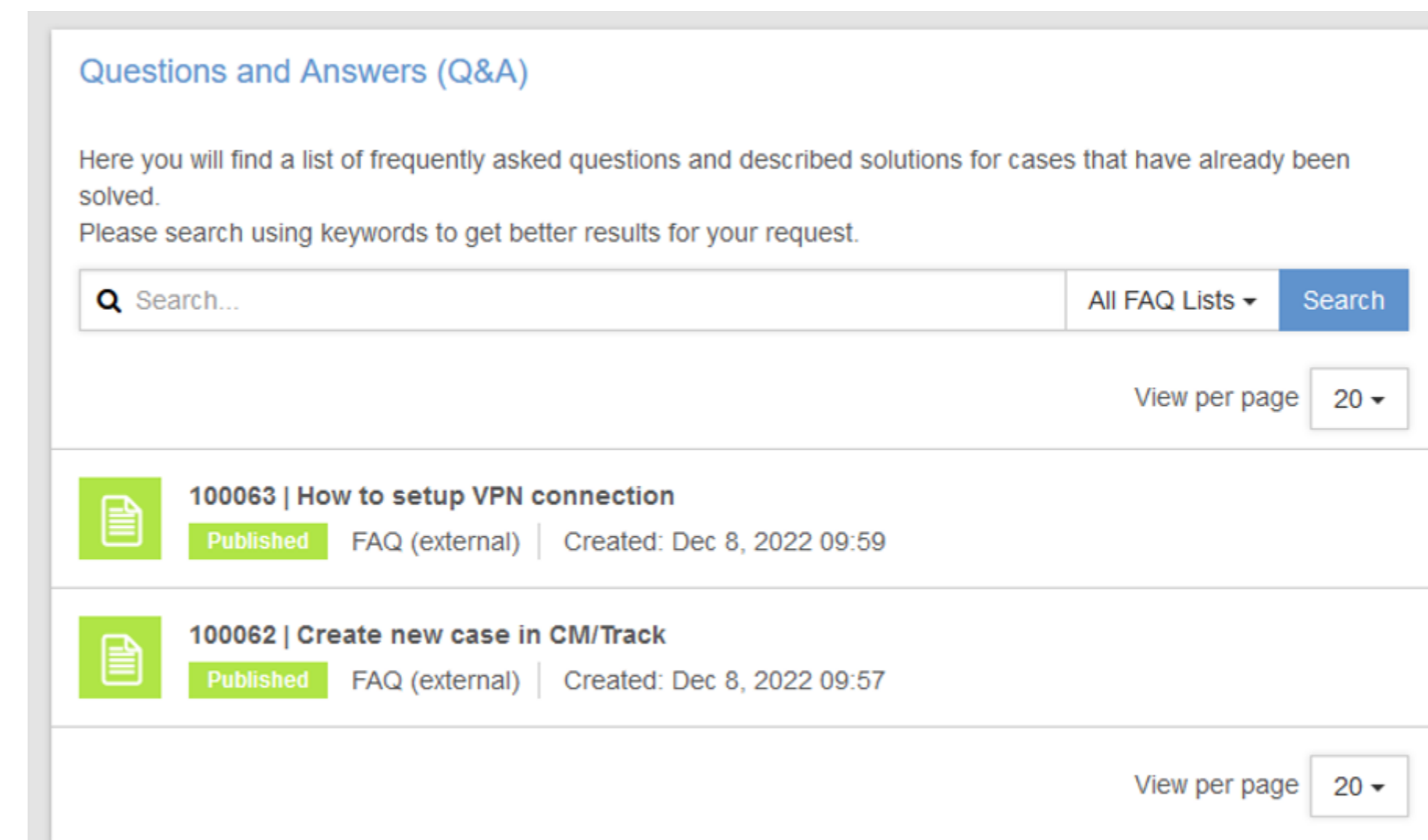
- Use the news feature to place important information directly on the start page. Ideal for general information and announcements.
- Create FAQs with solutions for frequently occurring problems and collect answers to common questions. Ideal for instructions and support.

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

### News

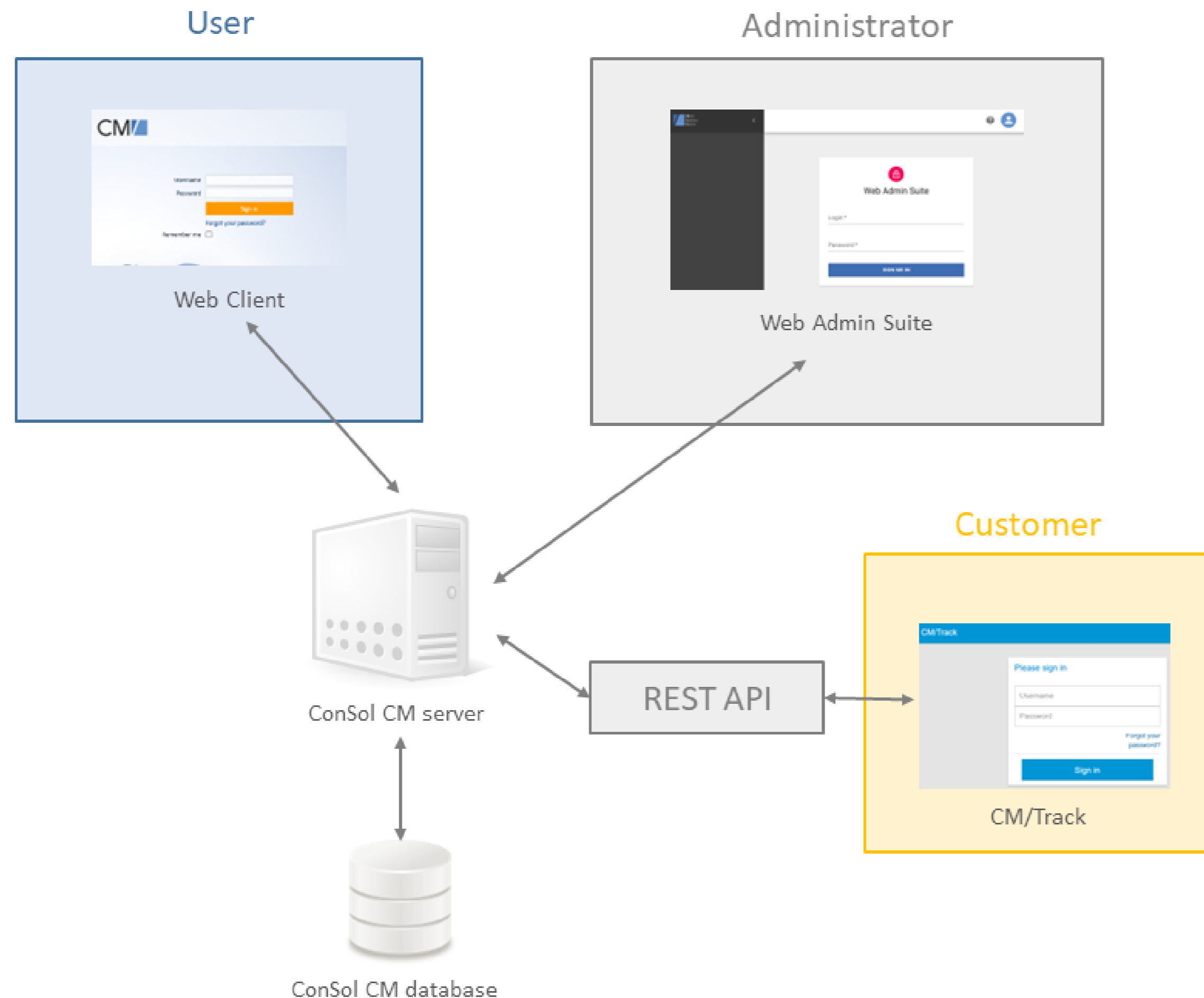


The screenshot shows a 'News' section with two items. The first item is dated '08 Dec 2022' and titled '100059 New features in CM/Track', posted at 9:31 AM by Fritz FAQ-Ersteller. The second item is also dated '08 Dec 2022' and titled '100058 Serverupdate at 6 pm', posted at 9:29 AM by Fritz FAQ-Ersteller. Both items have a downward arrow icon on the right.



The screenshot shows the 'Questions and Answers (Q&A)' section. It includes a search bar with the text 'Search...', a dropdown menu for 'All FAQ Lists', and a 'Search' button. Below the search bar, there is a 'View per page' dropdown menu set to '20'. The main content area lists two FAQ items: '100063 | How to setup VPN connection' and '100062 | Create new case in CM/Track'. Each item is marked as 'Published' and 'FAQ (external)', and includes a creation date of Dec 8, 2022. A second 'View per page' dropdown menu is located at the bottom right of the list.

# 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 from the ConSol CM server. Thus, it meets the security requirements for external provision.



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**

	<b>Online Help</b>	User Manual 6.15.1 (English)
	<b>PDF</b>	User Manual 6.15.1 (English)
	<b>Online Help</b>	Benutzerhandbuch 6.15.1 (Deutsch)
	<b>PDF</b>	Benutzerhandbuch 6.15.1 (Deutsch)

**Administrator**

	<b>Online Help</b>	Administrator Manual 6.15 (English)
	<b>Online Help</b>	Administratorhandbuch 6.15 (Deutsch)




**Process Designer**

	<b>Online Help</b>	Process Designer Manual 6.13.0.3 (English)
	<b>PDF</b>	Process Designer Manual 6.13.0.3 (English)

**DWH**

	<b>Online Help</b>	DWH Manual 6.11.0 (English)
	<b>PDF</b>	DWH Manual 6.11.0 (English)

**Setup and Operation**

	<b>Online Help</b>	Setup Manual 6.15 (English)
	<b>PDF</b>	Setup Manual 6.15 (English)
	<b>Online Help</b>	Operations Manual 6.15 (English)

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