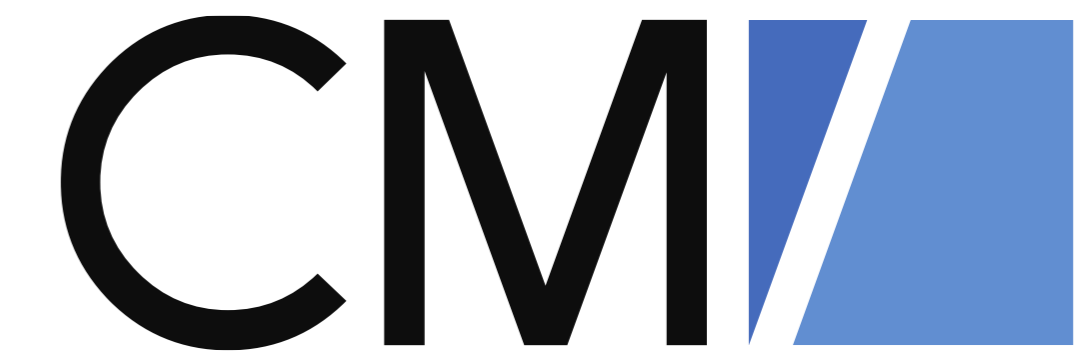# ConSol CM/Track

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

- 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

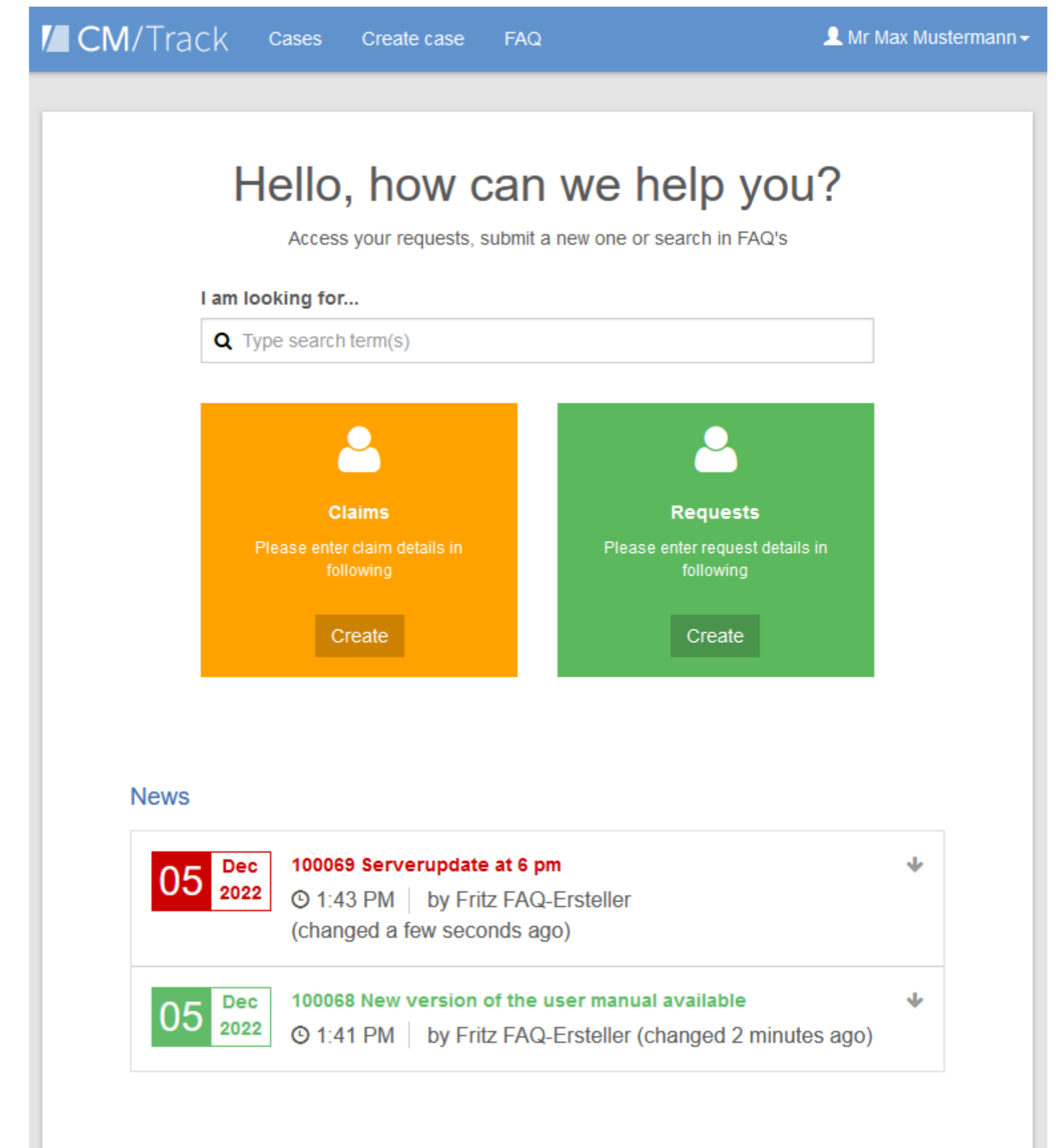# Features of CM/Track – start page

## 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
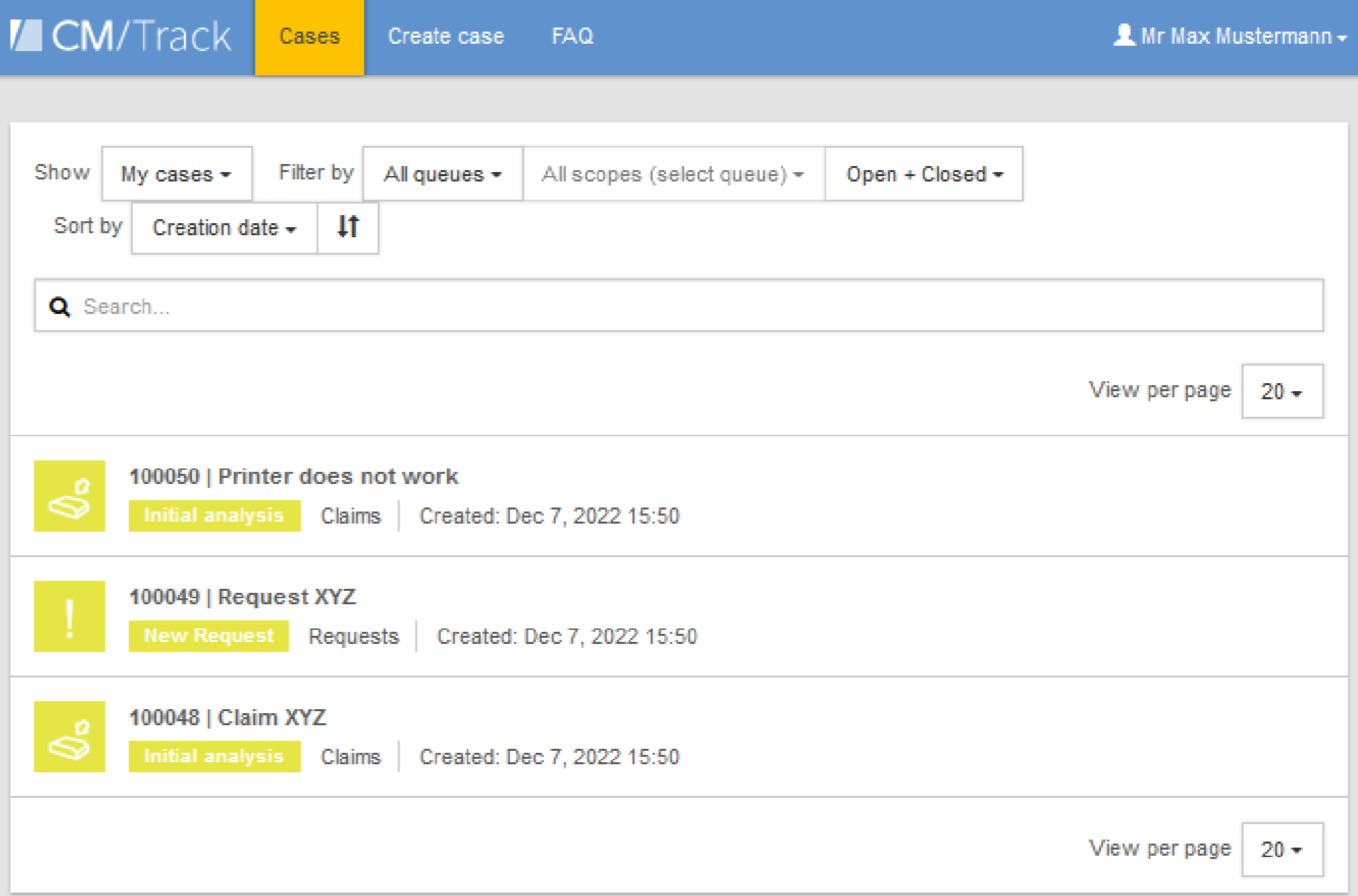
# Features of CM/Track – case list

## 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.



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# 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.
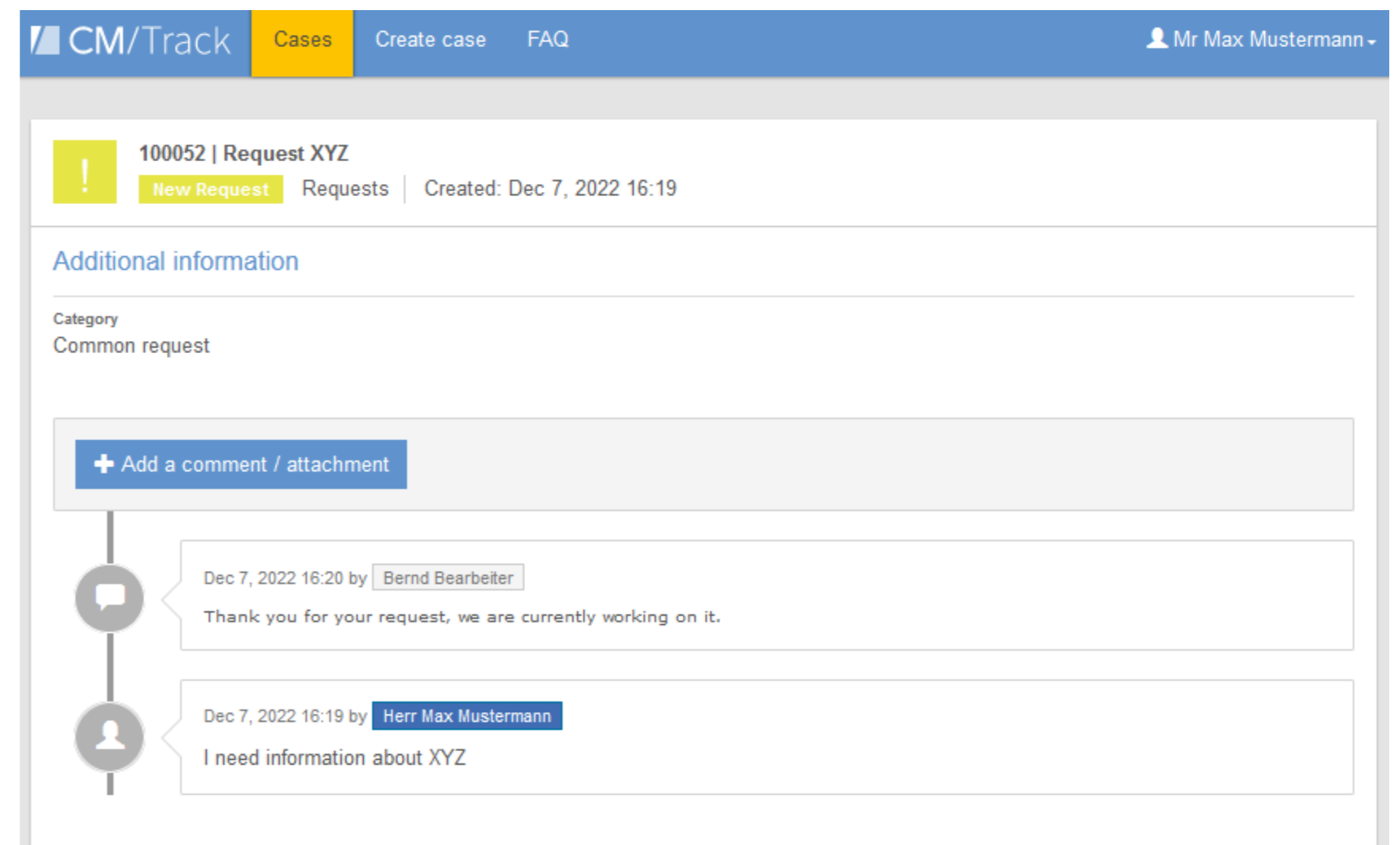
# Features of CM/Track – case details

## 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.

# 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.
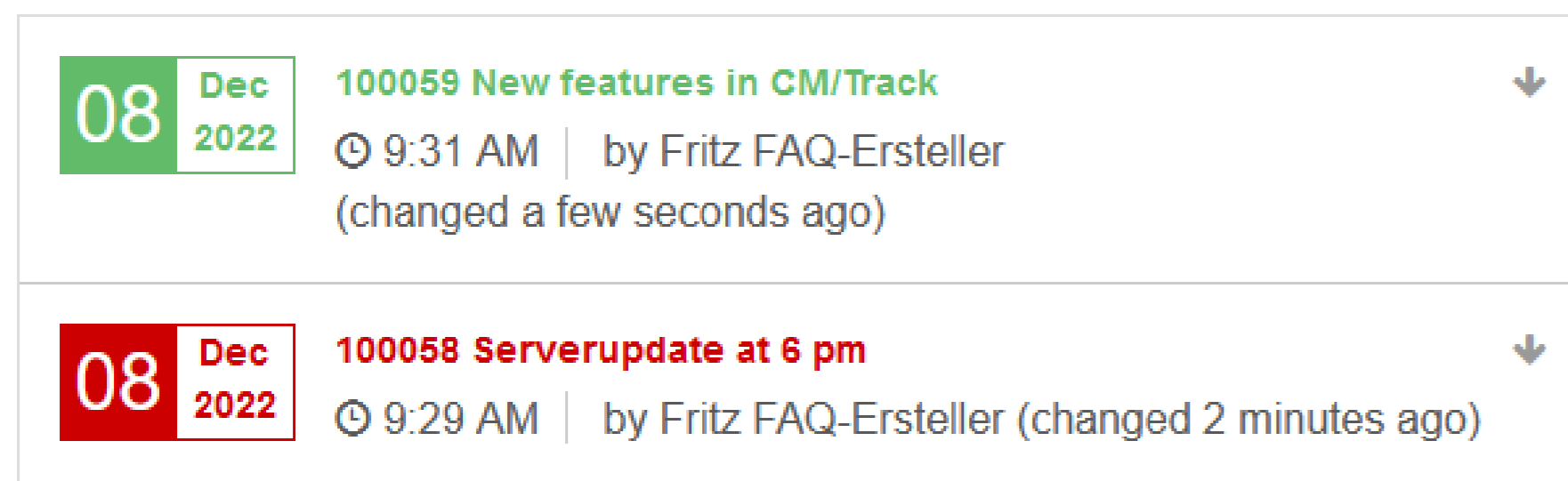
# Features of CM/Track – FAQs and news

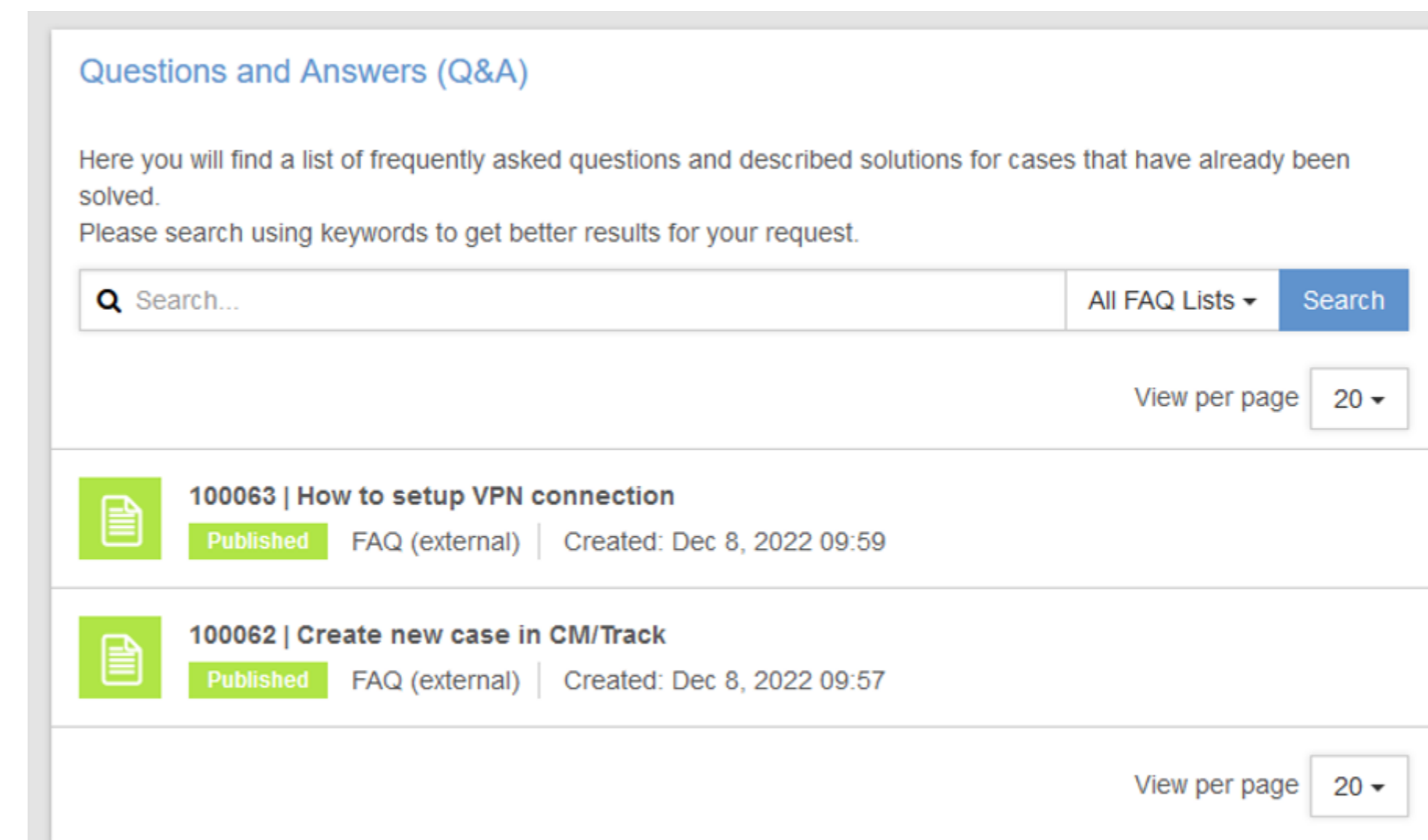## Communicate proactively with your customers by using FAQs and news

- 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.

# Technical background of CM/Track



User

Web Client

Administrator

Web Admin Suite

ConSol CM server

REST API

Customer

CM/Track

ConSol CM database
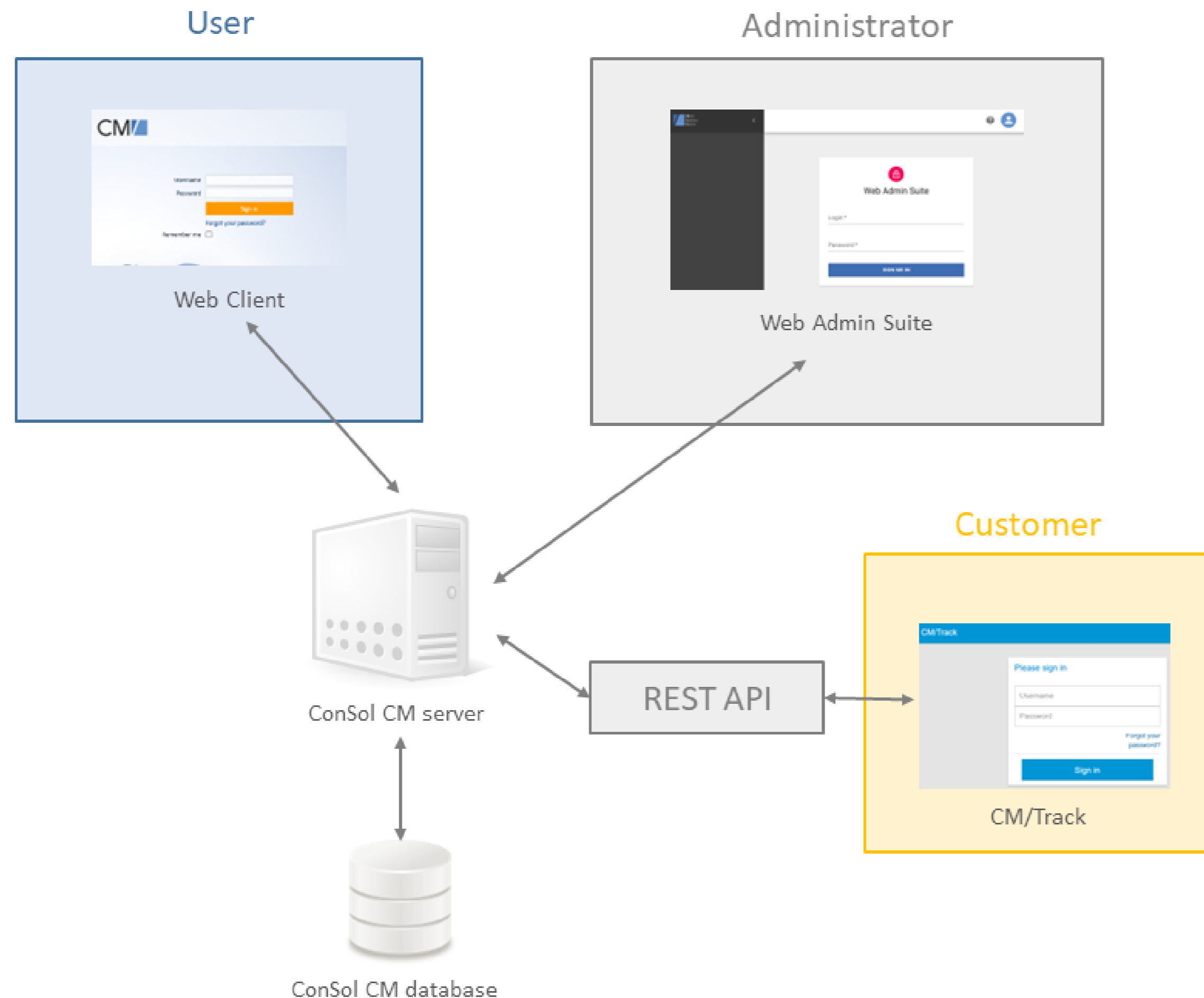
## Technical key data about CM/Track

- 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.

You want to learn more about ConSol CM?

Visit our TecDoc server

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- **Manuals**
  - **Administrator**
  - **User**
- **Release Notes**
- **System Requirements**
- **Feature presentations**
- **Solutions**

Discover the new ConSol CM version!