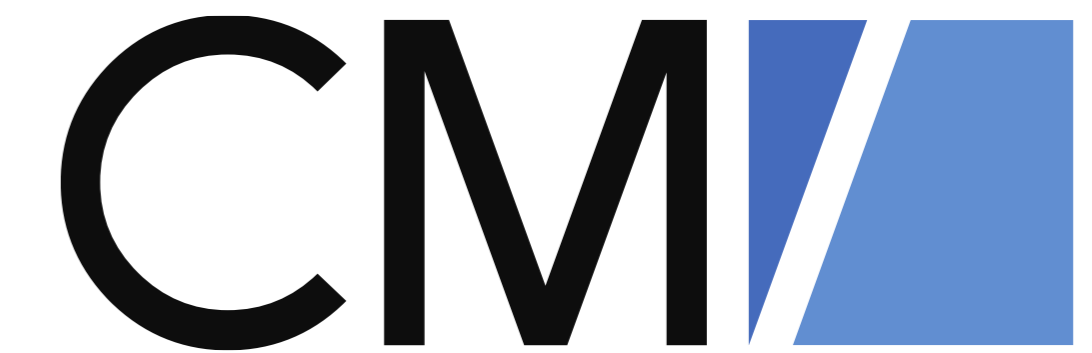


ConSol CM/Forms

November 2025, Product management ConSol CM



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



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Web forms

Customer registration

Personal data

First name *

Last name *

Email address *

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

- 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 *	Last name *
<input type="text" value="Please enter your first name"/>	<input type="text" value="Please enter your last name"/>
Email address *	Password *
<input type="text" value="Please enter your email address"/>	<input type="text" value="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
<input type="text"/>	<input type="text"/>	<input type="text"/>

Phone number

I want to receive notifications

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.

Customer satisfaction survey

Survey

	1	2	3	4	5
Please rate our service on a scale from 1 (poor) to 5 (excellent)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Please rate our response time on a scale from 1 (poor) to 5 (excellent)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comment

Do you have any suggestions or complaints?

Submit

Basic

File

Advanced

@ Email

Url

Phone Number

Tags

Date / Time

Day

Time

Currency

Survey

Signature

Layout

Data

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

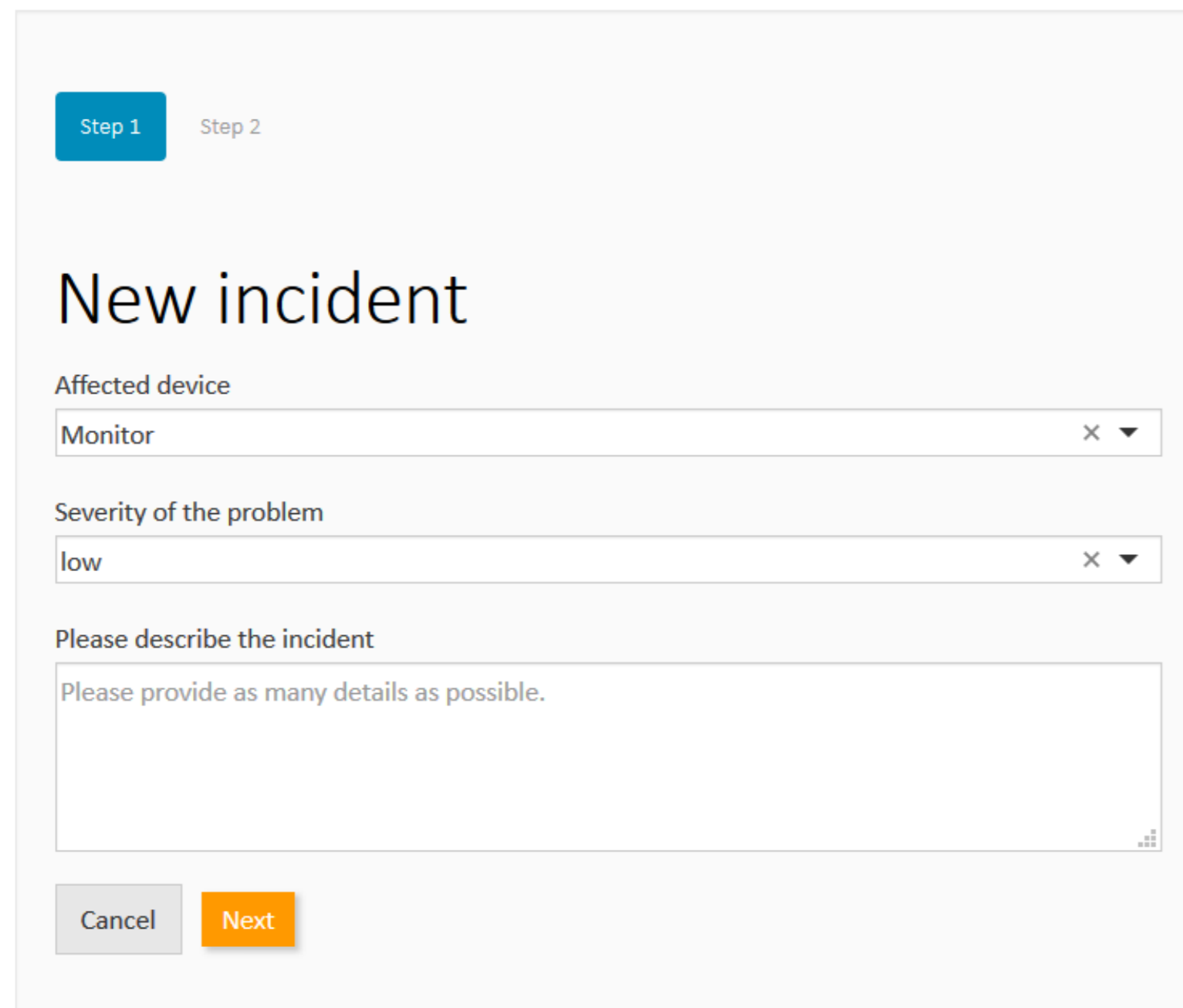
Add certificates, etc.

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.



Step 1 Step 2

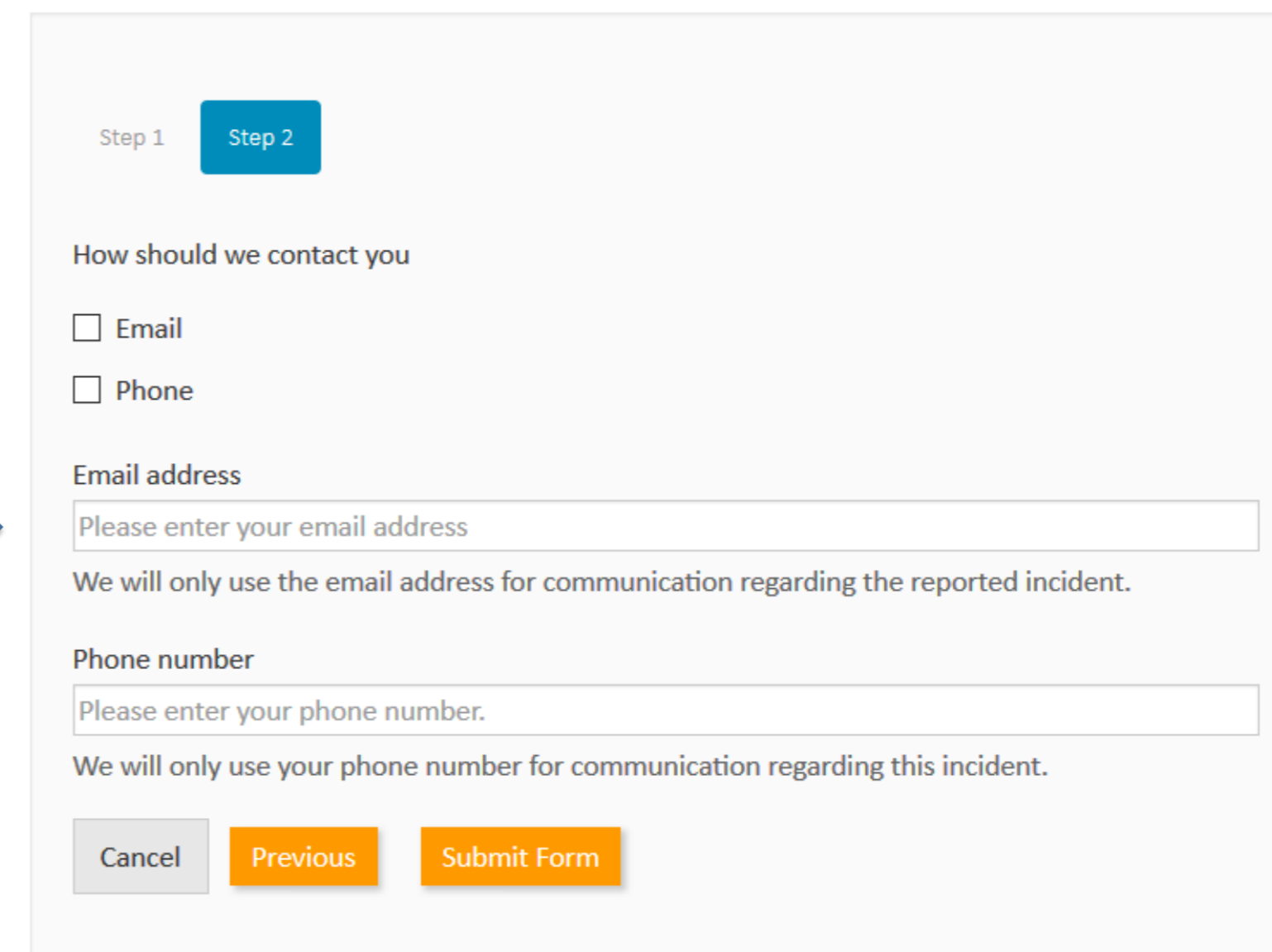
New incident

Affected device
Monitor x ▾

Severity of the problem
low x ▾

Please describe the incident
Please provide as many details as possible.

Cancel Next



Step 1 Step 2

How should we contact you

Email
 Phone

Email address
Please enter your email address
We will only use the email address for communication regarding the reported incident.

Phone number
Please enter your phone number.
We will only use your phone number for communication regarding this incident.

Cancel Previous Submit Form

Creating a web form

Maximum flexibility when creating a web form

You can make numerous choices when creating a web form in the Web Admin Suite:

- **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

The image shows a vertical menu for selecting form components. The menu is titled 'Basic' and contains the following items: Text Field, Text Area, Editor, Number, Password, Checkbox, Select Boxes, Select, Radio, and Button. Below this menu are four additional categories: File, Advanced, Layout, and Data.

Creating a web form

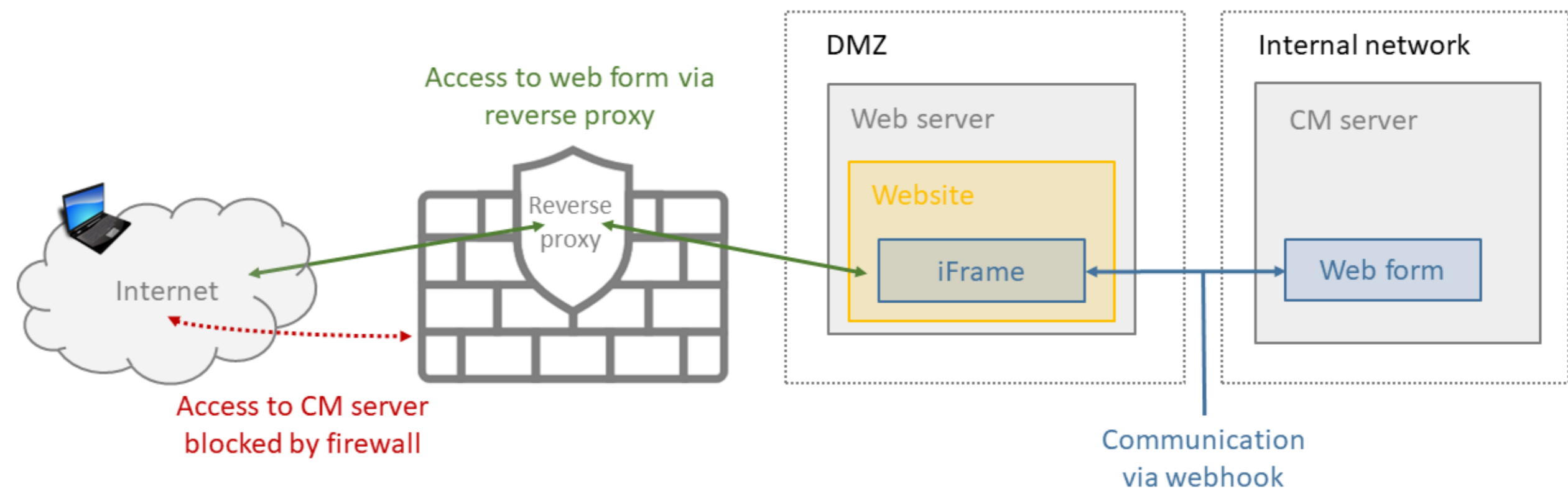
Publishing a web form

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

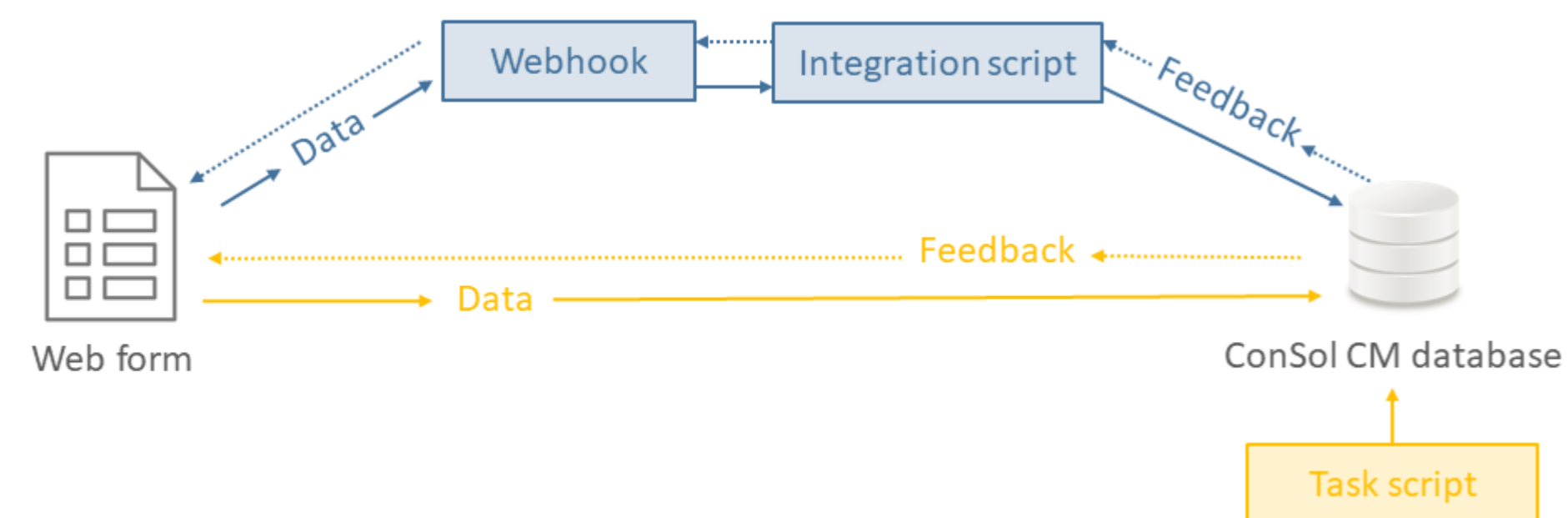
There are two options for processing the form data:

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.



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!

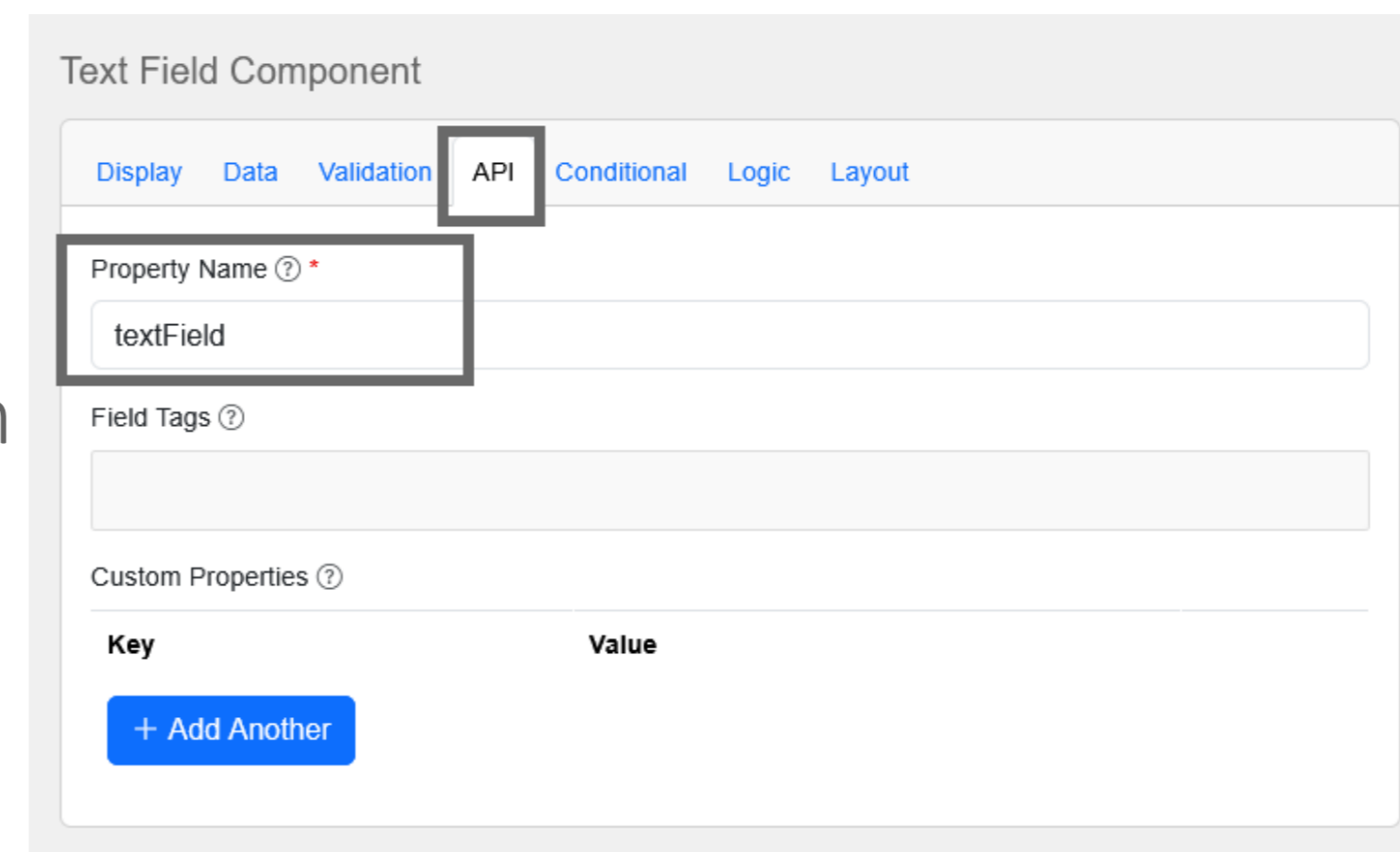
Creating a web form

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.



The screenshot shows the configuration interface for a 'Text Field Component'. The 'API' tab is selected and highlighted with a red box. Below the tabs, the 'Property Name' field is highlighted with a red box and contains the text 'textField'. The 'Field Tags' field is empty. The 'Custom Properties' section is empty, with a '+ Add Another' button visible.

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

Job application form

Last name: First name:

Gender: Male Female

Address:

Street:

City: ZIP:

Country:

Phone number: Email:

Date of birth: Place of birth:

Yes No

Full Time Part Time

Are you legally able to be employed in Poland? Have you ever be convicted of a felony? Available date to start work

Desired salary z? BRUTTO

Are you willing to relocate? Are you willing to travel?

Yes No

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



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 6.18 Version 6.17 Version 6.16 Older versions

User

	HTML	User Manual 6.18
	HTML	Benutzerhandbuch 6.18

Administrator

	HTML	Administrator Manual 6.18 (English)
	HTML	Administratorhandbuch 6.18 (Deutsch)

DWH

	HTML	DWH Manual 6.18 (English)
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Setup and Operation

	HTML	Setup and Operations Manual 6.18 (English)
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CM/Outlook-Add-in

	PDF	CM/Outlook-Add-in (English)
	PDF	CM/Outlook-Add-in (German)

CM/EBIA

	HTML	Metabase Reference Documentation (external)
	HTML	Metabase Learning Guides (external)

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!