

CGM PORTAL

Getting Started

REGISTRATION MANUAL

October 2026

Getting Started

CGM PORTAL

Instruction Manual for Customers

Table of Contents

1 Welcome
2 Portal Overview.....
3 Your First Steps.....
3.1 As a User
3.2 As an Administrator

1 Welcome

Welcome to the **CGM PORTAL**!

This comprehensive platform serves as your go-to hub for accessing our knowledge base, your cases, your invoices, and even managing your organizational data.

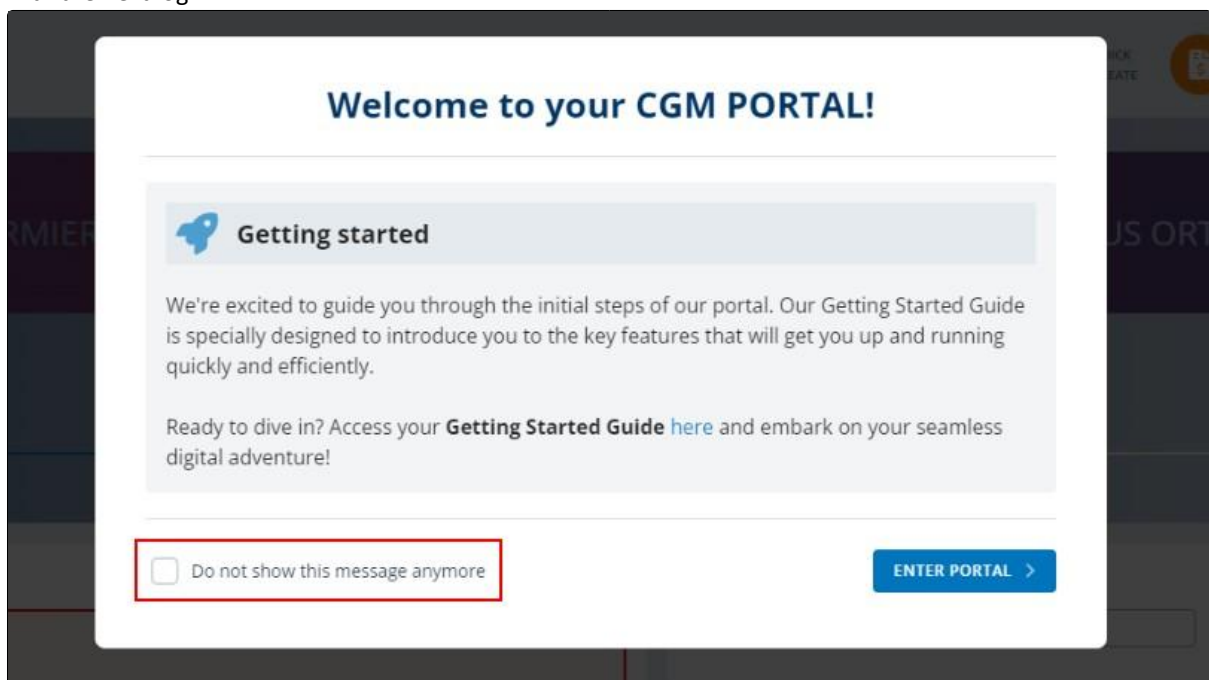
In this Getting Started Guide, we'll walk you through the **CGM PORTAL**'s structure and help you take your first steps towards utilizing its features.

Let's get started on your journey with the **CGM PORTAL**!

After successfully registering, it's time to log on to the **CGM PORTAL** and unlock its full potential!

If you log on for the first time, the system displays a Welcome text and a link to our Getting Started Guide. This information shall help you after your first login to quickly find your way in the system.

The pop-up includes a **checkbox** that you can activate **to prevent** that this Welcome pop-up is displayed again with the next login.



Once logged in, you'll find yourself on the **DASHBOARD (CGM PORTAL)**. This hub offers quick access to essential features, keeps you updated with the latest news, and provides handy links to additional information resources.

No matter what your role is, you will not only have access to the **DASHBOARD** but also to the following menus:

MYORG: Directly manage your organization in the **CGM PORTAL**.

SUPPORT: Get assistance and guidance whenever you need it. Create a Case with ease or access the **Download Center**.

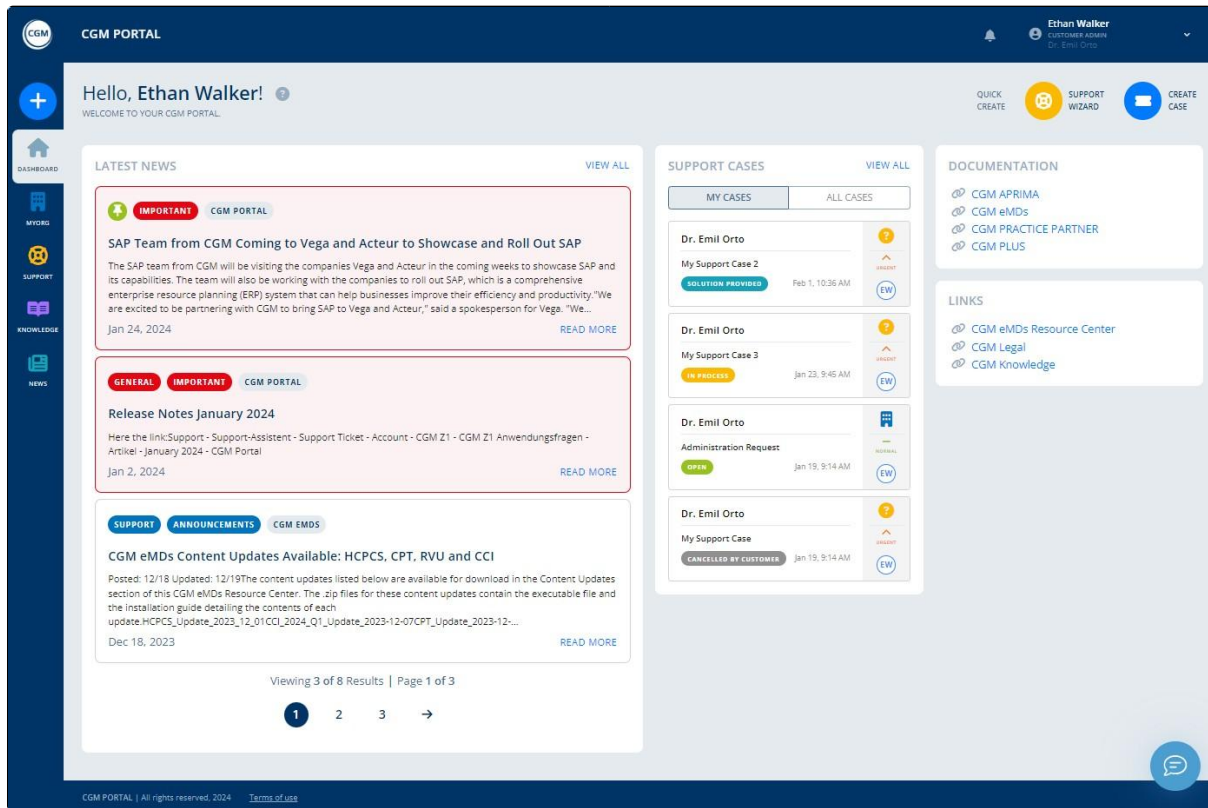
NEWS: Stay in the loop with important updates and announcements.

Use the navigation bar on the left to easily navigate through these menus.

Don't forget to check out the top-right corner!

There, you'll find access to [Notifications](#) that keep you informed about Case updates, as well as various [Profile Settings](#) that allow you to personalize your **CGM PORTAL** experience.

Get ready to explore, engage, and make the most out of your journey with the **CGM PORTAL**!



Across **key pages and functionalities** throughout the entire **CGM PORTAL**, you will find **help icons** (question marks). Clicking such an icon will open the corresponding **Knowledge Base article** on the right side explaining the corresponding functionality.

Support Case Account Test

TYPE

Support Case

Other/I am not sure

CGM eMDs

CREATED

Apr 8, 2024 9:49 AM

ACCOUNT

VAR Customer Wholesale

CONTACT

Name2 Name3

WATCHERS OF THIS CASE (0)

No watchers currently.

ASSIGNED

CGM Agent

CASE ID #

840209411

PRIORITY

URGENT

DESCRIPTION

Support Case Account Test

COMMENTS (0)

There are no comments currently in this ticket.

ADD COMMENT

CGM Help Center

Changing the main contact in a case

OPEN ARTICLE IN KNOWLEDGE BASE

Overview

By default, the creator of a case is set as the main contact of the case. If a case should be assigned to someone else in your organization, you can change the main contact.

Note: The availability of this functionality depends on the respective authorizations of cases and roles.

Changing the main contact

1. In the **CGM PORTAL**, go into the details of the case for which you want to change the main contact.
2. In section "Contact" on the left side, click on the ellipsis icon (three dots) and select "Change Contact".
3. In the pop-up, select the desired contact for your case.
4. Click on button "Save".

My Support Case 3

Support Case

Change contact

DR. EMILY GREEN PRINCE@CGM.COM

3 Your First Steps...

To become acquainted with the **CGM PORTAL**, we suggest starting with the following initial steps. However, feel free to explore the tool at your own pace and discover its full potential.

3.1 ...as a User

1. Adjust your [Profile Settings](#)

To customize your experience, start by adjusting your profile settings.

Follow these steps:

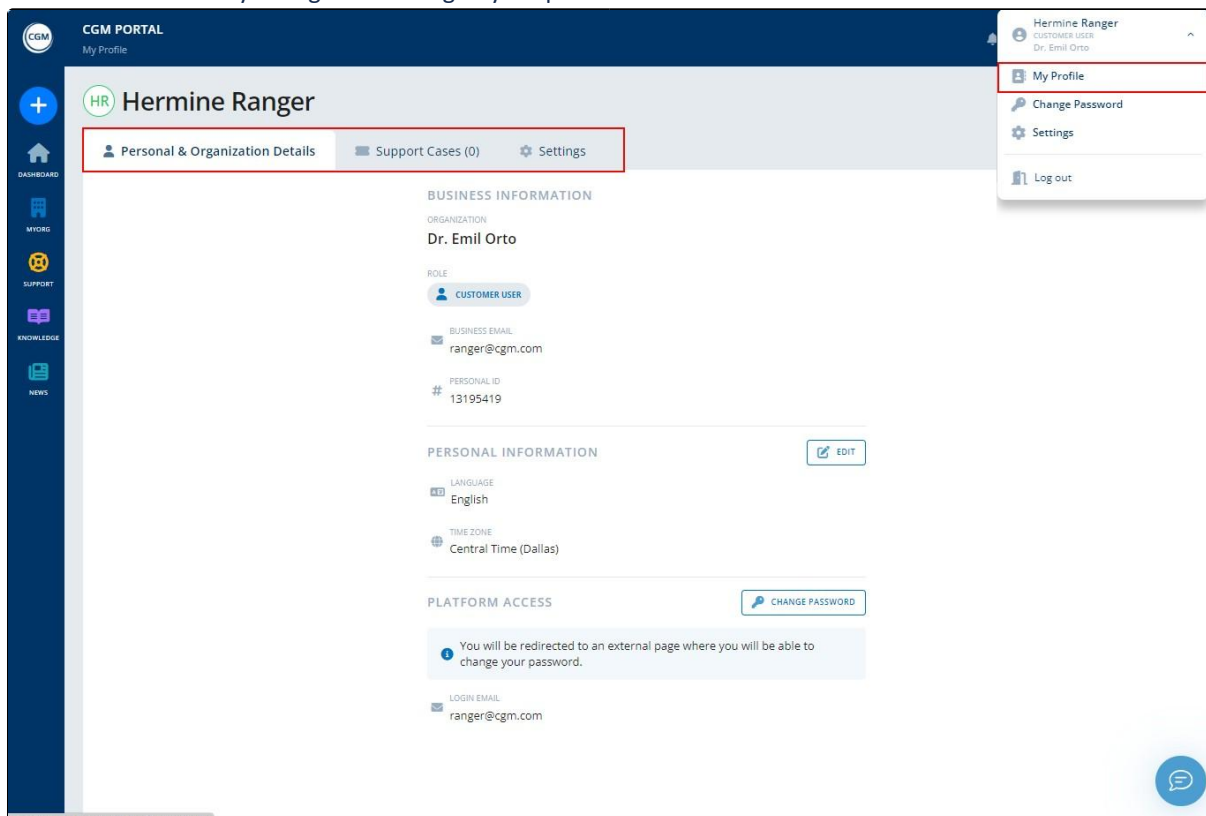
1. In the top right corner, click on your profile and select "**My Profile**".

You'll see different tabs on the screen on which you can change data or access Cases:

Personal & Organization Details

Support Cases Settings

2. Make the necessary changes according to your preferences.



2. Create a [Case](#)

If you have any issues or questions about your CGM product, you can create a **Support Case**.

There are two procedures to create a **Case**:

Use the **Support Wizard**, which will guide you step-by-step in creating your Case.

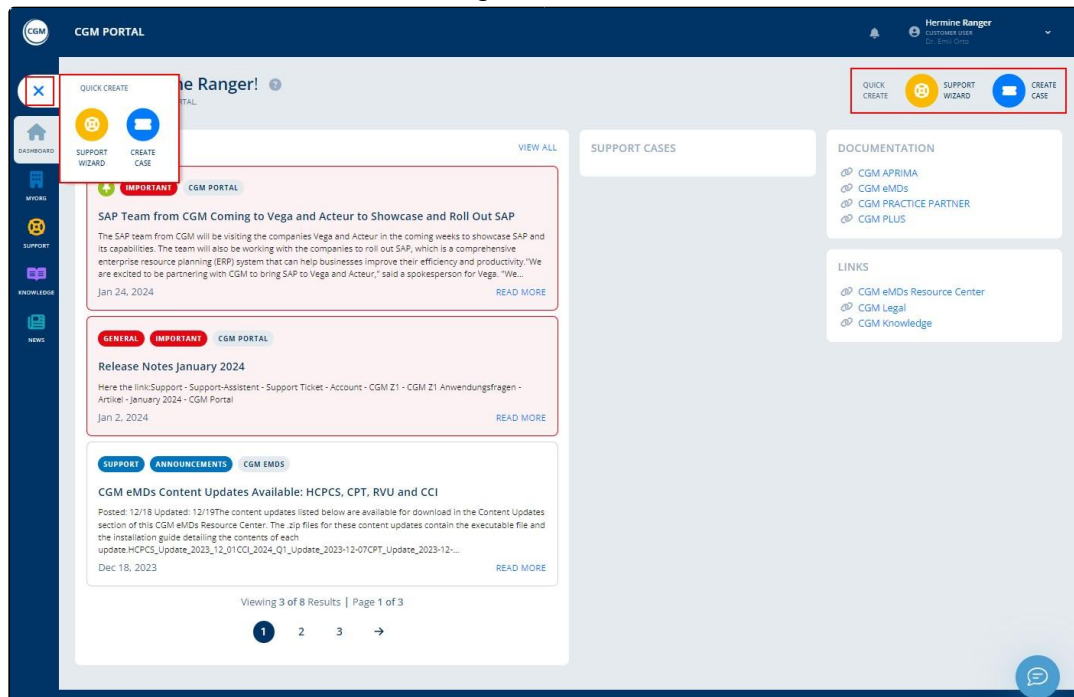


Use the **Create Case** form for an even faster Case creation process.

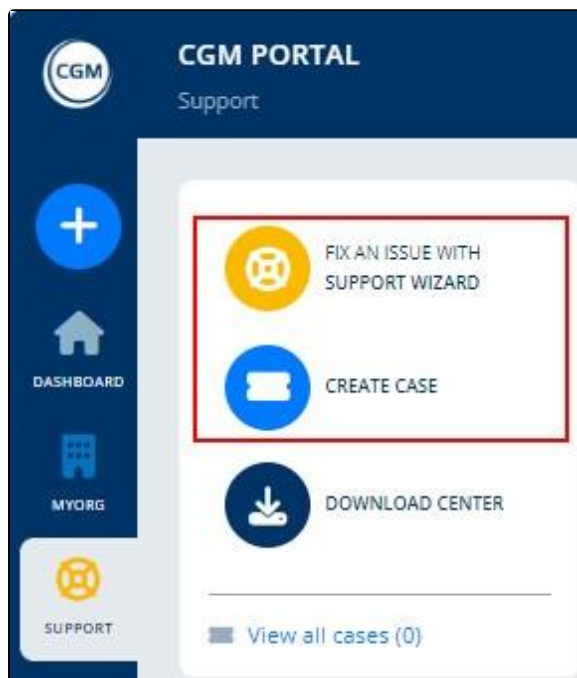


Both functionalities can be accessed as follows:

Use the **Quick Create** feature, which is available either at the top on the right side or on the left side via the '+' icon above the navigation bar.



Use the **SUPPORT** menu



3. Check your Notifications

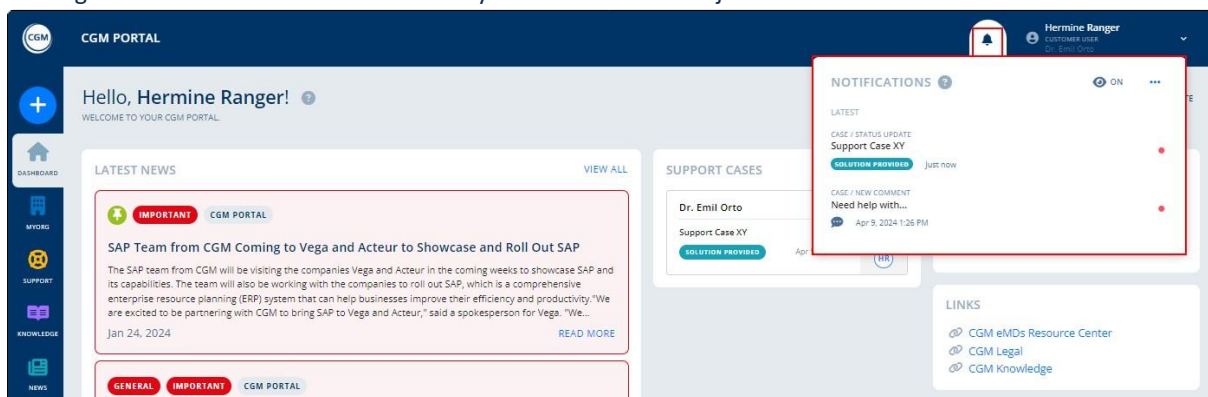
Have you received any notifications? You can find them by clicking on the **bell icon** next to the profile at the top on the right side.



If there are new notifications, you'll see a **red dot** next to the bell:

Click on the bell to see the notifications. Unread notifications are marked with a red dot.

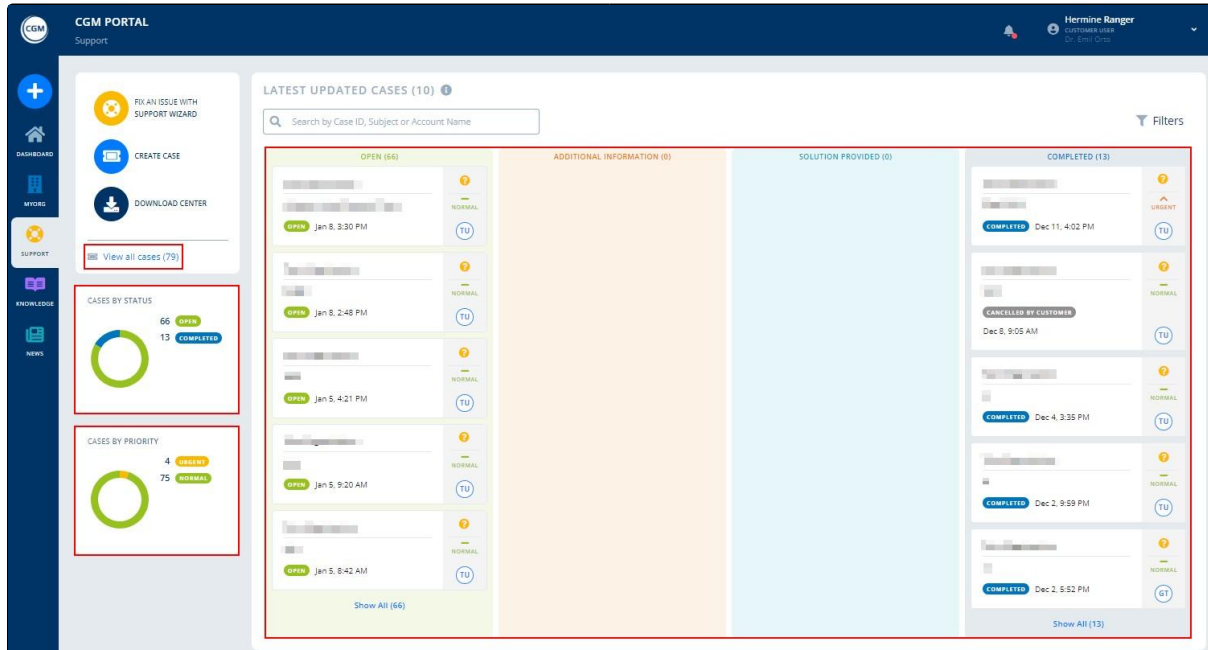
Clicking on a notification in the list will take you to the relevant object or information.



4. Set up personalized Case filters

By setting up your individual Case filter, you can quickly and efficiently find the cases that are most relevant to you. Take control of your portal experience and save valuable time by using this powerful feature.

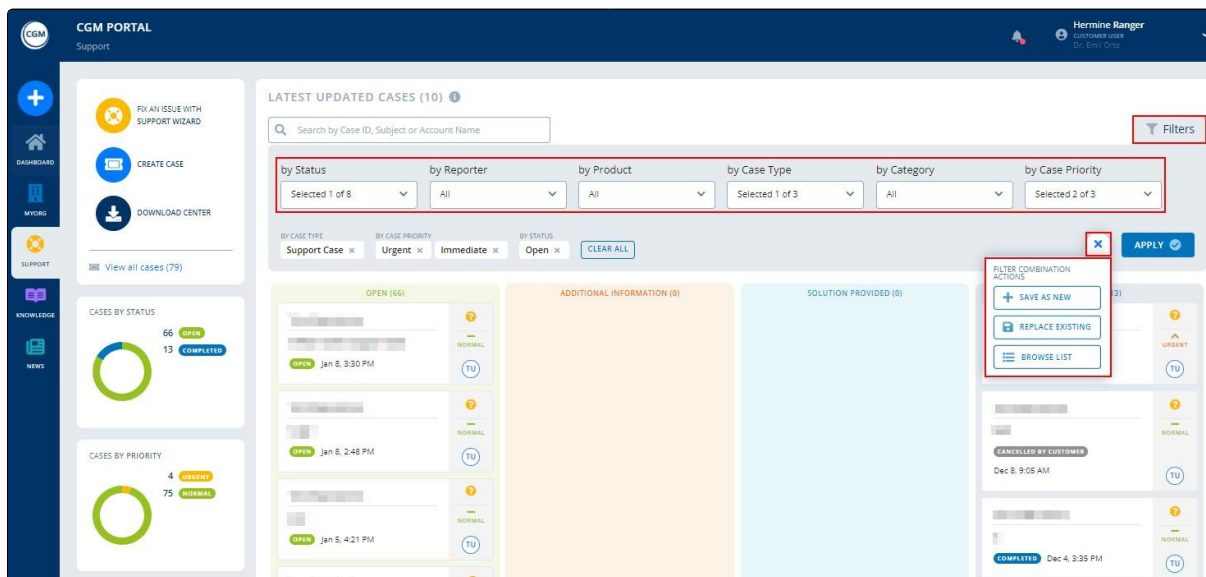
Although the **Kanban Board** and the **Pie Charts** in the **SUPPORT** menu already provide prefiltered case overviews, you can access a complete list of all your cases by clicking on the "**View all cases**" link.



Each of these entry points in the **SUPPORT** menu provide the possibility to search for and filter your cases.

To create your personalized Case filter, simply follow these steps:

1. Click on the "**Filters**" button. This will open several drop-down fields with different filter options.
2. Choose the filter criteria that best suit your requirements.
3. Click on the **ellipsis icon** (three dots) located next to the "**APPLY**" button and select the "**Save As New**" option.
4. Now, give your filter a name and description to easily distinguish it from other individual filters.
5. Once saved, you can access your personalized filter whenever you need it. Just click on the "**Filters**" button, followed by the **ellipsis icon**, and select the "**Browse List**" option. Here, you will find all the individual filters you have created.



3.2 ...as an Administrator

1. Create your [Contacts](#)²²

If you have an administrator role for your account, it's important to add employees or colleagues which should also have access to the **CGM PORTAL**.

To add a new contact, follow these steps:

1. Navigate to the **MYORG** menu.
2. Click on the "**ADD NEW CONTACT**" button.
3. Select an appropriate portal role for the contact based on the required authorization level and maintain the required fields. The following roles are available:

Admin: A user with Admin role in the portal has access to all functions in the portal. That means, an Admin can:

- create and change Contacts
- create Admin
- Cases and Support Cases
- view all cases of

the organization view all invoices of the organization

Super-Admin: A user with Super-Admin role in the portal is the main administrator of the account. similar access as normal Admin role. Difference: no other user can remove the SuperAdmin authorization/role (even if the other user has a Super-Admin role). can change the role from Admin to User.

User: A user with a User role in the portal can: create Support Cases for him-/herself has read access to the organization **Customer Support**

Admin: similar layout as "User", but without restriction to see their own cases only view all cases of the organization can be selected as Watcher

CGM PORTAL
My Organization

Ethan Walker
CUSTOMER SUPER ADMIN
Dr. Emil Orto

Dr. Emil Orto [REQUEST DATA CHANGE](#)

ADDRESS: 1234 Tutorial Street
New York, New York, 12345

CUSTOMER NUMBER: 13195345

TIME ZONE: Eastern Time (New York)

Contacts (4) **Contact Requests (0)** **Invoices (0)**

Search by name or ID

[ADD NEW CONTACT](#)

Viewing 4 of 4 Results

MY PROFILE

Ethan Walker ***

ROLE: **MAIN CONTACT** **CUSTOMER SUPER ADMIN**

BUSINESS CONTACT: testwalker@cgmm.com

TIME ZONE: Central Time (Dallas)

LANGUAGE: English EXTERNAL ID: 13195347

Ashley Nelson ***

ROLE: **LOGIN DISABLED**

BUSINESS CONTACT: [TIME ZONE: Central Time \(Dallas\)](#)

LANGUAGE: English EXTERNAL ID: 13195348

Emil Orto ***

ROLE: **CUSTOMER USER**

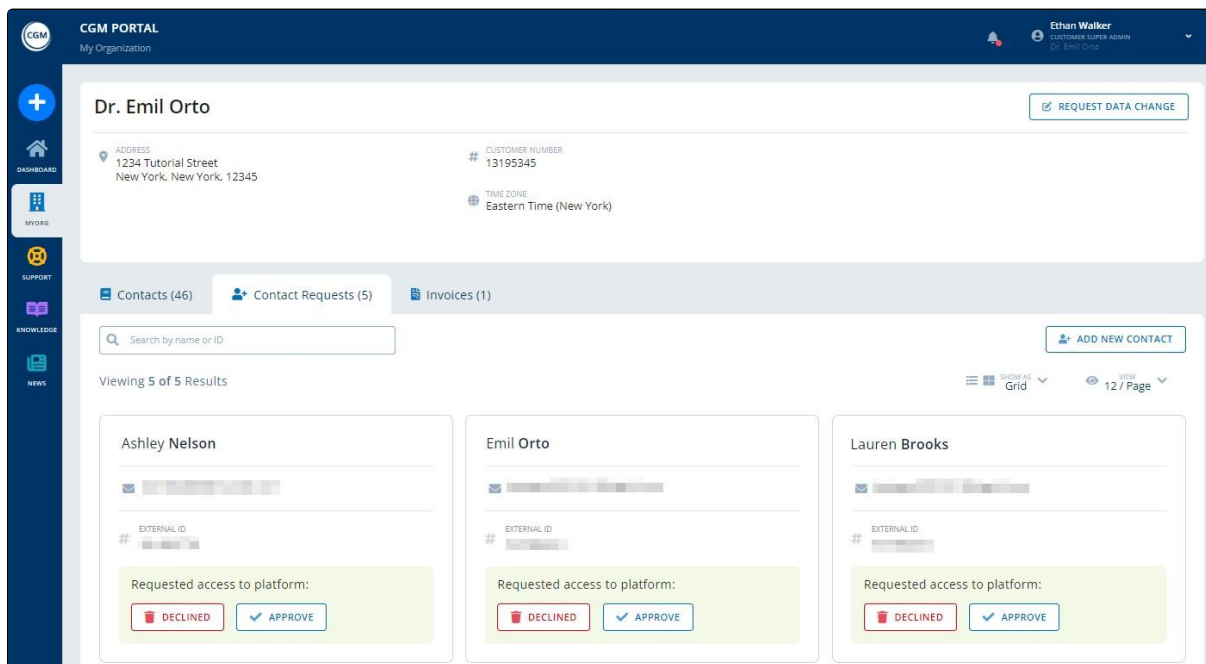
BUSINESS CONTACT: testorto@cgmm.com

TIME ZONE: Central Time (Dallas)

LANGUAGE: English EXTERNAL ID: 13195346

If an employee/colleague used the **self-onboarding process**, you will receive a **Contact Request**. You can find these requests in the **MYORG** menu on tab "**Contact Requests**".

Review the open requests and either **approve** or **decline** them. Once approved, the contact will be available on tab "**Contacts**".



2. Check your Notifications

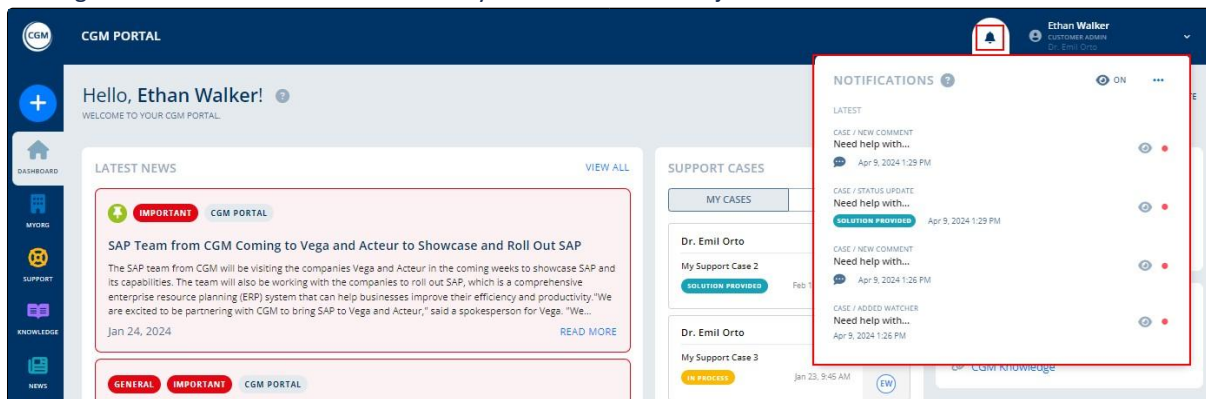
Have you received any notifications? You can find them by clicking on the **bell icon** next to the profile at the top on the right side.

If there are new notifications, you'll see a **red dot** next to the bell:



Click on the bell to see the notifications. Unread notifications are marked with a red dot.

Clicking on a notification in the list will take you to the relevant object or information.



3. Adjust your Profile Settings

To customize your experience, start by adjusting your profile settings.

Follow these steps:

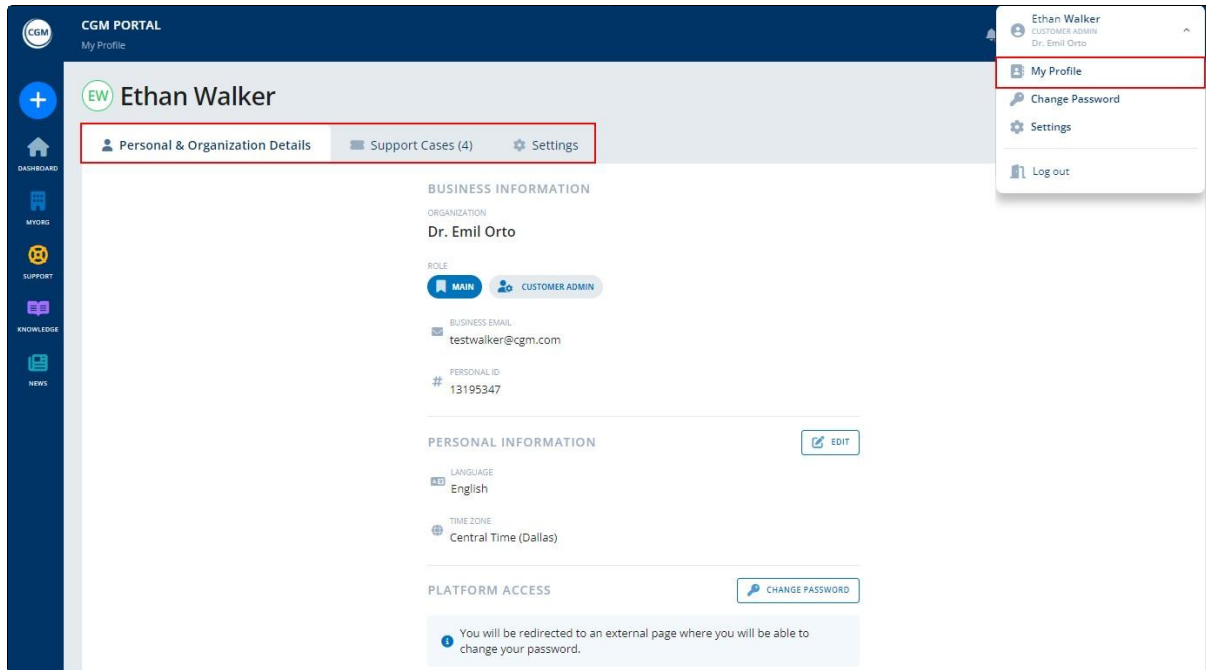
1. In the top right corner, click on your profile and select "**My Profile**".

You'll see different tabs on the screen on which you can change data or access Cases:

Personal & Organization Details

Support Cases Settings

2. Make the necessary changes according to your preferences.



4. Create a Case

We distinguish between Support Cases and Admin Cases.

Support Cases are used in case of issues/questions relating to a CGM product.

Admin Cases are used for administrative requests such as Billing, Invoicing, Contracts etc.

There are two procedures to create a **Case**:

Use the **Support Wizard**, which will guide you step-by-step in creating your Case.

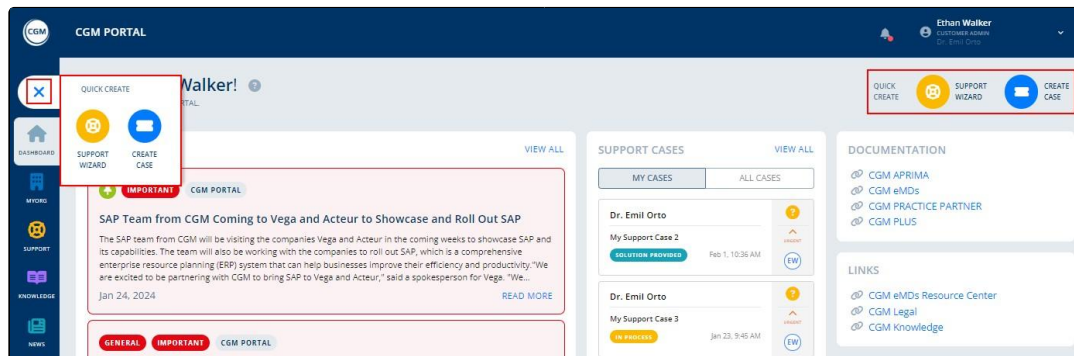


Use the **Create Case** form for an even faster Case creation process.

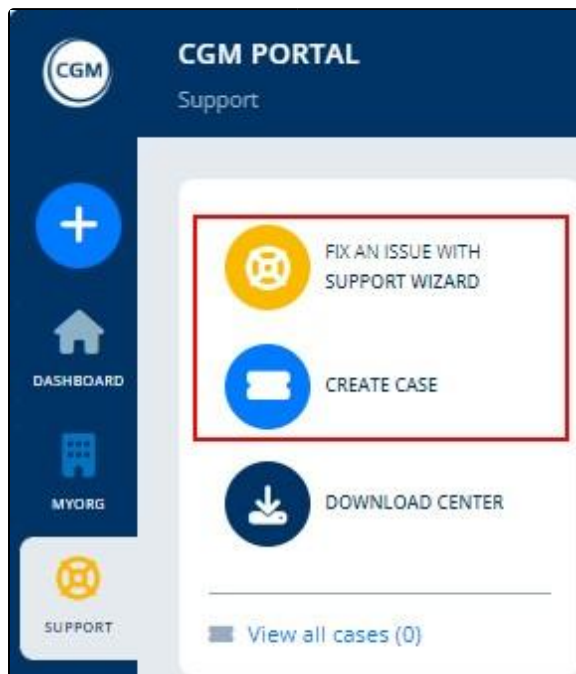


Both functionalities can be accessed as follows:

Use the **Quick Create** feature, which is available either at the top on the right side or on the left side via the '+' icon above the navigation bar.



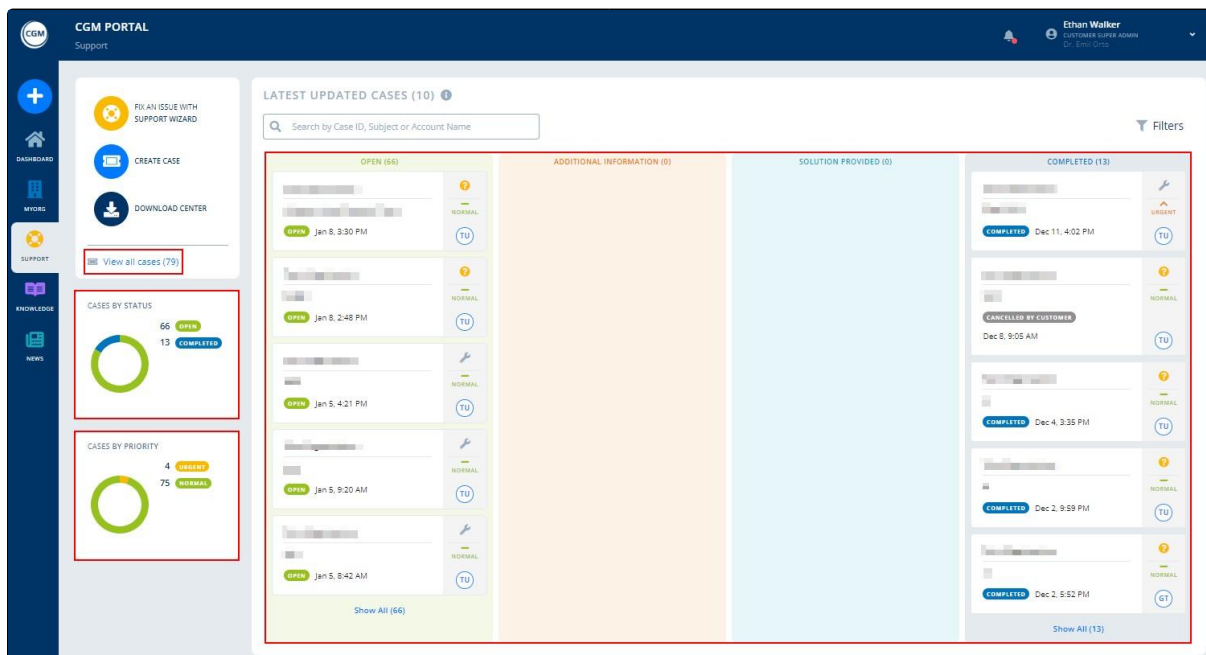
Use the **SUPPORT** menu



5. Set up personalized Case filters

By setting up your individual Case filter, you can quickly and efficiently find the cases that are most relevant to you. Take control of your portal experience and save valuable time by using this powerful feature.

Although the **Kanban Board** and the **Pie Charts** in the **SUPPORT** menu already provide prefiltered case overviews, you can access a complete list of all your cases by clicking on the "**View all cases**" link.



Each of these entry points in the **SUPPORT** menu provide the possibility to search for and filter your cases.

To create your personalized Case filter, simply follow these steps:

1. Click on the **"Filters"** button. This will open several drop-down fields with different filter options.
2. Choose the filter criteria that best suit your requirements.
3. Click on the **ellipsis icon** (three dots) located next to the **"APPLY"** button and select the **"Save As New"** option.
4. Now, give your filter a name and description to easily identify it.
5. Once saved, you can access your personalized filter whenever you need it. Just click on the **"Filters"** button, followed by the **ellipsis icon**, and select the **"Browse List"** option. Here, you will find all the filters you have created.