

# UPM Release Notes

## Version 25.1

ext.prd.001.08 | 02.28.25

ZINFI Confidential & Proprietary

Shared Under NDA



## Contents

<b>Version Summary</b>	<b>6</b>
Summary Description	6
ZINFI 6 S's of CX Strategy	10
<b>UPM 25.1 Features</b>	<b>12</b>
UPM Login Manager Upgrades - Enhanced Password Manager and Shortcut to Home	12
Related Application(s)	12
Feature Description	12
Origin of Feature	16
CX Strategy Relation (6 S's)	16
Portal User-Facing Benefits	16
Triggering Workflow with Record Delete	16
Related Application(s)	16
Feature Description	16
Origin of Feature	19
CX Strategy Relation (6 S's)	19
Portal User-Facing Benefits	19
Configuring Auto-content Visibility based on User Profile Country and Language via Portal Settings	19
Related Application(s)	19
Feature Description	19
'Profile Country Visibility' Portal Setting	19
'Profile Country Language Visibility' Portal Setting	23
Origin of Feature	25
CX Strategy Relation (6 S's)	25
Portal User-Facing Benefits	25
Persisting Visibility Configuration Window	26
Related Application(s)	26
Feature Description	26
Origin of Feature	28
CX Strategy Relation (6 S's)	28
Portal User-Facing Benefits	28
Advanced Search for List Pages	28
Related Application(s)	28
Feature Description	28
Origin of Feature	32
CX Strategy Relation (6 S's)	32
Portal User-Facing Benefits	32
Configuring Incentives Enablement for Partners	32
Related Application(s)	32
Feature Description	32
Origin of Feature	34
CX Strategy Relation (6 S's)	34

<i>Portal User-Facing Benefits</i> .....	34
<b>Multi-signee Contract Workflows for DocuSign Contracts</b> .....	34
<i>Related Application(s)</i> .....	34
<i>Feature Description</i> .....	34
<i>Add Signees</i> .....	35
<i>Reorder the Signees</i> .....	36
<i>DocuSign with Account</i> .....	37
<i>Origin of Feature</i> .....	39
<i>CX Strategy Relation (6 S's)</i> .....	39
<i>Portal User-Facing Benefits</i> .....	40
<b>Partner Locator Enhancements</b> .....	40
<i>Related Application(s)</i> .....	40
<i>Feature Description</i> .....	40
<i>Origin of Feature</i> .....	47
<i>CX Strategy Relation (6 S's)</i> .....	47
<i>Portal User-Facing Benefits</i> .....	47
<b>Configurable Tooltips in Dynamic Forms for Pre-Log-in Pages</b> .....	47
<i>Related Application(s)</i> .....	47
<i>Feature Description</i> .....	48
<i>Origin of Feature</i> .....	51
<i>CX Strategy Relation (6 S's)</i> .....	51
<i>Portal User-Facing Benefits</i> .....	52
<b>Tabbed View Interface for Application Record(s) Create/View</b> .....	52
<i>Related Application(s)</i> .....	52
<i>Feature Description</i> .....	52
<i>Origin of Feature</i> .....	56
<i>CX Strategy Relation (6 S's)</i> .....	56
<i>Portal User-Facing Benefits</i> .....	56
<b>AI-embedded Text Content Generator for ZINFI Editor</b> .....	56
<i>Related Application(s)</i> .....	56
<i>Feature Description</i> .....	57
<i>Origin of Feature</i> .....	64
<i>CX Strategy Relation (6 S's)</i> .....	64
<i>Portal User-Facing Benefits</i> .....	64
<b>Workflows Gallery</b> .....	65
<i>Related Application(s)</i> .....	65
<i>Feature Description</i> .....	65
<i>Origin of Feature</i> .....	67
<i>CX Strategy Relation (6 S's)</i> .....	67
<i>Portal User-Facing Benefits</i> .....	67
<b>Save Draft Workflows</b> .....	67
<i>Related Application(s)</i> .....	67
<i>Feature Description</i> .....	67
<i>Origin of Feature</i> .....	69
<i>CX Strategy Relation (6 S's)</i> .....	69

<i>Portal User-Facing Benefits</i> .....	69
Sharing of Library Category for Asset Co-branding.....	69
<i>Related Application(s)</i> .....	69
<i>Feature Description</i> .....	69
<i>Origin of Feature</i> .....	73
<i>CX Strategy Relation (6 S's)</i> .....	73
<i>Portal User-Facing Benefits</i> .....	73
Mark Communities as Favorites and Configure Community Email Notifications.....	74
<i>Related Application(s)</i> .....	74
<i>Feature Description</i> .....	74
<i>Origin of Feature</i> .....	75
<i>CX Strategy Relation (6 S's)</i> .....	75
<i>Portal User-Facing Benefits</i> .....	75
Automatic Partner Tier Assignment Based on Partner Score.....	76
<i>Related Application(s)</i> .....	76
<i>Feature Description</i> .....	76
<i>Origin of Feature</i> .....	79
<i>CX Strategy Relation (6 S's)</i> .....	79
<i>Portal User-Facing Benefits</i> .....	79
Auto Group Assignment based on Attributes .....	80
<i>Related Application(s)</i> .....	80
<i>Feature Description</i> .....	80
<i>Origin of Feature</i> .....	85
<i>CX Strategy Relation (6 S's)</i> .....	85
<i>Portal User-Facing Benefits</i> .....	85
Master/Parent-Child Partner Accounts and Record Visibility .....	85
<i>Related Application(s)</i> .....	85
<i>Feature Description</i> .....	86
<i>Origin of Feature</i> .....	89
<i>CX Strategy Relation (6 S's)</i> .....	89
<i>Portal User-Facing Benefits</i> .....	89
Incentive Rule Engine.....	90
<i>Related Application(s)</i> .....	90
<i>Feature Description</i> .....	90
<i>Origin of Feature</i> .....	97
<i>CX Strategy Relation (6 S's)</i> .....	97
<i>Portal User-Facing Benefits</i> .....	97
<b>Fixes and Patches.....</b>	<b>97</b>
Display Saved Groups and Users as Selected in the Visibility Configuration Window	97
<i>Related Application(s)</i> .....	97
<i>Feature Description</i> .....	97
<i>Origin of Feature</i> .....	100
<i>CX Strategy Relation (6 S's)</i> .....	100
<i>Portal User-Facing Benefits</i> .....	100

Integration of Upgraded Help Portal for All UPM Portals .....	100
<i>Related Application(s)</i> .....	100
<i>Feature Description</i> .....	100
<i>Origin of Feature</i> .....	101
<i>CX Strategy Relation (6 S's)</i> .....	102
<i>Portal User-Facing Benefits</i> .....	102
Multi-select Picklist Field UI/UX Upgrade .....	102
<i>Related Application(s)</i> .....	102
<i>Feature Description</i> .....	102
<i>Origin of Feature</i> .....	103
<i>CX Strategy Relation (6 S's)</i> .....	103
<i>Portal User-Facing Benefits</i> .....	103
Record Visibility Configurations Auto-applied for New Applications .....	103
<i>Related Application(s)</i> .....	103
<i>Feature Description</i> .....	104
<i>Origin of Feature</i> .....	104
<i>CX Strategy Relation (6 S's)</i> .....	105
<i>Portal User-Facing Benefits</i> .....	105
Create User with Default Inactive Status when Account is Inactive .....	105
<i>Related Application(s)</i> .....	105
<i>Feature Description</i> .....	105
<i>Origin of Feature</i> .....	106
<i>CX Strategy Relation (6 S's)</i> .....	106
<i>Portal User-Facing Benefits</i> .....	106
Email Domains Re-validation .....	106
<i>Related Application(s)</i> .....	106
<i>Feature Description</i> .....	106
<i>Origin of Feature</i> .....	107
<i>CX Strategy Relation (6 S's)</i> .....	107
<i>Portal User-Facing Benefits</i> .....	108

# Version Summary

## Summary Description

UPM 25.1 Release introduces several enhancements to support the Partner Journey on the ZINFI Unified Partner Management (UPM) platform. These enhancements help streamline processes across the Administration, Onboarding, Enablement, Marketing, Sales, Incentive, and Acceleration phases.

### Administration

- **UPM Login Manager Upgrades - Enhanced Password Manager and Shortcut to Home:** The Password Management and Navigation to Home Page features in ZINFI's UPM Portal improve security and user experience by incorporating a Password Visibility Toggle and strict password complexity requirements. Users can toggle password visibility, which auto-hides after 30 seconds of inactivity. Passwords must meet criteria like uppercase letters, special characters, numbers, and length requirements. Additionally, a "Back to Home" link on the Login and Reset Password pages allows users to return to the homepage easily during password management.
- **Triggering Workflow with Record Delete:** The Workflow Deletion Trigger feature in ZINFI's UPM Portal allows administrators to create workflows that execute when a record is deleted, complementing existing triggers like "On Create" and "On Update." Administrators can configure workflows by selecting the application (e.g., Contacts) and choosing the "On Delete" trigger with defined criteria. They can also set actions, like triggering email notifications using preconfigured templates. This feature enhances automation, enabling admins to respond to record deletions and improve compliance efficiently.
- **Configuring Auto-content Visibility based on User Profile Country and Language via Portal Settings:** By enabling 'Profile Country Visibility' or 'Profile Country Language Visibility' portal settings, Administrators can customize content access in the Content Library Application to align it with users' profiles in the platform. Enabling these settings allows the Administrators to configure auto-content access by matching it to specific countries or country-language combinations within user profiles, enhancing content administration across diverse regions and languages. Disabling these options - enables default content visibility based on the selections via the Country-Language page.
- **Partner Locator Enhancements:** The enhanced Partner Locator equips administrators with powerful tools for precise partner discovery by buyers and end-prospects, featuring Google Maps-integrated search parameters such as location-based filters (country, state, zip code, and radius) while also allowing for accurate location data input through latitude and longitude details in the Partner Account settings to enable seamless integration with Google Maps for Location View functionality. The integrated Google Maps feature helps by providing a visual map interface, allowing users to easily locate partners based on geographic proximity and quickly assess their locations. The Locator also features a revamped look and feel, featuring a Grid View of partner listings.
- **Configurable Tooltips in Dynamic Forms for Pre-Log-in Pages:** Admins can configure dynamic tooltips for fields within pre-login forms using the CMS, enhancing the clarity of form fields and improving usability. This feature requires admins to configure such pre-login form tooltips by -

removing an existing field from the form, configuring its tooltip through the CMS, and re-adding it to the form.

- **Tabbed View Interface for Application Record(s) Create/View:** The Tabbed View for Record Create/Record View feature introduces a structured and intuitive interface that improves viewability and streamlines data entry through a step-by-step, guided experience. Users can efficiently navigate and manage records by organizing information into distinct tabs, reducing visual clutter, and improving focus.
- **AI-embedded Text Content Generator for ZINFI Editor:** The AI-embedded Text Content Generator revolutionizes content creation for partners in UPM by integrating generative AI into the WYSIWYG ZINFI Editor. This feature empowers administrators to effortlessly create high-quality, professional content for emails, press releases, white papers, social media posts, and more directly within the platform.
- **Workflows Gallery:** The Workflows Gallery offers an improved interface with enhanced workflow management functionality. A thumbnail snapshot visually represents each workflow, displaying key details such as its name, status indicators, and action buttons. Administrators can easily manage workflows using quick-access buttons for viewing, editing, cloning, and deleting. The gallery also includes filtering and sorting options, allowing workflows to be refined by creation date, modification date, or name across categories or specific applications. Workflows are organized into application-specific categories within a collapsible tree structure, ensuring seamless navigation and organization.
- **Save Draft Workflows:** The "Save as Draft" feature for Workflows significantly improves workflow management by allowing users to save their progress at any point. This added flexibility allows users to pause their work and return to it later without fear of losing any workflow configurations, providing greater convenience and control over their work.
- **Automatic Partner Tier Assignment Based on Partner Score:** This feature simplifies partner management by automatically assigning a partner tier based on the partner's score. Administrators can configure this functionality in the Partner Tier Attributes settings within Access Management, defining specific rules for tier assignments such as Platinum, Gold, or Silver. When the Partner Score in the account profile is updated, the system evaluates it against the predefined rules and assigns the appropriate tier in real-time. This automation minimizes administrative effort, ensures accurate and consistent tier classifications, and keeps partner records up to date without manual intervention.
- **Auto Group Assignment based on Attributes:** This feature automates user group assignments based on predefined criteria like 'Country' and 'Partner Tier,' reducing manual effort and ensuring accuracy. As user attributes change, group associations update dynamically in real-time, maintaining consistency. Administrators can configure attribute-based rules within the system, allowing flexible and scalable group management. This enhances operational efficiency by eliminating manual updates and ensuring users are always assigned to the correct groups based on their profile attributes.
- **Master/Parent-Child Partner Accounts and Record Visibility:** The Master/Parent-Child Partner Accounts feature enables partner organizations to establish hierarchical relationships between partner accounts, allowing a parent-partner account to access and manage records from its associated child accounts. This ensures seamless data flow, centralized visibility, and efficient collaboration across different regional or business entities. By configuring these relationships through intuitive administrative settings, organizations can streamline operations and maintain a unified view of partner activities.

- **Incentive Rule Engine:** Administrators can configure and manage Market Development Fund (MDF) Incentives, Commission Rules, and Rebate Rules through the Incentive Rule Engine. They can define Incentive rules by specifying entitlement frequency, sales targets, payout amounts, and eligibility criteria, applicable year, allocation frequency, and incentive application criteria (Deal Closure or Invoice Generation). Once configured, Incentive rules can be defined by setting minimum and maximum sales targets, payout amounts, and entitlement types (Fixed or Percentage) to ensure accurate incentive distribution.

## Onboard

- **Advanced Search for List Pages:** The Advanced Search engine enhances onboarding by enabling admins and partners to search for relevant records and information across applications quickly. Customizable search criteria allow users to efficiently access specific details related to onboarding, such as contract templates and partner account configurations. The improved search functionality supports conditional logic with AND/OR operators, offering greater flexibility and precision.
- **Multi-signee Contract Workflows for DocuSign Contracts:** ZINFI enhances its Partner Contracts Management system with the Multi-party Contract Signee Setup. Admins can now configure and define the order of an unlimited number of signatories, both from the admin and partner sides, directly within the "Signee" list under the Partner Account. This ensures flexibility in accommodating complex signing workflows while maintaining precision and control. Contract templates can also be assigned at the Partner Account level, generating a unified contract for all specified signatories. Depending on business requirements, contract templates can be assigned during partner onboarding at the account or group level. Portal settings allow flexibility in assigning templates to Partner Accounts or Groups, ensuring that onboarding aligns with multi-ordered contractual requirements.
- **Configurable Tooltips in Dynamic Forms for Pre-Log-in Pages:** Tooltips provide contextual guidance for partner prospects during the sign-up process on pre-login pages - simplifying the onboarding process.

## Sell

- **Advanced Search for List Pages:** The Advanced Search engine enhances the partner journey during the Sell phase by efficiently providing partners and admins with powerful tools to filter records using flexible search criteria. Users can combine multiple fields, operators, and customizable logic, enabling precise data retrieval. Enhanced search functionality allows for defining complex queries with conditional logic, utilizing AND/OR operators to refine searches further. Users can define conditions for tailored results after selecting the necessary fields, specifying operators, and entering corresponding values. Once the query is set, clicking "Search" executes it, delivering relevant data quickly. Additionally, users can save their searches under custom Search Names for future reference, streamlining repetitive tasks and improving operational efficiency.

## Enable

- **Configuring Auto-content Visibility based on User Profile Country and Language via Portal Settings:** The 'Set Auto-content Visibility' feature in the Enable phase allows administrators to customize content access in the Content Library Application according to user profiles. By enabling

'Profile Country Visibility' or 'Profile Country Language Visibility' portal settings, administrators can configure auto-content access that aligns with specific countries or country-language combinations in user profiles. This feature enhances content management by ensuring users access relevant content based on their geographical location and language preferences, providing a tailored experience that supports diverse regional needs.

- **Auto Cobranding of Assets (Images) - as preset in Categories:** For partners, this enhancement simplifies the asset customization process within the Asset Library. Partners can choose images from designated Content Library categories when selecting an asset for co-branding. A real-time preview feature enables them to adjust alignment and sizing before finalizing changes, ensuring precise customization. Additionally, a side panel allows for easy content search, enhancing efficiency. The visibility logic for accessing the Content Library in the Asset Co-Brand section remains consistent with the stand-alone Content Library, ensuring a seamless and intuitive user experience.

## Incentivize

- **Configuring Incentives Enablement for Partners:** By defining incentive types (e.g., MDF, Commissions, Rebates) at the product level, organizations can better manage partner incentives, increasing motivation to prioritize specific products or services. This feature facilitates fair, transparent, and goal-aligned incentivization strategies for partners.
- **Incentive Rule Engine:** Partners can earn incentives based on deal closures or invoice generation, with entitlements calculated automatically per the predefined MDF rules. Once a deal is submitted and approved, the system updates MDF Fund allocations in real time, reflecting the total incentive earned by the partner based on the deal value and applicable MDF rules. Partners can track their incentives through the portal, ensuring transparency and efficiency in the reward distribution process. This automation enhances accuracy, reduces manual effort, and strengthens partner engagement by providing a clear, structured incentive framework.

## Accelerate

- **Mark Communities as Favorites and Configure Community Email Notifications:** This feature enhances community management by allowing users to personalize their experience with favorite communities and tailored email notifications. By marking communities as favorites, users can quickly access relevant discussions from their dashboard, improving engagement and navigation. Customizable email notifications—set to Weekly, Bi-Weekly, or Monthly—keep users informed about important updates, fostering continuous participation and ensuring they never miss key discussions or announcements.

## Fixes

- **Persisting Visibility Configuration Window:** Providing both 'Save' and 'Save and Close' buttons strikes an ideal balance between flexibility and efficiency for administrators. The 'Save' button enables ongoing adjustments while keeping the configuration window open, allowing for seamless fine-tuning of settings. On the other hand, the 'Save and Close' button offers a streamlined approach by saving changes and closing the window in a single action, minimizing repetitive steps. These options improve usability, optimize workflows, and give administrators greater control over visibility configurations.

Designed with thoughtfulness, these features are consistently available across all UPM applications that include Visibility Configuration.

- **Display Saved Groups and Users as Selected in the Visibility Configuration Window:** The Visibility Configuration feature now automatically displays saved groups and users pre-selected in the User and Group tree. This improvement enhances the admin experience by providing a clear view of existing visibility settings. The intuitive interface ensures admins can effortlessly verify and update configurations, streamlining the content management process. This fix is applied across all applications where the Visibility Configuration feature is integrated.
- **Integration of Upgraded Help Portal for All UPM Portals:** This fix integrates all UPM Portals (Single-tenant and Multi-tenant) with a state-of-the-art Help Portal hosted via HubSpot, replacing the legacy Help Portal. All single-tenant portals, including prominent client platforms, have transitioned to the new framework, offering a consistent, automated, and user-friendly support experience.
- **Multi-select Picklist Field UI/UX Upgrade:** This fix redesigns the multi-select picklist to adopt a dropdown-style appearance, enhancing user clarity and consistency. Previously, the multi-select picklist lacked a visual indicator, such as a down arrow, making it indistinguishable from a text box. The updated design now includes a down arrow, aligning it with standard dropdown lists for improved usability.
- **Record Visibility Configurations Auto-applied for New Applications:** Previously, when a new application was created, Record Visibility settings were not generated automatically, requiring manual configuration by support teams. With this update, Record Visibility settings are now enabled by default for every new application, allowing admins to configure Visibility Setting Rules - such as hierarchy-based or group-specific access - immediately.
- **Create User with Default Inactive Status when Account is Inactive:** This fix improves security by ensuring that users registering through the sign-up page are created with an inactive or pending status if their associated Partner Account is inactive. Previously, users were automatically assigned an active status, allowing them to access the platform or reset passwords even when their Partner Account was inactive, creating a security vulnerability. With this enhancement, users will receive a registration confirmation email but will be unable to log in or reset their password until their Partner Account is activated. Admins can still manually create users with an active status under inactive accounts; however, these users will remain restricted from logging in until the account becomes active.
- **Email Domains Re-validation:** The email domain validation rules have been updated to allow a broader set of valid domains, addressing a previous issue where certain legitimate domains were incorrectly restricted.

## ZINFI 6 S's of CX Strategy

-  Security
-  Stability
-  Scalability
-  Speed



Simplicity



Sufficiency

# UPM 25.1 Features

## UPM Login Manager Upgrades - Enhanced Password Manager and Shortcut to Home

### Related Application(s)

Users & Territories Management

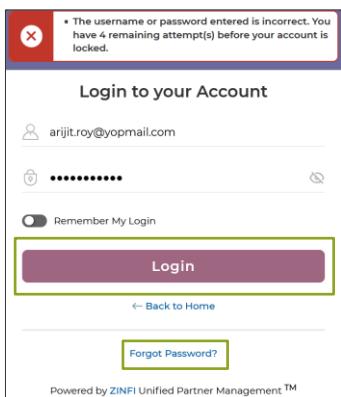
### Feature Description

UPM's 'Enhanced Password Management and Navigation to Home' features combine security and ease of use to enhance the user experience. The 'Password Visibility Toggle' lets users toggle between hiding and showing their password via an "Eye" icon, helping prevent typing errors. For added security, the password automatically reverts to hidden if left visible for 30 seconds of inactivity.

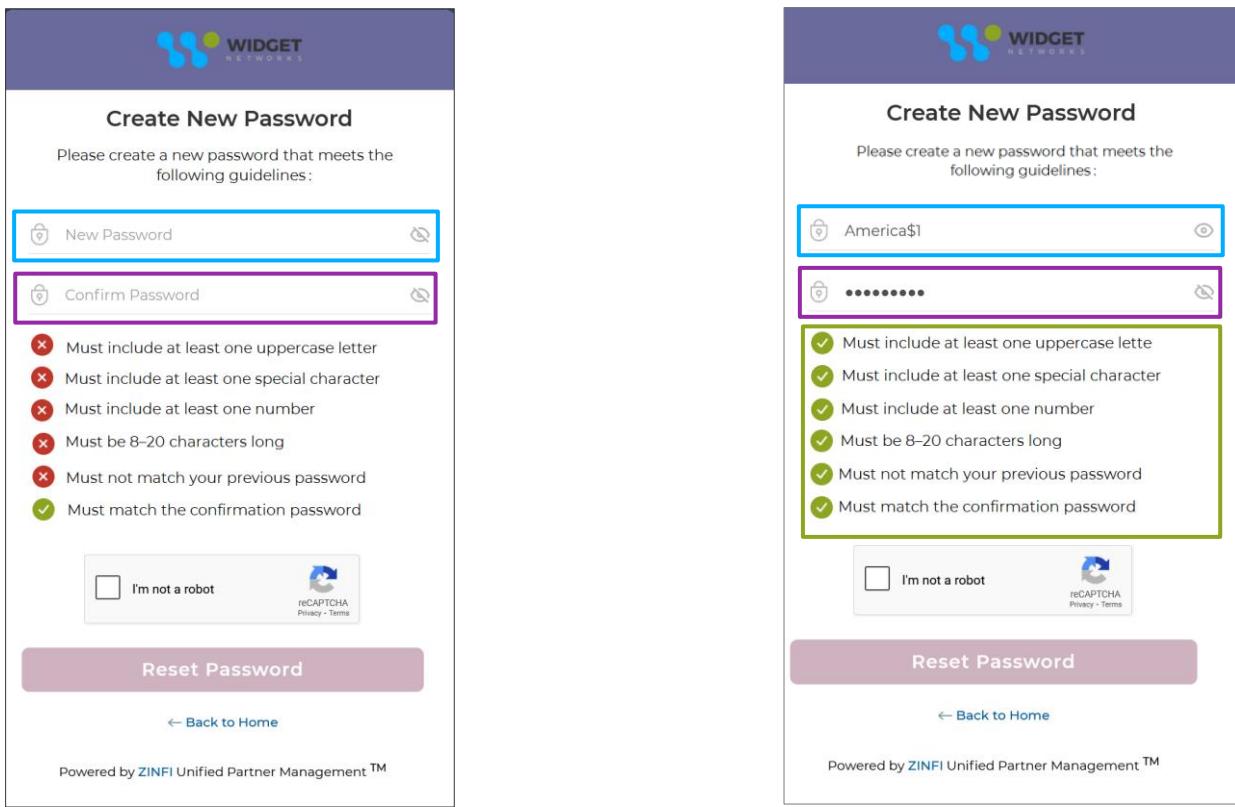
The 'Minimum Password Complexity Requirements' have been made visible, ensuring strong passwords match the following criteria –

- **Must include one uppercase character:** The password must include at least one uppercase letter (A-Z).
- **Must include at least one special character:** The password must include at least one special character (e.g., @, #, \$, %).
- **Must include at least one number:** The password must include at least one numeric digit (0-9).
- **Must be 8-20 characters long:** The password length must be between 8 and 20 characters.
- **Must not match with previous password:** The new password must differ from the previously used one.
- **Must match the confirmation password:** The password must exactly match the Confirm Password.

The 'Back to Home' link, now integrated into the Login and Reset Password pages, offers users a convenient way to return to the platform effortlessly.



- The user navigates to the **Create New Password** page by clicking the 'Forgot Password?' link on the UPM's login screen.
- The '**Create New Password**' screen includes two fields: '**New Password**' and '**Confirm Password**'. The User must enter their desired password into the New Password field (highlighted in blue). To ensure accuracy, the same password must be re-entered into the Confirm Password field (highlighted in purple) for verification.



**Create New Password**

Please create a new password that meets the following guidelines:

New Password (Eye icon)

Confirm Password (Eye icon)

✗ Must include at least one uppercase letter  
✗ Must include at least one special character  
✗ Must include at least one number  
✗ Must be 8-20 characters long  
✗ Must not match your previous password  
✓ Must match the confirmation password

I'm not a robot  reCAPTCHA [Privacy](#) - [Terms](#)

**Reset Password**

[← Back to Home](#)

Powered by ZINFI Unified Partner Management™

**Create New Password**

Please create a new password that meets the following guidelines:

America\$1 (Eye icon)

America\$1 (Eye icon)

✓ Must include at least one uppercase letter  
✓ Must include at least one special character  
✓ Must include at least one number  
✓ Must be 8-20 characters long  
✓ Must not match your previous password  
✓ Must match the confirmation password

I'm not a robot  reCAPTCHA [Privacy](#) - [Terms](#)

**Reset Password**

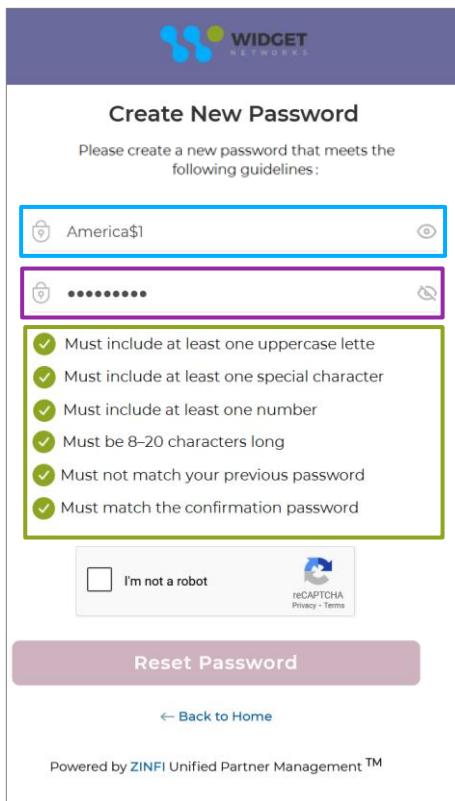
[← Back to Home](#)

Powered by ZINFI Unified Partner Management™

- **Password Visibility Toggle**—A toggle (Eye icon) is present next to the password field to switch between hiding and showing the password. By clicking the "Eye" icon, the user can confirm the accuracy of their password while typing, reducing the chance of input errors.
  - **The "Eye Open" Icon indicates** that the password is visible when the icon is clicked or toggled. When the user clicks the "Eye" icon toggle, the password must revert to its obscured state. Suppose the password is visible, and the user does not interact with the page for 30 seconds. In that case, the system should automatically revert the password field to the obscured state for security purposes.
  - **The "Eye Closed" Icon indicates that the password is hidden (the default configuration)**, and the entered password is obscured with dots.

**Note: The Password Visibility Toggle feature is also available on the "Log In" page of the UPM.**
- **Minimum Password Complexity Requirement**—The user must adhere to the criteria mentioned on the screen while creating the new password. Password criteria include requirements designed to enhance

security and protect against unauthorized access. Meeting each criterion parameter will be confirmed by displaying a green tick beside each criterion. The user can reset the new password once all the requirements are met.



**Create New Password**

Please create a new password that meets the following guidelines:

America\$1  \*\*\*\*\*

Must include at least one uppercase letter  
 Must include at least one special character  
 Must include at least one number  
 Must be 8-20 characters long  
 Must not match your previous password  
 Must match the confirmation password

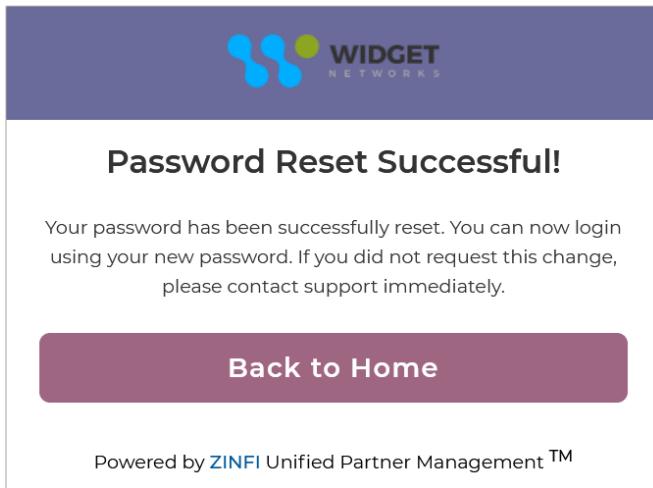
I'm not a robot reCAPTCHA Privacy - Terms

**Reset Password**

[← Back to Home](#)

Powered by ZINFI Unified Partner Management™

- After meeting the **Minimum Password Complexity** requirements, the user clicks the "Reset Password" button to submit the request, and a confirmatory message like the one visible in the image below will appear.



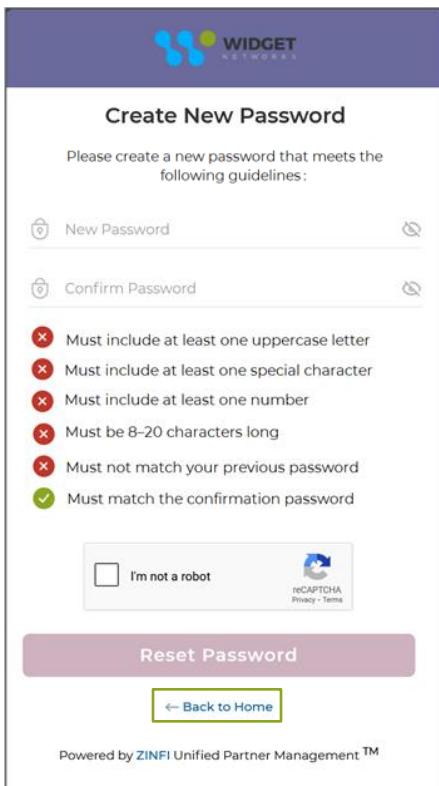
**Password Reset Successful!**

Your password has been successfully reset. You can now login using your new password. If you did not request this change, please contact support immediately.

**Back to Home**

Powered by ZINFI Unified Partner Management™

- **Back to Home** – At any point during the 'Forgot Password' process, users can return to the homepage by clicking the 'Back to Home' link. This link on the password reset page allows users to exit the reset process without saving their inputs and navigate directly to the UPM homepage. It provides a convenient option for users who choose to discontinue the password reset and explore other sections or features of the UPM.



**Create New Password**

Please create a new password that meets the following guidelines:

New Password  Confirm Password

Must include at least one uppercase letter  
 Must include at least one special character  
 Must include at least one number  
 Must be 8-20 characters long  
 Must not match your previous password  
 Must match the confirmation password

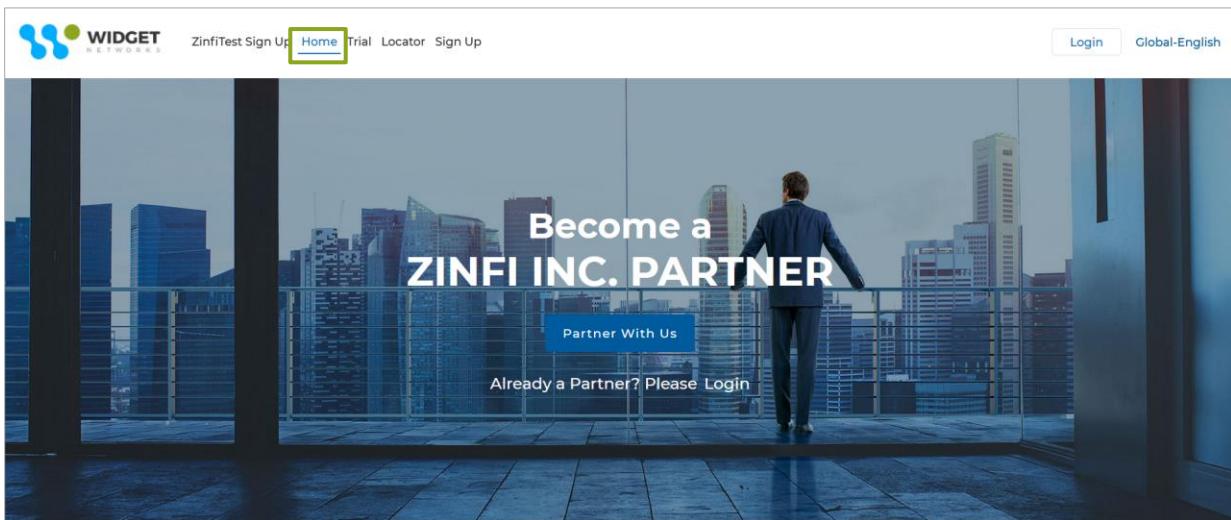
I'm not a robot reCAPTCHA  
Privacy - Terms

**Reset Password**

[← Back to Home](#)

Powered by ZINFI Unified Partner Management™

- Clicking the “**Back to Home**” button takes them to the Home page of the UPM.



## Origin of Feature

Customer request. This feature is requested to allow users to toggle password visibility, construct passwords following real-time parameter guidance, and provide a quick link to the home page.

## CX Strategy Relation (6 S's)



Security

## Portal User-Facing Benefits

This feature equips Admins with a secure platform for password creation, reduces input errors via visibility toggles, provides real-time guidance, and ensures effortless navigation back to the homepage for an improved user experience.

## Triggering Workflow with Record Delete

### Related Application(s)

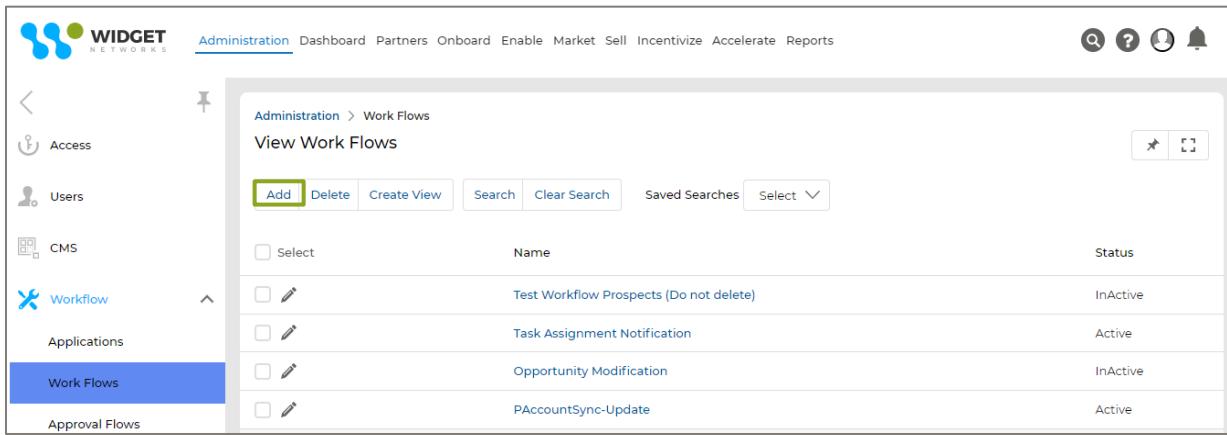
Workflow Management

### Feature Description

The UPM 25.1 Release introduces a new element to workflow configurations by adding the 'Delete' trigger option in the 'Application and Trigger Condition' window. This feature triggers workflows when an application's record is deleted, adding to the existing Record Triggers: 'On Create,' 'On Update,' and 'On Create or Update.'

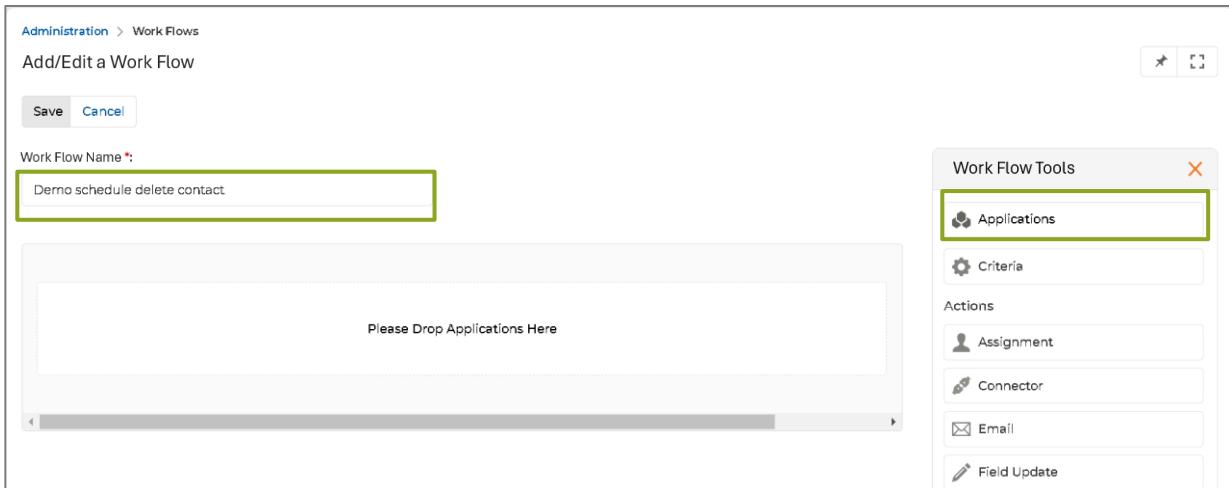
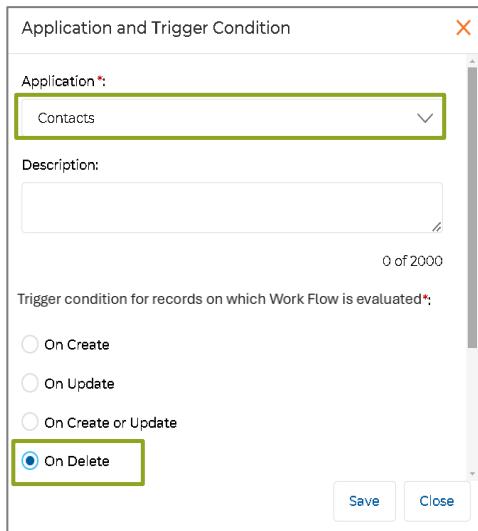
For example, we will create/configure a workflow that triggers when a Sales Contact Record is deleted, and the pre-configured criteria are evaluated. If the Criteria succeed, the pre-configured 'Email' is sent out to configured lists, and If the Criteria fail, the workflow will not process any actions.

- To Create a new Workflow for an application that will be triggered when a record is deleted, navigate to Administration > Workflow > Work Flows. A new Work Flow can be created by clicking the 'Add' button on the 'View Work Flows' page.



Select	Name	Status
<input type="checkbox"/>	Test Workflow Prospects (Do not delete)	InActive
<input type="checkbox"/>	Task Assignment Notification	Active
<input type="checkbox"/>	Opportunity Modification	InActive
<input type="checkbox"/>	PAccountSync-Update	Active

- Proceed by entering the Workflow Name. Next, drag and drop the Application Name and select Contacts. Afterward, choose the 'On Delete' action and click Save. This configuration ensures that the workflow is triggered whenever a Contact record is deleted.

Application and Trigger Condition

Application\*:

Contacts

Description:

Trigger condition for records on which Work Flow is evaluated\*:

On Create

On Update

On Create or Update

On Delete

Save Close

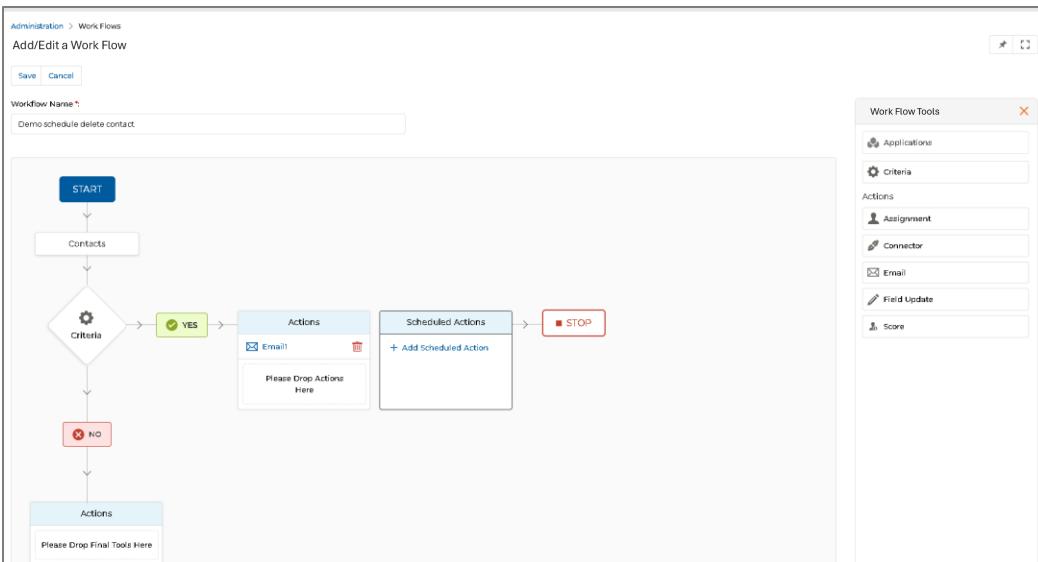
- The next step involves drag-dropping the “Criteria” and defining the criteria. In this example, the criteria are configured using the ‘Is Not Blank’ operator for the field ‘First Name’.

Criteria

ID	Fields	Operator	Value	Action
(1)	First Name	Is not blank		Remove
(2)	Select	Select		Add

Save Close

- To configure the Criteria-Success Action, drag and drop the Email field onto the “Yes-Actions” Window. Then, provide the necessary email details, such as selecting the email template, specifying the recipient type, and any other required information. Finally, click Save to complete the setup.



Email Information

Name: Email

Email Template: zinfitest contact

Additional Emails: anwesha.barai@zinfitech.com

Recipient Type:

- Related User
- Assigned User ID
- Created by (checked)

Save Close

## Origin of Feature

Customer request. This feature empowers Admin users to leverage the 'Record Delete' trigger for Workflow Execution

## CX Strategy Relation (6 S's)



Sufficiency

## Portal User-Facing Benefits

This feature allows Admins to create/configure workflows that trigger based on the 'Delete' condition.

---

## Configuring Auto-content Visibility based on User Profile Country and Language via Portal Settings

### Related Application(s)

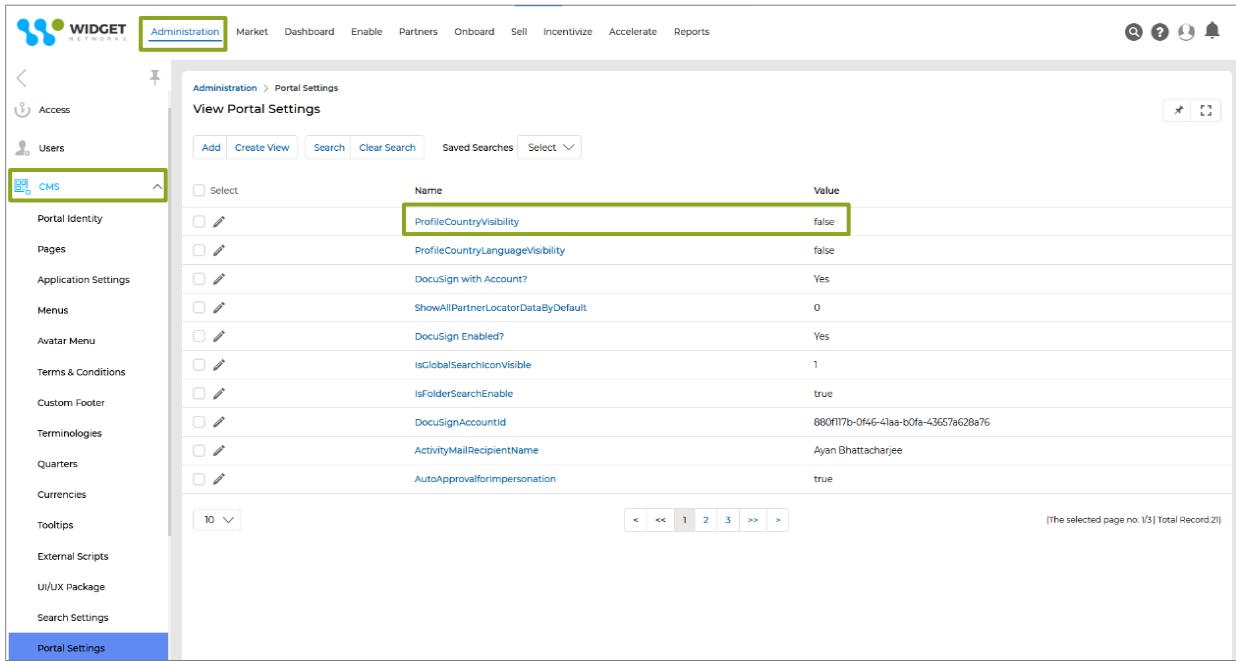
CMS Management

### Feature Description

The below-described portal settings offer enhanced flexibility and control over content visibility. Administrators can tailor content access in the Content Library Application by adjusting the '**Profile Country Visibility**' or '**Profile Country Language Visibility**' portal settings. Enabling these settings allows the Administrators to configure auto-content access by matching it to specific countries or country-language combinations within user profiles, enhancing content administration across diverse regions and languages. Disabling these options - enables default content visibility based on the selections via the Country-Language page.

### 'Profile Country Visibility' Portal Setting

- To access this portal setting, navigate to Administration > CMS > Portal Settings. This will take you **to the View Portal Settings page**, which lists all the Portal Settings.
- To enable/disable the Portal Setting, we must go to its details page. Click on the name of the Portal Setting on the listing page to go to the details page.

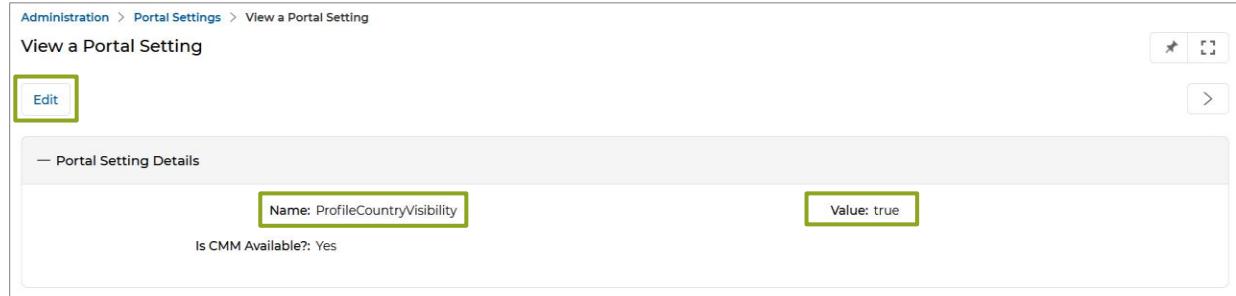


The screenshot shows the Zinfi Administration interface with the 'Administration' tab selected. The left sidebar lists various settings categories, with 'CMS' highlighted. The main content area shows a table of portal settings. The 'ProfileCountryVisibility' setting is highlighted with a green box, indicating it is the current focus. The table includes other settings like 'ProfileCountryLanguageVisibility' (Value: false), 'DocuSign with Account?' (Value: Yes), and 'AutoApprovalforImpersonation' (Value: true). The bottom right of the table area shows a note: '(The selected page no: 1/3 | Total Record:21)'.

### Enable the 'Profile Country Visibility' Portal Setting

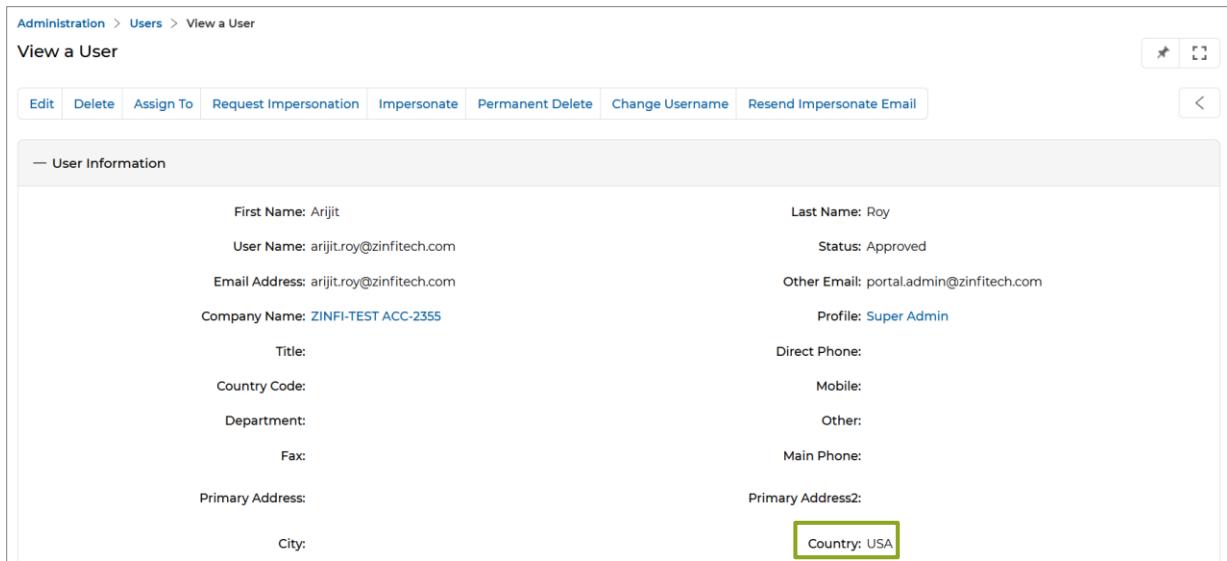
- Enabling this Portal Setting ensures that content visibility in the Content Library is determined solely by the countries specified in the user's profile.
- Once on the **View a Portal Setting** page, click the Edit button. To enable the Portal Setting, provide value in the value field.
- To enable this Portal Setting, set the Value to 'true.' If the value is set to 'true,' the User can view all the Content based on the Countries selected in the User Profile.

**Note: The country selected on the Country-Language selection page will not be considered for visibility.**



The screenshot shows the 'View a Portal Setting' page for the 'ProfileCountryVisibility' setting. The 'Edit' button is highlighted with a green box. The 'Name' field shows 'ProfileCountryVisibility' and the 'Value' field shows 'true'. Below these fields, a note says 'Is CMM Available?: Yes'.

- The Profile Country is selected as 'USA' in this example.



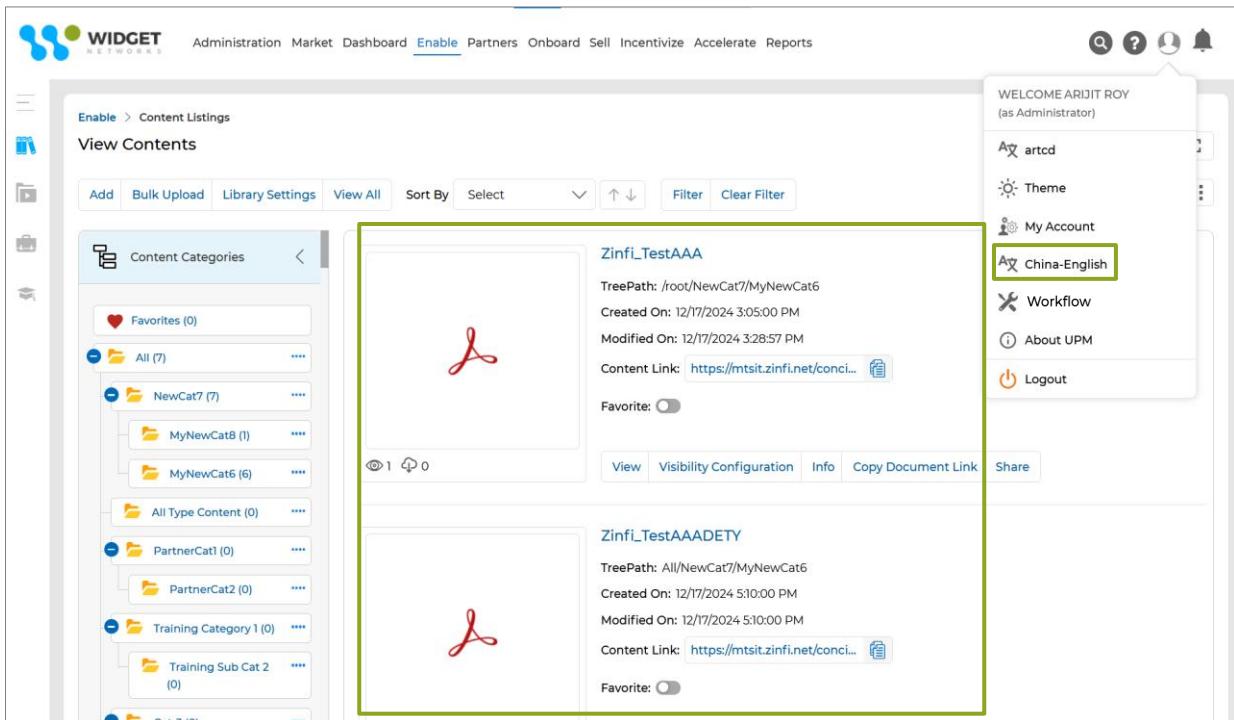
Administration > Users > View a User

**View a User**

— User Information

First Name:	Arijit	Last Name:	Roy
User Name:	arijit.roy@zinfi.com	Status:	Approved
Email Address:	arijit.roy@zinfi.com	Other Email:	portal.admin@zinfi.com
Company Name:	ZINFI-TEST ACC-2355	Profile:	Super Admin
Title:		Direct Phone:	
Country Code:		Mobile:	
Department:		Other:	
Fax:		Main Phone:	
Primary Address:		Primary Address2:	
City:		Country:	USA

- On the View Contents page, all the contents whose visibilities are tagged with the User Profile Country, i.e., USA, will be visible irrespective of the Country selected in the Country-Language selection page.



Enable > Content Listings

**View Contents**

Add Bulk Upload Library Settings View All Sort By Select Filter Clear Filter

Content Categories

- Favorites (0)
- All (7)
- NewCat7 (7)
  - MyNewCat8 (1)
  - MyNewCat6 (6)
- All Type Content (0)
- PartnerCat1 (0)
- PartnerCat2 (0)
- Training Category 1 (0)
  - Training Sub Cat 2 (0)
- Cat 2 (0)

Zinfi\_TestAAA

TreePath: /root/NewCat7/MyNewCat6  
Created On: 12/17/2024 3:05:00 PM  
Modified On: 12/17/2024 3:28:57 PM  
Content Link: <https://mtsit.zinfi.net/conci...>

Zinfi\_TestAAADETY

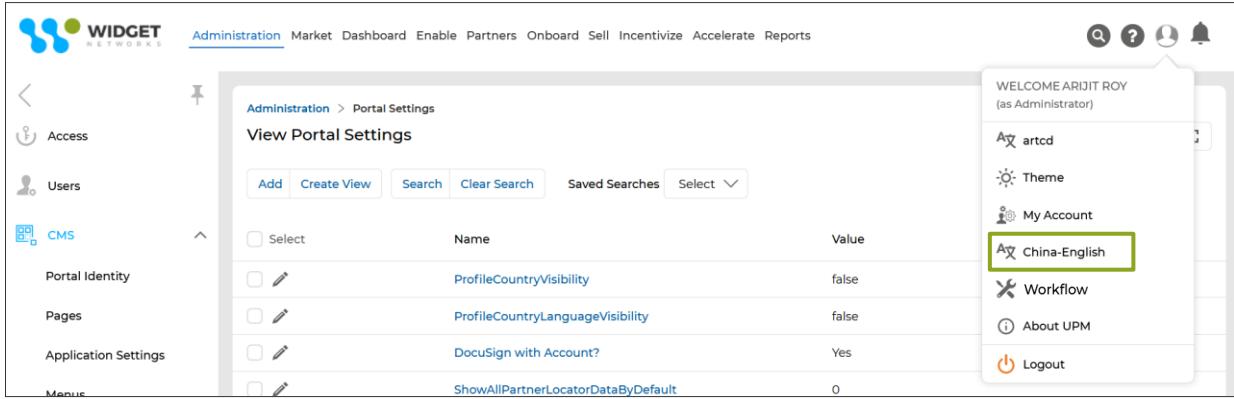
TreePath: All/NewCat7/MyNewCat6  
Created On: 12/17/2024 5:10:00 PM  
Modified On: 12/17/2024 5:10:00 PM  
Content Link: <https://mtsit.zinfi.net/conci...>

WELCOME ARIJIT ROY (as Administrator)

arcd Theme My Account China-English Workflow About UPM Logout

### Disable the 'Profile Country Visibility' Portal Setting

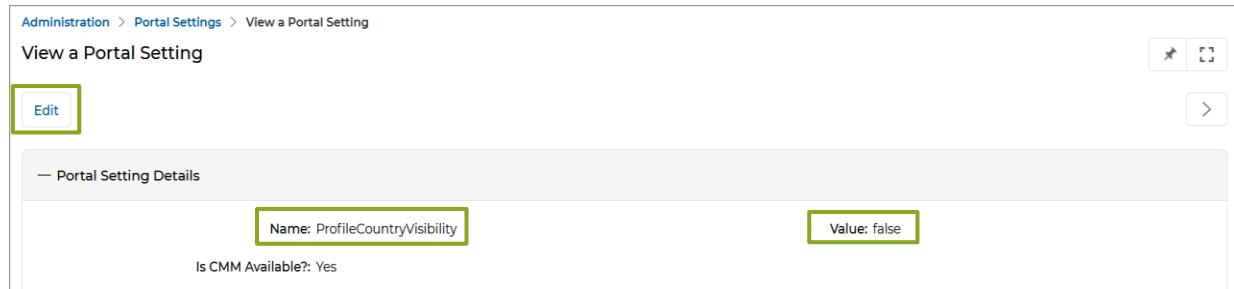
- Disabling this Portal Setting allows users to view content in the Content Library based on the country selected on the Country-Language selection page.



Administration > Portal Settings > View Portal Settings

Select	Name	Value
<input type="checkbox"/>	ProfileCountryVisibility	false
<input type="checkbox"/>	ProfileCountryLanguageVisibility	false
<input type="checkbox"/>	DocuSign with Account?	Yes
<input type="checkbox"/>	ShowAllPartnerLocatorDataByDefault	0

- Once on the **View a Portal Setting** page, click the **Edit** button. To disable the Portal Setting, provide value in the value field.
- To disable this Portal Setting, set the Value as 'false'. If the value is set as 'false', the User can only view contents in the Content Library based on the Country selection in the User's Country-Language selection page.



Administration > Portal Settings > View a Portal Setting

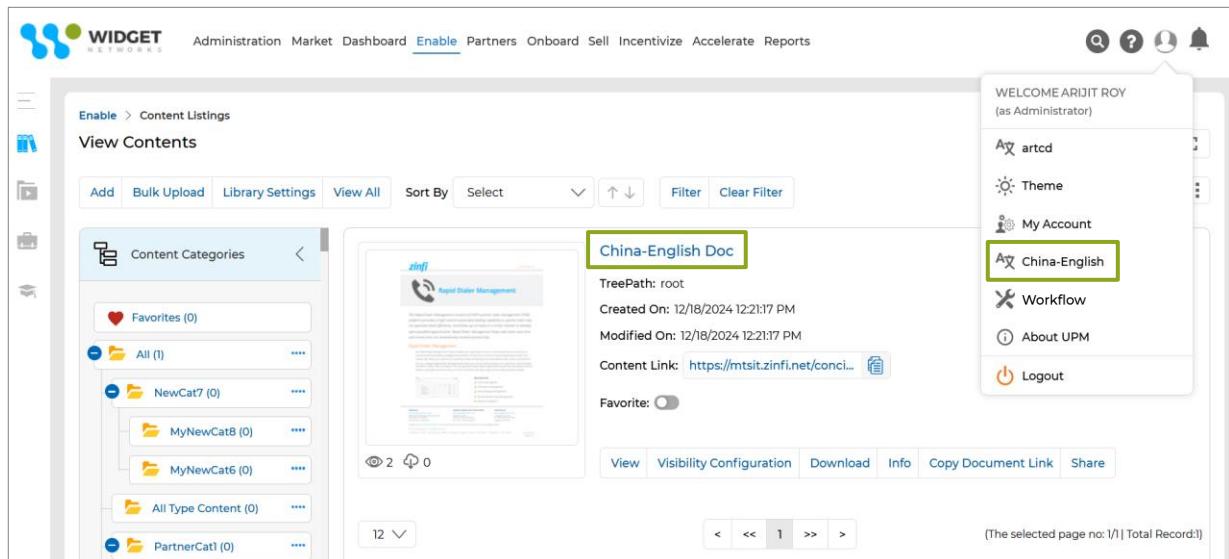
View a Portal Setting

**Edit**

— Portal Setting Details

Name: ProfileCountryVisibility	Value: false
--------------------------------	--------------

Is CMM Available?: Yes



Administration Market Dashboard **Enable** Partners Onboard Sell Incentivize Accelerate Reports

Enable > Content Listings

View Contents

Add Bulk Upload Library Settings View All Sort By Select Filter Clear Filter

Content Categories

- Favorites (0)
- All (1)
- NewCat7 (0)
- MyNewCat8 (0)
- MyNewCat6 (0)
- All Type Content (0)
- PartnerCat1 (0)

**China-English Doc**

TreePath: root

Created On: 12/18/2024 12:21:17 PM

Modified On: 12/18/2024 12:21:17 PM

Content Link: <https://mtsit.zinfo.net/conci...>

Favorite:

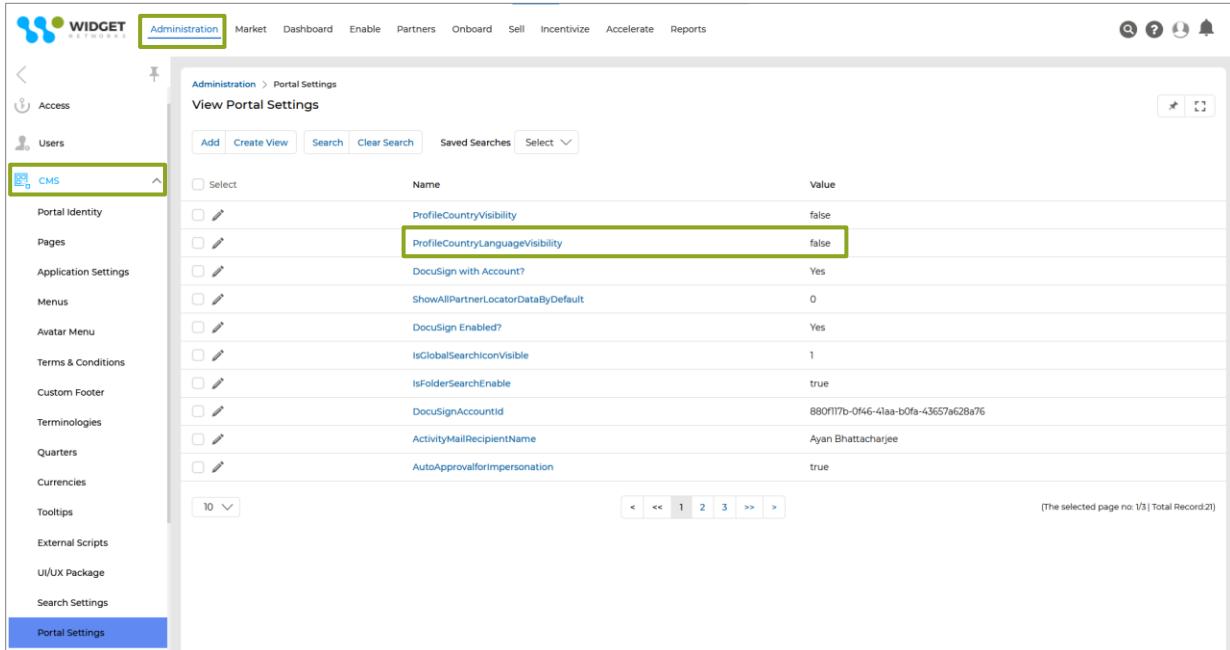
View Visibility Configuration Download Info Copy Document Link Share

12 < << 1 >> > (The selected page no: 1/1 | Total Record: 1)

**Note:** The language selected on the Country-Language selection page will not affect the visibility of the contents.

## ‘Profile Country Language Visibility’ Portal Setting

- To access this portal setting, navigate to Administration > CMS > Portal Settings. This will take you **to the View Portal Settings page**, which lists all the Portal Settings.
- To enable/disable the Portal Setting, we must go to its details page. Click on the name of the Portal Setting on the listing page to go to the details page.



Name	Value
ProfileCountryVisibility	false
ProfileCountryLanguageVisibility	false
DocuSign with Account?	Yes
ShowAllPartnerLocatorDataByDefault	0
DocuSign Enabled?	Yes
IsGlobalSearchIconVisible	1
IsFolderSearchEnabled	true
DocuSignAccountId	880ff17b-0f46-41aa-b0fa-43657a628a76
ActivityMailRecipientName	Ayan Bhattacharjee
AutoApprovalforImpersonation	true

### Enable the ‘Profile Country Language Visibility’ Portal Setting

- Enabling this portal setting ensures that the user can view all the Content based on the country and language selected in the user profile.

**Note: The Country and Language selected in the Country-Language selection page will not be considered for visibility.**

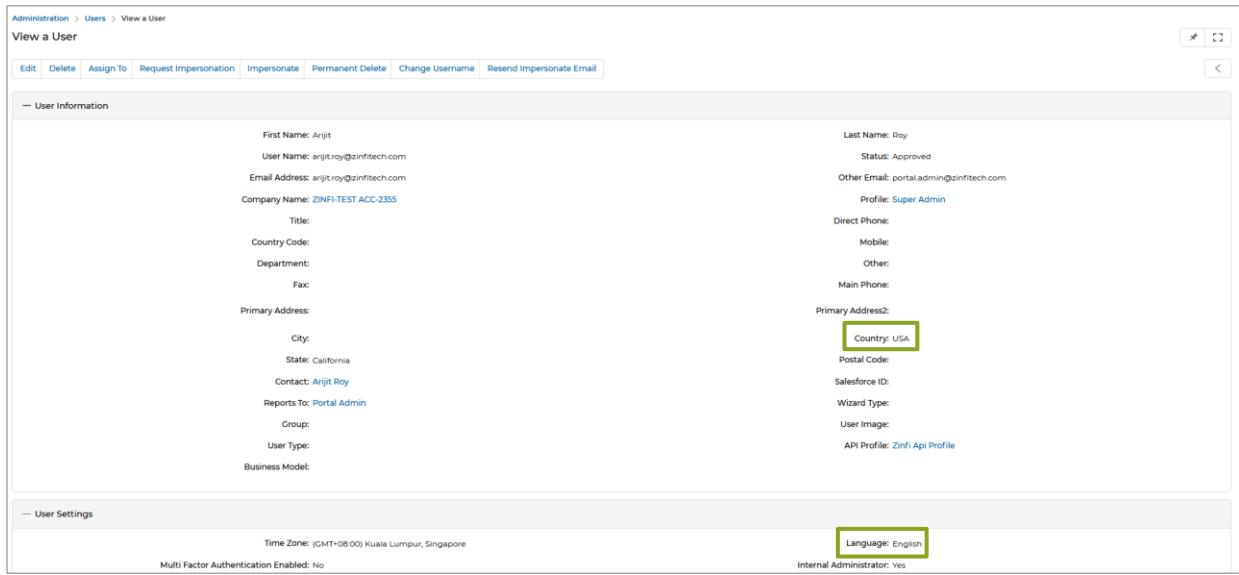
- To enable the Portal Setting, go to its details page. Click on the name of the Portal Setting on the listing page to go to the details page.
- Once on the **View a Portal Setting** page, click the Edit button. To enable the Portal Setting, provide a value in the value field. If the value is set to ‘true,’ then the User can view all the Contents based on the Country and Language selected in the User Profile.



Name: ProfileCountryLanguageVisibility	Value: true
--	-------------

Is CMM Available?: Yes

- The Profile Country and Language are selected as 'USA' and 'English' in this example.



**User Information**

First Name: Arjit  
User Name: arjit.roy@zinfitech.com  
Email Address: arjit.roy@zinfitech.com  
Company Name: ZINFI-TEST ACC-2355  
Title:  
Country Code:  
Department:  
Fax:  
Primary Address:  
City: California  
State: California  
Contact: Arjit Roy  
Reports To: Portal Admin  
Group:  
User Type:  
Business Model:

Last Name: Roy  
Status: Approved  
Other Email: portal.admin@zinfitech.com  
Profile: Super Admin  
Direct Phone:  
Mobile:  
Other:  
Main Phone:  
Primary Address:  
Country: USA  
Postal Code:  
Salesforce ID:  
Wizard Type:  
User Image:  
API Profile: Zinfí API Profile

**User Settings**

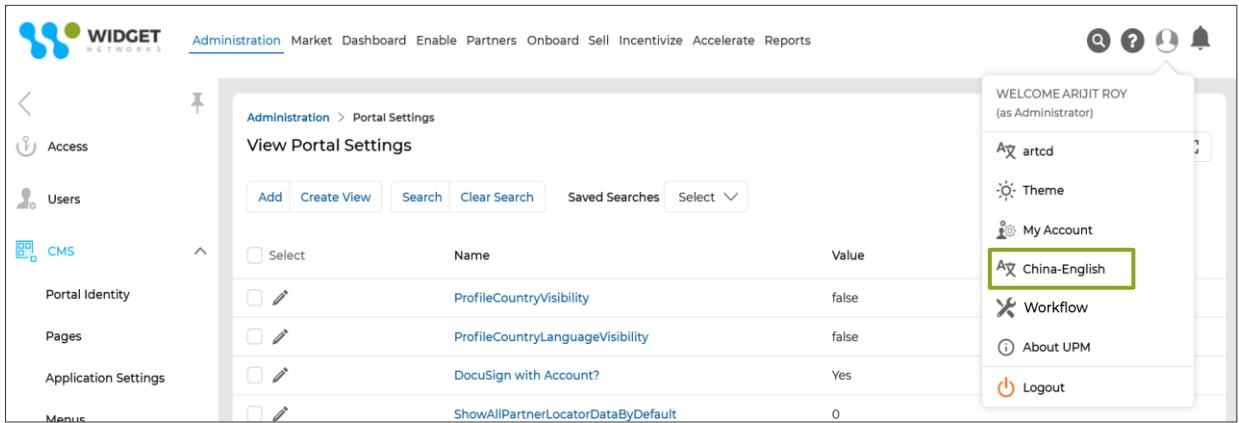
Time Zone: (GMT+08:00) Kuala Lumpur, Singapore  
Multi Factor Authentication Enabled: No  
Language: English  
Internal Administrator: Yes

- On the View Contents page, all the contents whose visibilities are tagged with the User Profile Country and Language will be visible irrespective of the Country and Language selected in the Country-Language selection page.

**Note: The User Profile may include multiple countries, but only one language can be selected. When the 'Profile Country Language Visibility' portal setting is enabled, the View Contents page in the Content Library will display all the contents associated with all countries and the specific language listed in the User Profile.**

### Disable the 'Profile Country Language Visibility' Portal Setting

- Disabling this Portal Setting allows users to view contents in the Content Library based on the Country and Language selected on the User's Country-Language selection page.



**Administration > Portal Settings**

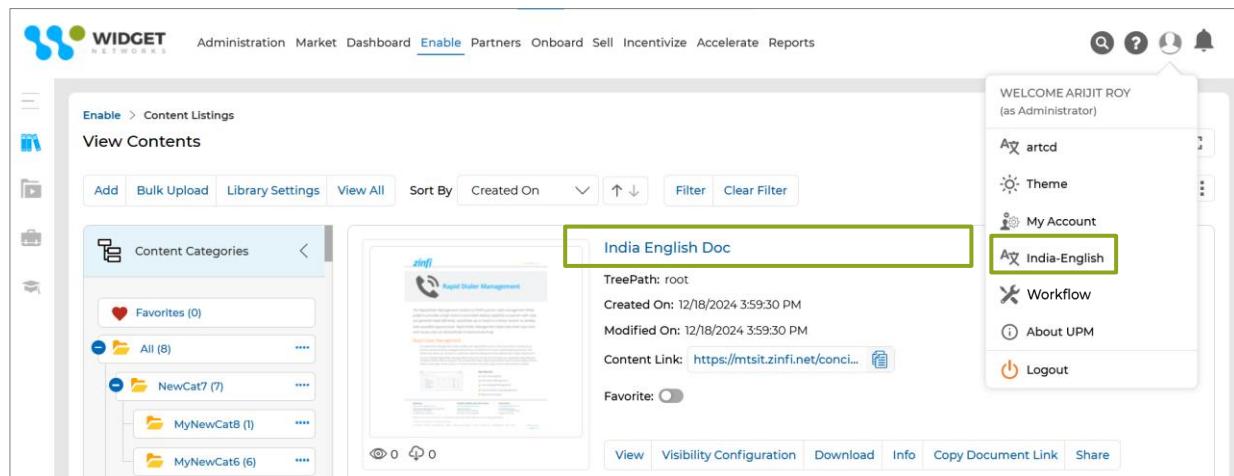
**View Portal Settings**

Add	Create View	Search	Clear Search	Saved Searches	Select
<input type="checkbox"/>	Select	Name	Value		
<input type="checkbox"/>	<input type="text"/>	ProfileCountryLanguageVisibility	false		
<input type="checkbox"/>	<input type="text"/>	ProfileCountryVisibility	false		
<input type="checkbox"/>	<input type="text"/>	DocuSign with Account?	Yes		
<input type="checkbox"/>	<input type="text"/>	ShowAllPartnerLocatorDataByDefault	0		

**WELCOME ARJIT ROY (as Administrator)**

- artcd
- Theme
- My Account
- China-English
- Workflow
- About UPM
- Logout

- To disable the Portal Setting, go to its details page. Click on the name of the Portal Setting on the listing page to go to the details page.
- Once on the **View a Portal Setting** page, click the Edit button. To disable the Portal Setting, provide value in the value field. Suppose the value is set as 'false'. In that case, the User will only be allowed to view contents in the Content Library based on the Country and Language selected in the User's Country-Language selection page.

## Origin of Feature

Customer request. The feature is provisioned to ensure administrators can set and control the visibility of contents in the Content Library based on User Profile Country and Language.

## CX Strategy Relation (6 S's)



Sufficiency

## Portal User-Facing Benefits

The feature allows administrators to set and control the visibility of contents in the Content Library based on User Profile Country and Language.

## Persisting Visibility Configuration Window

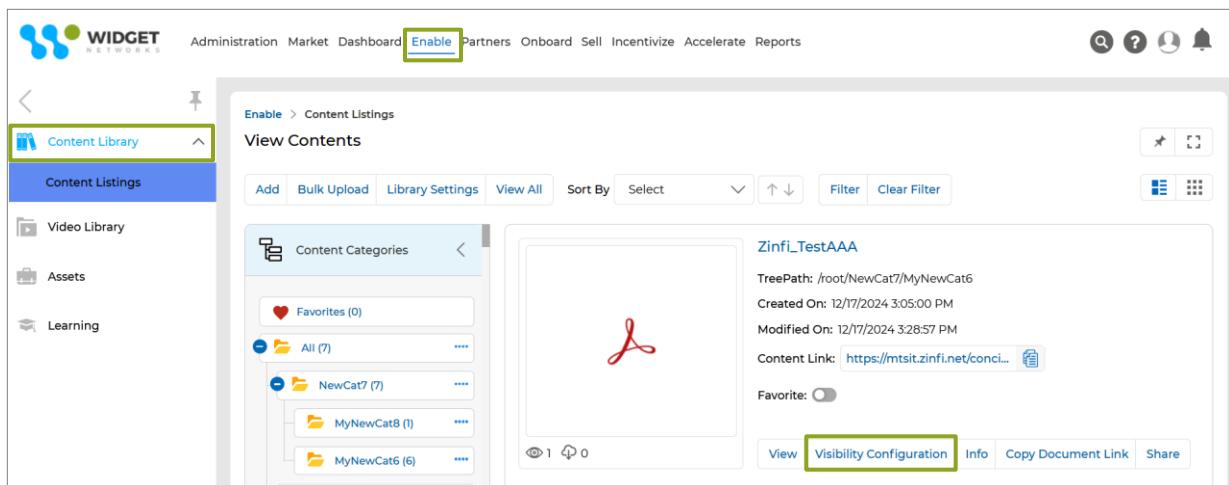
### Related Application(s)

Content Library Management, Generic

### Feature Description

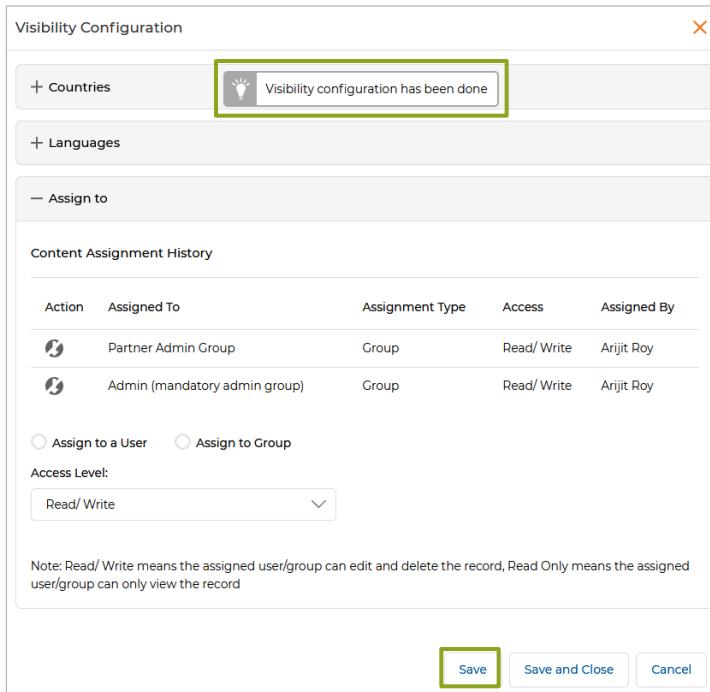
Including both 'Save' and 'Save and Close' buttons offers administrators a perfect balance of flexibility and efficiency. The 'Save' button allows ongoing adjustments without closing the configuration window, ensuring admins can fine-tune settings seamlessly. Meanwhile, the 'Save and Close' button simplifies the process by saving changes and exiting the window in one step, reducing repetitive actions. These options enhance usability, streamline workflows, and empower admins to manage visibility configurations more effectively. These features are thoughtfully designed and available across all applications in the UPM where Visibility Configuration is integrated.

- We must traverse the **Enable > Content Library > Content Listings** and click **Visibility Configuration** to open the **Visibility Configuration** window.

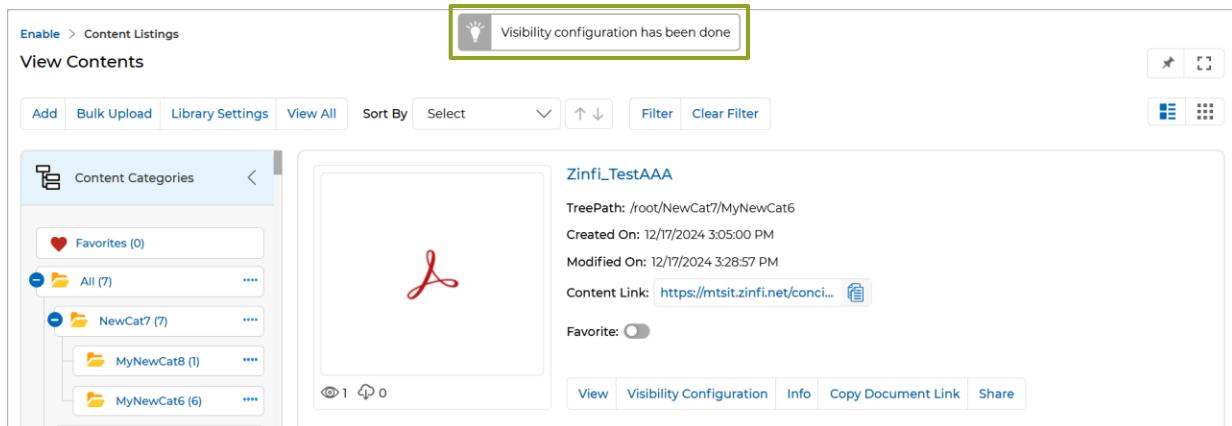


- Once the **Visibility Configuration** window is open, select Countries, Languages, and **User/Group** to configure visibility.
- Once the values are selected in the Visibility Configuration window, click Save.
- When clicking the 'Save' button, all changes should be updated, and a 'Visibility configuration has been done' message will be displayed.

- The **Visibility Configuration** window will remain open after clicking **Save**.



- Alternatively, instead of clicking the 'Save' button, the User can click the 'Save and Close' button after selecting values in the **Visibility Configuration** window.
- Clicking the 'Save and Close' button allows the User to update all the changes and close the **Visibility Configuration** window.
- Once the window is closed, a 'Visibility configuration has been done' message will appear on the **View Contents** page.



## Origin of Feature

Customer request. The feature is requested so that admins can either save ongoing adjustments without closing the **Visibility Configuration** window or save and exit the window in one streamlined action.

## CX Strategy Relation (6 S's)



Sufficiency

## Portal User-Facing Benefits

The feature allows administrators to save ongoing adjustments without closing the **Visibility Configuration** window or saving and exiting the window in one streamlined action.

## Advanced Search for List Pages

### Related Application(s)

Deals Registration Management, Generic

### Feature Description

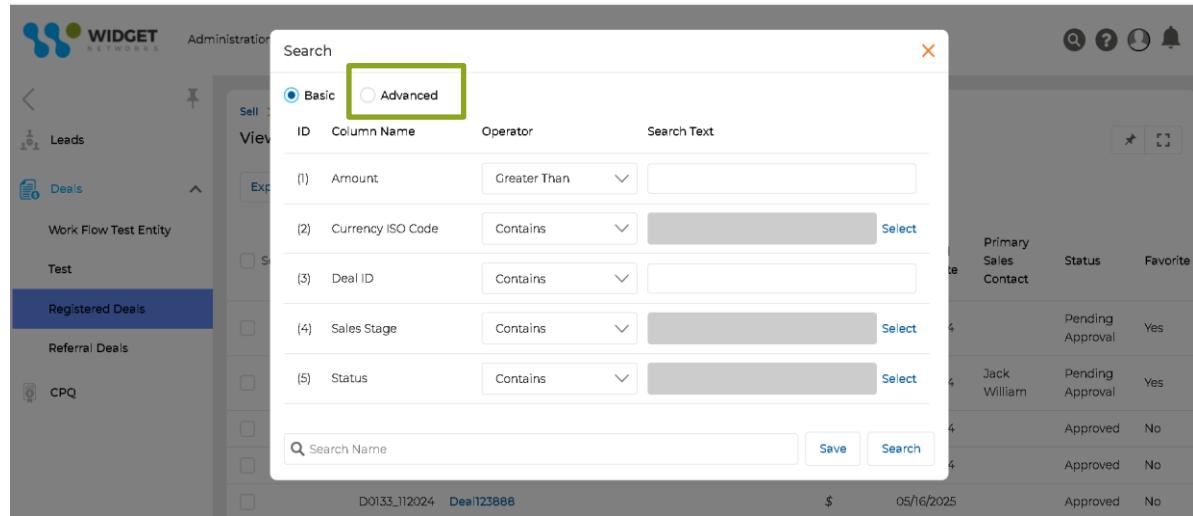
Records associated with any application can be searched based on field values matching specific criteria. The Search option on an application's Listing page enables users to locate records using predefined parameters, and administrators can configure searchable fields through the Workflow Automation Engine. These fields must be part of the application's details page to be included in the search criteria.

With the Hot Rod release of version 25.1, the Advanced Search engine enhances this functionality, enabling users to search for records using single or multiple field values combined with various operators. Unlike basic search, Advanced Search eliminates the need for fields pre-configured as searchable in Workflow. To use the Advanced Search engine, the business logic requires that the user's group of profiles has layout access. This powerful feature streamlines searches, offering flexibility and efficiency.

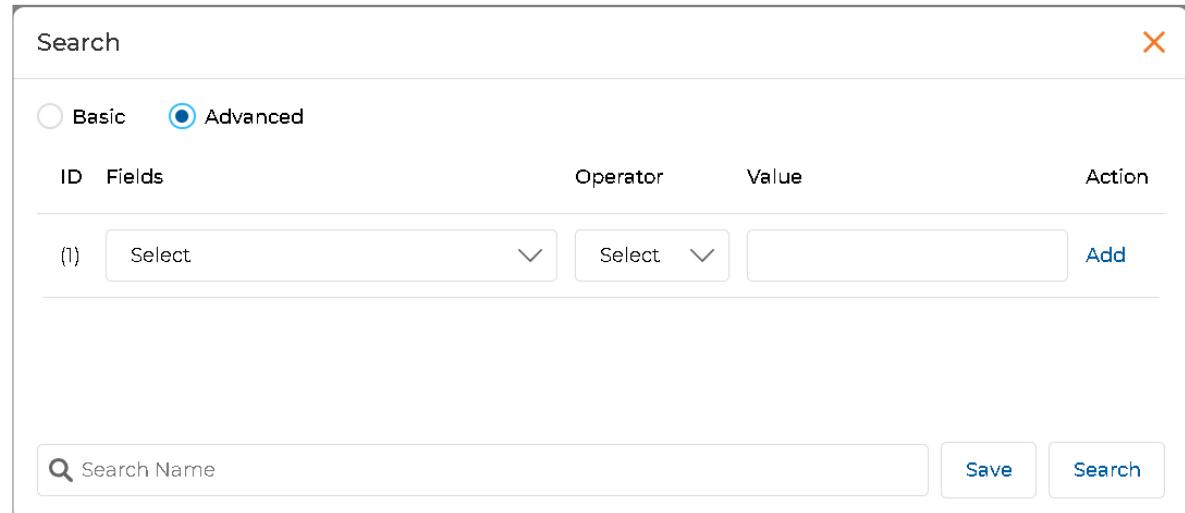
- To explore this feature, navigate to the Listing page of any application. In this case, we are using the Deals application, which can be accessed by navigating to **Sell > Deals > Registered Deals**.

Select	Deal ID	Deal Name	Account	Sales Stage	Amount	Expected Close Date	Primary Sales Contact	Status	Favorite
<input type="checkbox"/>	D0920_82018	PBM Opportunity	Jazz Semiconductor, Inc	10 - Closed Won	\$99000	09/03/2024	ZINFI CP	Approved	No
<input type="checkbox"/>	D0854_42023	Sunny 25 decode	MECHDYNE CORPORATION	10 - Closed Won	\$	09/03/2024		Ready for Submission	No
<input type="checkbox"/>	D1852_122023	Amet Mobile Widget Opportunity	Amet Faulibus Ut Inc.	10 - Closed Won	\$31500	09/20/2024	James Finn	Ready for Submission	No

- Clicking the **Search** button opens the Search pop-up window, enabling users to locate records using the **Advanced Search** option.



- Clicking **Advanced** opens the Search pop-up window for Advanced Search, as illustrated in the image below.

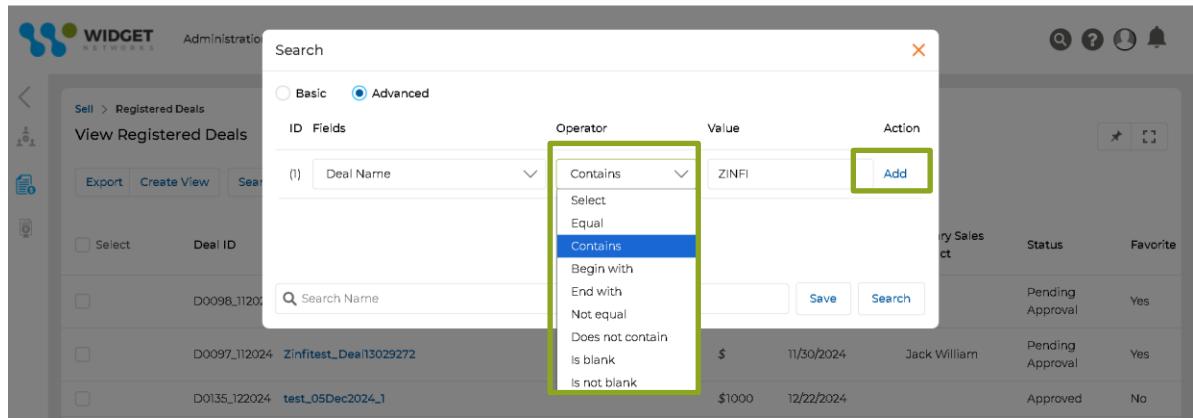


The Advanced Search dialog box is shown with the 'Advanced' tab selected. The search criteria table has the following columns:

ID	Fields	Operator	Value	Action
(1)	Select	Select		Add

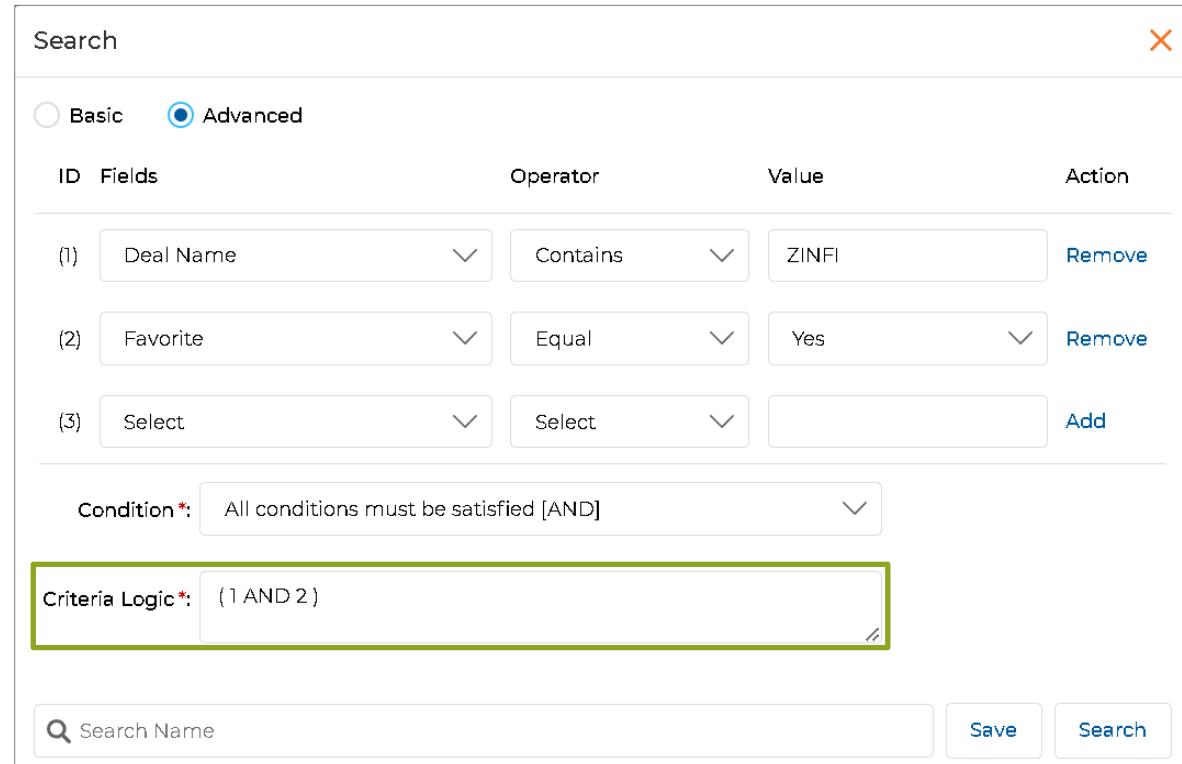
Below the table is a 'Search Name' input field, a 'Save' button, and a 'Search' button.

- On the Search page, select the necessary **Field Name** for the specific application, along with the appropriate **operator** and desired **Field Value** to perform the search and retrieve relevant records. After specifying each field, operator, and value, click **Add** to include it in the search criteria.



The screenshot shows the Zinfi UI for 'View Registered Deals'. The search criteria editor is open with the 'Advanced' tab selected. A search condition is being built: (1) Deal Name Contains ZINFI. A dropdown menu for operators is open, showing 'Contains' highlighted. The 'Add' button is highlighted with a green box.

- Selecting multiple fields with the specified criteria and values will display the **Criteria Editor** box, as shown in the image below.



The screenshot shows the Zinfi UI Criteria Editor box. It contains three search conditions:
 

- (1) Deal Name Contains ZINFI
- (2) Favorite Equal Yes
- (3) Select

 The 'Condition' dropdown is set to 'All conditions must be satisfied [AND]'. The 'Criteria Logic' input field is highlighted with a green box and contains the text '(1 AND 2)'.

- The 'Criteria editor box' allows you to set the **conditions** for this specific search. Available options are
  - All Conditions must be satisfied [AND] - For the above example, search results are filtered out for those records whose Deal Name contains the ZINFI Substring and whose Favorite is Yes
  - Any condition can be satisfied [OR] – Similarly for the above example, search results can be filtered out for those records whose Deal Name contains the ZINFI Substring or whose Favorite is Yes
  - Put Custom Criteria Logic.

### Search

Basic
Advanced
X

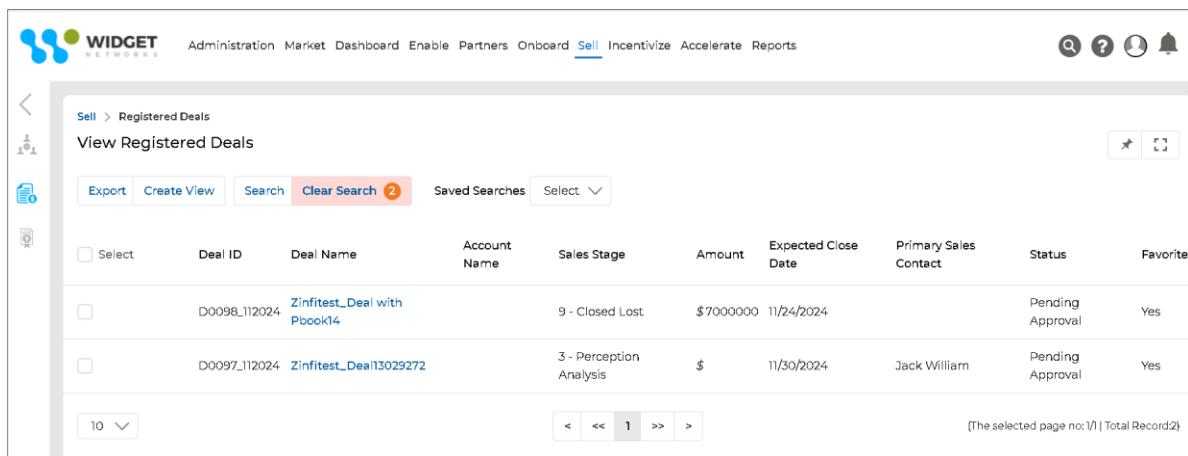
ID	Fields	Operator	Value	Action
(1)	Deal Name	Contains	ZINFI	<a href="#">Remove</a>
(2)	Favorite	Equal	Yes	<a href="#">Remove</a>
(3)	Select	Select		<a href="#">Add</a>

**Condition\*:** All conditions must be satisfied [AND] All conditions must be satisfied [AND]

**Criteria Logic\*:** Any condition can be satisfied [OR] Put custom criteria logic

Search Name
Save
Search

- After selecting the required fields, specifying the operators and corresponding values, and defining the conditions, click Search to execute the query. The example below illustrates a search where two fields are selected: the **Deal Name** field containing the value "ZINFI" and the **Favorite** field with the operator **Equals** set to "Yes," both connected by the **AND** condition. Additionally, the executed searches can be saved with a custom Search Name for future use.



Select	Deal ID	Deal Name	Account Name	Sales Stage	Amount	Expected Close Date	Primary Sales Contact	Status	Favorite
<input type="checkbox"/>	D0098_112024	Zinfitest_Deal with Pbook14		9 - Closed Lost	\$7000000	11/24/2024		Pending Approval	Yes
<input type="checkbox"/>	D0097_112024	Zinfitest_Deal13029272		3 - Perception Analysis	\$	11/30/2024	Jack William	Pending Approval	Yes

## Origin of Feature

This feature was developed based on a customer request. It allows users to search for records using various conditional logics, providing enhanced flexibility with multiple field values, operators, and customizable criteria to improve search efficiency and precision across applications.

## CX Strategy Relation (6 S's)



Sufficiency

## Portal User-Facing Benefits

The Advanced Search engine streamlines record searches with flexible criteria, multiple operators, and savable custom searches, enhancing usability, efficiency, and application personalization. This feature is for Admins and Partners.

---

## Configuring Incentives Enablement for Partners

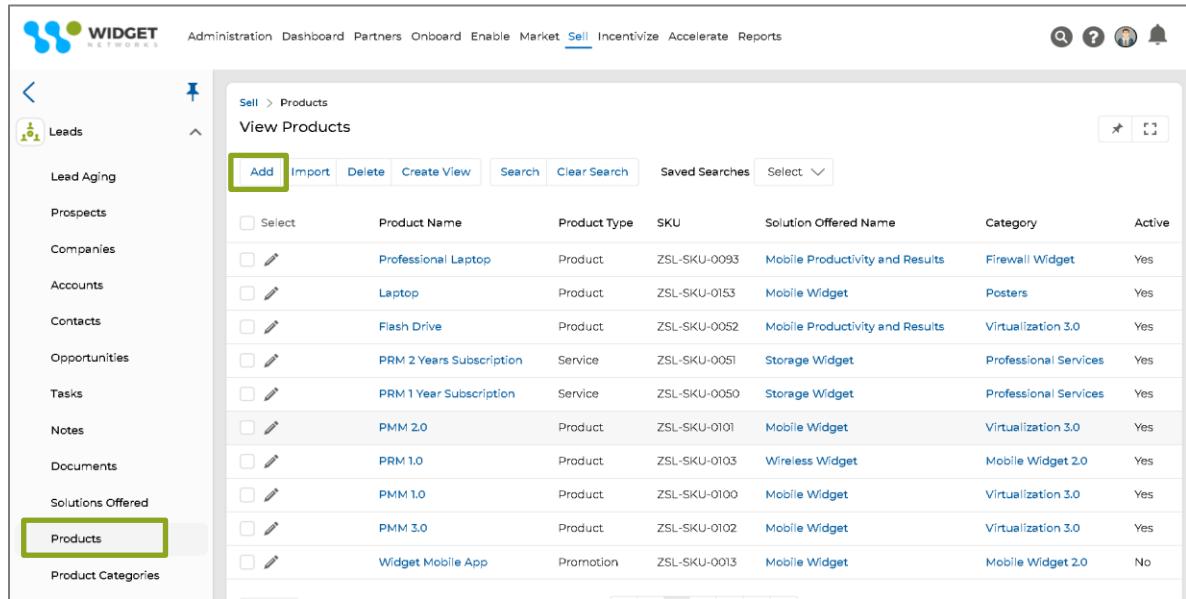
### Related Application(s)

Partner Leads Management

### Feature Description

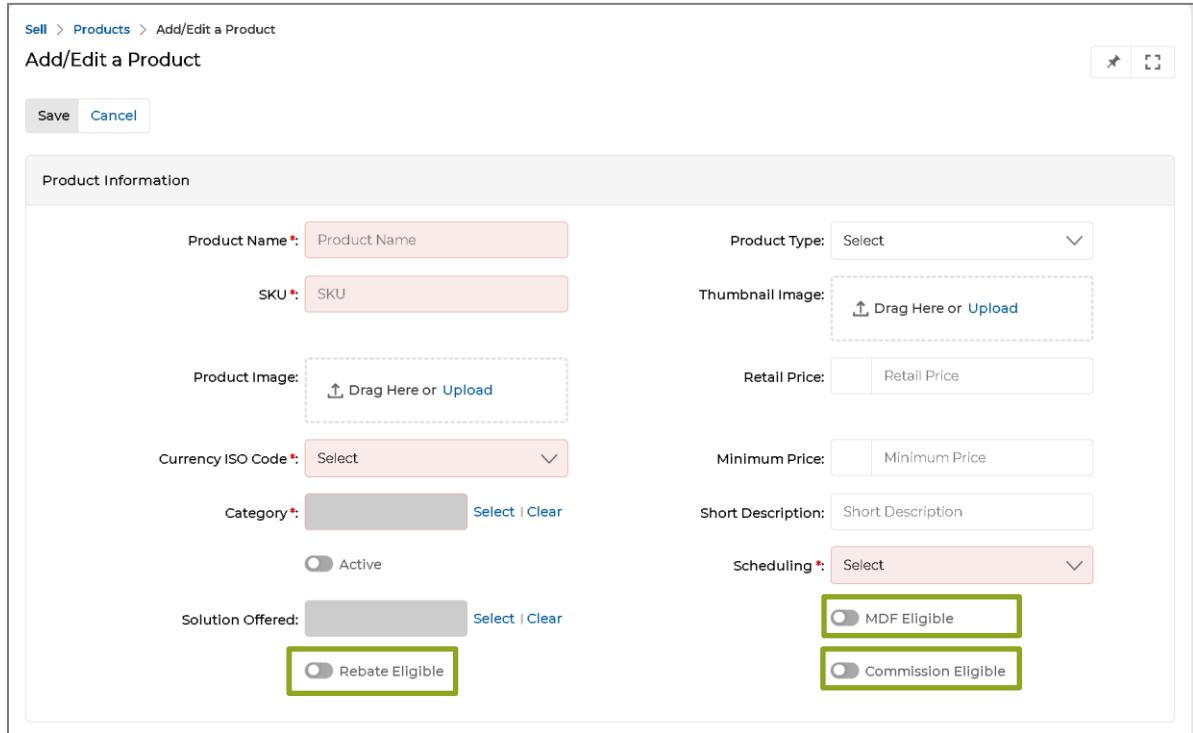
UPM's product management streamlines the handling of goods or services sold to customers or distributed to partners. With the 25.1 release, the Sales application now includes three dedicated fields for MDF, Commissions, and Rebates to Products. These enhancements allow Admin users to define incentive eligibility directly at the product level, ensuring precise alignment of products with the associated incentive types. This update empowers organizations to efficiently manage product-linked incentives, optimizing their sales and distribution strategies.

- To understand this feature, navigate to **Sell > Leads > Products** to explore detailed management and configuration options designed explicitly for Products.



Product Name	Product Type	SKU	Solution Offered Name	Category	Active
Professional Laptop	Product	ZSL-SKU-0093	Mobile Productivity and Results	Firewall Widget	Yes
Laptop	Product	ZSL-SKU-0153	Mobile Widget	Posters	Yes
Flash Drive	Product	ZSL-SKU-0052	Mobile Productivity and Results	Virtualization 3.0	Yes
PRM 2 Years Subscription	Service	ZSL-SKU-0051	Storage Widget	Professional Services	Yes
PRM 1 Year Subscription	Service	ZSL-SKU-0050	Storage Widget	Professional Services	Yes
PMM 2.0	Product	ZSL-SKU-0101	Mobile Widget	Virtualization 3.0	Yes
PRM 1.0	Product	ZSL-SKU-0103	Wireless Widget	Mobile Widget 2.0	Yes
PMM 1.0	Product	ZSL-SKU-0100	Mobile Widget	Virtualization 3.0	Yes
PMM 3.0	Product	ZSL-SKU-0102	Mobile Widget	Virtualization 3.0	Yes
Widget Mobile App	Promotion	ZSL-SKU-0013	Mobile Widget	Mobile Widget 2.0	No

- On the View Products page, clicking the Add button opens the Add/Edit Products page. In the Product Information section, you can define the incentive types a product is associated with by enabling the toggle keys for MDF, Rebates, and Commissions.



**Sell > Products > Add/Edit a Product**

**Add/Edit a Product**

**Product Information**

<b>Product Name*:</b> <input type="text" value="Product Name"/>	<b>Product Type:</b> <input type="text" value="Select"/>
<b>SKU*:</b> <input type="text" value="SKU"/>	<b>Thumbnail Image:</b> <input type="text" value="Drag Here or Upload"/>
<b>Product Image:</b> <input type="text" value="Drag Here or Upload"/>	<b>Retail Price:</b> <input type="text" value="Retail Price"/>
<b>Currency ISO Code*:</b> <input type="text" value="Select"/>	<b>Minimum Price:</b> <input type="text" value="Minimum Price"/>
<b>Category*:</b> <input type="text" value="Select   Clear"/>	<b>Short Description:</b> <input type="text" value="Short Description"/>
<input type="checkbox" value="Active"/> Active	
<b>Scheduling*:</b> <input type="text" value="Select"/>	
<input type="checkbox" value="MDF Eligible"/> MDF Eligible	
<input type="checkbox" value="Rebate Eligible"/> Rebate Eligible	
<input type="checkbox" value="Commission Eligible"/> Commission Eligible	

## Origin of Feature

Customer request. This feature empowers Admin users to specify incentive types directly at the product level.

## CX Strategy Relation (6 S's)



Sufficiency

## Portal User-Facing Benefits

This feature empowers Admin users to manage product incentives like MDF, Rebates, and Commissions directly at the product level, ensuring precise alignment and streamlined incentive management for enhanced efficiency.

## Multi-signee Contract Workflows for DocuSign Contracts

### Related Application(s)

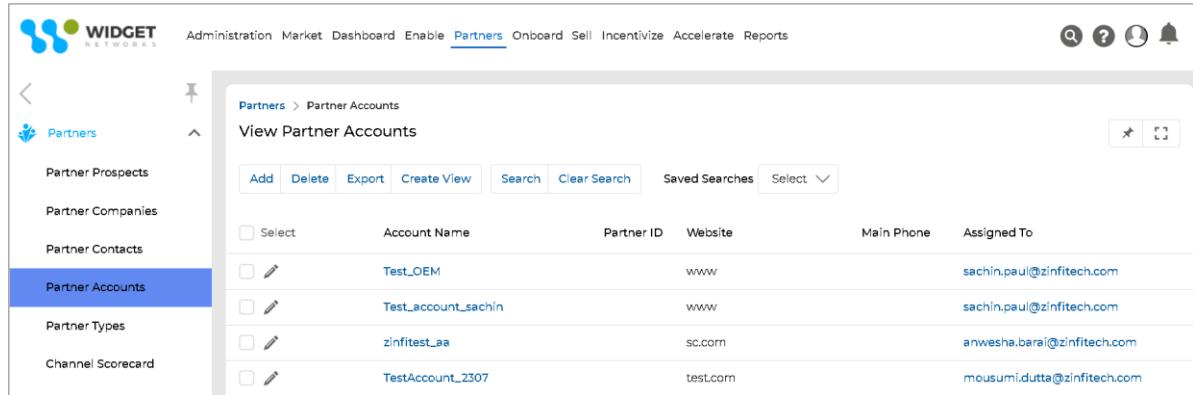
Partner Profile Management, CMS, Partner Contracts Management

### Feature Description

This feature enables admin users to set up contract templates and assign signatories from both the Admin and Partner sides, streamlining the contract signing process. Under the Partner Account, a related section named 'Signee' allows Admins to add signatories with a specified signing sequence (order). Administrators can select signatories using a user lookup field. Required fields include Name and Signatory Type (dropdown with options: Admin/Partner). Contract templates created by admins can be assigned to partner accounts, enabling the generation of a single contract template per partner account for both admin and partner signatories on the contract signatory list. DocuSign envelopes are automatically created for the relevant signatories upon contract generation, and email notifications are sent for signatures. The signing flow is fully automated, ensuring all designated signatories complete the process in the defined sequence before the contract is finalized.

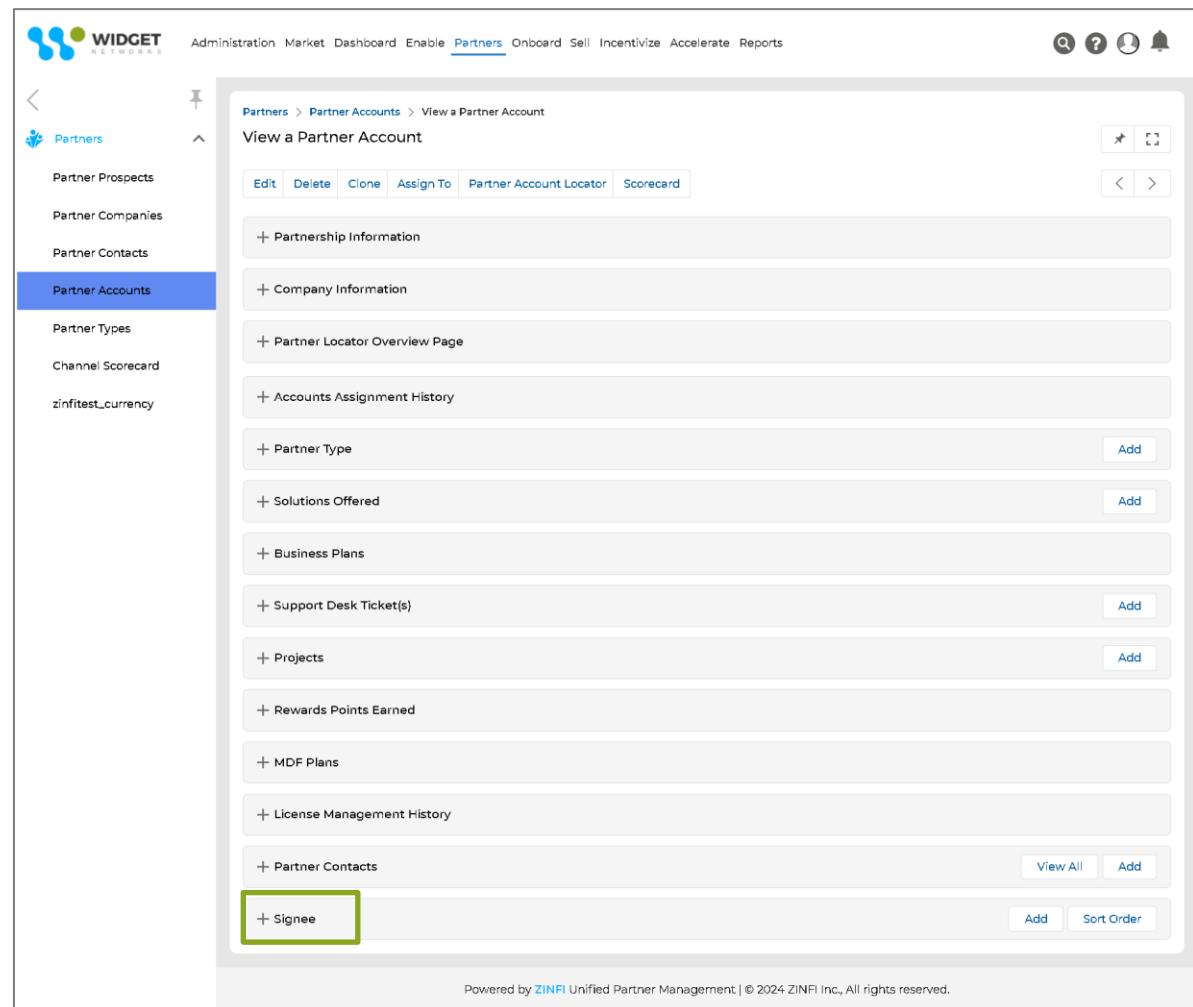
## Add Signees

- To explore this feature, navigate to the Listing page of the Partner Accounts application by traversing **Partners > Partners > Partner Accounts**.



Select	Account Name	Partner ID	Website	Main Phone	Assigned To
<input type="checkbox"/>	Test_OEM		www		sachin.paul@zinfitech.com
<input type="checkbox"/>	Test_account_sachin		www		sachin.paul@zinfitech.com
<input type="checkbox"/>	zinfitest_aa		sc.com		anwesha.barai@zinfitech.com
<input type="checkbox"/>	TestAccount_2307		test.com		mousumi.dutta@zinfitech.com
zinfitest_currency					

- Clicking on the name of a specific Partner Account navigates to its details page, where a new related list, 'Signee,' is available. Here, the admin user can add signatories who will participate in signing contractual agreements associated with this Partner Account.



Partnership Information	Company Information	Partner Locator Overview Page	Accounts Assignment History	Partner Type	Solutions Offered	Business Plans	Support Desk Ticket(s)	Projects	Rewards Points Earned	MDF Plans	License Management History	Partner Contacts	Signee
<input type="button" value="Add"/>	<input type="button" value="View All"/>	<input type="button" value="Add"/>											

Powered by ZINFI Unified Partner Management. © 2024 ZINFI Inc. All rights reserved.

- Clicking the Add button redirects you to the Contract Signees page, where you can designate signatories from either the Partner or Admin sides.

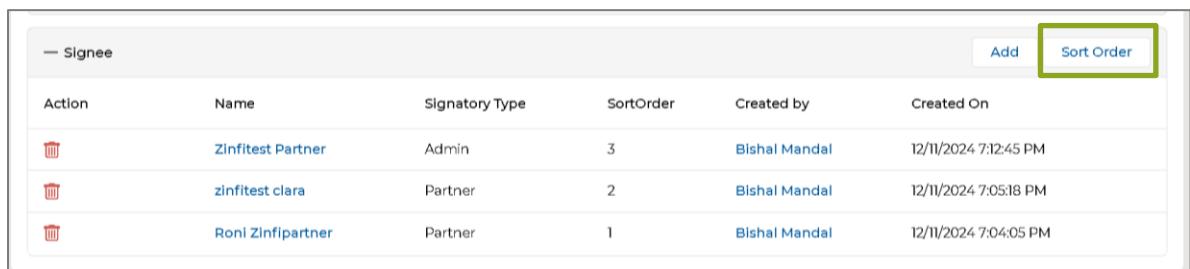


The screenshot shows the 'Contract Signees' page. At the top, there are 'Save' and 'Cancel' buttons. Below that is a 'Signee Information' section with fields for 'Partner Account' (set to 'zinfitest\_aa'), 'Signatory Type' (a dropdown menu with 'Select' highlighted), 'SortOrder' (set to '[System Generated]'), and 'Users' (a dropdown menu with 'Select' and 'Clear' options). At the bottom of the page are 'Save' and 'Cancel' buttons.

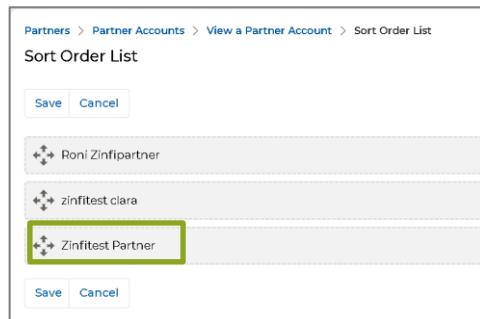
- Based on business requirements, you can add multiple signees from the Admin and Partner sides for all contractual agreements associated with this Partner Account.

## Reorder the Signees

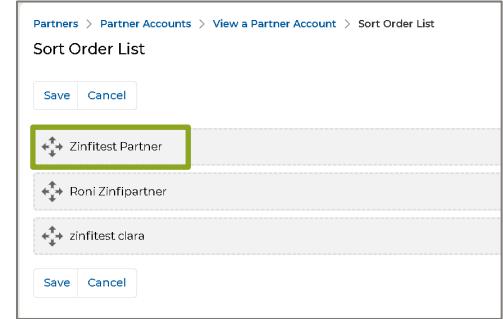
- For any contractual agreement, a specific signing sequence must be followed. The **Sort Order** functionality allows you to arrange this sequence. When signatories are added to the Signees list by the Admin, the sequence is automatically assigned based on the order in which they are saved. However, you can modify the sequence by clicking Sort Order and rearranging the entries using drag-and-drop.



The screenshot shows a table titled 'Signee' with columns: Action, Name, Signatory Type, SortOrder, Created by, and Created On. The table contains three rows: 'Zinfitest Partner' (SortOrder 3), 'zinfitest clara' (SortOrder 2), and 'Roni Zinfipartner' (SortOrder 1). At the top right of the table, there are 'Add' and 'Sort Order' buttons, with 'Sort Order' highlighted by a green box.



The screenshot shows the 'Sort Order List' page. It has 'Save' and 'Cancel' buttons at the top. Below is a list of signees with drag-and-drop icons: 'Roni Zinfipartner', 'zinfitest clara', and 'Zinfitest Partner'. The 'Zinfitest Partner' entry is highlighted with a green box. At the bottom are 'Save' and 'Cancel' buttons.



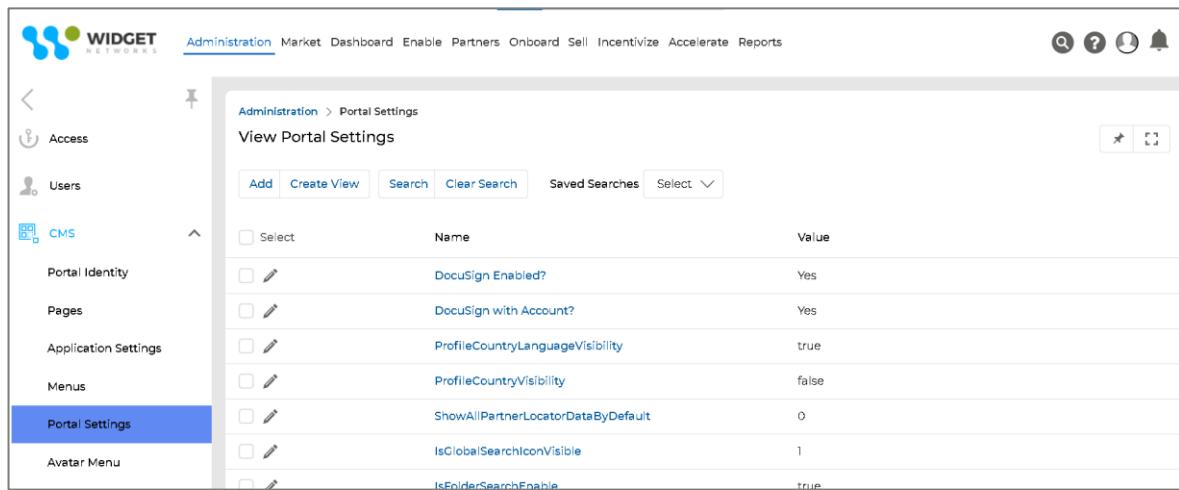
The screenshot shows the 'Sort Order List' page. It has 'Save' and 'Cancel' buttons at the top. Below is a list of signees with drag-and-drop icons: 'Zinfitest Partner', 'Roni Zinfipartner', and 'zinfitest clara'. The 'Zinfitest Partner' entry is highlighted with a green box. At the bottom are 'Save' and 'Cancel' buttons.

- Once the required signatories are added, and the sequence is defined, the final list will appear, as shown in the image below.

— Signee					
Action	Name	Signatory Type	SortOrder	Created by	Created On
	Zinfitest Partner	Admin	1	Bishal Mandal	12/11/2024 7:12:45 PM
	zinfitest clara	Partner	3	Bishal Mandal	12/11/2024 7:05:18 PM
	Roni Zinfipartner	Partner	2	Bishal Mandal	12/11/2024 7:04:05 PM

## DocuSign with Account

- To assign contract templates created by Admins to Partner Accounts, go to **Portal Settings** by navigating through **Administration > CMS > Portal Settings**.

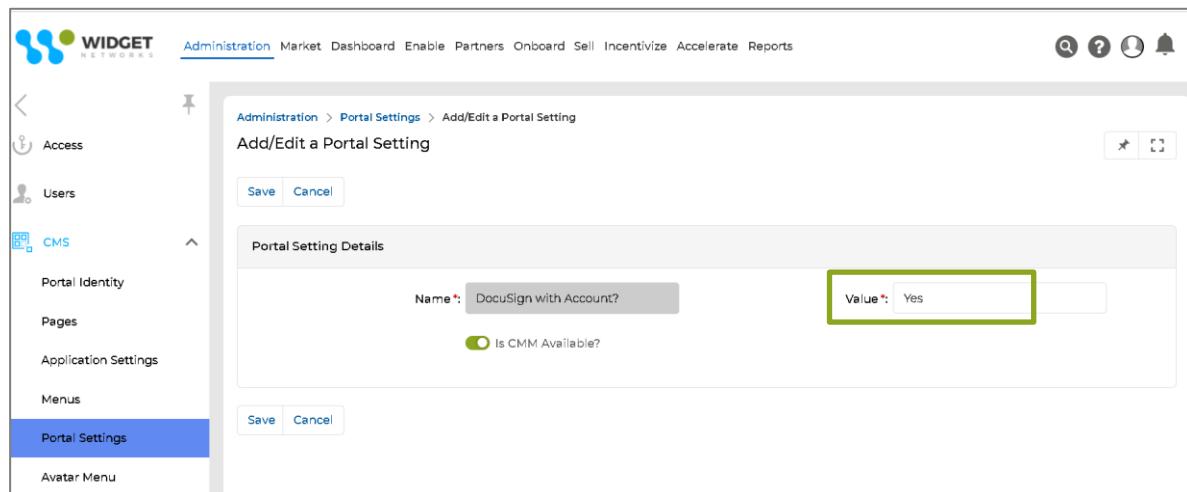


Administration > Portal Settings

View Portal Settings

Add	Create View	Search	Clear Search	Saved Searches	Select
	Name	Value			
	DocuSign Enabled?	Yes			
	DocuSign with Account?	Yes			
	ProfileCountryLanguageVisibility	true			
	ProfileCountryVisibility	false			
	ShowAllPartnerLocatorDataByDefault	0			
	IsGlobalSearchIconVisible	1			
	IsFolderSearchEnable	true			

- Clicking the edit icon for 'DocuSign with Account' directs you to the 'Add/Edit a Portal Setting' page, where the Value field should be set to 'Yes'.

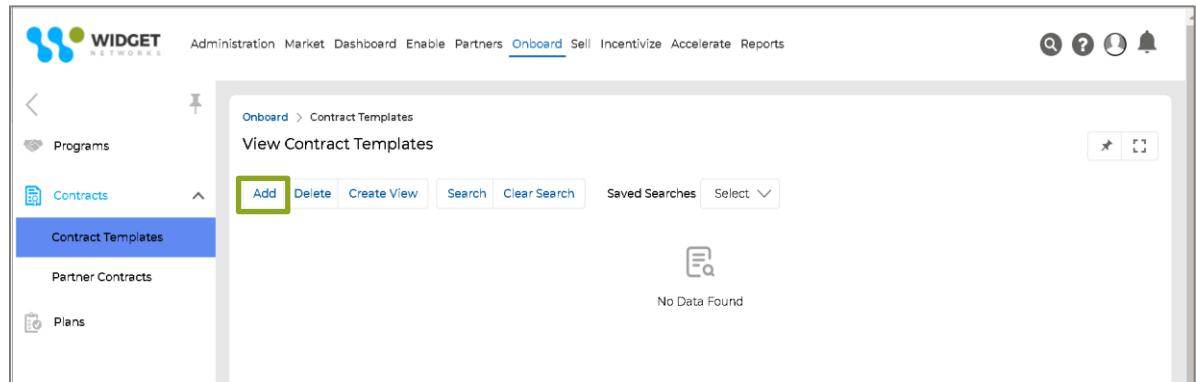


Administration > Portal Settings > Add/Edit a Portal Setting

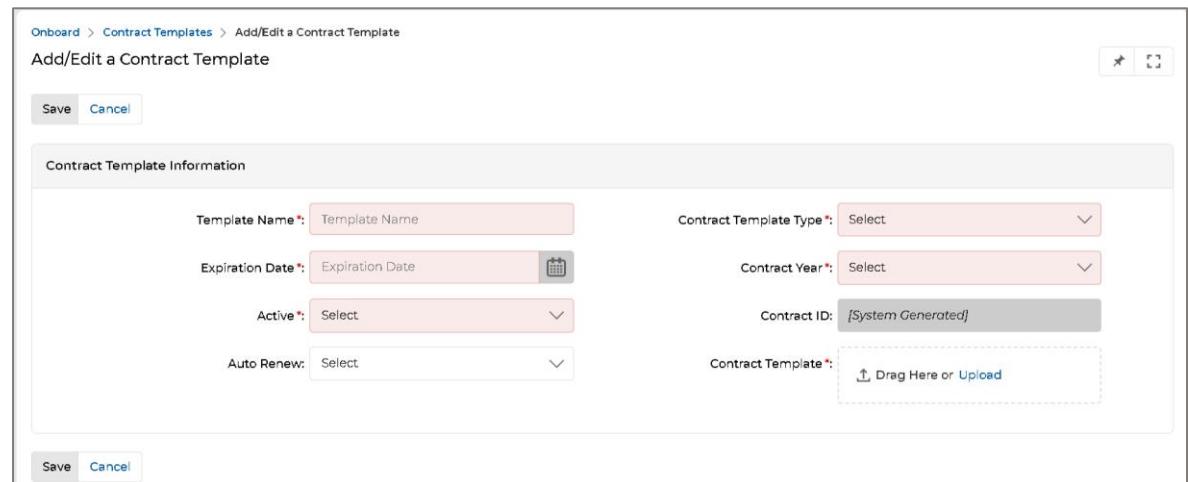
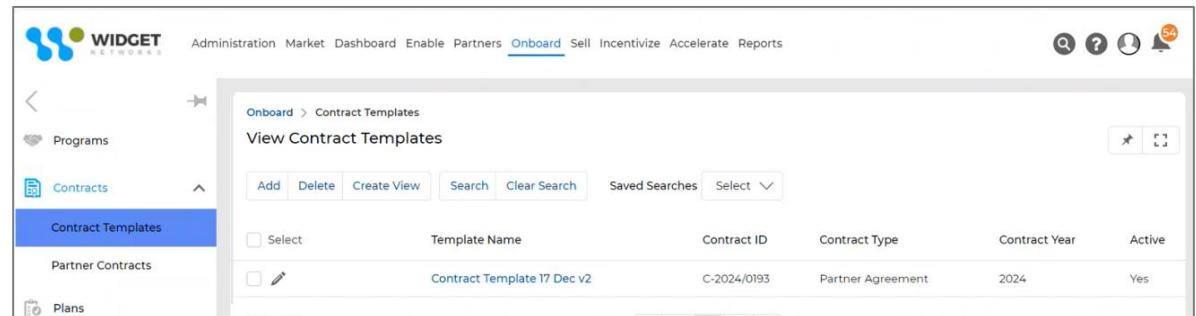
Add/Edit a Portal Setting

Save	Cancel
Portal Setting Details	
Name*: DocuSign with Account?	
<input checked="" type="checkbox"/> Is CMM Available?	
Save	Cancel

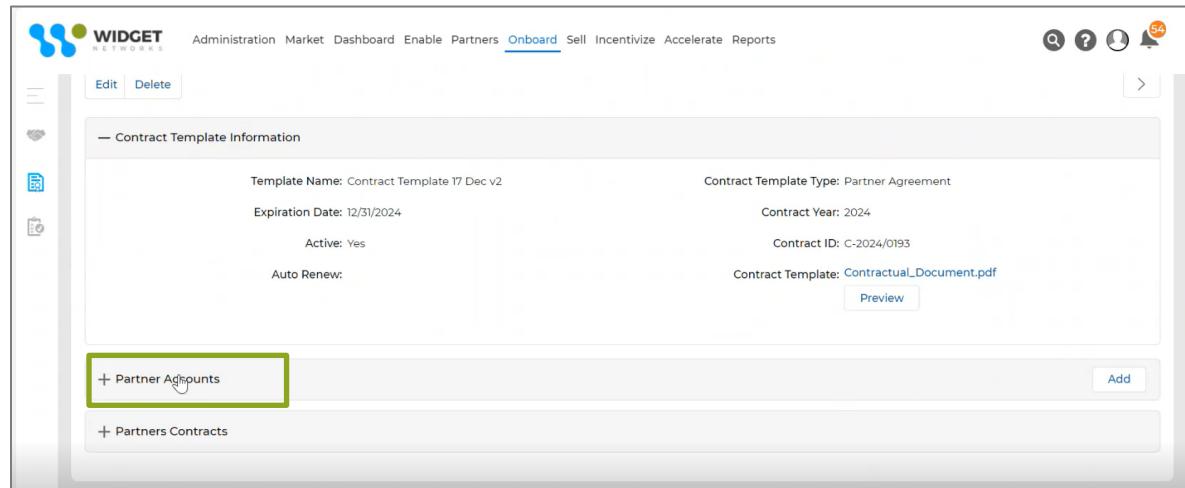
- To create a new contract template, navigate to Onboard > Contract Templates and click the Add button.



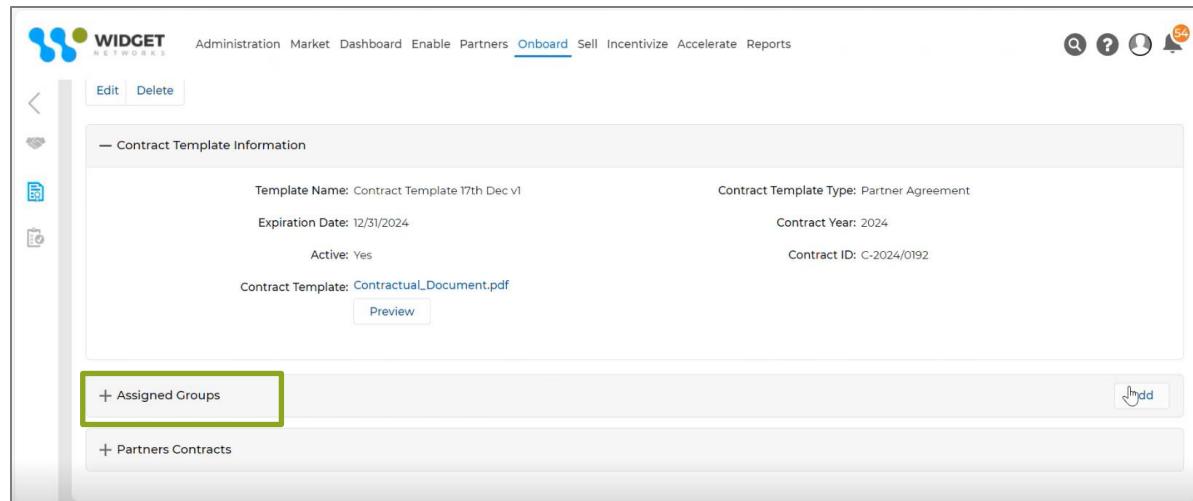
- Enter all necessary details on the Contract Template Information page and click Save. Once saved, the contract template will be assigned at the account level, including a list of related partner accounts where you can add the required accounts.

Select	Template Name	Contract ID	Contract Type	Contract Year	Active
<input type="checkbox"/>	Contract Template 17 Dec v2	C-2024/0193	Partner Agreement	2024	Yes



- Similarly, in Portal Settings, if the value for 'DocuSign with Account' is set to 'No', a contract template can be created for Groups, providing the option to add the necessary groups.



## Origin of Feature

Customer request. This feature enables Admin users to assign contract templates to Partner Accounts and effectively manage contract signatories.

## CX Strategy Relation (6 S's)



Scalability

## Portal User-Facing Benefits

This feature allows Admins to manage contract signatories efficiently, set signing sequences, and assign contract templates to Partner Accounts. It streamlines the contract signing process with flexible customization and automatic DocuSign integration for improved contract management.

## Partner Locator Enhancements

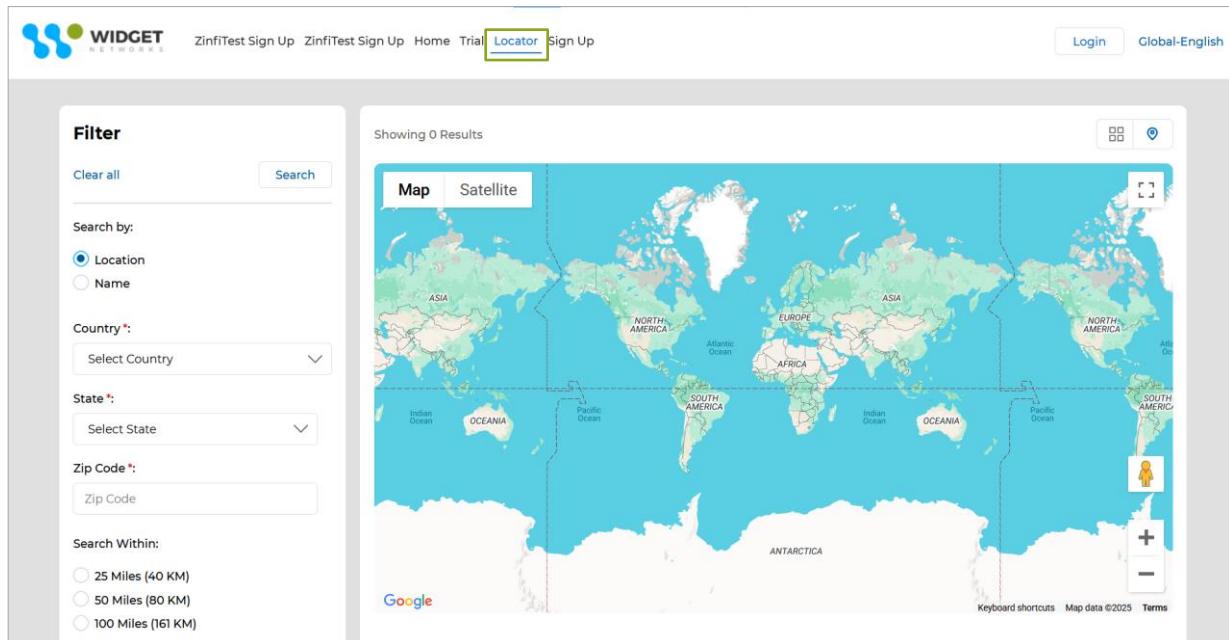
### Related Application(s)

Marketplace Management

### Feature Description

The enhanced Partner Locator empowers administrators with robust tools for precise partner discovery. Buyers and end-prospects can leverage powerful search filters integrated with Google Maps, including location-based criteria (country, state, zip code, and radius). Partner accounts can input precise location data (latitude and longitude) for seamless integration with Google Maps' Location View functionality, providing a user-friendly map interface. This enables users to easily locate partners and quickly assess their locations based on geographic proximity. The refreshed interface boasts a Grid View of partner listings, facilitating efficient scanning and identifying relevant partners.

- To access the Partner Locator, navigate to the UPM pre-login page, where you'll find a direct link.



- The landing page of the Partner Locator will display the integrated Google Maps and the Filter panel.
- In the Partner Locator, you can explore a variety of search parameters and view listings of Partners that match your criteria.

The Filter panel allows you to search for partners by Location or Name, offering flexibility in finding the desired results. To clear the selected search parameters, click Clear All, and click the Search button to search for Partners. The **Clear All** and **Search** buttons have been made available from this 25.1 version at the top and bottom of the Filter panel for ease-of-use.

**Filter**

**Search by:**

Location  
 Name

**Country \*:**  
India

**State \*:**  
West Bengal

**Zip Code \*:**  
700091

**Search Within:**

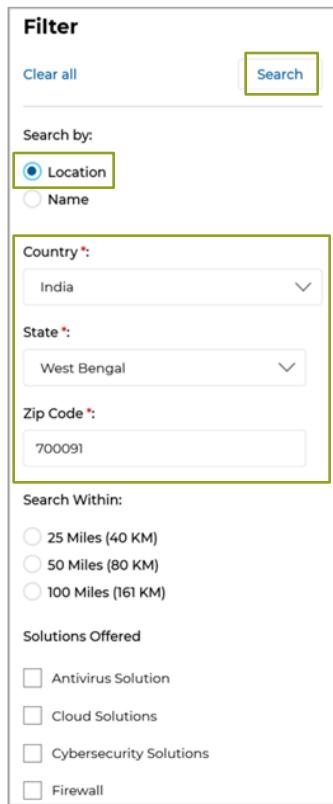
25 Miles (40 KM)  
 50 Miles (80 KM)  
 100 Miles (161 KM)

**Solutions Offered**

Antivirus Solution  
 Cloud Solutions  
 Cybersecurity Solutions  
 Firewall  
 NAS Solutions  
 Zinfitest Locator  
 ZinfiTest Solution Offered 1  
 ZinfiTest Solution Offered 2  
 ZinfiTest Solution Offered 3  
 ZinfiTest Solution Offered 4  
 ZinfiTest Solution Offered 5

**Clear all** **Search**

- **Location:** To search by location, select the Location filter and refine your search to discover Partners based on their geographical details. The search filters available under 'Location' are described below.



**Filter**

Clear all

Search by:

Location  Name

Country \*:

State \*:

Zip Code \*:

Search Within:

25 Miles (40 KM)  
 50 Miles (80 KM)  
 100 Miles (161 KM)

Solutions Offered

Antivirus Solution  
 Cloud Solutions  
 Cybersecurity Solutions  
 Firewall

#### i. Search Fields:

- **Country** – Choose a specific country from the dropdown to narrow your search results.
- **State** – Choose a specific state from the dropdown to narrow your search results.
- **Zip Code** – Provide a specific one to narrow your search results.

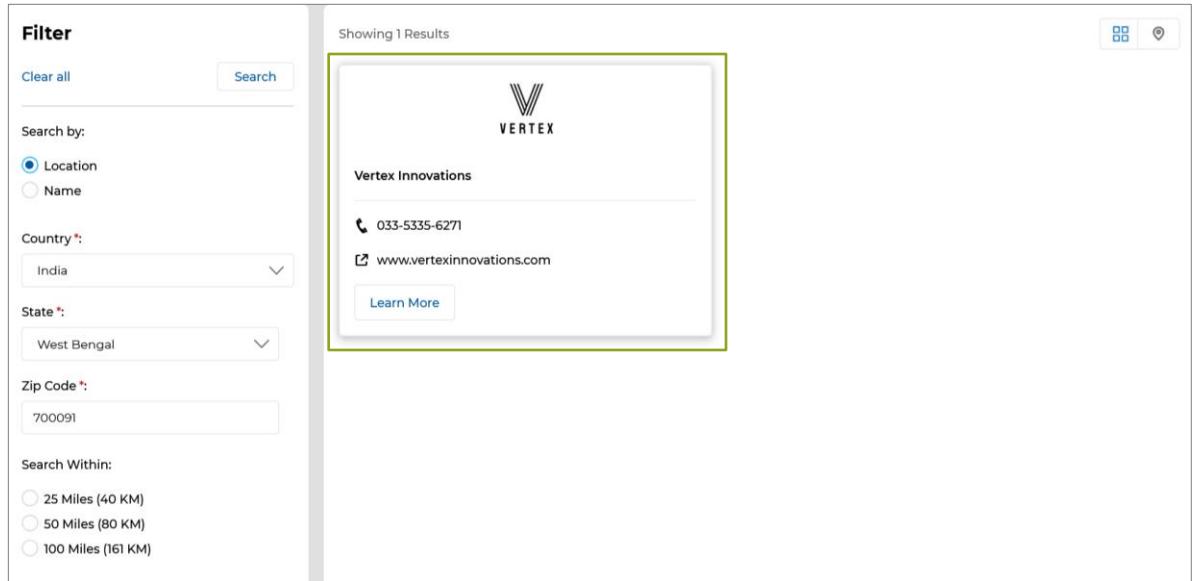
#### ii. Search Within:

- **25 Miles (40 KM)** – Select this option to search Partners within the 25 Miles (40 KM) radius within the Zip Code mentioned.
- **50 Miles (80 KM)** – Select this option to search Partners within the 50 Miles (80 KM) radius within the Zip Code mentioned.
- **100 Miles (161 KM)** – Select this option to search for Partners within the 100-mile (161-kilometer) radius of the Zip Code mentioned.

#### iii. Solutions Offered Filters:

- This filter showcases all partners' available solutions, allowing users to explore options tailored to their needs. Users can refine the partner listings by selecting their

desired solutions, ensuring the displayed details align perfectly with their chosen criteria.



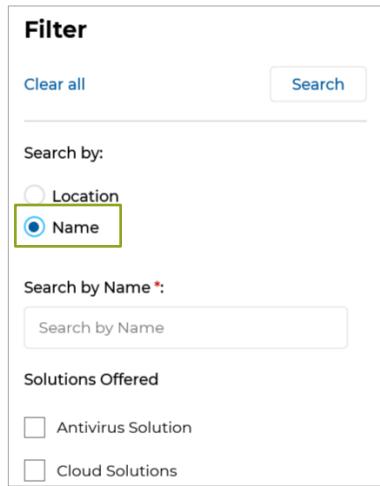
The screenshot shows the ZINFO search interface. On the left, a 'Filter' sidebar is open with the following settings:

- Search by:**  Location  Name
- Country \*:** India
- State \*:** West Bengal
- Zip Code \*:** 700091
- Search Within:**  25 Miles (40 KM)  50 Miles (80 KM)  100 Miles (161 KM)

The main panel displays the search results for 'VERTEX' with the following details:

**VERTEX**  
**VERTEX Innovations**  
*033-5335-6271*  
[www.vertexinnovations.com](http://www.vertexinnovations.com)  
[Learn More](#)

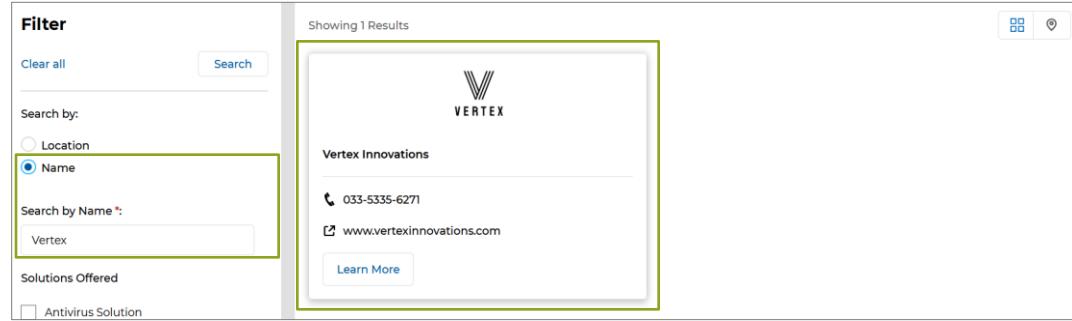
- **Name:** Select the Name filter to search for Partners by name. The search filters available under the Name category are detailed below.



The screenshot shows the ZINFO search interface with the 'Name' filter selected in the 'Search by' section. Other settings in the sidebar include:

- Search by Name \*:**
- Solutions Offered** (checkboxes for Antivirus Solution and Cloud Solutions are present but not checked)

- Search by Name:** Enter the partner's name in the search field and click the Search button to view its details.



**Filter**

Clear all

Search by:  Location  Name

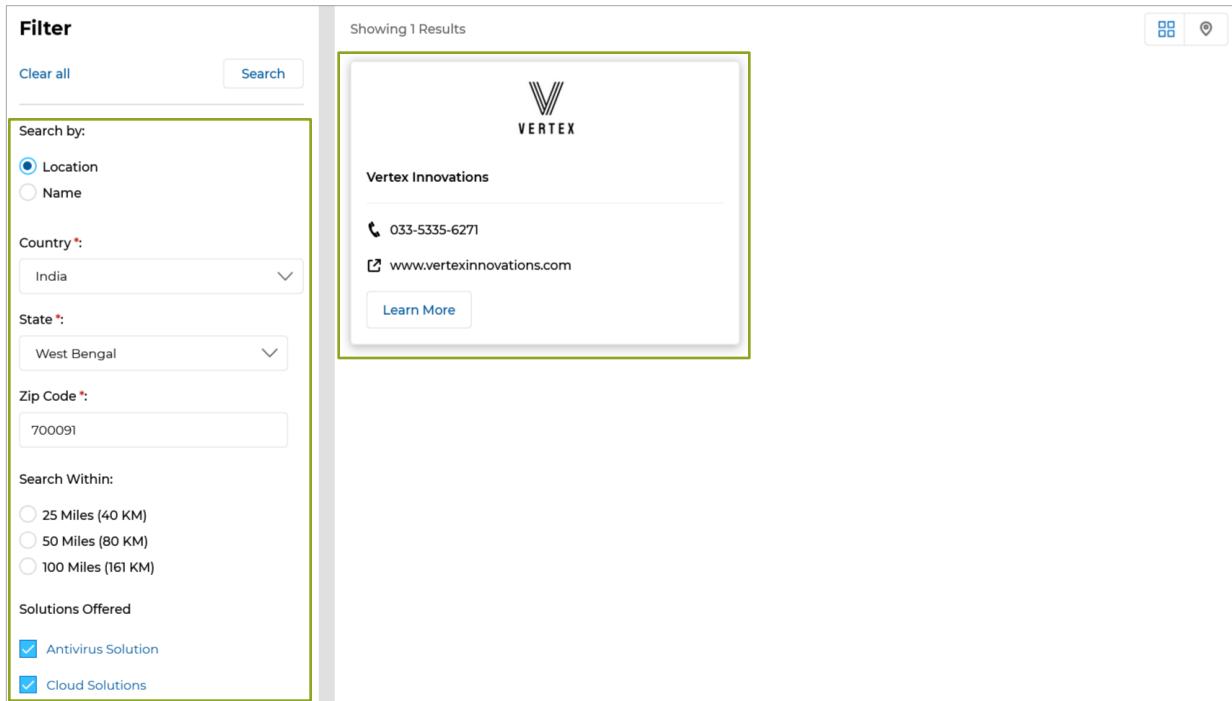
Search by Name \*:

Solutions Offered  Antivirus Solution

Showing 1 Results

**VERTEX**  
Vertex Innovations  
033-5335-6271  
www.vertexinnovations.com  
[Learn More](#)

- Once the Partners are searched according to the selected parameters, their details will appear on the right side of the Filter panel.



**Filter**

Clear all

Search by:  Location  Name

Country \*:

State \*:

Zip Code \*:

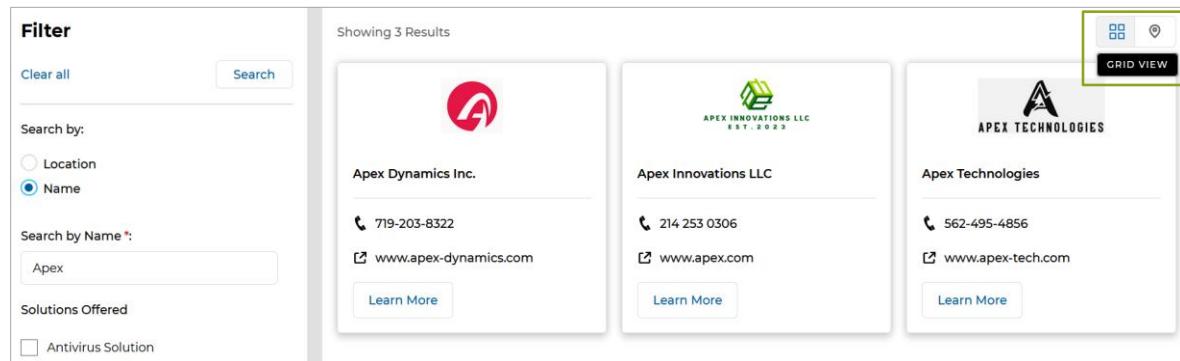
Search Within:  25 Miles (40 KM)  50 Miles (80 KM)  100 Miles (161 KM)

Solutions Offered  Antivirus Solution  Cloud Solutions

Showing 1 Results

**VERTEX**  
Vertex Innovations  
033-5335-6271  
www.vertexinnovations.com  
[Learn More](#)

- The User can view the Partner details either by **Grid View** or **Location View** –
  - Grid View:** The Grid View feature presents each Partner's details in a visually structured grid layout, ensuring clarity and ease of access. Key information, including the Partner's name, contact number, and website, is displayed concisely and organized, enhancing user experience and simplifying data navigation.



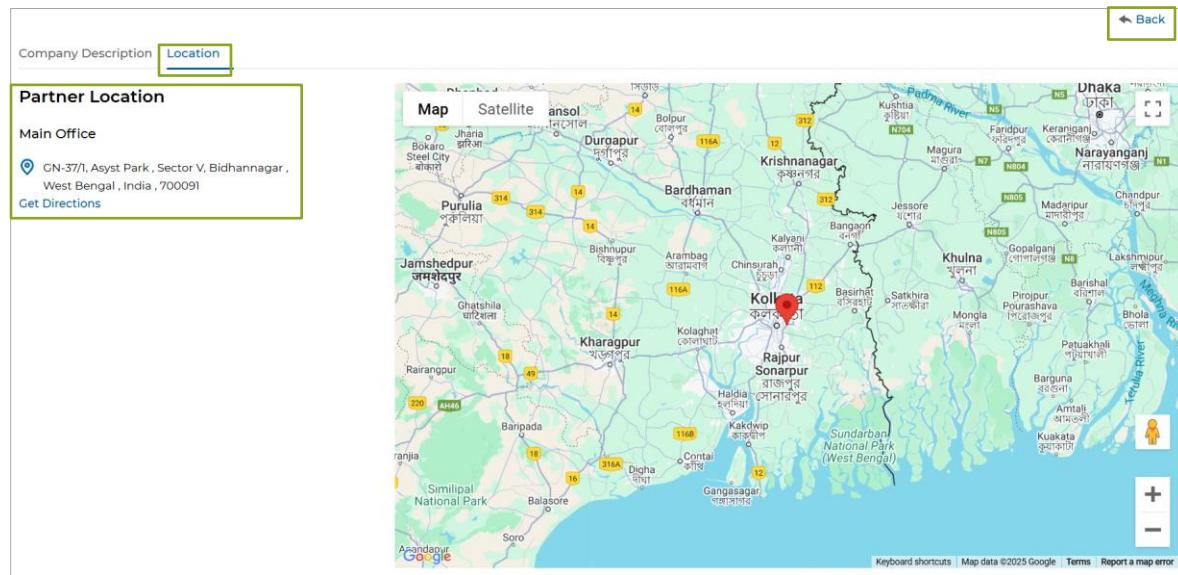
Clicking the 'Learn More' button will take us to the partner's details page. Information such as the Partner's name, address, phone number, and website will be available.

Two tabs are available –

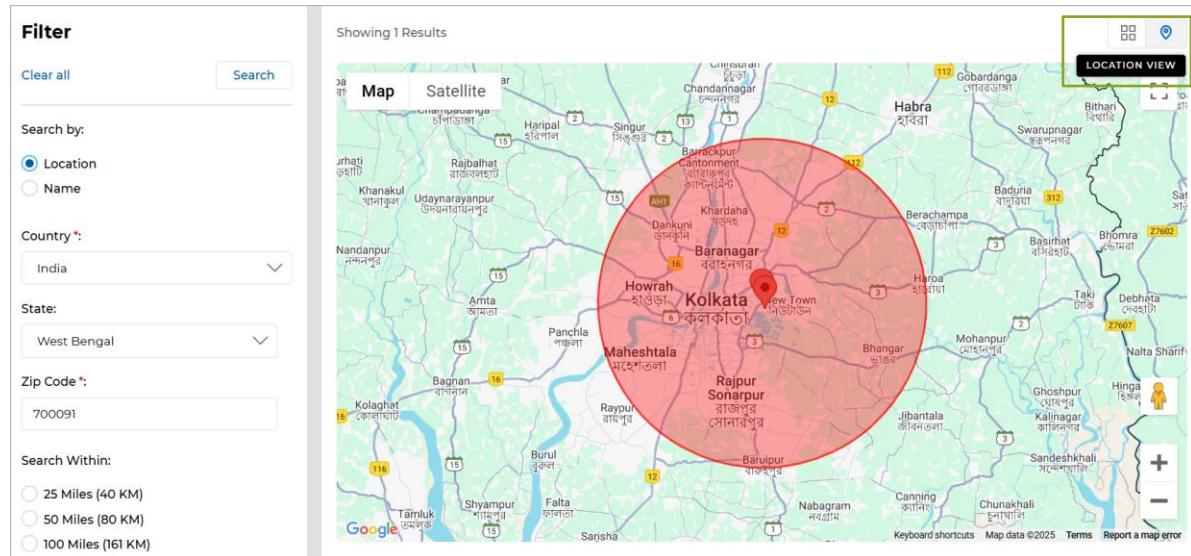
- Company Description:** The Company Description provides a concise overview of the Partner, serving as an introduction to potential customers, partners, and other stakeholders. It typically includes key details such as the company's name, mission, vision, values, industry, and a brief history. It may also highlight the core products or services, target audience, and unique selling points that set the business apart.



- Location:** The Location section provides essential information about where the Partner is situated, helping customers, partners, and other stakeholders connect with them physically if needed. It typically includes the company's physical address, such as street, city, state, and postal code. This section also features an embedded Google Maps map for easy navigation.
- Back** – Clicking the integrated Back Button for the 25.1 release takes the user to the Partner listing page.



- **Location View:** The Location View feature effortlessly enables users to locate a Partner on Google Maps. This functionality is available exclusively when the Partner's latitude and longitude coordinates are specified in the Partnership Information section on the Partner details page.



**Note:** In the Partnership Information section of the Add/Edit Partner Account page, ensure that the partner's Latitude and Longitude are provided along with other necessary details. Including the latitude and longitude allows for accurate pinpointing of the partner's location on Google Maps on the Locator page. This functionality works in coordination with the partner's ZIP code.

Partners > Partner Accounts > View a Partner Account

View a Partner Account

Edit Delete Clone Assign To Partner Account Locator Scorecard

— Partnership Information

Account Name:	Vertex Innovations	License Status:	Active
Partner ID:		Preferred Distributor:	
MDF Allowed:	No	Target Segments:	
MDF Quarterly Budget:		Strategic Alliances:	
Deal Registration Allowed:	No	Specialization:	
Lead Distribution Ranking:		Core Competencies:	
Key Competitors:		Territory Focus:	
Account Created:	1/28/24 12:22:36 PM	Last Updated:	12/24/24 11:03:44 AM
Account Admin:		Region:	ASIA PACIFIC
Reports To:		Groups Assign To:	
Master Account:		Relationship Challenges:	
Partner Logo:	 Picture1.png	Apps Specialization:	
Latitude:	22.5728522	Longitude:	88.4341222
Partner Tier:		Partner Score:	

## Origin of Feature

Customer request. The feature is requested to enhance the Partner Locator by integrating advanced search filters with Google Maps for precise partner discovery.

## CX Strategy Relation (6 S's)



Sufficiency

## Portal User-Facing Benefits

The feature allows administrators/partners to use enhanced Partner Locator integrated with advanced search filters with Google Maps.

## Configurable Tooltips in Dynamic Forms for Pre-Log-in Pages

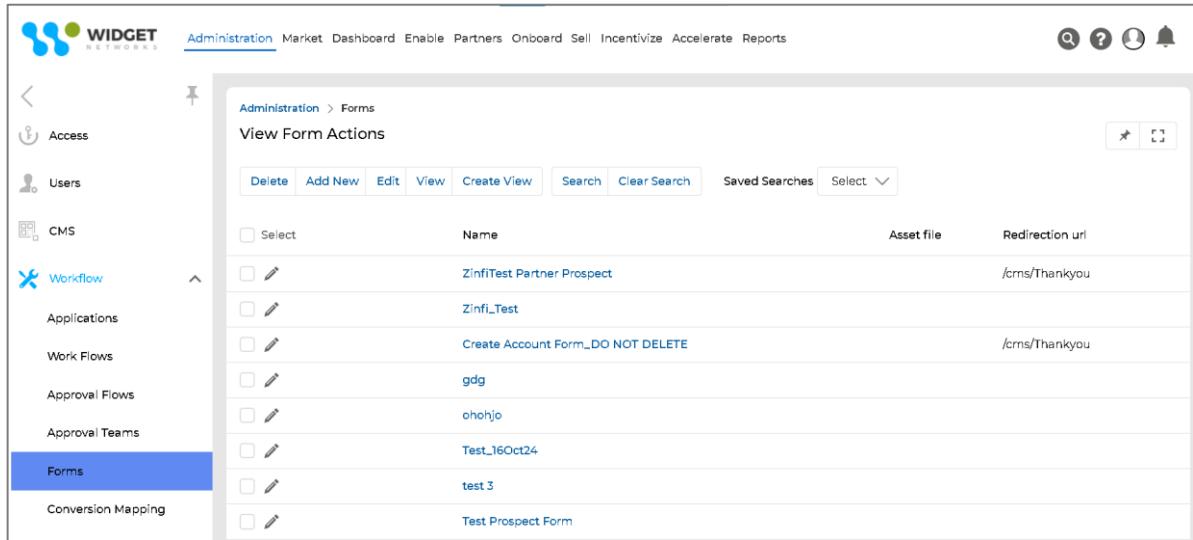
### Related Application(s)

Workflow Management

## Feature Description

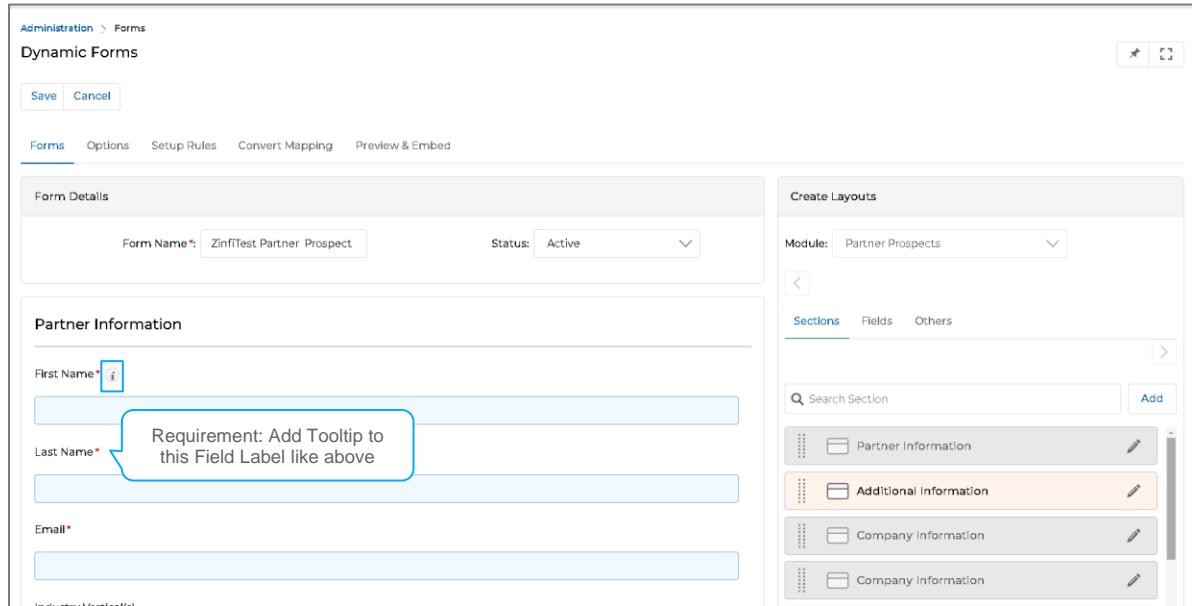
The UPM 25.1 Release introduces the ability for Admins to configure tooltips for each control in 'Dynamic Forms,' enhancing user guidance during 'Form' completion. Positioned to the right of each control, tooltips dynamically fetch text from the backend. To add or edit a tooltip, the field must first be removed from the form, then the tooltip configured from CMS, and finally re-added via drag-and-drop from the Create canvas. This feature ensures precise, user-friendly guidance in pre-login forms.

- To understand this feature in detail, go to **Administration > Workflow > Forms**.

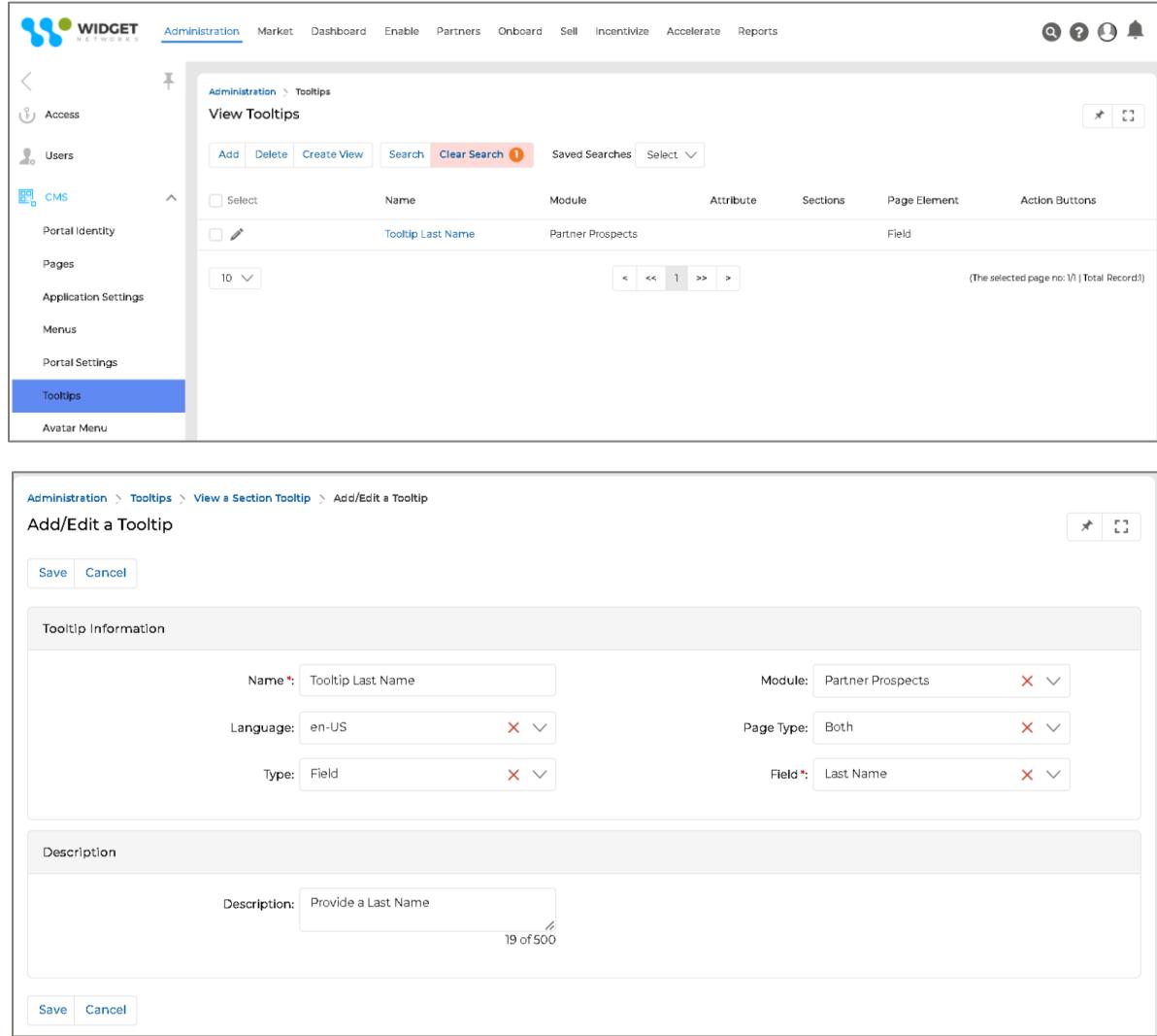


Select	Name	Asset file	Redirection url
<input type="checkbox"/>	ZinfoTest Partner Prospect		/cms/Thankyou
<input type="checkbox"/>	Zinfo_Test		
<input type="checkbox"/>	Create Account Form_DO NOT DELETE		/cms/Thankyou
<input type="checkbox"/>	gdg		
<input type="checkbox"/>	ohohjo		
<input type="checkbox"/>	Test_16Oct24		
<input type="checkbox"/>	test_3		
<input type="checkbox"/>	Test Prospect Form		

- Clicking on 'Forms' will navigate you to the 'View Form Actions' page, where you can create a form for a Partner Prospect on the pre-login page. The UPM 25.1 Release introduces tooltips for form fields, providing users with clear guidance for completing the form, as illustrated in the image below.



- To add a tooltip to any control on the pre-login page, the control must first be configured with a tooltip in the CMS. For instance, the 'Last Name' field can be configured with a tooltip by navigating to **Administration > CMS > Tooltips**.



The screenshot shows the Zinfi CMS Administration interface. The left sidebar is collapsed, showing the following navigation structure:

- Access
- Users
- CMS** (selected)
- Portal identity
- Pages
- Application Settings
- Menus
- Portal Settings
- Tooltips** (selected)
- Avatar Menu

The main content area is titled "View Tooltips". It includes a toolbar with "Add", "Delete", "Create View", "Search", "Clear Search" (with a red notification dot), and "Saved Searches". Below the toolbar is a table with the following columns: "Select", "Name", "Module", "Attribute", "Sections", "Page Element", and "Action Buttons". One row is visible, showing "Tooltip Last Name" under "Name", "Partner Prospects" under "Module", and "Field" under "Page Element". The table has a page number indicator "10" and a navigation bar with arrows. A note at the bottom right says "(The selected page no: 1/1 | Total Record: 1)".

Below this, the URL is "Administration > Tooltips > View a Section Tooltip > Add/Edit a Tooltip". The form is titled "Add/Edit a Tooltip" and contains the following fields:

Tooltip Information	
Name:	Tooltip Last Name
Module:	Partner Prospects
Language:	en-US
Page Type:	Both
Type:	Field
Field:	Last Name

The "Description" section contains a text area with the placeholder "Provide a Last Name".

At the bottom of the form are "Save" and "Cancel" buttons.

- Next, the existing field (without a tooltip) must be removed from the current form.

Administration > Forms

## Dynamic Forms

Save Cancel

Forms Options Setup Rules Convert Mapping Preview & Embed

### Form Details

Form Name\*: ZinfiTest Partner Prc Status: Active

### Partner Information

First Name\*

Email\*

Industry Vertical(s)

Contact Address

### Create Layouts

Module: Partner Prospects

Sections Fields Others

Search Section  Add

- Partner Information
- Additional Information
- Company Information
- Company Information
- Alternate Address

- Finally, the ‘Last Name’ field can be re-added from the ‘Create Layout’ panel using drag-and-drop functionality.

Administration > Forms

## Dynamic Forms

Save Cancel

Forms Options Setup Rules Convert Mapping Preview & Embed

### Form Details

Form Name\*: ZinfiTest Partner Prospect Status: Active

### Partner Information

First Name\*

Last Name\*  Tooltip added to this field

Email\*

### Create Layouts

Module: Partner Prospects

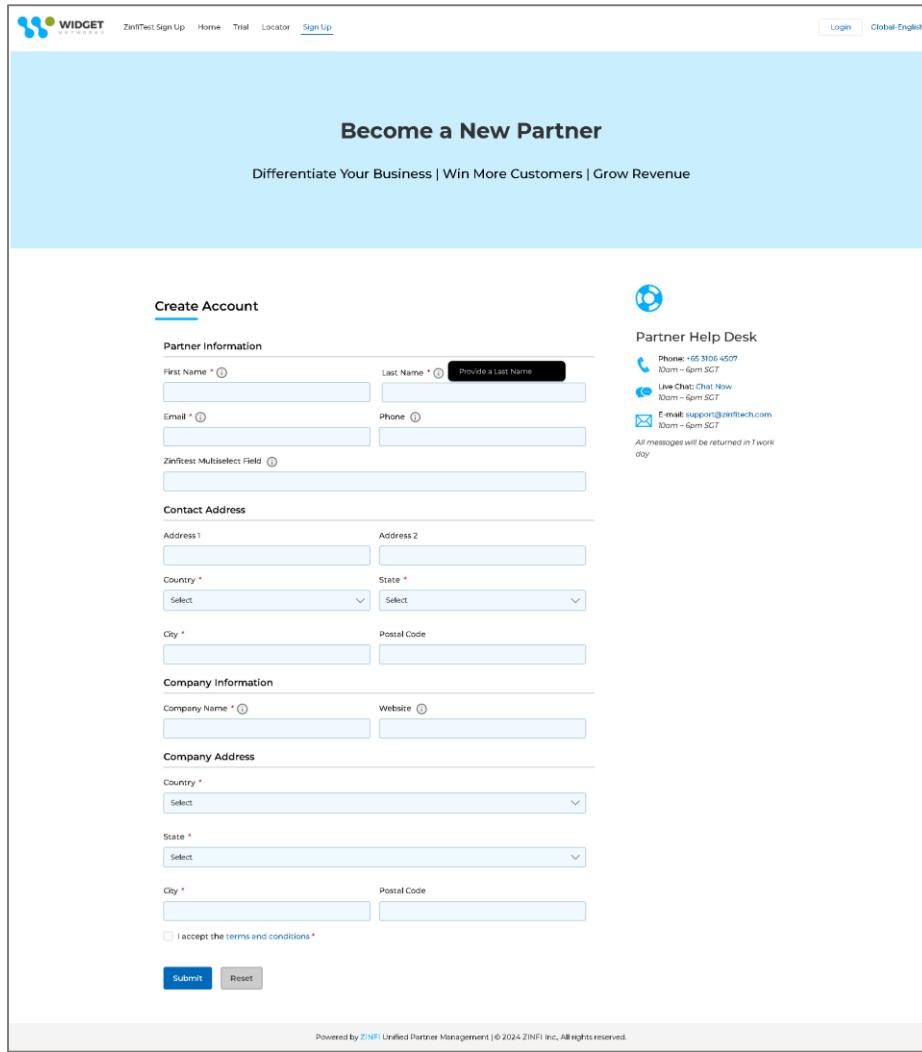
Sections Fields Others

Search Fields  Add

Setup Field Display Logic

- First Name[ FIRST\_NAME ]
- Last Name[ LAST\_NAME ]
- Phone[ PHONE\_HOME ]

- Once tooltips are added to the required controls and the record is saved, they will appear on the pre-login page, as illustrated in the image below.



The screenshot shows a 'Create Account' form on a 'Become a New Partner' page. The form includes sections for Partner Information, Contact Address, Company Information, and Company Address. A tooltip for a required field is visible above the 'Last Name' input field. The right side of the page features a 'Partner Help Desk' section with contact information and a 'Powered by ZINFO Unified Partner Management | © 2024 ZINFO Inc, All rights reserved.' footer.

## Origin of Feature

Customer request. This feature enables admins to configure tooltips for controls on the pre-login page, providing users with essential guidance while completing the form.

## CX Strategy Relation (6 S's)



Sufficiency

## Portal User-Facing Benefits

Tooltips configured by admins assist users in completing forms on pre-login pages. This feature provides dynamic, backend-driven guidance for form controls, enhancing usability and delivering a seamless, intuitive experience for users navigating the pre-login interface.

## Tabbed View Interface for Application Record(s) Create/View

### Related Application(s)

Generic, Workflow Management

### Feature Description

The Tabbed View for Record Create/Record View in the 25.1 Release provides a structured, efficient, and user-friendly experience to create/view a record for any UPM application. It enhances usability, productivity, and accuracy by organizing information into intuitive sections, validating data in real time, and improving navigation. The tabbed interface organizes related information into separate sections, reducing visual clutter and making navigation intuitive. Users can quickly switch between tabs (e.g., for Plans - Details, Plan Template, etc.) without scrolling through long forms. The structured layout improves readability and user focus, allowing users to locate and edit relevant fields without unnecessary distractions quickly. During record Creation/Editing, as users complete each tab, the system validates the input, ensuring data accuracy and preventing errors. This ensures a logical flow for creating and viewing records.

- In the following example, after logging into the UPM, the user navigates to the **Onboard > Plans > Plan Templates**.
- On the View Plan Templates page, clicking the 'Edit' button of the template will take the user to the Add/Edit a Plan Template page.

Template Name	Type	Last Modified Date
Schneider Electric Business Plan Template	Joint Marketing Plan	01/28/2025 5:27:09 PM

- On the edit page, the Related Lists will be displayed in a Sequential Tabbed Form, where each tab – Details, Plan Template and Plan Template Name becomes accessible progressively, as shown in the image below.

Onboard > Plan Templates > View a Plan Template > Add/Edit a Plan Template

### Add/Edit a Plan Template

[Cancel](#)

**Details**    Plan Template    Plan Template Name

**Plan Template Information**

Template Name \*: Schneider Electric Business Plan Template      Template Type: Joint Marketing Plan [X](#) [▼](#)

Valid From: 08/01/2024 [X](#) [Calendar](#)      Valid Till: 10/31/2024 [X](#) [Calendar](#)

**Lead Generation**

Operator: Greater Than [X](#) [▼](#)      Value: 80

**Deal Closure**

Operator: Greater Than [X](#) [▼](#)      Value: 15

**Deal Value**

Operator: Greater Than [X](#) [▼](#)      Value:  Value

**Customer Satisfaction**

Operator: Greater Than [X](#) [▼](#)      Value: 85%

[Save & Continue](#)

[Cancel](#)

- To proceed to the next tab, the user must click the '**Save & Continue**' button after entering the required details in the current form.
- Clicking the 'Previous' button will take the user to the previous Related List.

Onboard > Plan Templates > View a Plan Template > Add/Edit a Plan Template

### Add/Edit a Plan Template

[Cancel](#)

Details  Plan Template  Plan Template Name

— Plan\_Template\_Name

Action	Partner ID	Plan Name	Plan ID	Partner Account Type
		Signing Vendors	MP-24Q4-000015.1	
		Demo September 12	MP-24Q3-000014.2	Value Added Reseller
		Dave4	MP-24Q3-000013.2	Distributor
		Dave3	MP-24Q3-000012.2	
		BOPP Demo August6th	MP-24Q3-000011.2	Large Account Reseller

[View All](#) [Add](#)

[Click to View More](#)

[Previous](#) [Save](#)

[Cancel](#)

- Previously, the Related Lists were displayed as shown in the image below.

Onboard > Plan Templates > View a Plan Template

### View a Plan Template

[Edit](#) [Delete](#) [Assign To](#)

— Plan Template Information

Template Name: Schneider Electric Business Plan Template	Template Type: Joint Marketing Plan
Valid From: 08/01/2024	Valid Till: 10/31/2024

+ Lead Generation

+ Deal Closure

+ Deal Value

+ Customer Satisfaction

+ Plan Template

— Plan Template Name

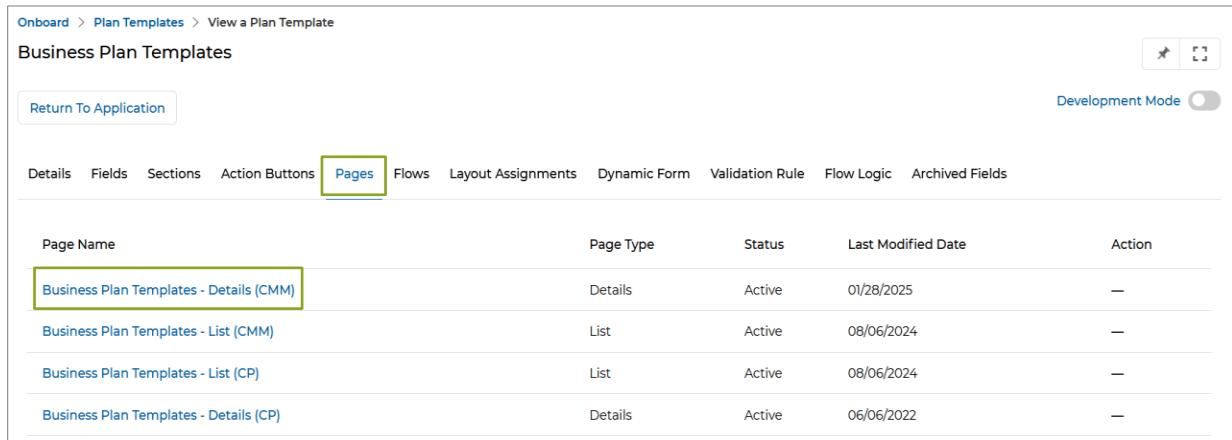
Action	Partner ID	Plan Name	Plan ID	Partner Account Type
		Signing Vendors	MP-24Q4-000015.1	
		Demo September 12	MP-24Q3-000014.2	Value Added Reseller
		Dave4	MP-24Q3-000013.2	Distributor
		Dave3	MP-24Q3-000012.2	
		BOPP Demo August6th	MP-24Q3-000011.2	Large Account Reseller

[View All](#) [Add](#)

[Click to View More](#)

- **Enabling the Feature for a UPM Application:**

- To change the layout of the Related Lists to **Tabbed View** from **Expandable** format, the user needs to go to Workflow from the Avatar menu and go to the details page of the application.



Onboard > Plan Templates > View a Plan Template

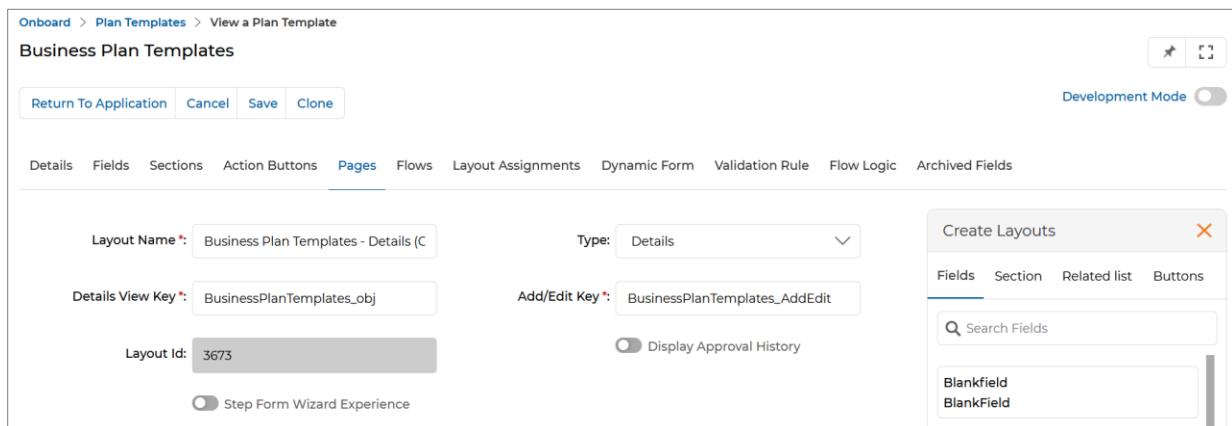
Business Plan Templates

Return To Application

Development Mode

Details Fields Sections Action Buttons **Pages** Flows Layout Assignments Dynamic Form Validation Rule Flow Logic Archived Fields

Page Name	Page Type	Status	Last Modified Date	Action
Business Plan Templates - Details (CMM)	Details	Active	01/28/2025	—
Business Plan Templates - List (CMM)	List	Active	08/06/2024	—
Business Plan Templates - List (CP)	List	Active	08/06/2024	—
Business Plan Templates - Details (CP)	Details	Active	06/06/2022	—



Onboard > Plan Templates > View a Plan Template

Business Plan Templates

Return To Application Cancel Save Clone

Development Mode

Details Fields Sections Action Buttons **Pages** Flows Layout Assignments Dynamic Form Validation Rule Flow Logic Archived Fields

Layout Name \*: Business Plan Templates - Details (C) Type: Details

Details View Key \*: BusinessPlanTemplates\_obj Add/Edit Key \*: BusinessPlanTemplates\_AddEdit

Layout Id: 3673 Display Approval History

Step Form Wizard Experience

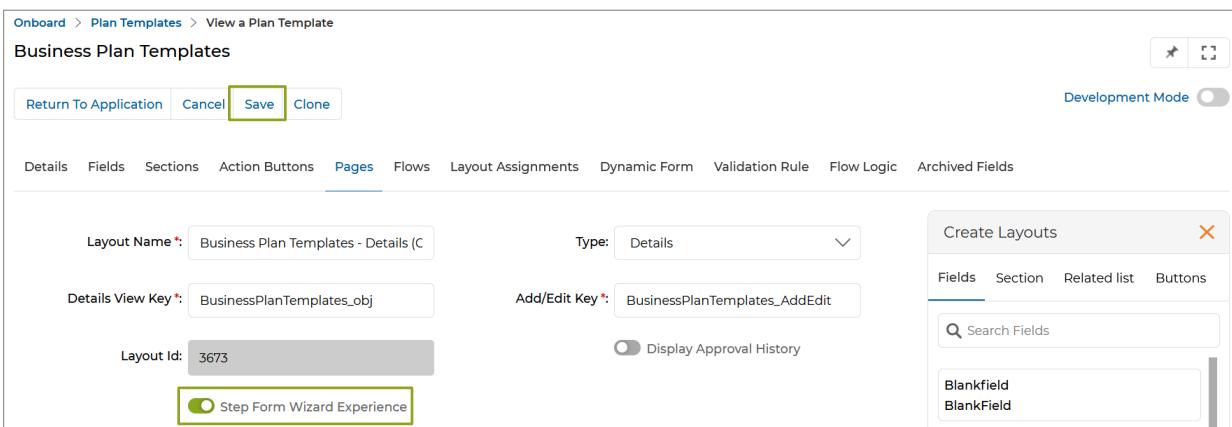
Create Layouts

Fields Section Related list Buttons

Search Fields

Blankfield BlankField

- To change the layout of the Related Lists to **Tabbed View**, the user needs to enable the toggle key associated with '**Step Form Wizard Experience**' and click Save.



Onboard > Plan Templates > View a Plan Template

Business Plan Templates

Return To Application Cancel **Save** Clone

Development Mode

Details Fields Sections Action Buttons **Pages** Flows Layout Assignments Dynamic Form Validation Rule Flow Logic Archived Fields

Layout Name \*: Business Plan Templates - Details (C) Type: Details

Details View Key \*: BusinessPlanTemplates\_obj Add/Edit Key \*: BusinessPlanTemplates\_AddEdit

Layout Id: 3673 Display Approval History

**Step Form Wizard Experience**

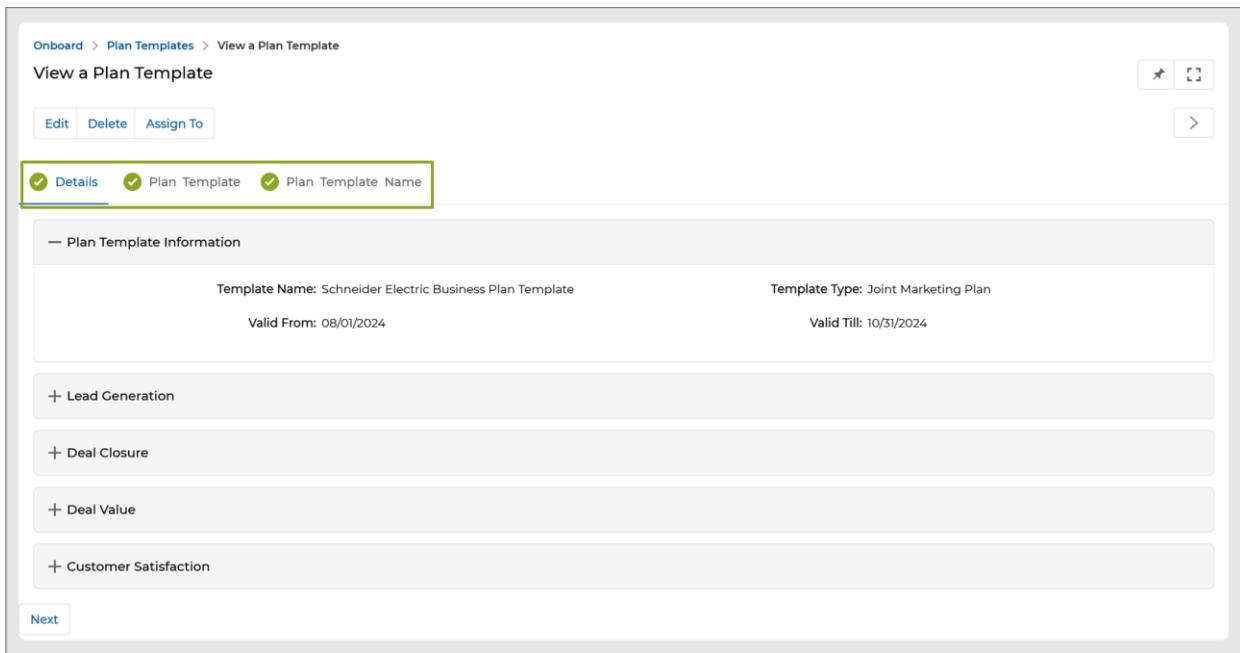
Create Layouts

Fields Section Related list Buttons

Search Fields

Blankfield BlankField

- Upon returning to the application, the user finds the layout of the Related Lists has been changed to Guided Form.



Onboard > Plan Templates > View a Plan Template

View a Plan Template

Edit Delete Assign To

Details Plan Template Plan Template Name

Plan Template Information

Template Name: Schneider Electric Business Plan Template  
Valid From: 08/01/2024  
Template Type: Joint Marketing Plan  
Valid Till: 10/31/2024

+ Lead Generation

+ Deal Closure

+ Deal Value

+ Customer Satisfaction

Next

## Origin of Feature

Customer request. This feature is designed to enable users to utilize Tabbed View to create and view records within UPM.

## CX Strategy Relation (6 S's)



Simplicity

## Portal User-Facing Benefits

This feature allows Admins and Partners to create/view records in UPM via Tabbed View.

## AI-embedded Text Content Generator for ZINFI Editor

## Related Application(s)

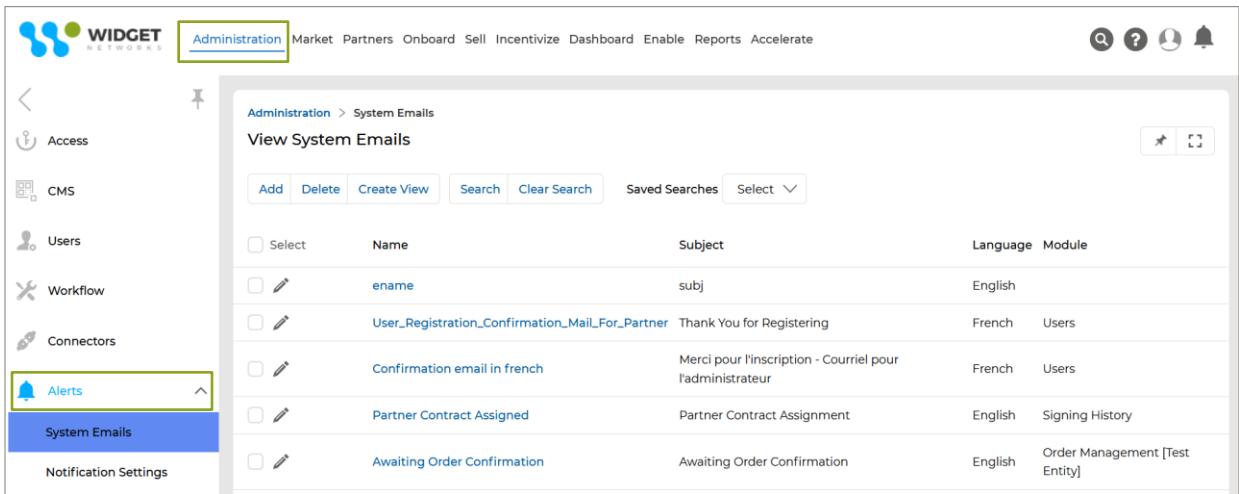
Alerts & Notification Management, Generic

## Feature Description

By leveraging generative AI, the AI-embedded text content generator for WYSIWYG ZINFI Editor integrations across the platform enables users to create high-quality content for press releases, white papers, and social media posts, accurately and in record time. The wizard-driven approach ensures a seamless and intuitive workflow, allowing users to generate content templates, refine text, and translate content into multiple languages effortlessly.

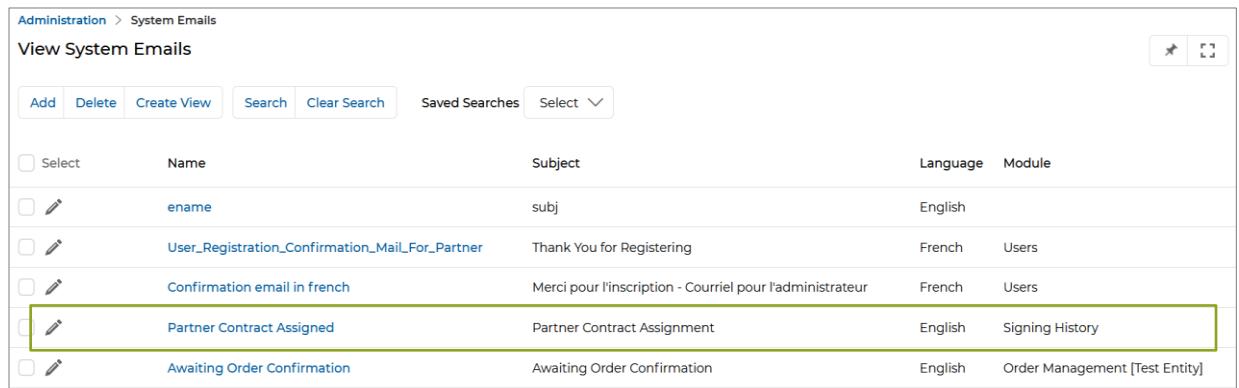
Additionally, the tool improves user experience with its customizable templates and refinement options, catering to specific needs and preferences. It fosters collaboration and enhances productivity by enabling multiple users to work seamlessly. By maintaining a professional tone and ensuring clarity, the AI-embedded generator supports effective communication, making it a valuable asset for organizations aiming to streamline content creation and improve operational efficiency.

- In the following example, after logging into UPM, the user navigates to **Administration > Alerts > System Emails**.



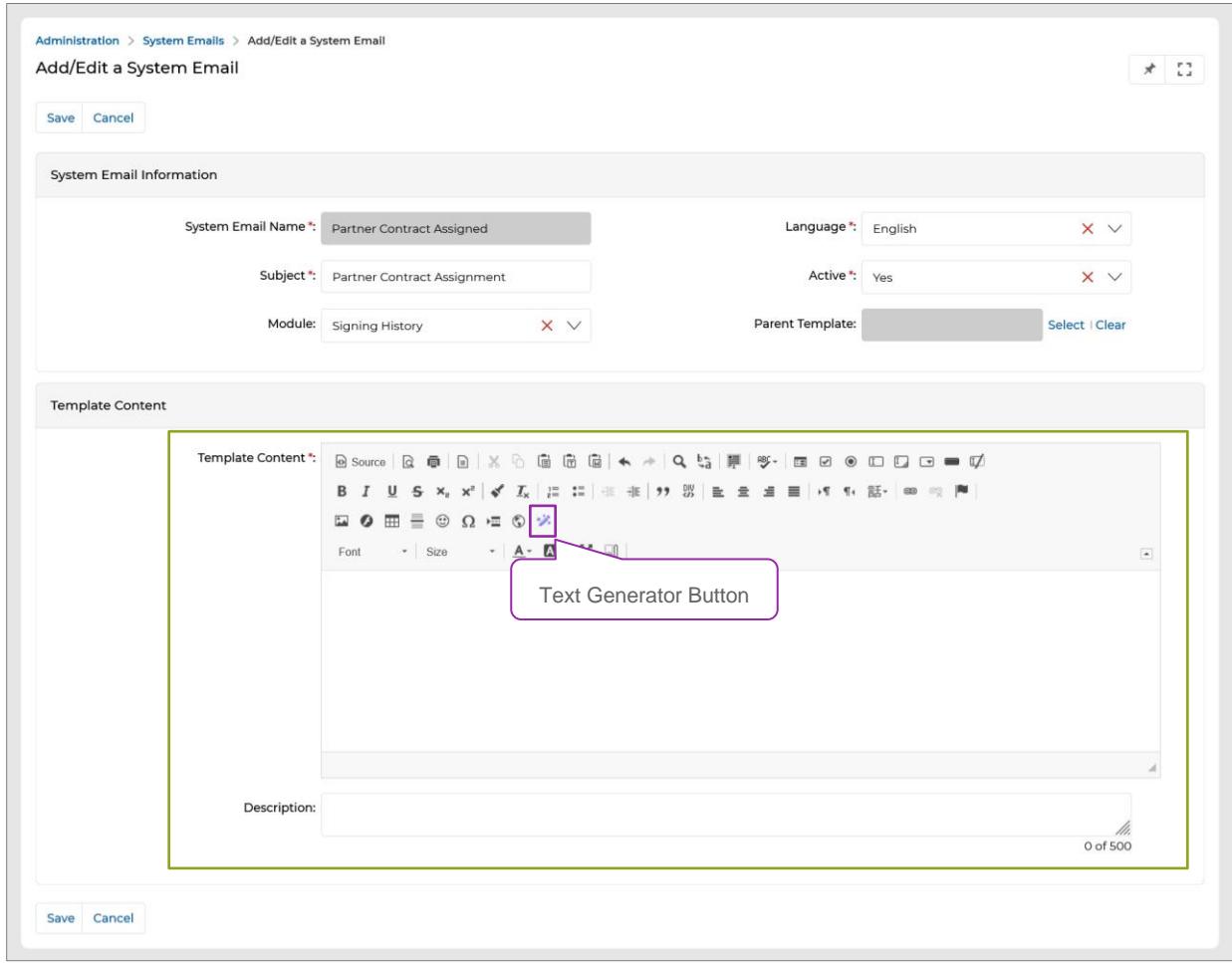
Name	Subject	Language	Module
ename	subj	English	
User_Registration_Confirmation_Mail_For_Partner	Thank You for Registering	French	Users
Confirmation_email_in_french	Merci pour l'inscription - Courriel pour l'administrateur	French	Users
Partner Contract Assigned	Partner Contract Assignment	English	Signing History
Awaiting Order Confirmation	Awaiting Order Confirmation	English	Order Management [Test Entity]

- On the listing page, the user clicks the pencil icon next to a System Email to open its details page.



Name	Subject	Language	Module
ename	subj	English	
User_Registration_Confirmation_Mail_For_Partner	Thank You for Registering	French	Users
Confirmation_email_in_french	Merci pour l'inscription - Courriel pour l'administrateur	French	Users
<b>Partner Contract Assigned</b>	Partner Contract Assignment	English	Signing History
Awaiting Order Confirmation	Awaiting Order Confirmation	English	Order Management [Test Entity]

- On the Template Content editor on the details page, the user clicks the Text Generator Button, which launches the Draft with AI window to create draft content.



Administration > System Emails > Add/Edit a System Email

Add/Edit a System Email

System Email Information

System Email Name\*: Partner Contract Assigned

Language\*: English

Subject\*: Partner Contract Assignment

Active\*: Yes

Module: Signing History

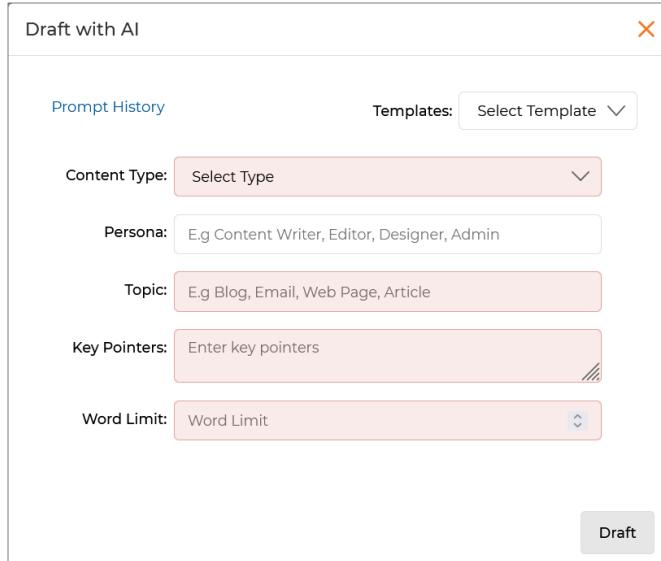
Parent Template: Select | Clear

Template Content

Template Content\*:   
 Text Generator Button (highlighted with a purple box)

Description: 0 of 500

Save | Cancel



Draft with AI

Prompt History

Templates: Select Template

Content Type: Select Type

Persona: E.g Content Writer, Editor, Designer, Admin

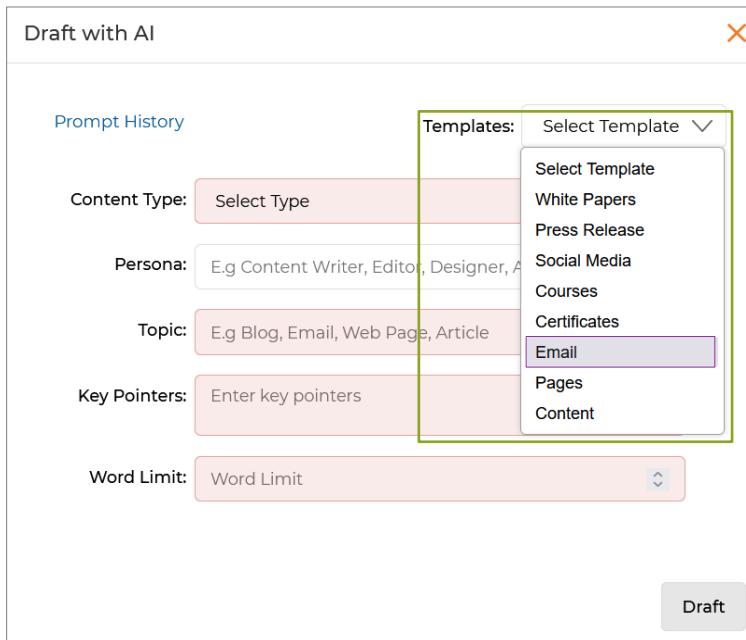
Topic: E.g Blog, Email, Web Page, Article

Key Pointers: Enter key pointers

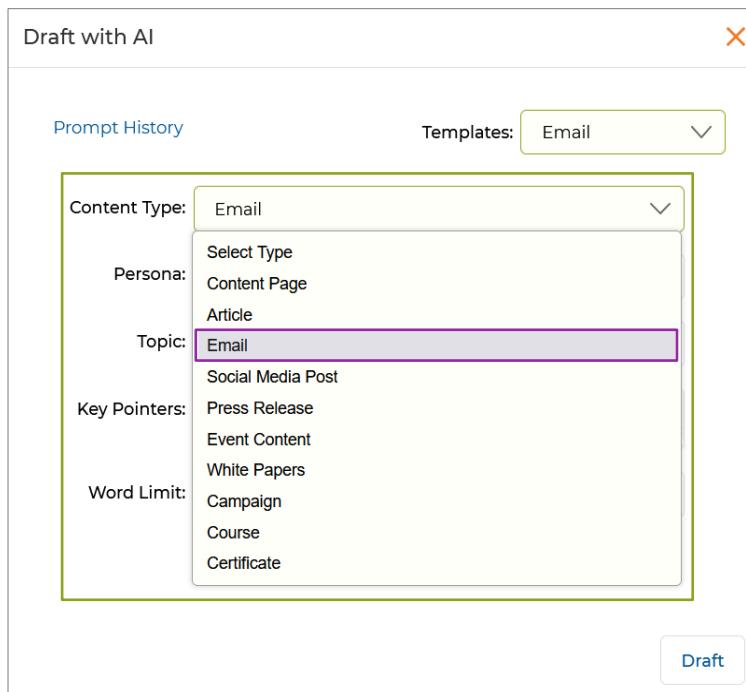
Word Limit: Word Limit

Draft

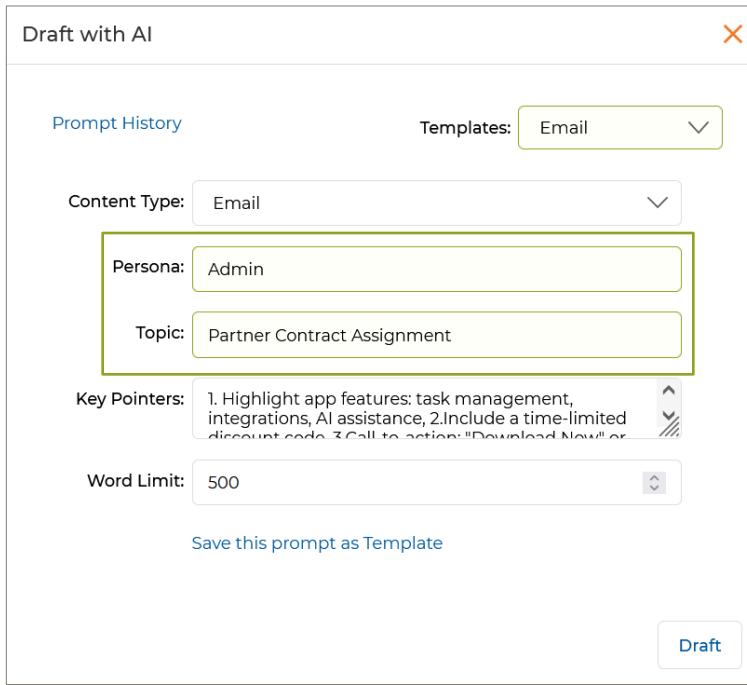
- We can select the type of template we want to use from the Templates dropdown menu. The available template types are White Papers, Press Releases, Social Media, Courses, Certificates, Emails, Pages, and Contents. For this example, we select Email.



- We have to select a type of content from a list of contents from the Content Type dropdown menu. The available content types are Content Page, Article, Email, Social Media Post, Press Release, Event Content, White Papers, Campaign, Course, and Certificate. For this example, we select Email.



- Once the Content Type is selected, we've to mention the Persona and the Topic in the Persona and the Topic Fields, respectively.



Draft with AI

Prompt History

Templates: Email

Content Type: Email

Persona: Admin

Topic: Partner Contract Assignment

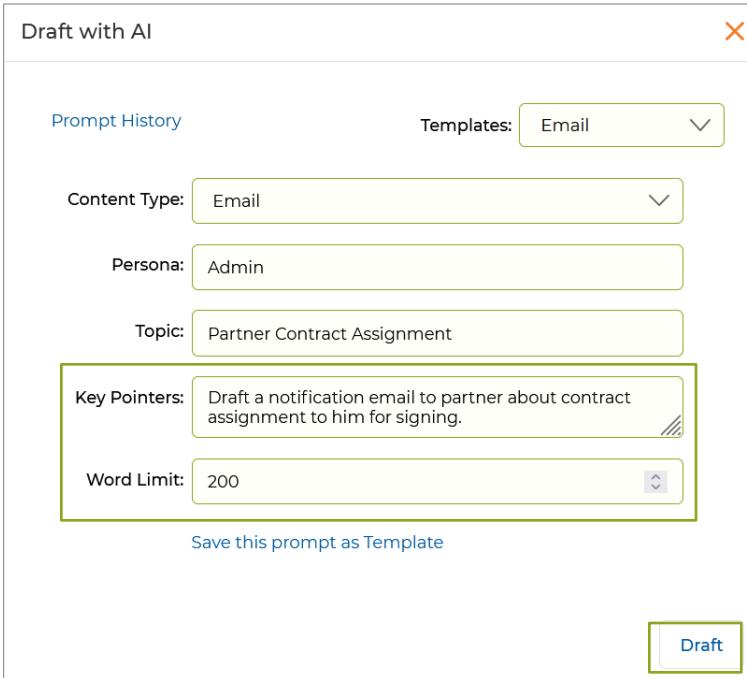
Key Pointers: 1. Highlight app features: task management, integrations, AI assistance; 2. Include a time-limited discount code; 3. Call to action: "Download Now" or similar

Word Limit: 500

Save this prompt as Template

Draft

- In the Key Pointers field, the textual instruction and context to draft the email have to be provided.
- The word limit of the generated content can be set in the Word Limit field.



Draft with AI

Prompt History

Templates: Email

Content Type: Email

Persona: Admin

Topic: Partner Contract Assignment

Key Pointers: Draft a notification email to partner about contract assignment to him for signing.

Word Limit: 200

Save this prompt as Template

Draft

- Click the Draft button to generate the content of the email.
- The content will be generated on the **Draft with AI** window.
- Click Insert to insert the generated content.

**Draft with AI** X

**#AI generated content**

Partner Contract Assignment Notification

**Partner Contract Assignment Notification**

Dear [Partner's Name],

We hope this email finds you well. We are pleased to inform you that we have prepared a contract for our upcoming collaboration. We believe this contract encapsulates the terms and conditions that will guide our partnership towards success.

As a valued partner, your agreement and signature are essential to formalize this arrangement. We kindly request that you review the contract and provide us with your signed copy at your earliest convenience.

The contract has been attached to this email for your review. Please feel free to reach out to us if you have any questions or require further clarification on any of the clauses. Your feedback is important to us, and we are open to any suggestions you may have.

Once we receive the signed contract from your end, we will proceed with the next steps to ensure a smooth start to our partnership.

We look forward to your positive response and to a fruitful collaboration.

Thank you and best regards,

[Your Name]  
[Your Position]  
[Your Contact Information]

Redraft
Edit prompt
Delete
Insert

Administration > System Emails > Add/Edit a System Email

**Add/Edit a System Email**

Save
Cancel

**System Email Information**

System Email Name: <input type="text" value="Partner Contract Assigned"/>	Language: <input type="text" value="English"/>
Subject: <input type="text" value="Partner Contract Assignment"/>	Active: <input checked="checked" type="checkbox"/>
Module: <input type="text" value="Signing History"/>	Parent Template: <input type="text"/> <span style="border: 1px solid #ccc; padding: 2px 5px; margin-left: 5px;">Select</span> <span style="border: 1px solid #ccc; padding: 2px 5px; margin-left: 5px;">Clear</span>

**Template Content**

Template Content:

Text Generator Button

Dear [Partner's Name],

We hope this email finds you well. We are pleased to inform you that we have prepared a contract for our upcoming collaboration. We believe this contract encapsulates the terms and conditions that will guide our partnership towards success.

As a valued partner, your agreement and signature are essential to formalize this arrangement. We kindly request that you review the contract and provide us with your signed copy at your earliest convenience.

body

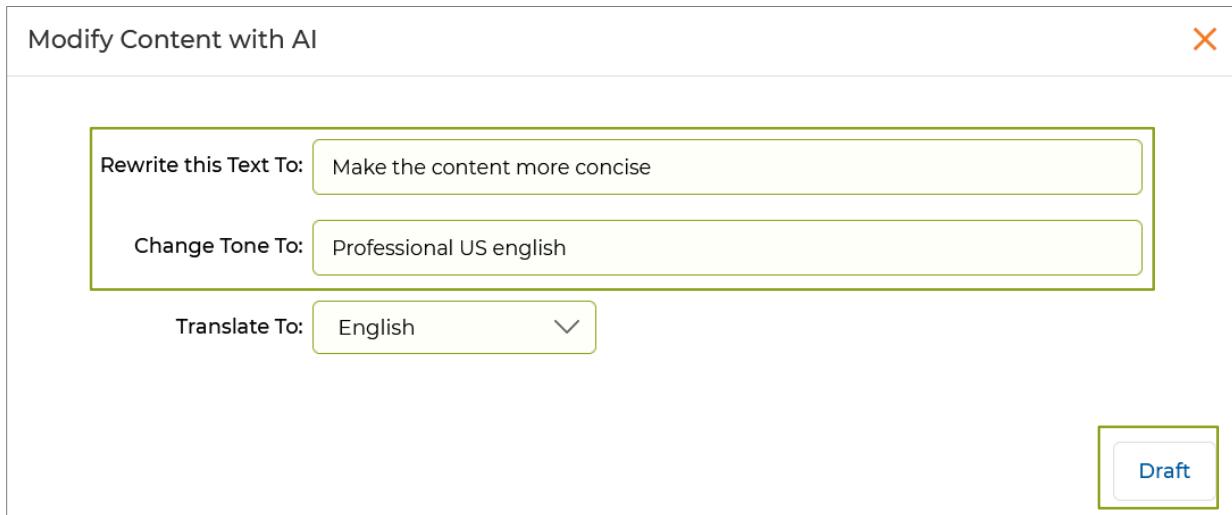
Description:

Selected Text

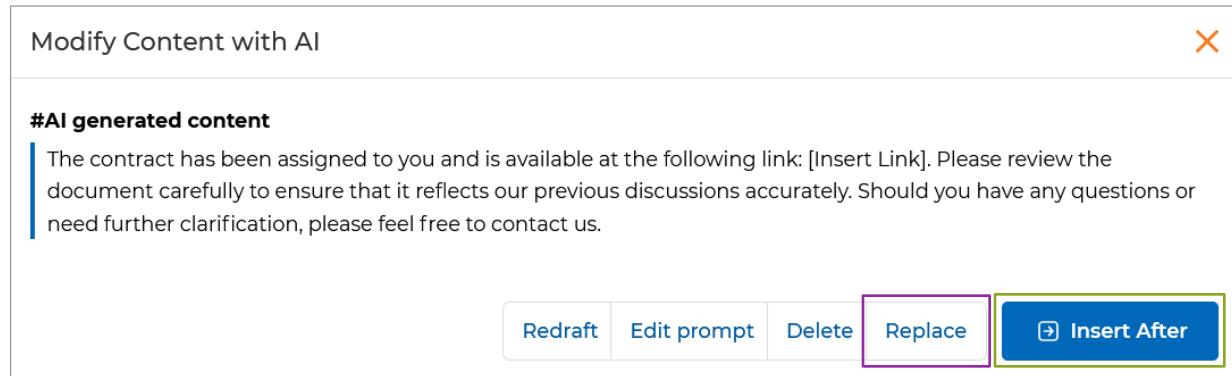
0 of 500

Save
Cancel

- To edit a specific section of the content, the user selects the text to be modified and clicks the Text Generator Button, opening the Modify Content with AI window.



- The user enters instructions in the 'Rewrite this Text To' and 'Change Tone To' fields, then clicks Draft, as illustrated in the example image below.
- The modified content is generated in the AI editor. Clicking Insert After adds the new text right after the selected content in the Template Content editor.
- To replace the selected content on the Template Content editor with the newly generated content, click the Replace button.



- In this example, clicking Replace updates the existing content with the modified version.

Template Content\*:

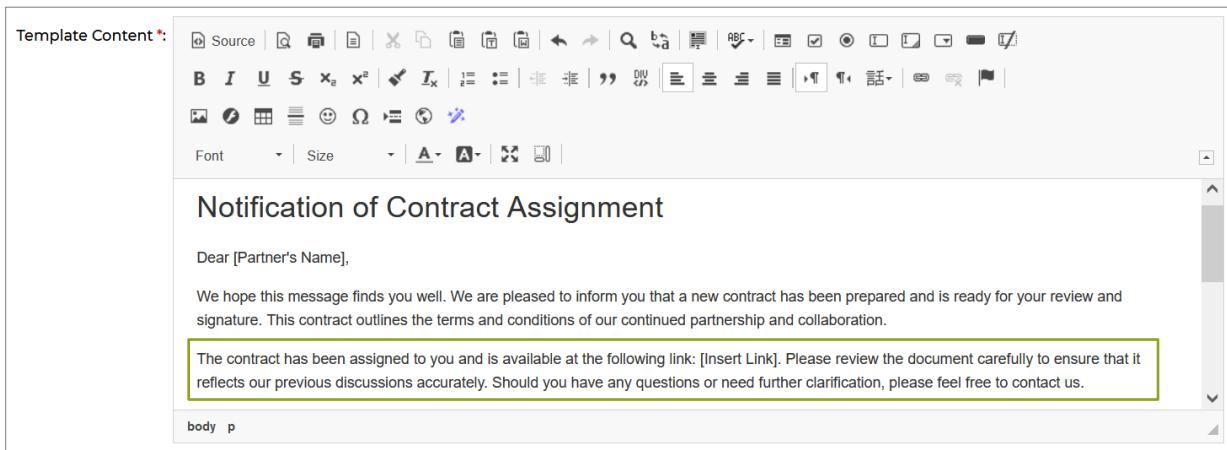
Notification of Contract Assignment

Dear [Partner's Name],

We hope this message finds you well. We are pleased to inform you that a new contract has been prepared and is ready for your review and signature. This contract outlines the terms and conditions of our continued partnership and collaboration.

The contract has been assigned to you and is available at the following link: [Insert Link]. Please review the document carefully to ensure that it reflects our previous discussions accurately. Should you have any questions or need further clarification, please feel free to contact us.

body p



- It is also possible to translate the whole/part of the content into different languages.
- To translate content, the user selects the text in the Template Content editor, then chooses a language from the Translate To dropdown menu in the Modify Content with AI window and clicks Draft.

Modify Content with AI

Rewrite this Text To: French

Change Tone To: Professional French

Translate To: French

French

Select

Chinese-Simplified

Chinese-Traditional

English

Espanol

French

German

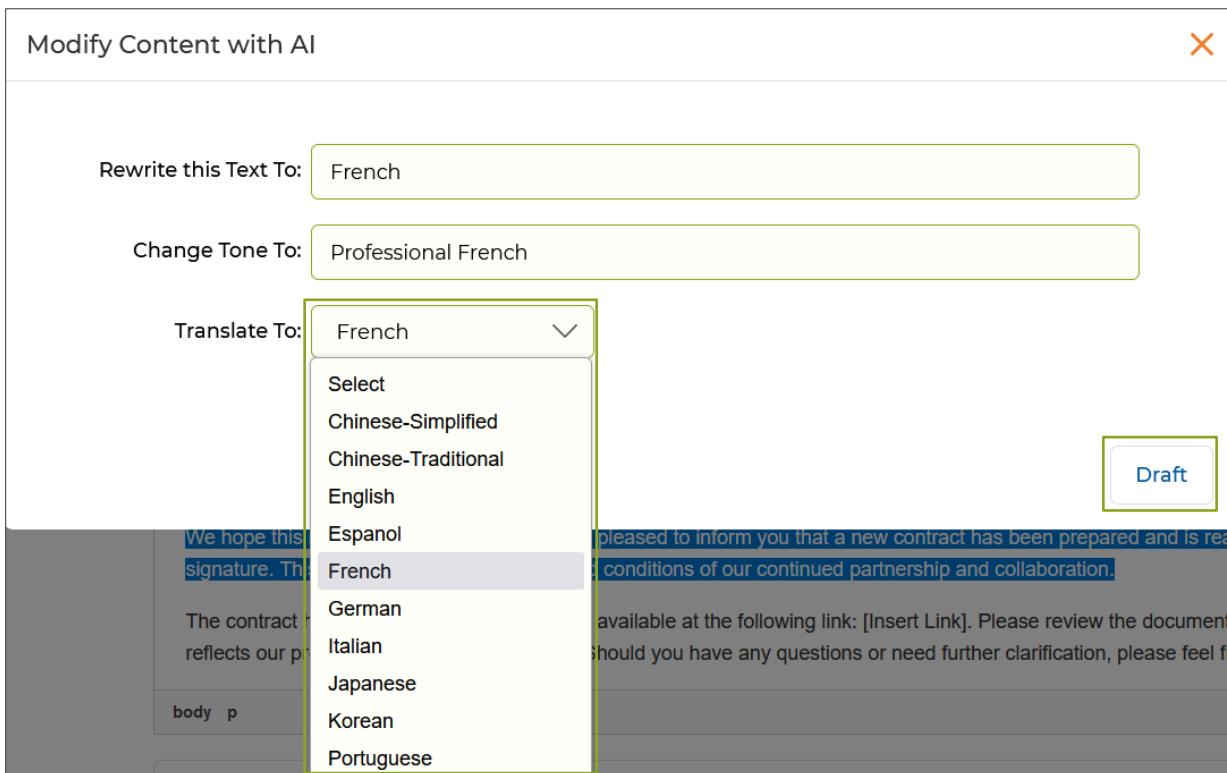
Italian

Japanese

Korean

Portuguese

Draft



- In this example, we change the selected content to French and click Draft.
- The translated content is generated in the AI editor. Clicking Replace updates the selected text with the translated version.

### Modify Content with AI

**#AI generated content**

Nous espérons que ce message vous trouve en bonne santé. Nous avons le plaisir de vous informer qu'un nouveau contrat a été préparé et est désormais prêt pour votre examen et signature. Ce document détaille les termes et conditions de notre partenariat continu et de notre collaboration future.

Redraft Edit prompt Delete Replace Insert After

- The translated content will appear on the Template Content editor if we click Replace.

## Origin of Feature

Customer request. This feature is requested to implement an AI-embedded text content generator for the ZINFO Editor.

## CX Strategy Relation (6 S's)



## Portal User-Facing Benefits

This feature allows users to generate auto-text using the AI-embedded text content creators in the ZINFO Editor.

**\*Note: This feature is not available OOTB and will be provided upon request.**

## Workflows Gallery

### Related Application(s)

Workflow Management

### Feature Description

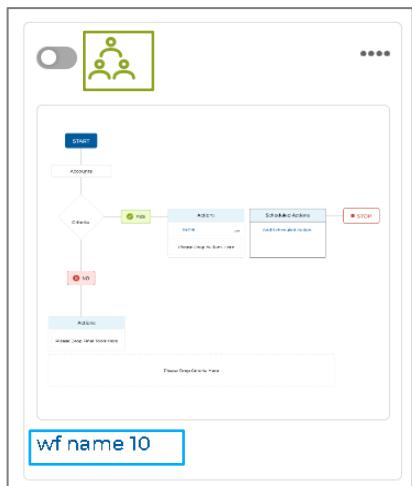
The Workflows Gallery is designed to enhance the user experience by offering a new interface with streamlined functionality for managing workflows. The gallery features application-wise workflow categories in a collapsible tree structure, enabling easy navigation and organization. Each workflow is represented by a thumbnail, a snapshot of the Workflow, along with details such as name, action buttons, and status indicators.

Easily accessible Action Buttons introduced for each workflow, allow administrators to perform actions such as viewing, editing, cloning, and deleting. The Gallery supports Filters, which can be applied across categories or specific applications and sorted by criteria like creation date, modification date, or name is readily associated. Pagination facilitates smooth navigation, while workflow group associations enable state toggling with specific restrictions. This comprehensive gallery layout simplifies workflow management while maintaining a user-friendly interface.

- To access the Workflow gallery and understand this feature in detail in the new card layout view, traverse to **Administration > Workflow > Work Flows**.

Clicking 'All Workflows' will display all the Applications for which Workflows have been created.

- A workflow will only function when it is associated with a group; without this association, it remains inactive. The images below illustrate the workflows linked to groups and those without associations. For all such workflows, clicking the four dots will display the options: 'View & Edit,' 'Info,' 'Clone,' and 'Delete'.

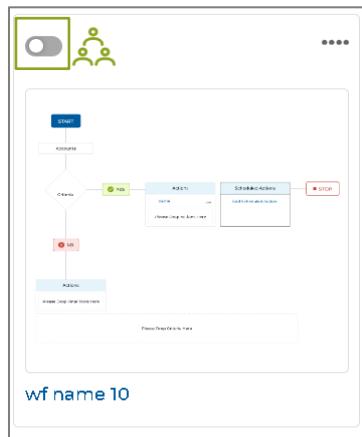


Workflow associated with Groups

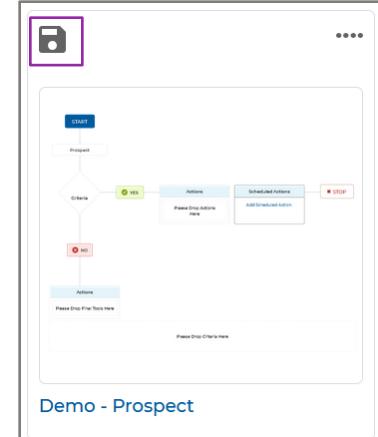


Workflow not associated with Groups

- A workflow that is associated with a Group can only be made active or inactive by enabling/disabling the toggle key (highlighted in green border) as shown in the image below.



Workflow in Inactive Mode



Workflow in Draft Mode

- A workflow can also exist in the **Draft stage**, identifiable by the icon shown in the image above (highlighted in purple border). For workflows in the Draft stage, clicking the four dots will display only the options to View & Edit, and Delete.

## Origin of Feature

Customer request. The Workflows Gallery enables admins to easily access Workflows via the Category Tree and also easily traverse to a Workflow via the Thumbnail View.

## CX Strategy Relation (6 S's)



## Portal User-Facing Benefits

This feature allows admins to manage workflows efficiently with an organized, application-wise collapsible category tree structure integrated with thumbnail card view for each workflow.

---

## Save Draft Workflows

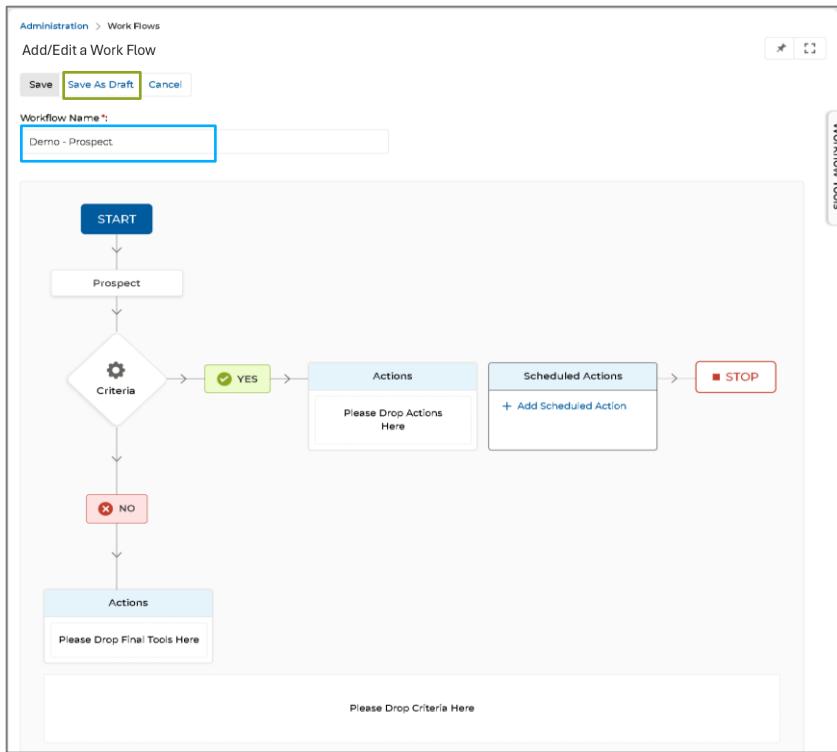
### Related Application(s)

Workflow Management

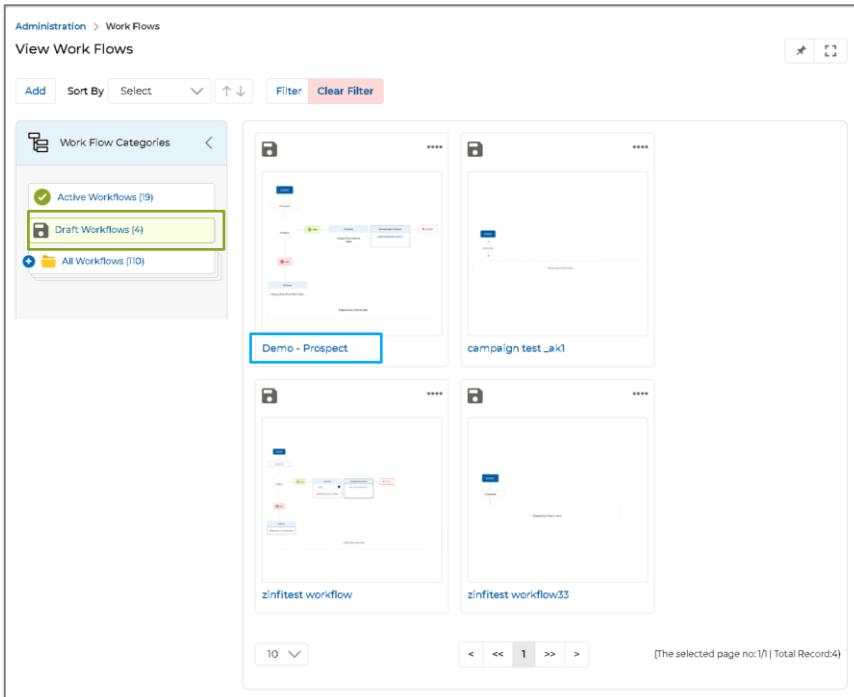
### Feature Description

The introduction of the Workflow - Save as Draft feature, enhances workflow management by allowing users to save their progress at any stage. This functionality provides greater flexibility and convenience, enabling users to pause their work and resume later without losing any Workflow specifications.

- To explore this feature in detail, navigate **Administration > Workflow > Work Flows** and click the Add button. The Save as Draft feature activates only when the minimum requirements are met: the workflow must have a name, and it must be associated with an application, as illustrated in the image below.



- Clicking 'Save as Draft' the Workflow will get saved as a draft and will get displayed in the 'Draft Work Flows' category as shown in the image below.
- A workflow in the draft stage cannot be associated with a group and, therefore, cannot be activated.



## Origin of Feature

Customer request. This feature allows admin users to save their workflow progress, enabling them to pause and resume workflow configuration whenever required.

## CX Strategy Relation (6 S's)



## Portal User-Facing Benefits

This feature allows admin users to save their workflow progress, enabling them to work at their own speed and revisit tasks to complete workflows when needed.

---

## Sharing of Library Category for Asset Co-branding

### Related Application(s)

Content Library Management, Co-Branded Assets Management

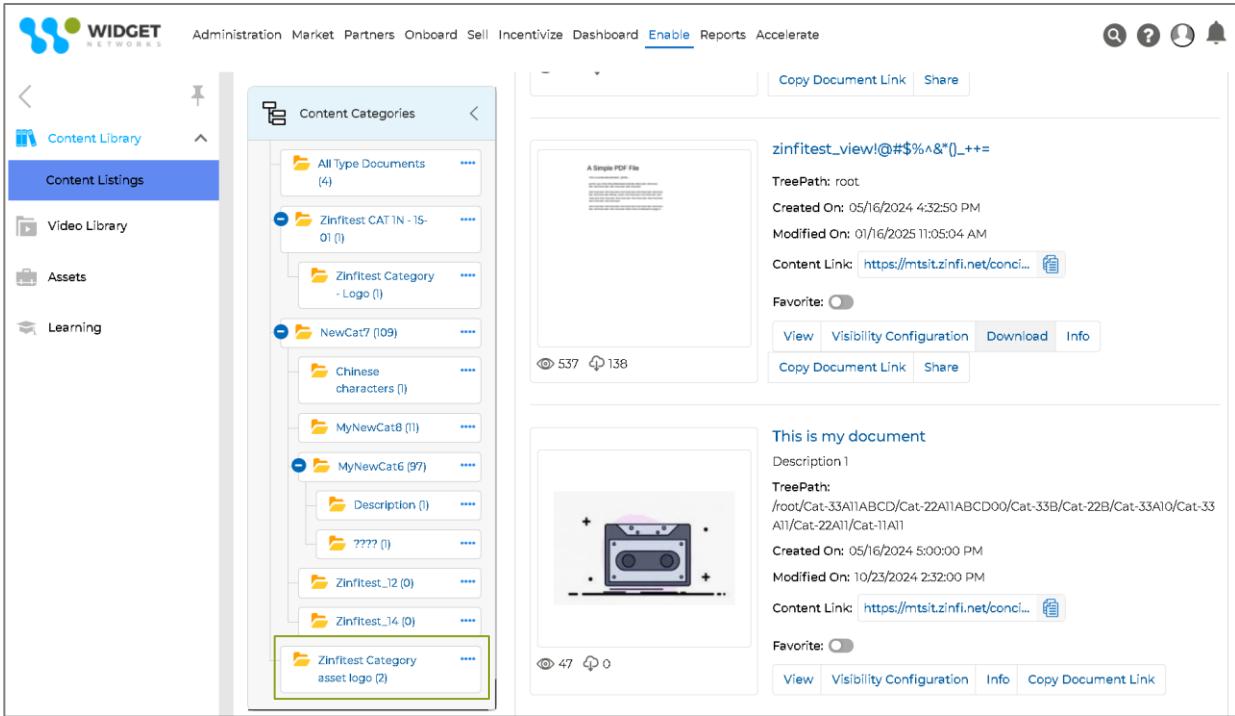
### Feature Description

The upgraded release incorporates an upgraded sharing system for Co-branding Elements, allowing admins to designate specific Content Library categories containing Co-brandable Elements for co-branding of assets by Partners. A new "Available for Co-Branding" field in the "View Category Details" section of Content Categories allows admins to control which categories appear in the Co-Brand section of the Asset Library. This ensures that partners can only access pre-approved content for customization.

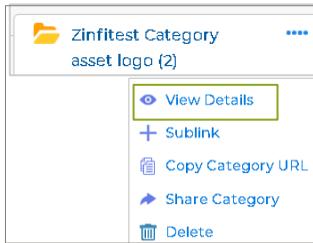
This update simplifies the asset customization process within the Asset Library application for partners. When selecting an asset for co-branding, they can choose images from designated Content Library categories. A real-time preview feature lets them adjust alignment and sizing before finalizing changes, while a side panel provides easy content search, enhancing efficiency. The visibility logic for Content Library access in the Asset Co-Brand section remains consistent with the stand-alone Content Library, ensuring a seamless user experience.

## Admin Experience

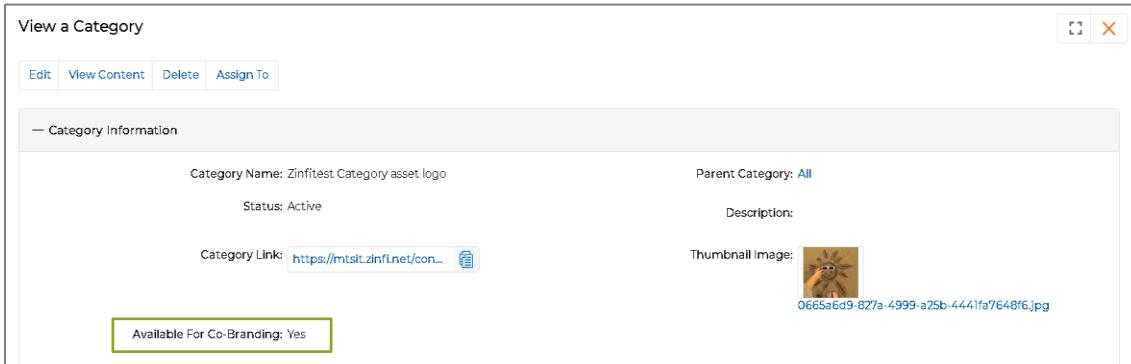
- Admins can upload multiple logos or images to a specific category in the Content Library and make them available to designated partners. To do this, they must navigate to **Enable > Content Library > Content Listings** and select the desired category.



- After selecting the category, click on the four dots and select **View Details**.



- Clicking **View Details** navigates to the **View a Category** page, where the **Available for Co-Branding** option must be set to **Yes**. This ensures that all logos or images within the category are accessible to the assigned partner when selecting a logo during the co-branding process.



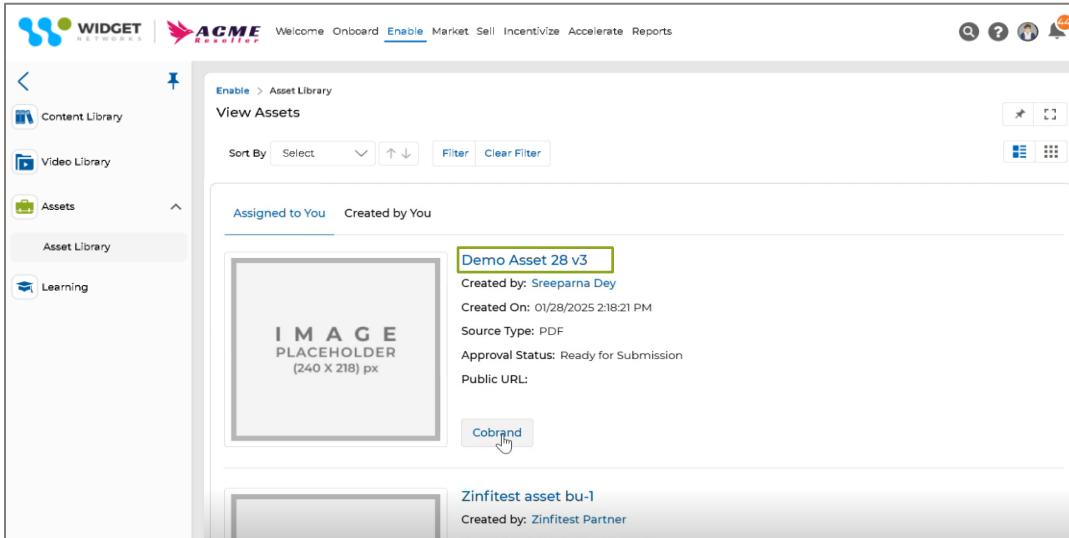
The screenshot shows the 'View a Category' page. At the top, there are buttons for Edit, View Content, Delete, and Assign To. Below that is a section titled 'Category Information' with the following details:

- Category Name: Zinfitest Category asset logo
- Status: Active
- Parent Category: All
- Description:
- Category Link: <https://mtsit.zinfi.net/con...>
- Thumbnail Image: A small image of a cartoon character with the file name 0665a6d9-827a-4999-a25b-4441fa7648f6.jpg

At the bottom of the page, there is a button labeled 'Available For Co-Branding: Yes' with a green border.

## Partner Experience

- To co-brand an asset, the designated partner must navigate to **Enable > Assets > Asset Library**. Within the Asset Library, in the 'Assigned to You' section the partner user will find the asset already assigned to them.

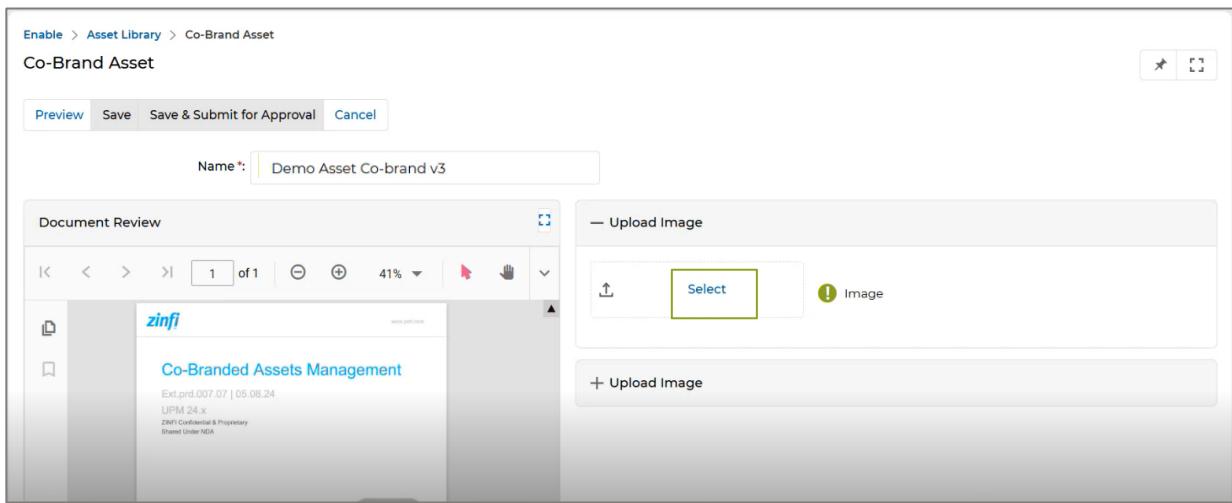


The screenshot shows the 'Asset Library' page under the 'Enable' section. The left sidebar includes links for Content Library, Video Library, Assets (which is selected), Asset Library, and Learning. The main area is titled 'View Assets' and shows a list of assets. The first asset in the list is highlighted with a green border and has the following details:

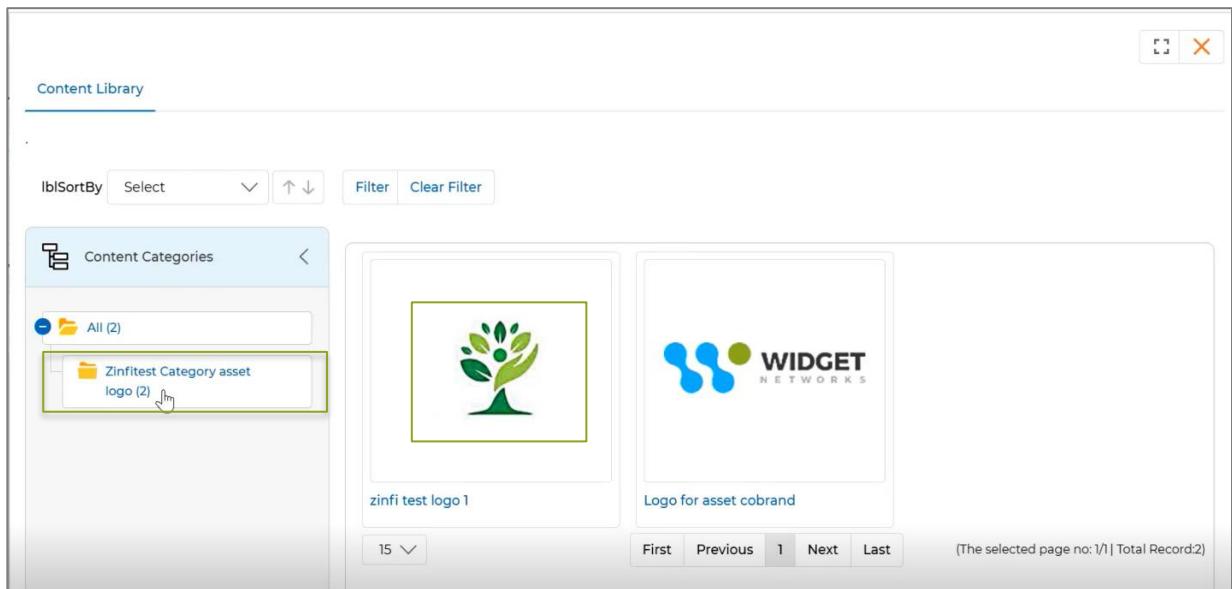
- Demo Asset 28 v3**
- Created by: Sreeparna Dey
- Created On: 01/28/2025 2:18:21 PM
- Source Type: PDF
- Approval Status: Ready for Submission
- Public URL:

Below the details is a button labeled 'Co-brand' with a hand cursor icon. The second asset in the list is partially visible with the text 'Zinfitest asset bu-1' and 'Created by: Zinfitest Partner'.

- Clicking **Co-brand** will direct the partner user to the **Co-Brand Asset** page, where the **Upload Image** section provides the option to select logos or images.



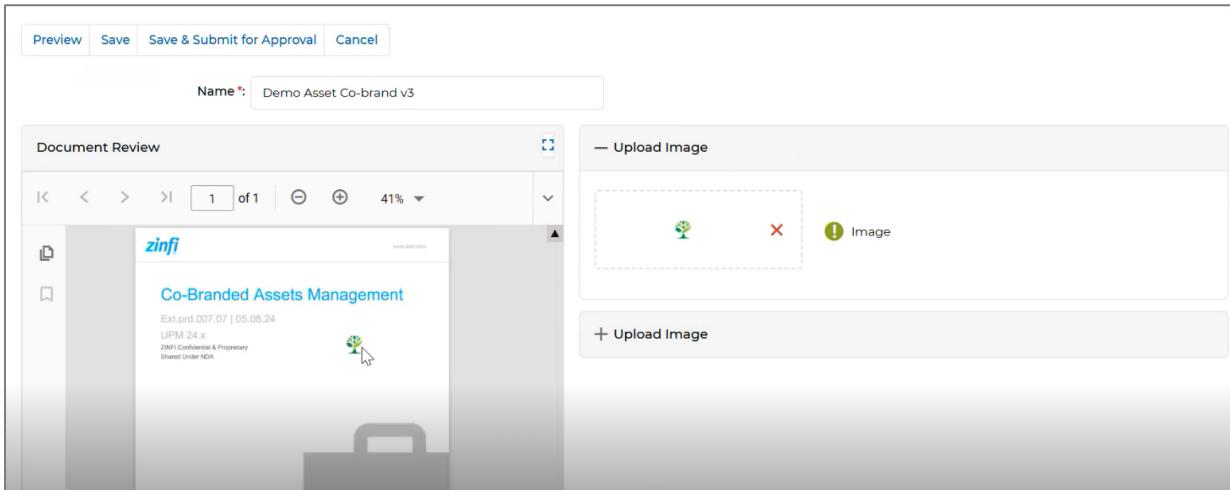
- Clicking **Select** opens a side panel displaying image categories assigned by the admin. This enables the partner user to choose the appropriate logo or image for Co-Branding.



- Once the image\logo is selected, it will be displayed as shown below.



- The Partner user can preview the co-branded document by clicking Preview, as shown in the image below.



- Finally, clicking **Save** allows the Partner user to save the Co-Branded Asset.

## Origin of Feature

Customer request. The feature is requested for admin users to configure a category where multiple images/logos can be uploaded and made available to Partner users for cobranding assets.

## CX Strategy Relation (6 S's)



Sufficiency

## Portal User-Facing Benefits

This feature allows admins to configure a designated category in the Content Library where logos and images can be uploaded and made accessible to specific partner users for co-branding assets.

## Mark Communities as Favorites and Configure Community Email Notifications

### Related Application(s)

Community Management

### Feature Description

The Community Favorite & Email Notification Feature allows users to mark a community as a favorite and configure email notification preferences to stay updated on discussions and activities.

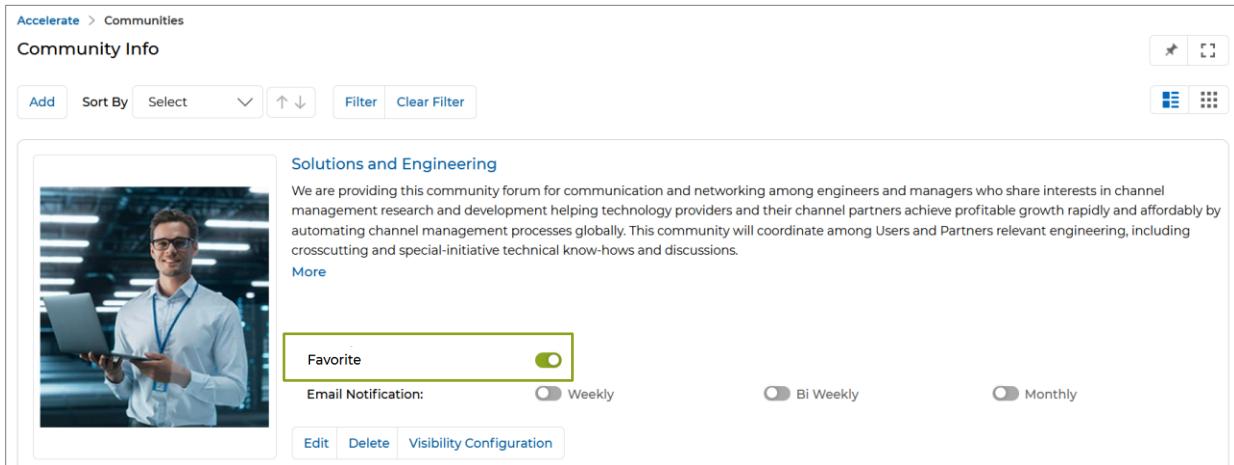
- **Favorite Community:** Users can enable the "Favorite" toggle to access their preferred communities from their dashboard quickly.
- **Email Notifications:** Users can select Weekly, Bi-Weekly, or Monthly email updates to stay informed about new posts, discussions, and announcements within the community.

This feature enhances user engagement by providing personalized notifications and easy access to relevant community discussions.

- We must navigate to Accelerate > Community > Communities to reach the Community Info page, where all the Communities are listed.

A screenshot of the ZINFO Accelerate platform. The top navigation bar includes 'Administration', 'Market', 'Partners', 'Onboard', 'Sell', 'Incentivize', 'Dashboard', 'Enable', 'Reports', and 'Accelerate' (which is highlighted). The sidebar on the left has links for 'Search Communities &amp; Support', 'Community' (which is selected and highlighted in blue), 'Communities', 'Calendar', and 'Marketplace'. The main content area shows 'Accelerate &gt; Communities' and 'Community Info' for the 'Solutions and Engineering' community. It features a photo of a man holding a laptop, a description of the community's purpose, and a 'Favorite' toggle switch. Below that are three email notification toggle switches for 'Weekly', 'Bi Weekly', and 'Monthly'. At the bottom are 'Edit', 'Delete', and 'Visibility Configuration' buttons.

- We enable the toggle key associated with 'Favorite' without setting up 'Email Notification'.



Community Info

**Solutions and Engineering**

We are providing this community forum for communication and networking among engineers and managers who share interests in channel management research and development helping technology providers and their channel partners achieve profitable growth rapidly and affordably by automating channel management processes globally. This community will coordinate among Users and Partners relevant engineering, including crosscutting and special-initiative technical know-hows and discussions.

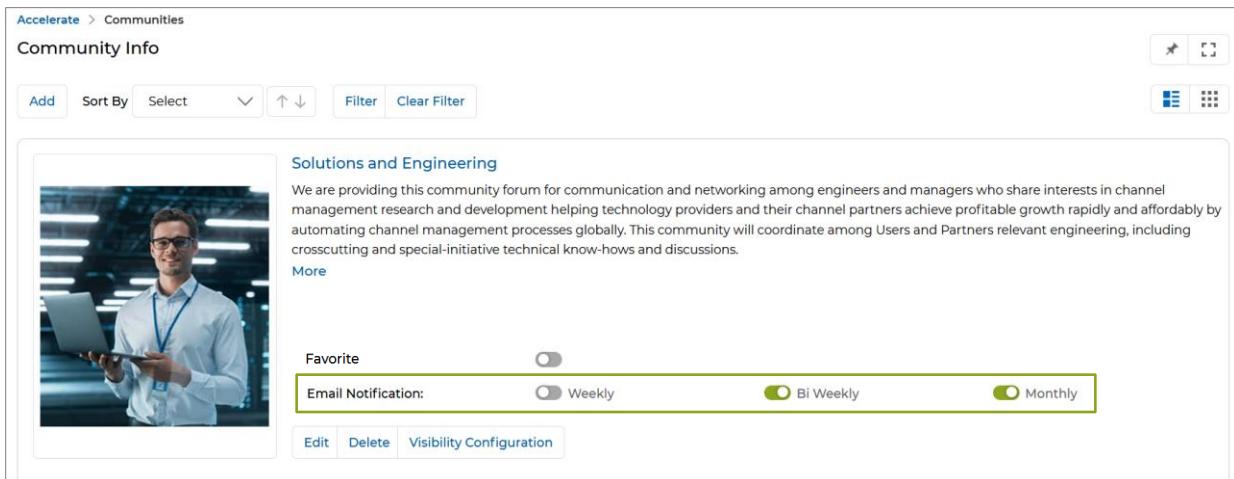
[More](#)

**Favorite**

Email Notification:  Weekly  Bi Weekly  Monthly

[Edit](#) [Delete](#) [Visibility Configuration](#)

- It is also possible to enable 'Email Notification' without marking the Community as 'Favorite'.



Community Info

**Solutions and Engineering**

We are providing this community forum for communication and networking among engineers and managers who share interests in channel management research and development helping technology providers and their channel partners achieve profitable growth rapidly and affordably by automating channel management processes globally. This community will coordinate among Users and Partners relevant engineering, including crosscutting and special-initiative technical know-hows and discussions.

[More](#)

**Favorite**

Email Notification:  Weekly  Bi Weekly  Monthly

[Edit](#) [Delete](#) [Visibility Configuration](#)

## Origin of Feature

Customer request. The feature is requested to mark Favorite and Email Notifications separately for Communities.

## CX Strategy Relation (6 S's)



Simplicity

## Portal User-Facing Benefits

The feature allows administrators and partners to mark Favorite and Email Notifications separately for Communities.

## Automatic Partner Tier Assignment Based on Partner Score

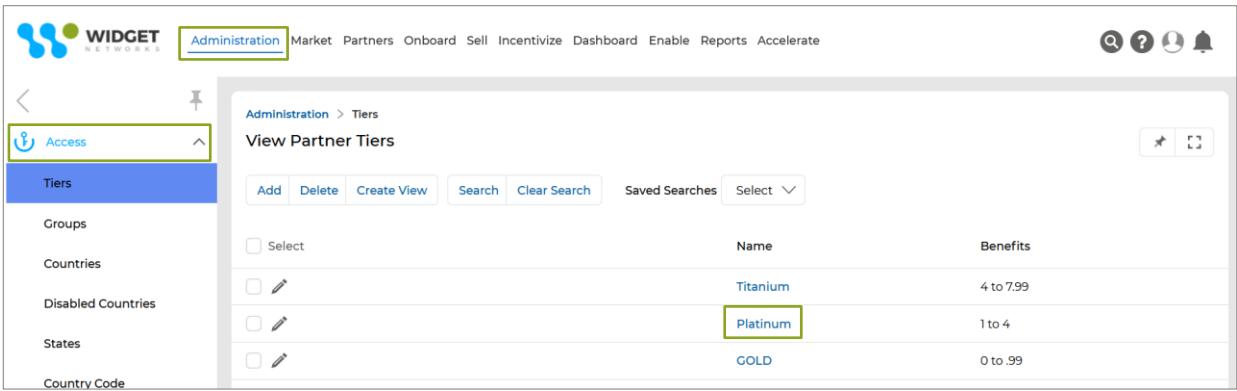
### Related Application(s)

Access Management, Partners Profile Management

### Feature Description

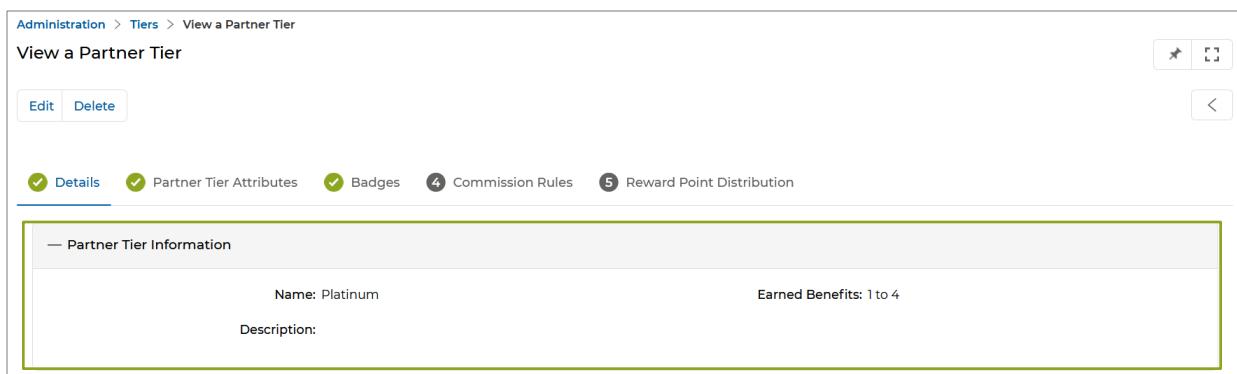
The Automatic Partner Tier Assignment feature streamlines partner management by assigning a partner tier to the Partner Account based on the partner's score. This functionality is configurable within the Partner Tier Attributes settings via Access Management, where administrators can define rules and conditions for tier assignments. Each rule corresponds to a specific partner tier (e.g., Platinum, Gold, Silver), ensuring accurate and consistent tier categorization. When the Partner Score field in the partner account profile is updated, the system automatically evaluates the score against predefined rules and assigns the appropriate tier to the partner record. This automated process reduces administrative effort, ensures real-time tier updates, and maintains consistency in partner classifications.

- We must navigate **Administration > Access > Tiers** to reach the **View Partner Tiers** page, which lists all the Partner Tiers.

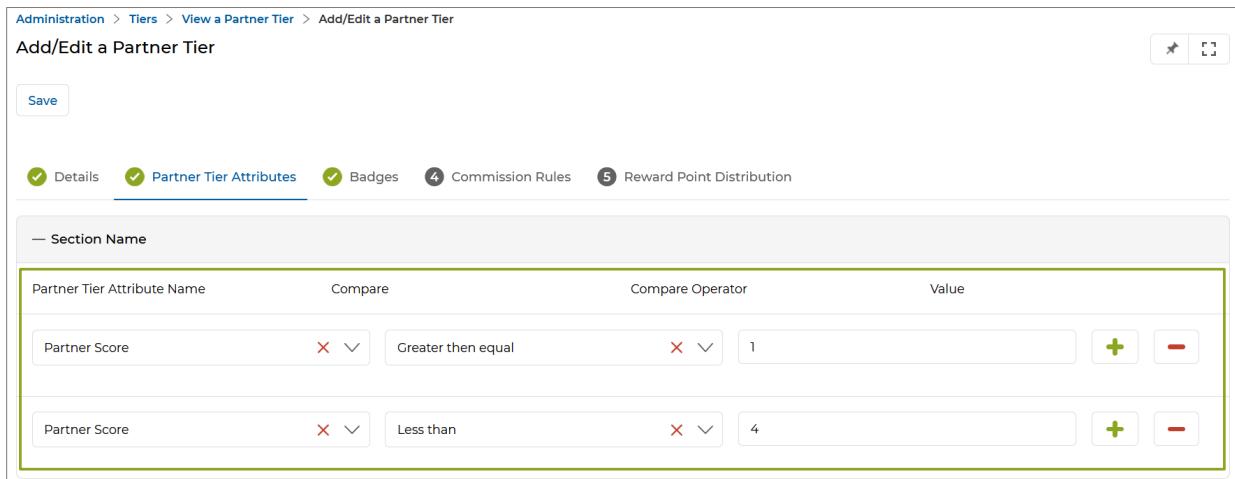


	Name	Benefits
<input type="checkbox"/>	Titanium	4 to 7.99
<input checked="" type="checkbox"/>	Platinum	1 to 4
<input type="checkbox"/>	GOLD	0 to .99

- To define Partner Tier Attributes for the Platinum Partner Tier - we go to the details page of the Partner Tier - Platinum.



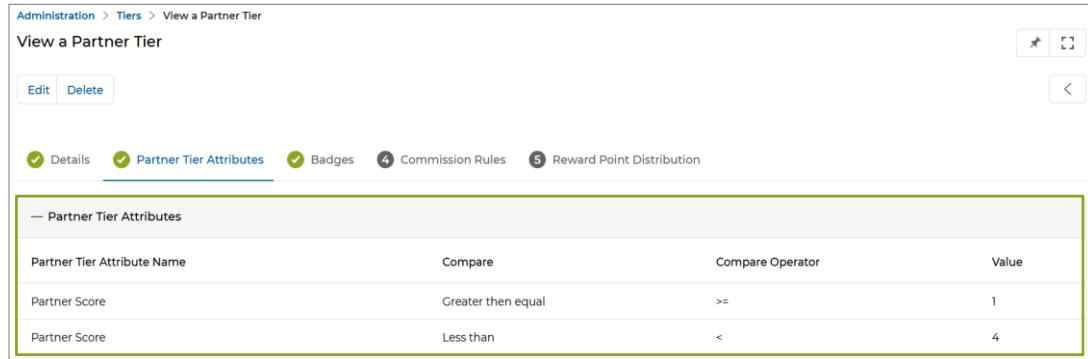
- In the Partner Tier Attributes tab, we need to configure the values for the auto-assignment of the Partner Tier. In our example case, we configure Partner Score as the attribute for auto-assignment of the Platinum Partner Tier, so that when the Partner Score of a Partner Account is between 1 and less than 4, the Account will be automatically assigned the Platinum Partner Tier.
- The following Partner Tier Attributes are defined as –



Partner Tier Attribute Name	Compare	Compare Operator	Value
Partner Score	Greater then equal	>=	1
Partner Score	Less than	<	4

- **Partner Tier Attribute Name**—This refers to the specific attribute of a partner that is being evaluated. In the example given, "Partner Score" is the attribute being assessed.
- **Compare** —This indicates the action of evaluating or assessing the Partner Tier Attribute against a certain criterion or value.
- **Compare Operator** – This is the logical operator used to compare the Partner Tier Attribute with a specified value.
- **Value** – This is the value against which the Partner Tier Attribute is compared using the specified operator.

We defined two attributes – one whose Partner Score value is  $\geq 1$  AND the other has a Partner Score value of  $< 4$ . When a Partner Account's score falls within this range, then Platinum Partner Tier will be auto-assigned to the Account.



Partner Tier Attribute Name	Compare	Compare Operator	Value
Partner Score	Greater then equal	$\geq$	1
Partner Score	Less than	<	4

- We navigate to **Partners > Partners > Partner Accounts** to reach the **View Partner Accounts** page, listing all Partner Accounts.
- We go to the **Add/Edit a Partner Account** page of a Partner Account and view the **Partner Score** and **Partner Tier**, which are not yet configured.

Partners > Partner Accounts > View a Partner Account

View a Partner Account

Edit Delete Clone Assign To Partner Account Locator Scorecard

Partnership Information

Account Name: Irvin Technologies	License Status: Active
Partner ID: 830926251	Preferred Distributor: IngramMicro
MDF Allowed: Yes	Target Segments: SMB, Mid-Market, Enterprise
MDF Quarterly Budget: 15000	Strategic Alliances: Hitachi, Dell
Deal Registration Allowed: Yes	Specialization: All Verticals
Lead Distribution Ranking: 80	Core Competencies: Security Solutions
Key Competitors: CDW, ComTech, NetFish	Territory Focus: Southeast
Account Created: 03/04/16 1:08:06 AM	Last Updated: 08/20/24 4:47:19 AM
Account Admin: Widget CPA	Region: AMERICAS
Reports To: Portal Admin	Master Account: OEM Company
Partner Tier: Affiliate Partner	Relationship Challenges: Pricing Automation, MDF Utilization Support, Target Database Acquisition
Partner Logo: 	Apps Specialization:
Latitude:	Longitude:
Partner Tier: None	Partner Score:

- Now, if we update the Partner Score Field with '1' in the Partner Score field and click Save, we will find the Partner Tier automatically updated to the "Platinum Tier".

Partners > Partner Accounts > View a Partner Account

View a Partner Account

Edit Delete Clone Assign To Partner Account Locator Scorecard

— Partnership Information

Account Name: Irvin Technologies	License Status: Active
Partner ID: 830926251	Preferred Distributor: IngramMicro
MDF Allowed: Yes	Target Segments: SMB, Mid-Market, Enterprise
MDF Quarterly Budget: 15000	Strategic Alliances: Hitachi, Dell
Deal Registration Allowed: Yes	Specialization: All Verticals
Lead Distribution Ranking: 80	Core Competencies: Security Solutions
Key Competitors: CDW, CornTech, NetFish	Territory Focus: Southeast
Account Created: 03/04/16 1:08:06 AM	Last Updated: 08/20/24 4:47:19 AM
Account Admin: Widget CPA	Region: AMERICAS
Reports To: Portal Admin	Master Account: OEM Company
Partner Tier: Affiliate Partner	Relationship Challenges: Pricing Automation, MDF Utilization Support, Target Database Acquisition
Partner Logo:  ai-generated-logo.png	Apps Specialization:
Latitude:	Longitude:
Partner Tier: Platinum	Partner Score: 1

## Origin of Feature

Customer request. The feature is requested to automatically update Partner Tier in Partner Account by changing Partner Score.

## CX Strategy Relation (6 S's)



Sufficiency

## Portal User-Facing Benefits

This feature allows administrators to update the Partner Tier of the Partner Account by changing the Partner Score.

## Auto Group Assignment based on Attributes

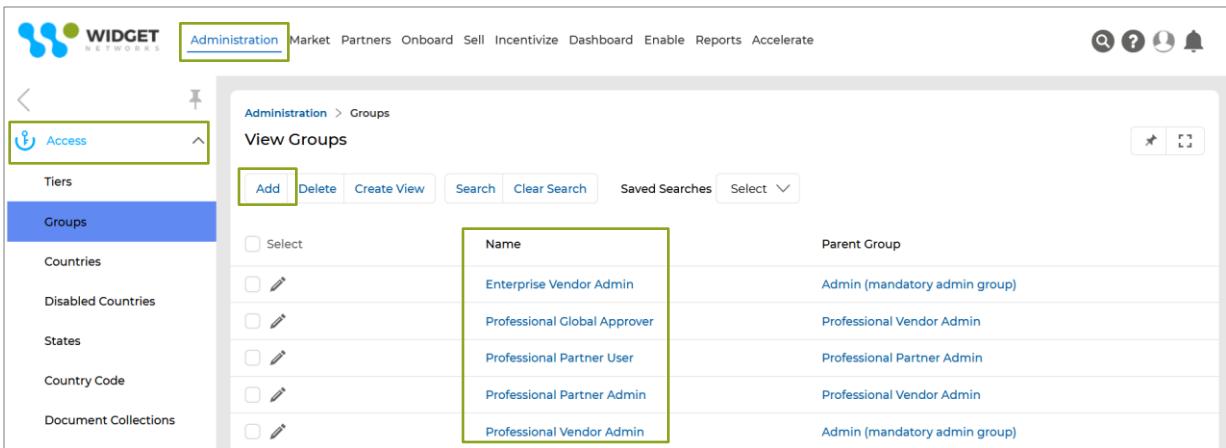
### Related Application(s)

Access Management, Users

### Feature Description

This release feature offers significant benefits by automating group assignments based on Group Attributes such as 'Country' and 'Partner Tier', reducing manual effort and ensuring accuracy. It enhances operational efficiency by dynamically updating automatic Group association as user attributes change, ensuring real-time consistency. This feature improves scalability while allowing Admins to configure and customize group attributes as and whenever needed.

- We must navigate **Administration > Access > Groups** to reach the **View Groups** page where all the Groups are listed.

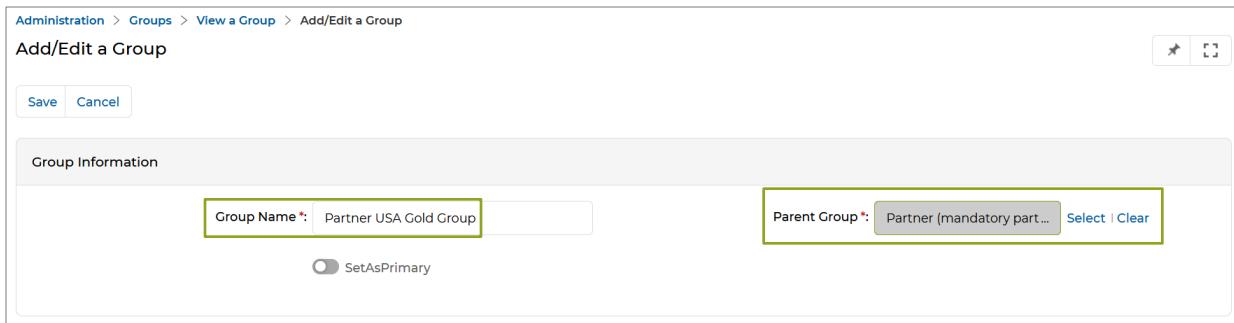


Name	Parent Group
Enterprise Vendor Admin	Admin (mandatory admin group)
Professional Global Approver	Professional Vendor Admin
Professional Partner User	Professional Partner Admin
Professional Partner Admin	Professional Vendor Admin
Professional Vendor Admin	Admin (mandatory admin group)

- We click the Add button and reach the Add/Edit Group page, where we can create a new Group.



- We provide the Group Name (Partner USA Gold Group), select Parent Group, and click Save.



Administration > Groups > View a Group > Add/Edit a Group

Add/Edit a Group

Save Cancel

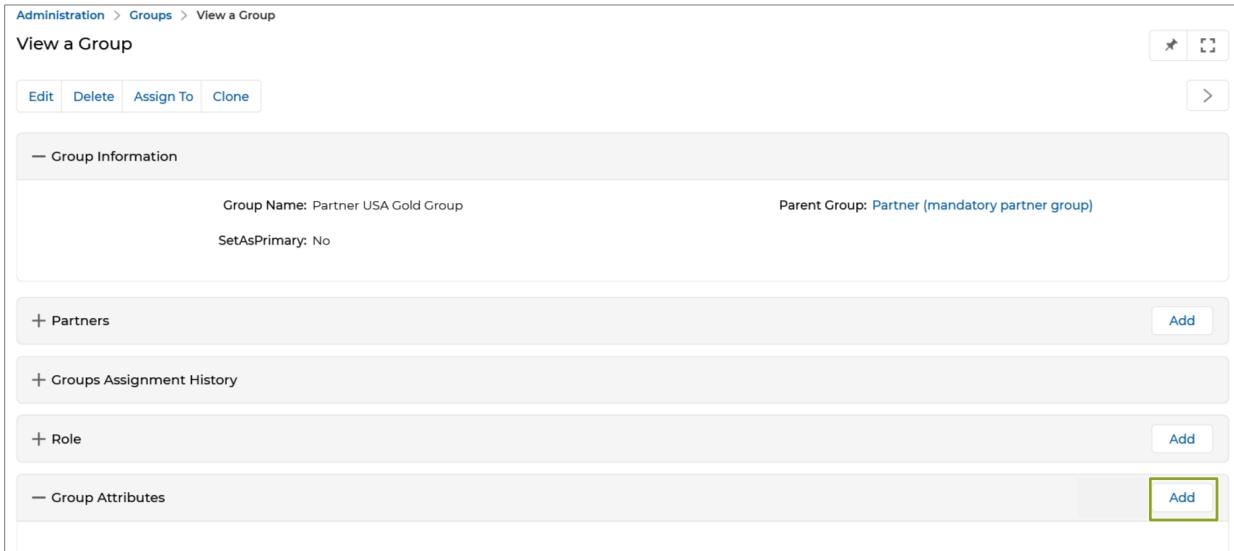
Group Information

Group Name\*: Partner USA Gold Group

Parent Group\*: Partner (mandatory part... Select | Clear)

SetAsPrimary

- We click the Add button associated with Group Attributes to configure Group Attributes, which takes us to the Group Attributes page. The 'Partner USA Gold Group' will be auto-assigned to the User if the User's Partner Account is Gold Partner Tier AND the User's Country is USA.



Administration > Groups > View a Group

View a Group

Edit Delete Assign To Clone >

Group Information

Group Name: Partner USA Gold Group Parent Group: Partner (mandatory partner group)

SetAsPrimary: No

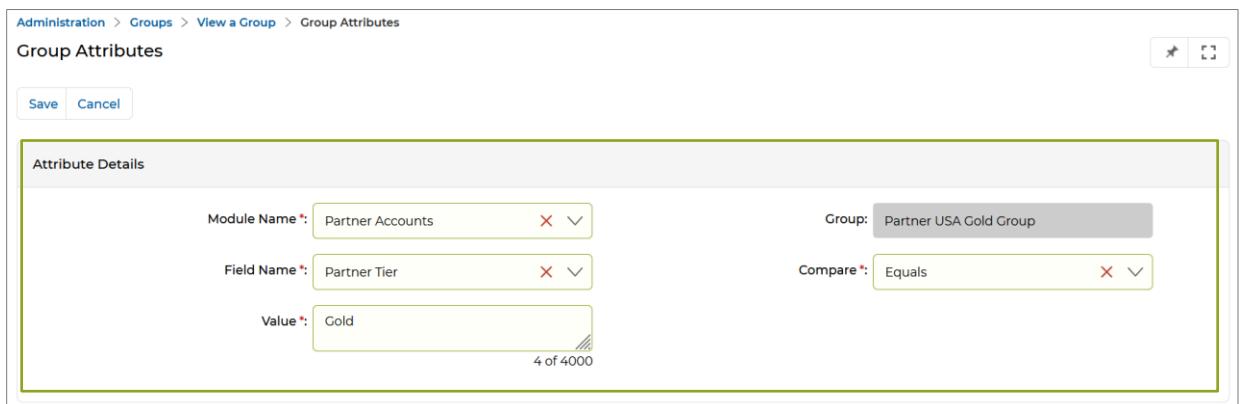
+ Partners Add

+ Groups Assignment History

+ Role Add

— Group Attributes Add

- We define the value of a Group Attribute by providing details in the fields of the Attribute Details section:



Administration > Groups > View a Group > Group Attributes

Group Attributes

Save Cancel

Attribute Details

Module Name\*: Partner Accounts X ▾

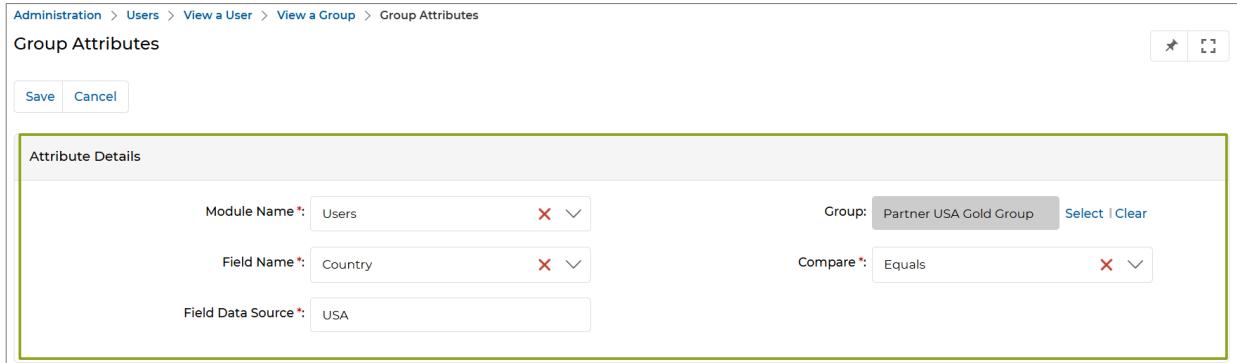
Field Name\*: Partner Tier X ▾

Value\*: Gold 4 of 4000

Group: Partner USA Gold Group

Compare\*: Equals X ▾

- **Module Name:** This specifies that in this example, the attribute applies to the **Partner Accounts** module, meaning the condition is evaluated for Partner Account records.
- **Field Name:** This attribute is used to filter Partner Accounts based on their **Partner Tier**.
- **Value:** The system will check if the **Partner Tier** value is **Gold** and apply the attribute condition accordingly.
- **Group:** Any Partner Account that meets the condition (**Partner Tier = Gold**) will be automatically assigned to the **Partner USA Gold Group**.
- **Compare:** The system will assign the Partner Tier based on the selected comparison operator. In this case, we use **Equals**, meaning only Partner Accounts where the **Partner Tier** exactly matches the specified value will meet the criteria. Other available comparison operators include **Not Equals**, **Like**, **In**, and **Contains**.
- Similarly, we define the value of another Group Attribute in the Attribute Details section by providing details in the following fields:



Administration > Users > View a User > View a Group > Group Attributes

Group Attributes

Attribute Details

Module Name:

Group:

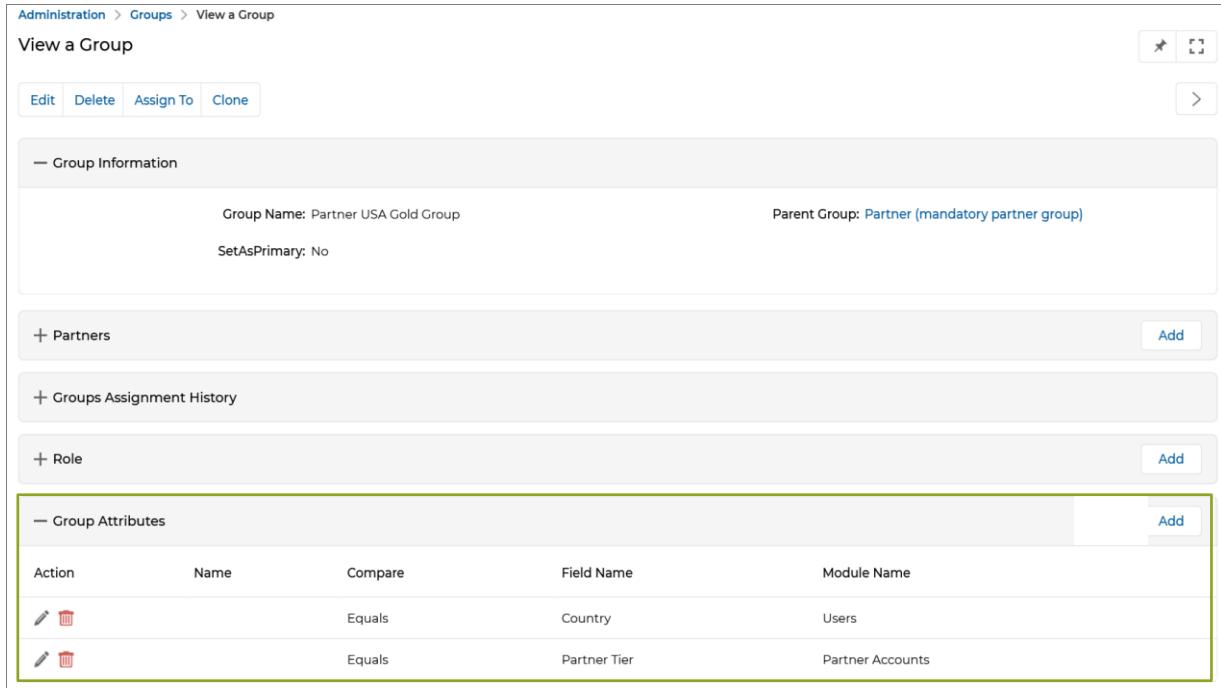
Field Name:

Compare:

Field Data Source:

- **Module Name:** This specifies that in this example the attribute applies to the **Users** module, meaning the condition is evaluated for user records.
- **Field Name:** This attribute is used to **filter users** based on their country.
- **Field Data Source:** The system will check if the user's **Country** value matches "**USA**".
- **Group:** Any user that meets the condition (**Country = USA**) will be automatically assigned to the **Partner USA Gold Group**.
- **Compare:** The system will assign users to the group only if their **Country** exactly matches "USA".

- The Group Attributes with its values will be visible on the Group Attributes related list on the View a Group page.



Administration > Groups > View a Group

**View a Group**

**Group Information**

Group Name: Partner USA Gold Group      Parent Group: Partner (mandatory partner group)

SetAsPrimary: No

**Partners** Add

**Groups Assignment History**

**Role** Add

**Group Attributes** Add

Action	Name	Compare	Field Name	Module Name
 	Equals		Country	Users
 	Equals		Partner Tier	Partner Accounts

- We navigate to the details page of a User whose country is USA and the Partner Tier of their Partner Account is Gold and the 'Partner USA Gold Group' has been auto-assigned to the User.

Administration > Users > View a User

View a User

— User Information

First Name: Dwayne	Last Name: Johnson
User Name: dwaynejohnson1234@yopmail.com	Status: Approved
Email address: dwaynejohnson1234@yopmail.com	Other Email:
Company Name: Antique Stores	Profile: Partner Admin
Title: Executive	Direct Phone: 1-903-289-0885
Mobile: 1-903-555-0885	Department: Sales
Other:	Fax: 1-903-289-0877
Main Phone: 1-903-555-0909	Primary Address: 3802 Pickens Way
Primary Address2: 3343 Richland Avenue	City: Dallas
Country: USA	State: Texas
Postal Code: 75247	Contact: Allen A. Bowen
Salesforce ID:	Reports To: Portal Admin
Wizard Type:	Group: Partner Admin Group
User Image:  approver1.png	User Type: Partner User
API Profile:	Business Model:

+ User Settings

— Groups

Action	Group	Is Primary
 	Partner USA Gold Group	No
 	Partner Admin Group	Yes

Administration > Users > View a User > View a Partner Account

**View a Partner Account**

[Edit](#) [Delete](#) [Clone](#) [Assign To](#) [Partner Account Locator](#) [Scorecard](#)

**Partnership Information**

Account Name: Antique Stores	License Status: Active
Partner ID: 939272663	Preferred Distributor: Dimension Data
MDF Allowed: Yes	Target Segments: All Verticals
MDF Quarterly Budget: 7500	Strategic Alliances: Red Hat
Deal Registration Allowed: Yes	Specialization: All Verticals
Lead Distribution Ranking: 2	Core Competencies: Virtualization
Key Competitors: Ingram Micro	Territory Focus: Entire Americas
Account Created: 04/09/18 9:27:53 AM	Last Updated: 03/28/19 6:35:50 AM
Account Admin:	Region: AMERICAS
Reports To:	Master Account: Connectivity Kings
Partner Tier: None	Relationship Challenges: NA
Partner Logo:	Apps Specialization:
Latitude:	Longitude:
Partner Tier: GOLD	Partner Score: 0

## Origin of Feature

Customer request. The feature is requested to automatically assign and update Group associations based on changing user attributes.

## CX Strategy Relation (6 S's)



Sufficiency

## Portal User-Facing Benefits

This feature allows administrators to automate group assignments by configuring Group Attributes.

## Master/Parent-Child Partner Accounts and Record Visibility

## Related Application(s)

Access Management, Sales Leads Management

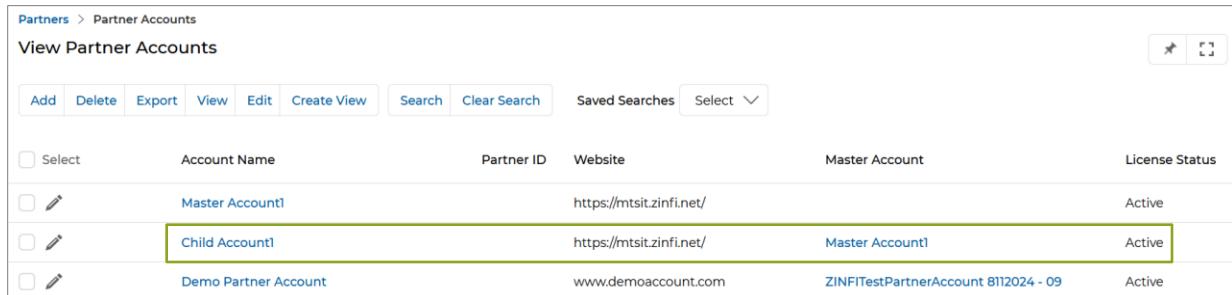
## Feature Description

In a global business environment, Partner Organizations often operate across multiple regions with distinct legal entities, branding, and operational structures. For instance, a Partner Org. headquartered in the United States may have several European Branch Offices, each functioning under a different business Partner Name. Therefore, the Parent Partner Organization must access a centralized view of all Partner-related activities across the Partner Branch locations, ensuring efficient operations.

With this release, UPM allows partner organizations to configure hierarchical relationships between partner accounts through intuitive administrative settings. Once configured, the parent partner account can view and manage records from associated child accounts, ensuring seamless data flow and collaboration across the organization.

ZINFI has introduced a robust Partner Account Hierarchy solution, which allows Partner organizations to establish a parent-child relationship between their Partner Accounts. This configuration enables the Partner Account Parent/Headquarter users to seamlessly access the details and records of their associated Partner Branch Accounts, such as the European office.

- Navigate to Partners > Partners > Partner Accounts after logging into the portal. Selecting the name of a specific Partner Account will help you navigate its details page. All Account Names are listed with the Master Account (Parent Account, if any) on the List Page.



The screenshot shows a list of Partner Accounts. The first account is 'Master Account' (https://mtsit.zinfi.net/), which is the parent account. The second account is 'Child Account1' (https://mtsit.zinfi.net/), which is a child account of the Master Account. The third account is 'Demo Partner Account' (www.demoaccount.com), which is another child account of the Master Account. The 'Child Account1' row is highlighted with a green border.

View Partner Accounts					
<input type="button" value="Add"/>	<input type="button" value="Delete"/>	<input type="button" value="Export"/>	<input type="button" value="View"/>	<input type="button" value="Edit"/>	<input type="button" value="Create View"/>
<input type="button" value="Search"/>		<input type="button" value="Clear Search"/>		<input type="button" value="Saved Searches"/>	<input type="button" value="Select"/>
<input type="checkbox"/>	Select	Account Name	Partner ID	Website	Master Account
<input type="checkbox"/>		Master Account1		https://mtsit.zinfi.net/	Active
<input type="checkbox"/>		Child Account1		https://mtsit.zinfi.net/	Master Account1
<input type="checkbox"/>		Demo Partner Account		www.demoaccount.com	ZINFITestPartnerAccount 8112024 - 09

- To update the Master/Parent Account of a Child Partner Account, click on the Child Partner Account – Child Account1, to access its details page.

Partners > Partner Accounts > View a Partner Account

### View a Partner Account

Edit Delete Clone Assign To Partner Account Locator Scorecard

— Partnership Information

Account Name: Child Account1	License Status: Active
Partner ID:	Preferred Distributor:
MDF Allowed: No	Target Segments:
MDF Quarterly Budget:	Strategic Alliances:
Deal Registration Allowed: No	Specialization:
Lead Distribution Ranking:	Core Competencies:
Key Competitors:	Territory Focus:
Account Created: 12/26/24 2:13:00 PM	Last Updated: 02/13/25 7:37:25 AM
Account Admin:	Region: GLOBAL
Reports To:	Groups Assign To:
Master Account: Master Account1	Relationship Challenges:
Partner Logo: 	Apps Specialization:
Latitude:	Longitude:
Partner Tier: None	Partner Score:

- The associated Master/Partner Account for the selected Child Partner Account is displayed and click **Edit** to change the Master/Parent Account if required.

**Note: Thus, the Parent/Master Account is Master Account1, and the Child Account is Child Account1.**

- Parent-Child Partner Account Hierarchical Visibility can be enabled for Sales Prospects, Contracts, Opportunities, etc. In the example below, we will utilize the configuration settings for Sales Prospects.

WIDGET NETWORKS Administration Market Partners Onboard Sell Incentivize Dashboard Enable Reports Accelerate

Access

Administration > Record Visibility

### View Record Visibilities

Create View Search Clear Search Saved Searches Select

Select	Module Name	Default Access	User Hierarchy Enabled	Enable Account Hierarchy Visibility	Persona Account Hierarchy for Profile	Persona User Hierarchy for Profile
<input type="radio"/>	Courses		No			
<input type="radio"/>	Sales Prospects	Private	No	Yes	Partner Admin, Partner	
<input type="radio"/>	Tasks	Public Read/Write	Yes	Yes	Starter Partner User, Enterprise Vendor Admin	

- To configure the Record Visibility of any application, navigate to Administration > Access Management > Record Visibility. The image below shows the Record Visibility configured for the Sales Prospects.

Administration > Record Visibility > View a Record Visibility > Add/Edit a Record Visibility

Add/Edit a Record Visibility

Save Cancel

Record Visibility Information

Module Name:	Sales Prospects	Default Access:	Private
<input type="checkbox"/> Enable User Hierarchy		<input type="checkbox"/> Enable Account Hierarchy Visibility: Yes	
Persona Account Hierarchy for Profile:		Partner Admin, Partner	
Persona User Hierarchy for Profile:			

- **Enable Account Hierarchy Visibility** - Select 'yes' to Enable Account Hierarchy Visibility for the Sales Prospects.
- **Persona Account Hierarchy for Profile**—Also select the Profiles of the Parent Partner Account, which can view the records of the Child Partner Accounts.
- Once configured, click Save to save the Visibility Settings for the specific Application—Sales Prospects. Similar steps must be followed for other Applications.
- The User associated with **Master Account1**, logs into UPM. The User can now view records of the **Partner Child Account (Child Account1)** along with his/her own records.

WIDGET NETWORKS |  Welcome Market Onboard Sell Incentivize Enable Reports Accelerate

Sell > Prospects

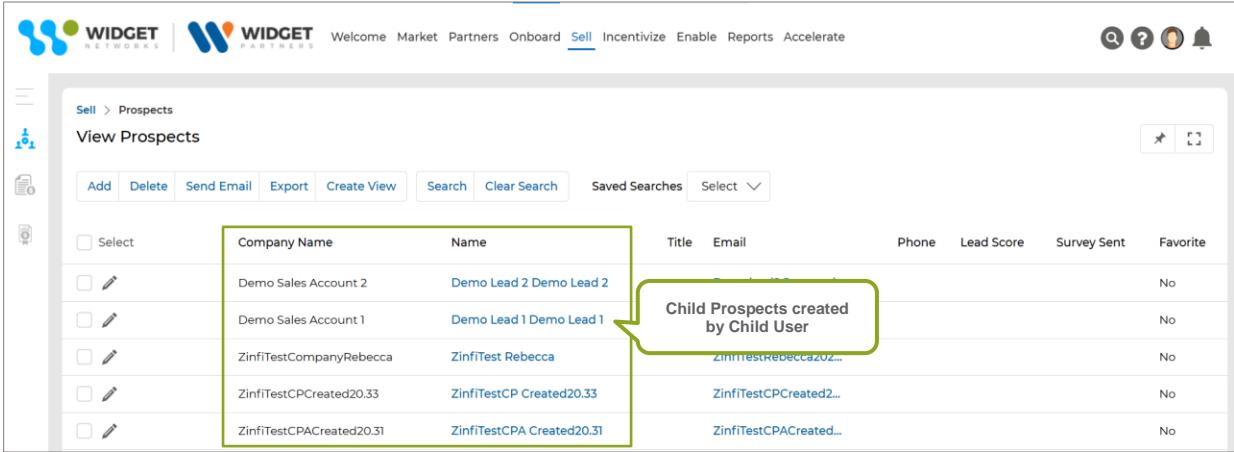
View Prospects

Select	Company Name	Name	Title	Email	Phone	Lead Score	Survey Sent	Favorite
<input type="checkbox"/>	Demo Sales Account 2	Demo Lead 2 Demo Lead 2	Demolead2@yopmail...					No
<input type="checkbox"/>	Demo Sales Account 1	Demo Lead 1 Demo Lead 1	DemoLead@yopmail...					No
<input type="checkbox"/>	ZinfiTestCompanyRebecca	ZinfiTest Rebecca	ZinfiTestRebecca202...					No
<input type="checkbox"/>	ZinfiTestCPCreated20.33	ZinfiTestCP Created20.33	ZinfiTestCPCreated2...					No
<input type="checkbox"/>	ZinfiTestCPACreated20.31	ZinfiTestCPA Created20.31	ZinfiTestCPACreated...					No
<input type="checkbox"/>	ZinfiTestCPCreated20.21	ZinfiTestCP Created20.21	ZinfiTestCPCreated2...					No
<input type="checkbox"/>	ZinfiTestCPACreated20.19	ZinfiTestCPA Created20.19	ZinfiTestCPACreated...					No
<input type="checkbox"/>	ZinfiTestCPCreated20.09	ZinfiTestCP Created20.09	ZinfiTestCPCreated2...					No
<input type="checkbox"/>	ZinfiTestCPACreated20.08	ZinfiTestCPA Created20.08	ZinfiTestCPACreated...					No
<input type="checkbox"/>	ZinfiTestMasterProspect	ZinfiTest Master Prospect	ZinfiTestMasterPros...					No
<input type="checkbox"/>	ZinfiTestRaul2024	ZinfiTest Raul	ZinfiTestRaul2024@y...					No
<input type="checkbox"/>	ZinfiTestDaul2024	ZinfiTest Daul	ZinfiTestDaul2024@y...					No

**Parent/Master Prospects** (highlighted with a purple box)

**Child Prospects** (highlighted with a green box)

- The User associated with Child Account1, logs into UPM. The User can now only view records of the Partner Child Account (Child Account1).



Company Name	Name	Title	Email	Phone	Lead Score	Survey Sent	Favorite
Demo Sales Account 2	Demo Lead 2 Demo Lead 2						No
Demo Sales Account 1	Demo Lead 1 Demo Lead 1						No
ZinfiTestCompanyRebecca	ZinfiTest Rebecca						No
ZinfiTestCPCreated20.33	ZinfiTestCP Created20.33						No
ZinfiTestCPACreated20.31	ZinfiTestCPA Created20.31						No

## Origin of Feature

Customer request. This feature enables Partner organizations to establish a parent-child relationship between their Partner Accounts, allowing Parent/Headquarter users to seamlessly access the details and records of their associated Partner Branch Accounts.

## CX Strategy Relation (6 S's)



Sufficiency

## Portal User-Facing Benefits

This feature allows administrators to configure a Partner Account Hierarchy solution which enables Partner organizations to establish a parent-child relationship between their Partner Accounts, allowing Parent/Headquarter users to seamlessly access the details and records of their associated Partner Branch Accounts.

## Incentive Rule Engine

### Related Application(s)

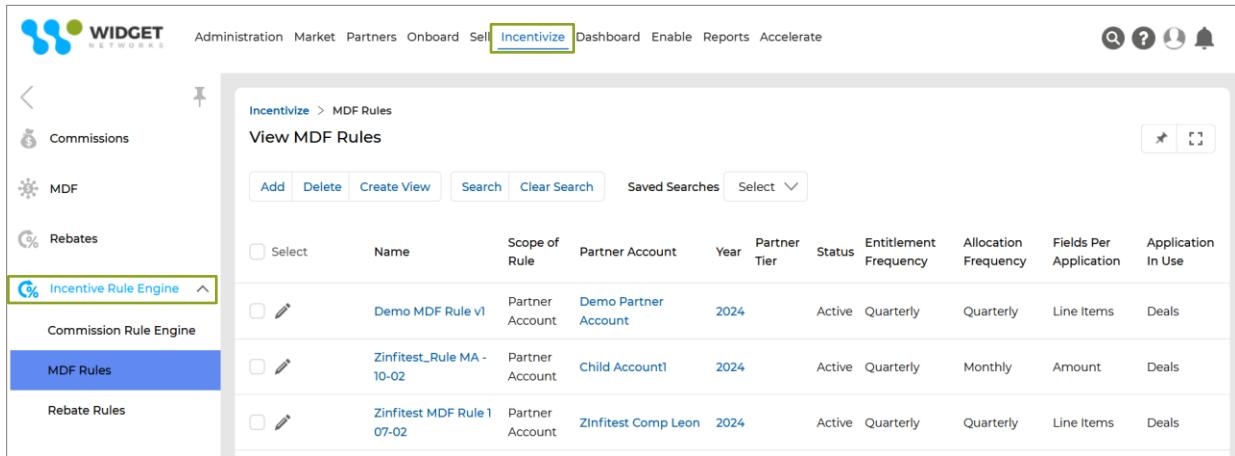
Commissions Management, Market Development Funds Management, Rebates Management

### Feature Description

The Incentive Rule Engine automates the calculation and distribution of incentives, ensuring accurate and timely payouts based on predefined sales targets and eligibility criteria. By configuring Market Development Funds (MDF), Commission, and Rebate Rules, administrators can set parameters such as entitlement frequency, sales thresholds, and payout amounts. The system dynamically calculates entitlements upon deal closure or invoice generation, eliminating manual intervention and minimizing errors. This structured approach enhances partner engagement, optimizes incentive distribution, and ensures transparency in reward management.

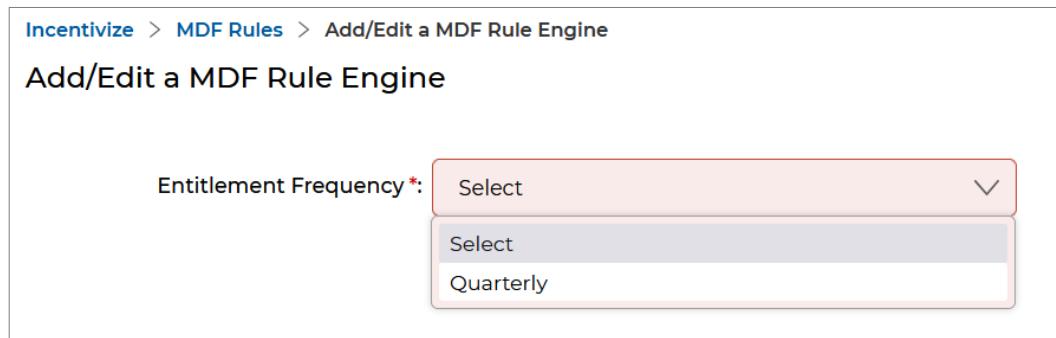
#### Example Use Case

- Navigate to Incentivize > Incentive Rule Engine > MDF Rules to reach the View MDF Rules page listing all the MDF Rules.

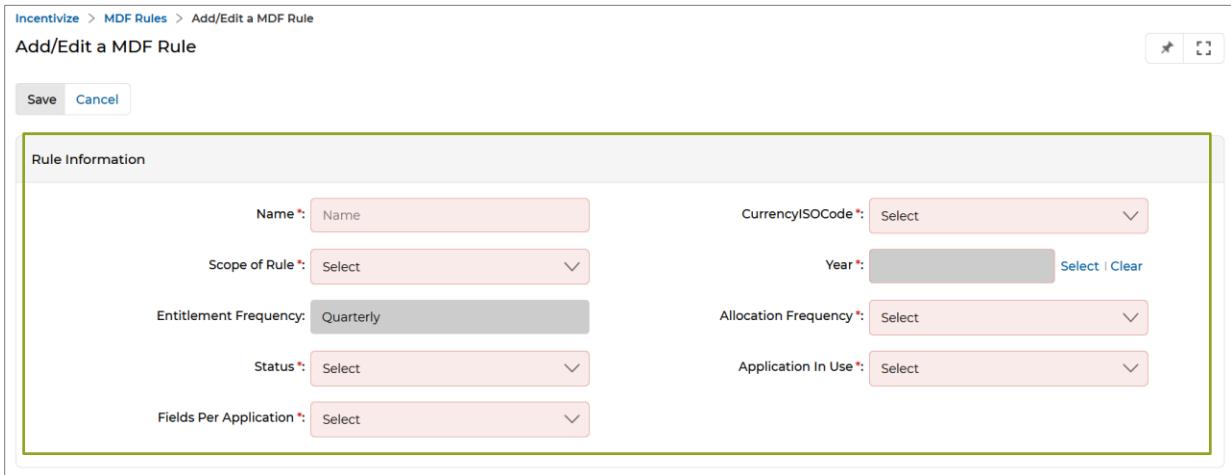


Select	Name	Scope of Rule	Partner Account	Year	Partner Tier	Status	Entitlement Frequency	Allocation Frequency	Fields Per Application	Application In Use
<input type="checkbox"/>	Demo MDF Rule v1	Partner Account	Demo Partner Account	2024	Active	Quarterly	Quarterly	Line Items	Deals	
<input type="checkbox"/>	Zinfitest_Rule MA - 10-02	Partner Account	Child Account1	2024	Active	Quarterly	Monthly	Amount	Deals	
<input type="checkbox"/>	Zinfitest MDF Rule 07-02	Partner Account	Zinfitest Comp Leon	2024	Active	Quarterly	Quarterly	Line Items	Deals	

- To add a new MDF Rule we have to click the Add button. Clicking the Add button will take us to **Add/Edit a MDF Rule Engine** page, where from the Entitlement Frequency dropdown menu we've to select the frequency of the incentive payout to Partners, which is Quarterly in this example.

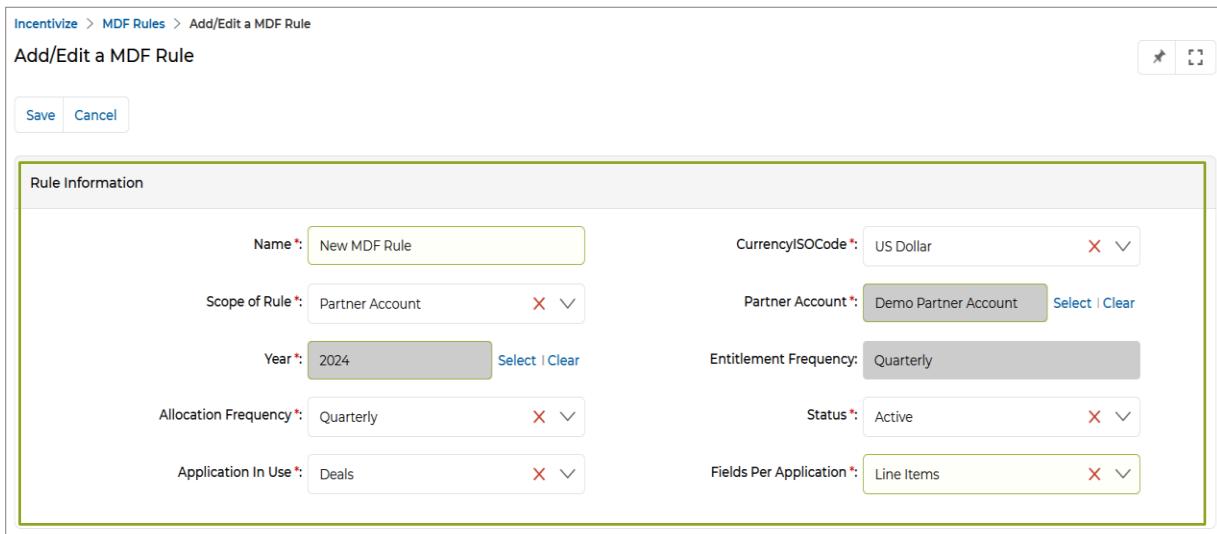


- Selection of **Entitlement Frequency**, will take us to **Add/Edit a MDF Rule** page where we've to provide the necessary information in the Rule Information to create the new MDF Rule. The fields are described below:



- **Name** – Provide the name of the MDF Rule.
- **Currency ISO Code** – Choose the desired currency from the dropdown list.
- **Scope of Rule** – Three options are available in this dropdown list – Partner Tier, Partner Account, and All. If a Partner Tier is selected, then the Rule will apply to the Accounts that have a specific Partner Tier. Select Partner Account to apply the Rule to a specific Partner Account. Selecting All will apply the Rule to all Accounts.
- **Year** – Select the year for which the MDF Rule is applicable.
- **Entitlement Frequency** – The value in this field shows the frequency of incentive payout.
- **Allocation Frequency** – The period during which partners must meet their targets to qualify for incentives.
- **Status** – It could be either Active or Inactive.
- **Application In Use** – The Partner can earn an incentive on Deal closure or Invoice generation. Select either Deal or Invoice as per requirement.
- **Fields Per Application** – Select Line Items or Amount from this dropdown menu.

- Once done, click Save. The newly created Rule will be visible in the View MDF Rules page.



Incentivize > MDF Rules > Add/Edit a MDF Rule

Add/Edit a MDF Rule

Save Cancel

**Rule Information**

Name\*: New MDF Rule

CurrencyISOCode\*: US Dollar

Scope of Rule\*: Partner Account

Partner Account\*: Demo Partner Account

Year\*: 2024

Entitlement Frequency: Quarterly

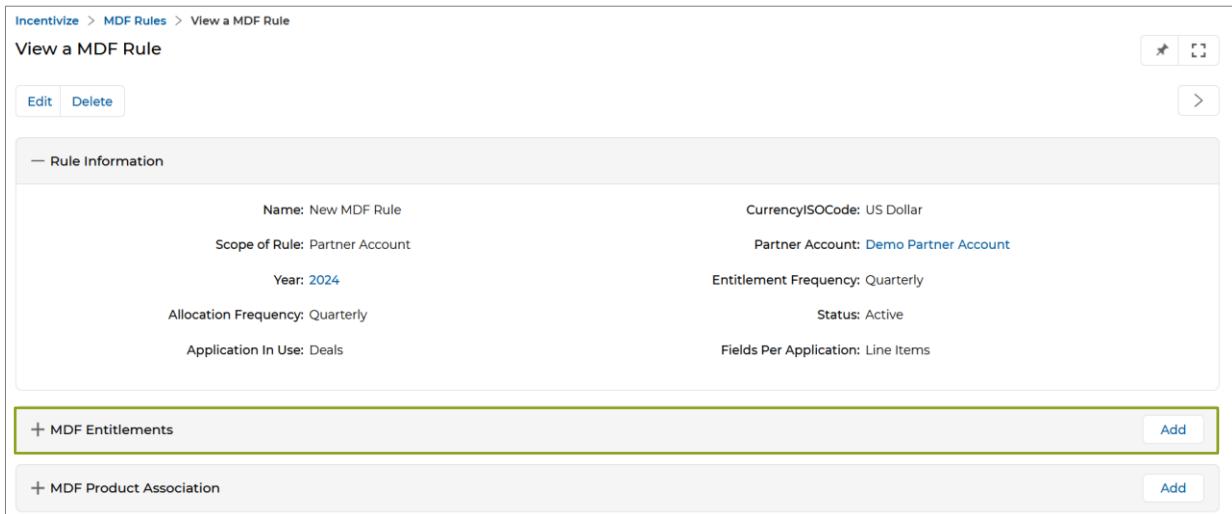
Allocation Frequency\*: Quarterly

Status\*: Active

Application In Use\*: Deals

Fields Per Application\*: Line Items

- Once we go to the details page of the MDF Rule, we've to define MDF Entitlements rules, by clicking Add button associated with MDF Entitlements. We will define the minimum and maximum sales targets that partners must achieve to qualify for incentives. Additionally, we will specify the quarter in which the incentive will be paid out and the exact amount the partner is entitled to receive.



Incentivize > MDF Rules > View a MDF Rule

View a MDF Rule

Edit Delete

**Rule Information**

Name: New MDF Rule

CurrencyISOCode: US Dollar

Scope of Rule: Partner Account

Partner Account: Demo Partner Account

Year: 2024

Entitlement Frequency: Quarterly

Allocation Frequency: Quarterly

Status: Active

Application In Use: Deals

Fields Per Application: Line Items

+ MDF Entitlements

+ MDF Product Association

Add

- Clicking the Add button takes us to Add/Edit a MDF Entitlement page where we've to provide Entitlement Details. The fields are explained below:

Add/Edit a MDF Entitlement

Save Cancel

Entitlement Details

MDF Rule Engine:	New MDF Rule	Select   Clear	Entitlement Frequency*:	Quarterly
Time Period*:	Q1	X	CurrencyISOCode*:	US Dollar
Minimum Sales Range*:	\$ 500		Maximum Sales Range*:	\$ 1,000
Entitlement Type*:	Fixed	X	Incentive*:	100

- MDF Rule Engine** – Name of the MDF Rule associated with the MDF Entitlement.
  - Entitlement Frequency** – Shows the Entitlement Frequency already selected beforehand.
  - Time Period** – Select the quarter on which the incentive will be paid.
  - CurrencyISOCode** – Currency of the incentive.
  - Minimum Sales Range** – Minimum Sales Target for Partner to achieve.
  - Maximum Sales Range** – Maximum Sales Target for Partner to achieve.
  - Entitlement Type** – Entitlement Type will be either Fixed or Percentage.
  - Incentive** – Provide the amount or the percentage on this field.
- We can add more MDF Entitlements as per requirements as visible in the image below.

Incentivize > MDF Rules > View a MDF Rule

View a MDF Rule

Edit Delete

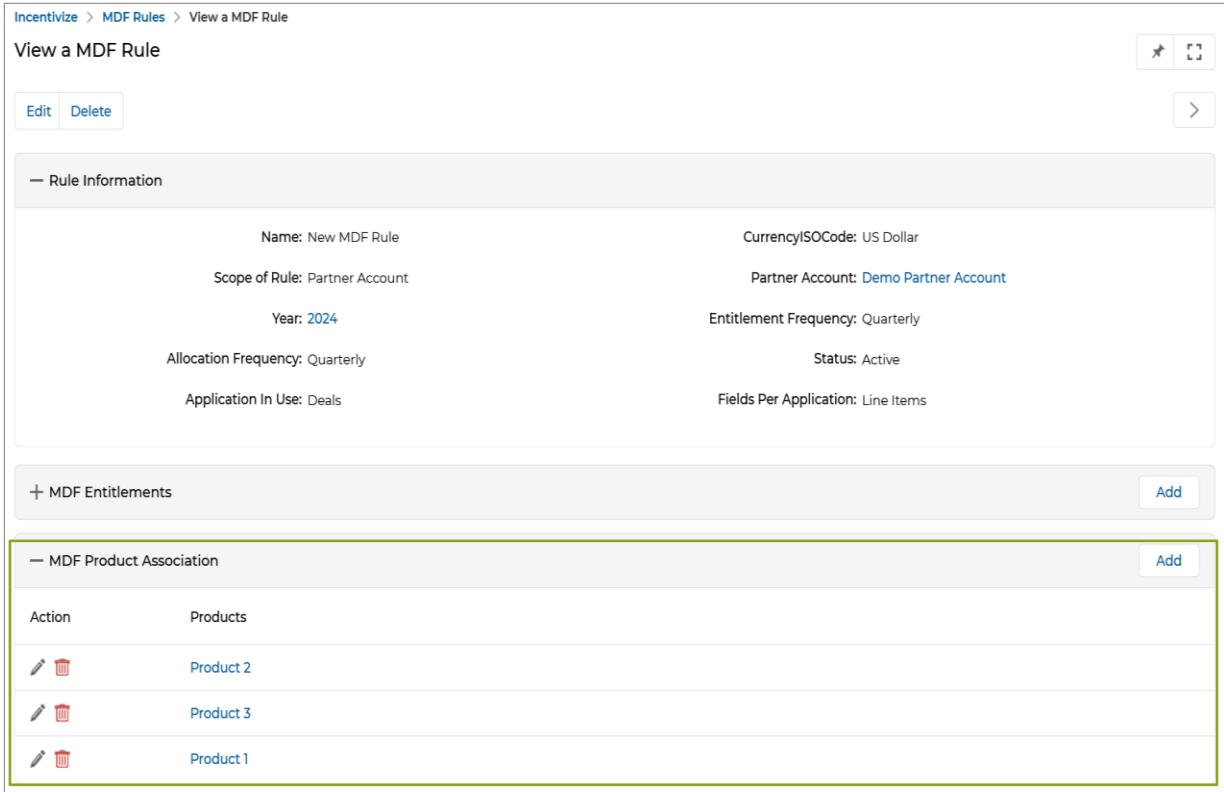
Rule Information

Name: New MDF Rule	CurrencyISOCode: US Dollar
Scope of Rule: Partner Account	Partner Account: Demo Partner Account
Year: 2024	Entitlement Frequency: Quarterly
Allocation Frequency: Quarterly	Status: Active
Application In Use: Deals	Fields Per Application: Line Items

MDF Entitlements

Action	Time Period	Minimum Sales Range	Maximum Sales Range	Entitlement Type	Incentive
	Q4	\$ 3001	\$ 50000	Fixed	400
	Q3	\$ 2001	\$ 3000	Fixed	300
	Q2	\$ 1001	\$ 2000	Fixed	200
	Q1	\$ 500	\$ 1000	Fixed	100

- From MDF Entitlements details, we find that if the Partner sells between –
  - \$500 - \$1000 is eligible to receive \$100 as Incentive
  - \$1001 - \$2000 is eligible to receive \$200 as Incentive
  - \$2001 - \$3000 is eligible to receive \$300 as Incentive
  - \$3001 - \$50000 is eligible to receive \$400 as Incentive
- Next, in the MDF Product Association related list we've to add the MDF Eligible Products by clicking Add button.



**Rule Information**

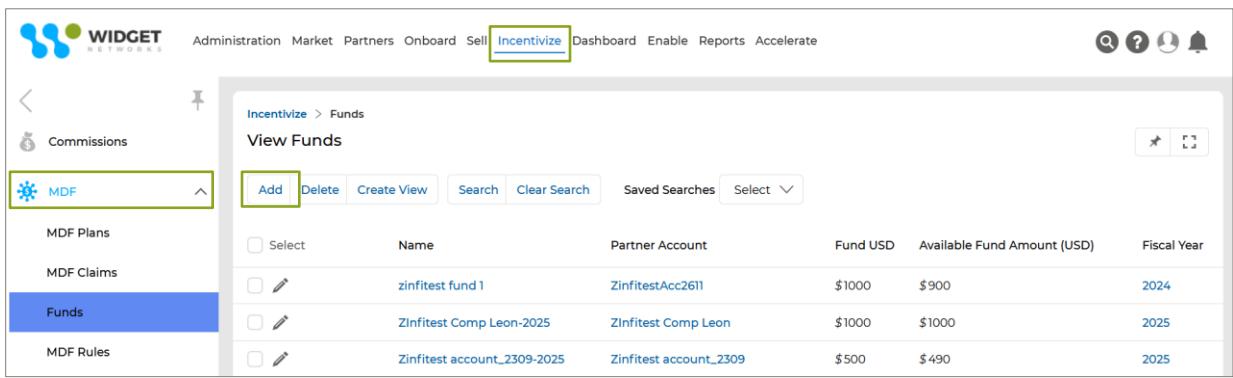
Name: New MDF Rule	CurrencyISOCode: US Dollar
Scope of Rule: Partner Account	Partner Account: Demo Partner Account
Year: 2024	Entitlement Frequency: Quarterly
Allocation Frequency: Quarterly	Status: Active
Application In Use: Deals	Fields Per Application: Line Items

**MDF Entitlements**

**MDF Product Association**

Action	Products
	Product 2
	Product 3
	Product 1

- Now, navigate to Incentivize > MDF > Funds and click Add button to add new Fund bucket.

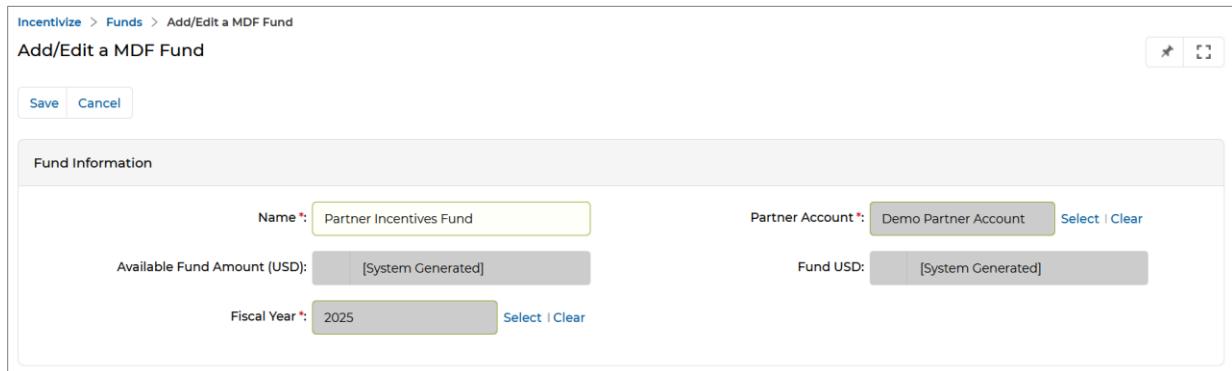
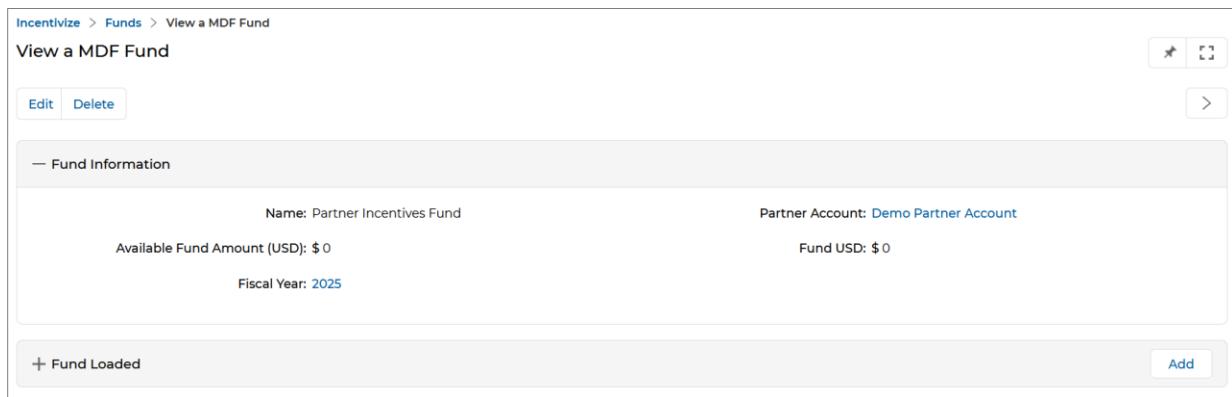


**Incentivize > Funds**

**View Funds**

Select	Name	Partner Account	Fund USD	Available Fund Amount (USD)	Fiscal Year
	zinfitest fund 1	ZinfitestAcc2611	\$1000	\$900	2024
	Zinfitest Comp Leon-2025	Zinfitest Comp Leon	\$1000	\$1000	2025
	Zinfitest account_2309-2025	Zinfitest account_2309	\$500	\$490	2025

- In the Add/Edit a MDF Fund provide the name of the Fund, Partner Account and Fiscal Year and save the details.

- Now, we log in to the Partner portal and navigate to Sell > Deals > Registered Deals and click Add button to add a Deal, add Deal Line Items and submit it for approval.

Sell > Registered Deals > View a Registered Deal

### View a Registered Deal

[Edit](#) [Submit for Approval](#)

[Deal Information](#)

Deal Name: Cloud Storage Deal	Deal ID: D0305_22025
Currency ISO Code: US Dollar	Quarter: FY24Q4
Expected Close Date: 03/02/2025	Sales Stage:
Type: New Deal	Lead Source:
Status: Ready for Submission	Price Book: New Price Book for Cloud Products
Favorite: No	Amount: \$ 4,550
Approved Date:	

[+ Contact Information](#)

[+ Company Information](#)

[+ Partner](#)

[Deal Line Items](#)

[Add Product\(s\)](#)

Action	Deal Name	Currency Exchange Rate	Currency ISOCode
	Product 3	1	US Dollar
	Product 2	1	US Dollar
	Product 1	1	US Dollar

- Once the Deal gets approved by the Approver, we navigate to Incentivize > MDF > Funds and go to the details page of the MDF Fund we created earlier and see that total incentive earned by the Partner has been auto-calculated based on the value of the Deal and the rules defined in MDF Rule and displayed in the Fund Loaded related list.

Incentivize > Funds > View a MDF Fund

### View a MDF Fund

[Edit](#) [Delete](#)

[Fund Information](#)

Name: Partner Incentives Fund	Partner Account: Demo Partner Account
Available Fund Amount (USD): \$ 400	Fund USD: \$ 400
Fiscal Year: 2025	

[Fund Loaded](#)

Action	Name	Timeframe	Incentive Amount	Admin Contribution	Fund Total
	Partner Incentives Fund-Q1	Q1	\$ 400	\$ 0	\$ 400

## Origin of Feature

Customer request. This feature automates MDF incentives, ensuring accurate, efficient, and structured partner rewards.

## CX Strategy Relation (6 S's)



Sufficiency

## Portal User-Facing Benefits

This feature allows administrators to automate MDF incentives, ensuring accurate, efficient, and structured partner rewards.

---

# Fixes and Patches

## Display Saved Groups and Users as Selected in the Visibility Configuration Window

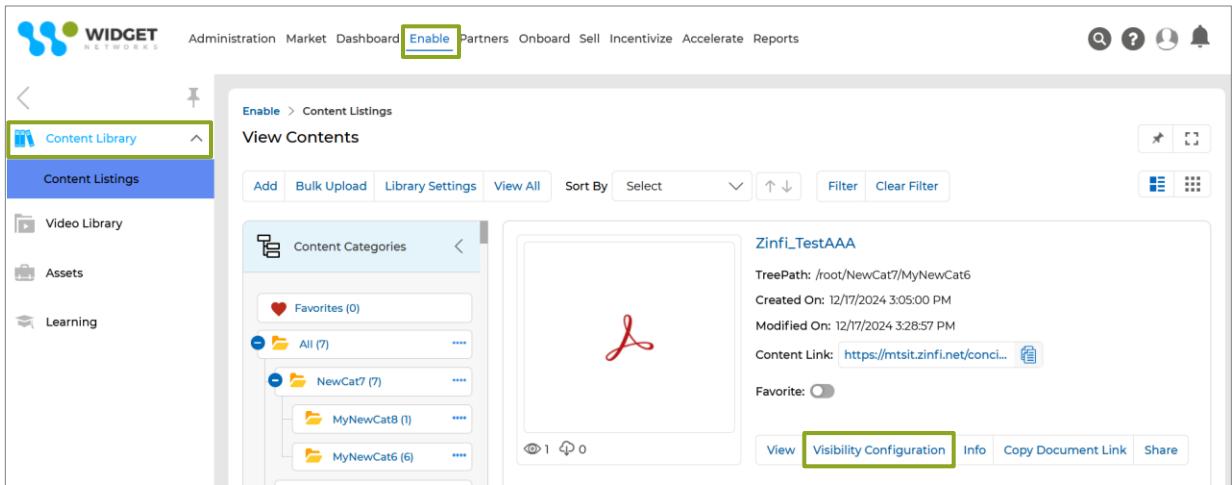
### Related Application(s)

Content Library Management, Generic

### Feature Description

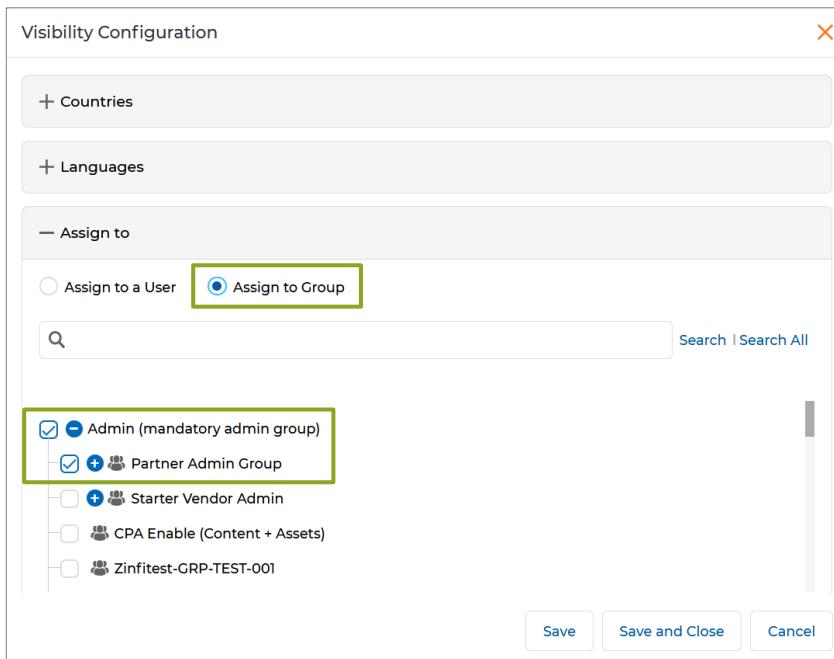
The enhanced visibility configuration feature greatly improves the admin experience by pre-selecting saved groups and users in the User and Group tree. This intuitive enhancement eliminates confusion by clearly displaying the current visibility settings, ensuring accuracy and ease of use. Admins can effortlessly verify or update configurations without relying on memory, streamlining the process and saving time. This feature demonstrates a thoughtful approach to usability, reinforcing clarity and precision in managing visibility settings. This enhancement is available across all applications in the UPM where Visibility Configuration is integrated.

- We must traverse the **Enable > Content Library > Content Listings** and click **Visibility Configuration** to open the **Visibility Configuration** window.



The screenshot shows the Zinfi Enable interface. The top navigation bar includes links for Administration, Market, Dashboard, **Enable** (which is highlighted in blue), Partners, Onboard, Sell, Incentivize, Accelerate, and Reports. The left sidebar has a 'Content Library' section with 'Content Listings' selected, and other options like Video Library, Assets, and Learning. The main content area is titled 'Enable > Content Listings' and 'View Contents'. It shows a 'Content Categories' tree with 'Favorites (0)', 'All (7)', 'NewCat7 (7)', 'MyNewCat8 (1)', and 'MyNewCat6 (6)'. To the right, a document preview for 'Zinfi\_TestAAA' is shown, including its TreePath, creation and modification dates, content link, and a 'Favorite' toggle. The 'Visibility Configuration' button is highlighted with a green box in the bottom right corner of the content area.

- Once the **Visibility Configuration** window is open, select Countries, Languages, and **User/Group**.
- In this example, select the desired Groups to assign the content.



The screenshot shows the 'Visibility Configuration' dialog box. It has sections for '+ Countries' and '+ Languages'. The 'Assign to' section is expanded, showing two radio buttons: 'Assign to a User' (unchecked) and 'Assign to Group' (checked and highlighted with a green box). Below this is a search bar with 'Search' and 'Search All' buttons. A list of groups is shown, with 'Admin (mandatory admin group)' and 'Partner Admin Group' checked (highlighted with a green box). At the bottom are 'Save', 'Save and Close', and 'Cancel' buttons.

- Click **Save** once the desired Groups are selected.

Visibility Configuration

— Assign to

Content Assignment History

Action	Assigned To	Assignment Type	Access	Assigned By
	Partner Admin Group	Group	Read/ Write	Arijit Roy
	Admin (mandatory admin group)	Group	Read/ Write	Arijit Roy

Assign to a User  Assign to Group

Search | Search All

Admin (mandatory admin group)  
 Partner Admin Group  
 Starter Vendor Admin  
 CPA Enable (Content + Assets)  
 Zinfitest-GRP-TEST-001

Save Save and Close Cancel

- Click **Save** once the desired Groups are selected.

Visibility Configuration

— Assign to

Content Assignment History

Action	Assigned To	Assignment Type	Access	Assigned By
	Partner Admin Group	Group	Read/ Write	Arijit Roy
	Admin (mandatory admin group)	Group	Read/ Write	Arijit Roy

Assign to a User  Assign to Group

Search | Search All

Admin (mandatory admin group)  
 Partner Admin Group  
 Starter Vendor Admin  
 CPA Enable (Content + Assets)  
 Zinfitest-GRP-TEST-001

Save Save and Close Cancel

- Once selected Groups are saved, the selection of the Groups with the check mark and the selection summary is permanently saved, as shown in the image above.

- The Visibility Configuration window should display all previously saved groups and users as selected when accessed.

## Origin of Feature

Customer request. The feature is requested to save the Group/User selection in the Visibility Configuration Window.

## CX Strategy Relation (6 S's)



Sufficiency

## Portal User-Facing Benefits

This feature allows administrators to save Group/User selection in the Visibility Configuration Window.

---

## Integration of Upgraded Help Portal for All UPM Portals

### Related Application(s)

Generic

### Feature Description

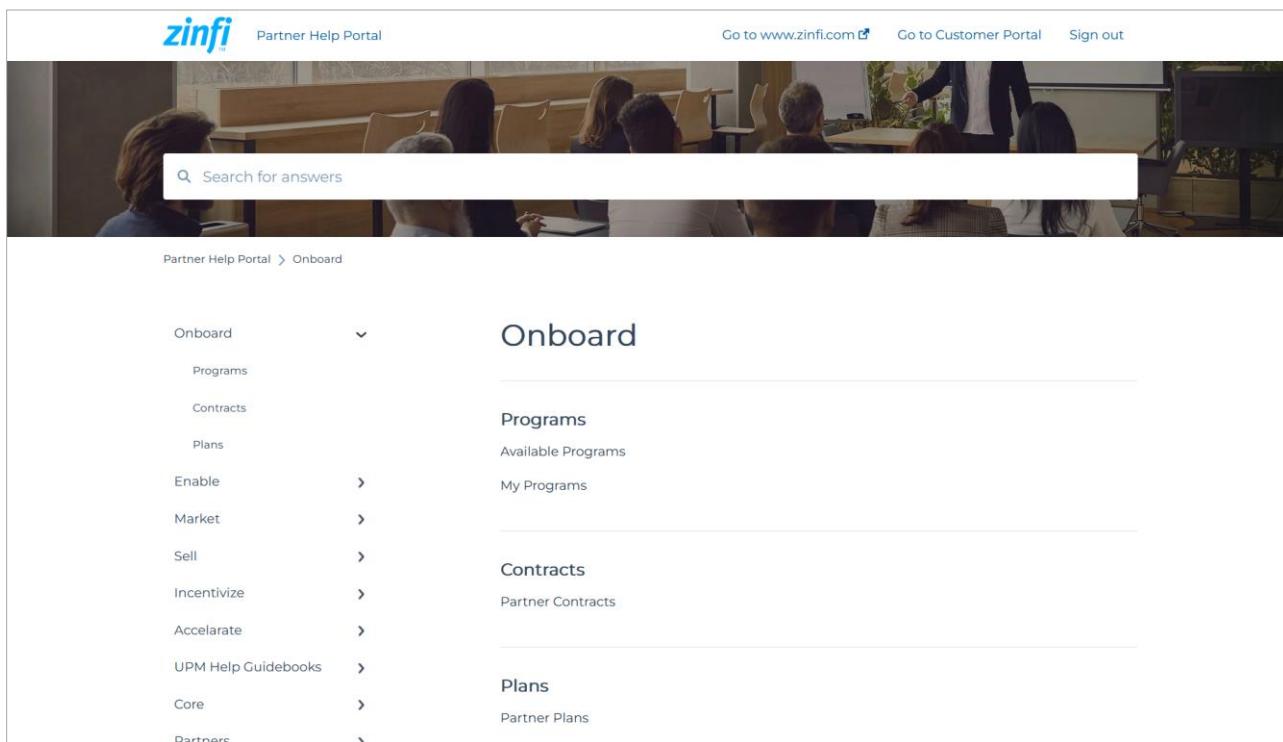
This fix integrates all UPM Portals (Single-tenant and Multi-tenant) with a state-of-the-art Help Portal hosted via HubSpot, replacing the legacy Help Portal. All single-tenant portals, including prominent client platforms, have transitioned to the new framework, offering a consistent, automated, and user-friendly support experience.



Streamline How You  
**Onboard Your Partners**

**Onboarding & Enablement Programs**

Programs Management enables your organization to automate the partner recruitment, onboarding, and enablement process with a series of step-by-step activities through a configured Partner Program Flow. The application helps you create varied Partner Programs comprising a hierarchy of



zinfi Partner Help Portal

Go to www.zinfi.com  Go to Customer Portal Sign out

Search for answers

Partner Help Portal > Onboard

Onboard

- Programs
- Contracts
- Plans
- Enable >
- Market >
- Sell >
- Incentivize >
- Accelerate >
- UPM Help Guidebooks >
- Core >
- Partners >

**Onboard**

- Programs**
  - Available Programs
  - My Programs
- Contracts**
  - Partner Contracts
- Plans**
  - Partner Plans

## Origin of Feature

Customer request. The feature is requested to replace the legacy Help Portal with a new Help Portal hosted in HubSpot.

## CX Strategy Relation (6 S's)



Sufficiency

## Portal User-Facing Benefits

This feature allows the Admin and Partner to use the new Help Portal in UPM.

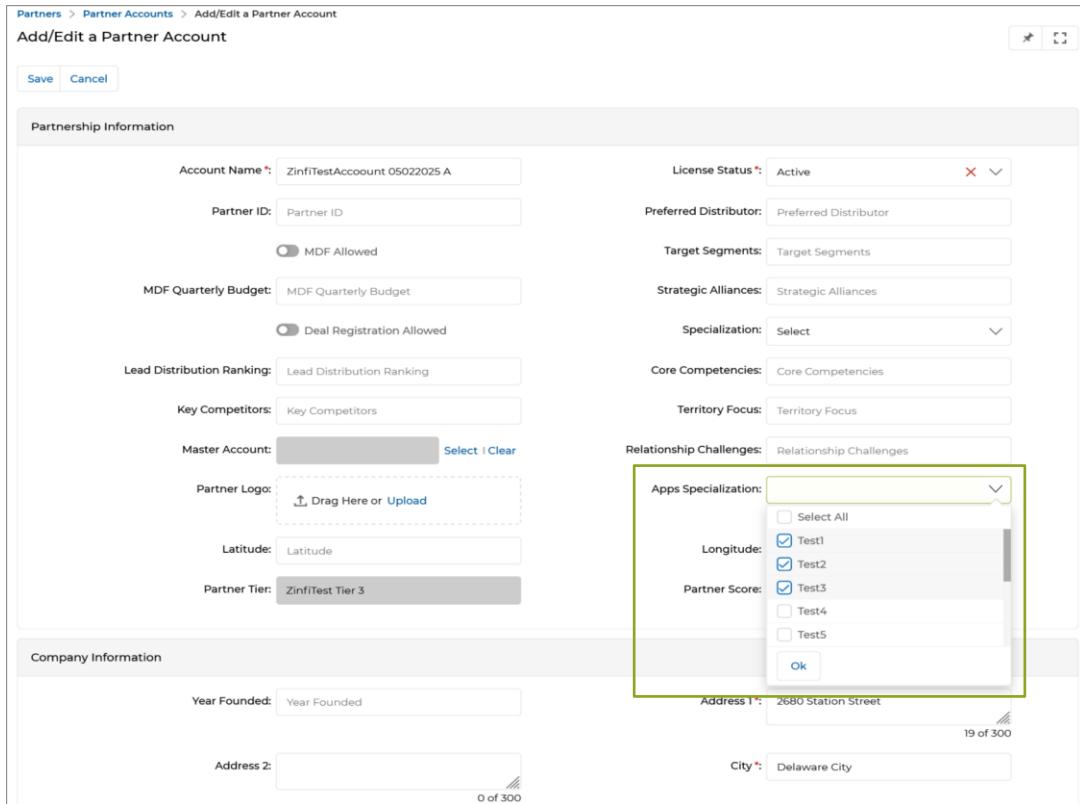
## Multi-select Picklist Field UI/UX Upgrade

### Related Application(s)

Generic

### Feature Description

This fix involves redesigning the multi-select picklist to resemble a dropdown style for better user understanding and consistency. The previous multi-select picklist lacked the visual indicator (e.g., a down arrow) to distinguish it from a text box. The multi-select picklist now includes a down arrow, making it visually consistent with standard dropdown lists.



Partners > Partner Accounts > Add/Edit a Partner Account

Add/Edit a Partner Account

Partnership Information

Account Name *: ZinfoTestAccount 05022025 A	License Status *: Active
Partner ID: Partner ID	Preferred Distributor: Preferred Distributor
<input type="checkbox"/> MDF Allowed	Target Segments: Target Segments
MDF Quarterly Budget: MDF Quarterly Budget	Strategic Alliances: Strategic Alliances
<input type="checkbox"/> Deal Registration Allowed	Specialization: Select
Lead Distribution Ranking: Lead Distribution Ranking	Core Competencies: Core Competencies
Key Competitors: Key Competitors	Territory Focus: Territory Focus
Master Account: <input type="button" value="Select   Clear"/>	Relationship Challenges: Relationship Challenges
Partner Logo: <input type="button" value="Drag Here or Upload"/>	Apps Specialization: <input type="button" value="Select All"/>
Latitude: Latitude	Longitude: <input type="checkbox"/> Test1 <input checked="" type="checkbox"/> Test2 <input checked="" type="checkbox"/> Test3 <input type="checkbox"/> Test4 <input type="checkbox"/> Test5
Partner Tier: ZinfoTest Tier 3	Partner Score: <input type="button" value="Ok"/>

Company Information

Year Founded: Year Founded	Address 1: 2680 Station Street
Address 2: <input type="button" value="0 of 300"/>	City *: Delaware City

Partners > Partner Accounts > Add/Edit a Partner Account

### Add/Edit a Partner Account

Save Cancel

#### Partnership Information

Account Name *:	ZinfoTestAccount 05022025 A	License Status *:	Active
Partner ID:	Partner ID	Preferred Distributor:	Preferred Distributor
<input checked="" type="radio"/> MDF Allowed		<input checked="" type="radio"/> Target Segments: Target Segments	
<input checked="" type="radio"/> MDF Quarterly Budget: MDF Quarterly Budget		<input checked="" type="radio"/> Strategic Alliances: Strategic Alliances	
<input checked="" type="radio"/> Lead Distribution Ranking: Lead Distribution Ranking		<input checked="" type="radio"/> Specialization: Select	
<input checked="" type="radio"/> Key Competitors: Key Competitors		<input checked="" type="radio"/> Core Competencies: Core Competencies	
<input checked="" type="radio"/> Master Account: Select   Clear		<input checked="" type="radio"/> Territory Focus: Territory Focus	
<input checked="" type="radio"/> Partner Logo: Drag Here or Upload		<input checked="" type="radio"/> Relationship Challenges: Relationship Challenges	
<input checked="" type="radio"/> Latitude: Latitude		<input checked="" type="radio"/> Apps Specialization: Test1, Test2, Test3	
<input checked="" type="radio"/> Longitude: Longitude			

## Origin of Feature

Customer request. The fix is requested to redesign the multi-select picklist to resemble a dropdown for better clarity and consistency.

## CX Strategy Relation (6 S's)



Simplicity

## Portal User-Facing Benefits

This feature allows the Admin and Partner to use the new multi-select picklist.

## Record Visibility Configurations Auto-applied for New Applications

## Related Application(s)

Access Management

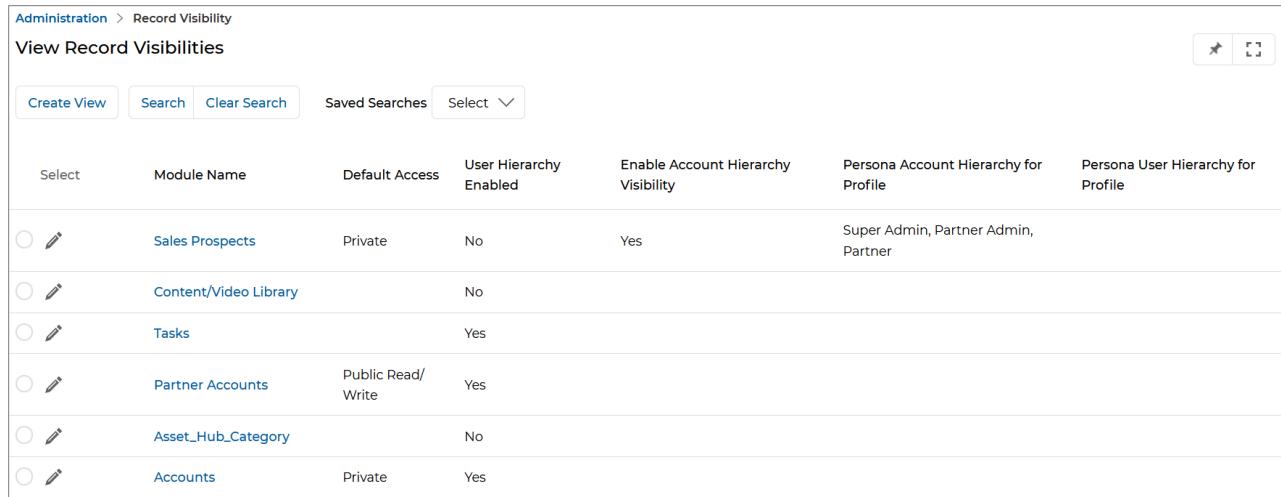
## Feature Description

Previously, when a new application was created, Record Visibility settings were not automatically generated, requiring manual intervention from support teams to configure access controls. This new update ensures that Record Visibility settings are enabled by default for every new application, allowing admins to immediately configure Visibility Setting Rules, such as hierarchy or group-specific access rules.

- Whenever a new application is created, it will appear in the Record Visibility application, allowing admins to control settings such as:
  - Default Access
  - User Hierarchy settings
  - Group-specific rules for record access

Administration > Record Visibility

**View Record Visibilities**

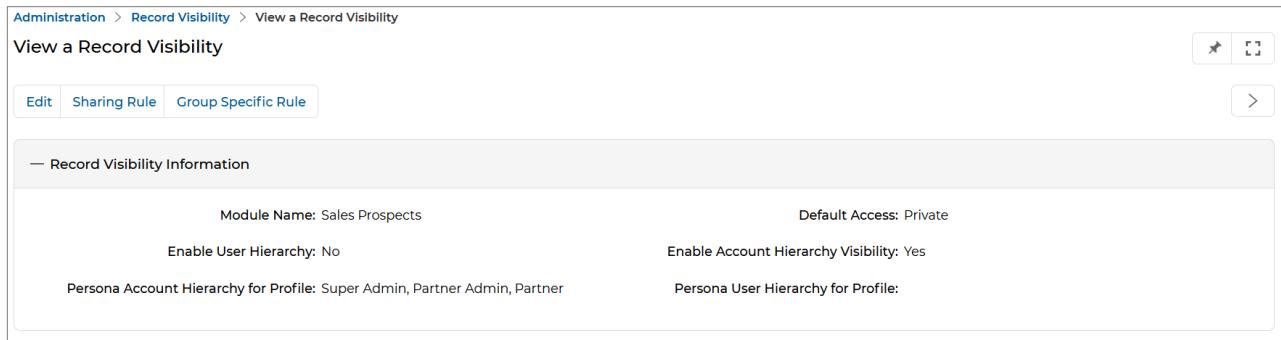


The screenshot shows a table with the following data:

Select	Module Name	Default Access	User Hierarchy Enabled	Enable Account Hierarchy Visibility	Persona Account Hierarchy for Profile	Persona User Hierarchy for Profile
<input type="radio"/>	Sales Prospects	Private	No	Yes	Super Admin, Partner Admin, Partner	
<input type="radio"/>	Content/Video Library		No			
<input type="radio"/>	Tasks		Yes			
<input type="radio"/>	Partner Accounts	Public Read/Write	Yes			
<input type="radio"/>	Asset_Hub_Category		No			
<input type="radio"/>	Accounts	Private	Yes			

Administration > Record Visibility > View a Record Visibility

**View a Record Visibility**



The screenshot shows a table with the following data:

Record Visibility Information	
Module Name: Sales Prospects	Default Access: Private
Enable User Hierarchy: No	Enable Account Hierarchy Visibility: Yes
Persona Account Hierarchy for Profile: Super Admin, Partner Admin, Partner	Persona User Hierarchy for Profile:

## Origin of Feature

Customer request. The fix is requested to automatically enable Record Visibility Settings for new applications, eliminating the need for manual configuration.

## CX Strategy Relation (6 S's)



Security

### Portal User-Facing Benefits

This feature auto-configures Record Visibility Settings for new applications.

## Create User with Default Inactive Status when Account is Inactive

### Related Application(s)

Users & Territories Management

### Feature Description

This fix enhances security by ensuring that users registering via the sign-up page are created with an inactive or pending status if their associated Partner Account is inactive. Previously, users were created with an active status, allowing them to access the platform or reset passwords even when the Partner Account was inactive, which posed a security risk. With this update, users will receive a registration confirmation email but cannot access the platform or reset their password until the Partner Account is activated. Admins can still manually create users with active status from inactive accounts, but these users will remain restricted from logging in until the account is active. This fix addresses security gaps and ensures better access control while maintaining admin flexibility.

Administration > Users > View a User

View a User

Edit Delete Assign To Request Impersonation Impersonate Permanent Delete Change Username Resend Impersonate Email

— User Information

First Name: ZinfoTest	Last Name: Olmos
User Name: ZinfoTestOlmos2024@yopmail.com	Status: Pending
Email address: ZinfoTestOlmos2024@yopmail.com	Other Email:
Company Name: ZTestAccount PartnerLocator 8112024 - 01	Profile: Partner
Title: SQA	Direct Phone:
Country Code:	Mobile:
Department:	Other:
Fax:	Main Phone:
Primary Address: 4308 Tuna Street 1	Primary Address2: 4308 Tuna Street 2

Administration > Users > View a User > View a Partner Account

### View a Partner Account

[Edit](#) [Delete](#) [Clone](#) [Assign To](#) [Partner Account Locator](#) [Scorecard](#)

**Partnership Information**

Account Name: ZTestAccount PartnerLocator 8112024 - 01	License Status: Inactive
Partner ID:	Preferred Distributor:
MDF Allowed: No	Target Segments:
MDF Quarterly Budget:	Strategic Alliances:
Deal Registration Allowed: No	Specialization:
Lead Distribution Ranking:	Core Competencies:
Key Competitors:	Territory Focus:
Account Created: 10/23/24 5:32:10 AM	Last Updated: 01/29/25 11:31:43 AM

## Origin of Feature

Customer request. The fix is requested to ensure that users are created with an inactive or pending status if their associated Partner Account is inactive, which prevents them from accessing the portal.

## CX Strategy Relation (6 S's)



Security

## Portal User-Facing Benefits

This feature allows the Admin to create users with default inactive status when the Partner Account is inactive.

## Email Domains Re-validation

### Related Application(s)

Generic

### Feature Description

The email domain validation rules have been updated to allow a broader set of valid domains, addressing a previous issue where certain legitimate domains were incorrectly restricted. Previously, only a limited set of standard domains such as:

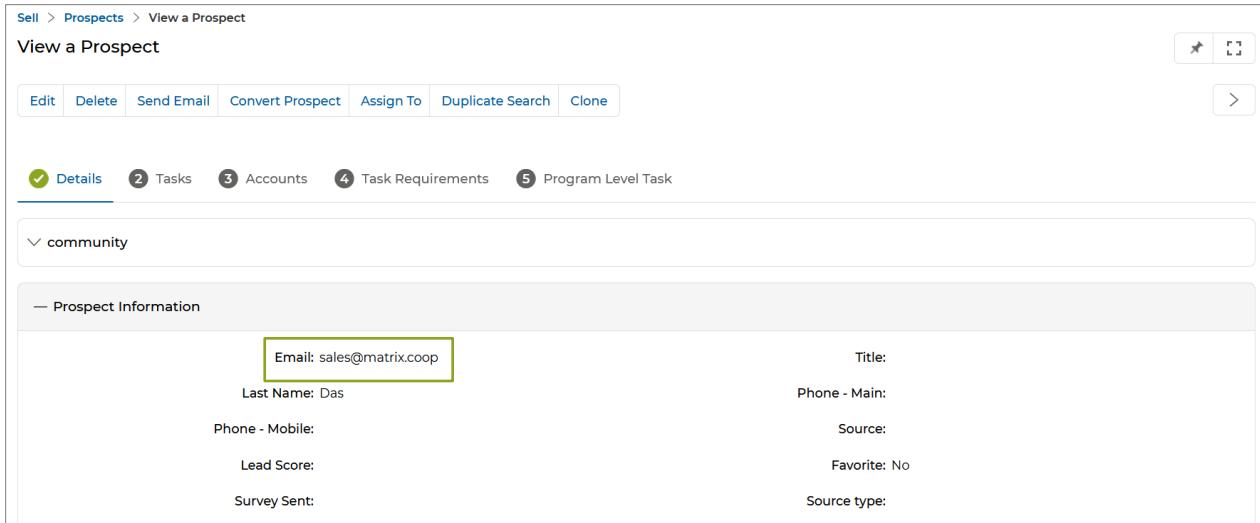
- o '.com'
- o '.org'

- '.net'
- '.info'
- '.visa'

were allowed, while other valid domains like

- '.edu'
- '.gov'
- '.mail'
- '.coop'
- '.museum'
- '.int'

were being blocked. This issue adversely affected multiple applications, including Sales Prospect, Sales Contact, Email, Sales Account, Partner Prospect, Partner Contact, Partner Account, Partner Users, and the signup form. In the latest Release, UPM 25.1, the system correctly accepts all valid domains across these applications, ensuring a smoother user experience during signups, lead creation, and other email input fields.



## Origin of Feature

Customer request. The fix is requested to update the email domain validation rules to allow newly recognized domains and ensure seamless email input.

## CX Strategy Relation (6 S's)



Security

## Portal User-Facing Benefits

This feature allows the Admin and Partner to use the newly recognized domains and ensure seamless email input.

---

Feature Name	Application(s)	CX Strategy Relation	User Type(s)
UPM Login Manager Upgrades - Enhanced Password Manager and Shortcut to Home	Users & Territories Management	Security	Admin
Triggering Workflow with Record Delete	Workflow Management	Sufficiency	Admin
Configuring Auto-content Visibility based on User Profile Country and Language via Portal Settings	CMS Management	Sufficiency	Admin
Persisting Visibility Configuration Window	Content Library Management, Generic	Sufficiency	Admin
Advanced Search for List Pages	Deals Registration Management, Generic	Sufficiency	Admin, Partner
Configuring Incentives Enablement for Partners	Partner Leads Management	Sufficiency	Admin
Multi-signee Contract Workflows for DocuSign Contracts	Partners Profile Management, CMS Management, Partner Contracts Management	Scalability	Admin
Partner Locator Enhancements	Marketplace Management	Sufficiency	Admin, Partner
Configurable Tooltips in Dynamic Forms for Pre-Log-in Pages	Workflow Management	Sufficiency	Admin
Tabbed View Interface for Application Record(s) Create/View	Workflow Management, Generic	Sufficiency	Admin
AI-embedded Text Content Generator for ZINFI Editor	Alerts & Notification Management, Generic	Speed	Admin
Workflows Gallery	Workflow Management	Simplicity	Admin

Save Draft Workflows	Workflow Management	Sufficiency	Admin
Sharing of Library Category for Asset Co-branding	Content Library Management, Co-Branded Assets Management	Sufficiency	Admin, Partner
Mark Communities as Favorites and Configure Community Email Notifications	Community Management	Simplicity	Admin, Partner
Automatic Partner Tier Assignment Based on Partner Score	Access Management, Partner Profile Management	Sufficiency	Admin
Auto Group Assignment based on Attributes	Access Management, Users	Sufficiency	Admin
Master/Parent-Child Partner Accounts and Record Visibility	Access Management, Sales Leads Management	Sufficiency	Admin, Partner
Incentive Rule Engine	Market Development Funds Management	Sufficiency	Admin, Partner
<b>Fixes and Patches</b>			
Display Saved Groups and Users as Selected in the Visibility Configuration Window	Content Library Management, Generic	Sufficiency	Admin
Integration of Upgraded Help Portal for All UPM Portals	Generic	Sufficiency	Admin, Partner
Multi-select Picklist Field UI/UX Upgrade	Generic	Simplicity	Admin, Partner
Record Visibility Configurations Auto-applied for New Applications	Access Management	Security	Admin
Create User with Default Inactive Status when Account is Inactive	Users & Territories Management	Security	Admin
Email Domains Re-validation	Generic	Security	Admin, Partner