

Alerts & Notification Management

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UPM 25.x

ZINFI Confidential & Proprietary

Shared Under NDA



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Introduction

The mobile alerts function of UPM allows administrators to easily display alerts to their users' and partners' mobile devices when specific business events occur in the customers' UPM instance. UPM alerts utilize the connected aSaaS (adaptive SaaS) framework to set up localized alert templates which can be activated and sent over predetermined time intervals to specific users. Specific triggered operations in the UPM can be set up through UPM's Alerts Management Application as alerts that specify a notification message and recipients. The alert feature hands off notifications to services operated by device OS vendors, such as Apple or Google, for subsequent delivery to customers' mobile devices. Alerts are handled by UPM's CENTRI (Centralized Interconnect integration) engine through REST API, which provides the integration mechanism.

UPM alerts let your users know when certain events occur in UPM or when you want to impart information to your users. For example, alerts let users know when they receive approval requests or when someone replies to a user's comments.

UPM makes it easy to set up custom alerts for instant or scheduled notifications. Alerts can be based on system actions, partner functions such as email opens, system operations, and user/partner activities, such as the establishment of a new account or a deal registration.

Types of Alerts

In-app Alerts

In-app notifications keep users aware of relevant activity while they're using the UPM app. By tapping the notification icon, a user can view the most recent notifications received within the last 90 days.

If the Communities Application is enabled for your organization, users will see notifications from all of the communities they're members of. To help users easily identify which community notification came from, the community's name is listed after the time stamp.

Push Notifications

Push notifications are alerts that appear on a mobile device when a user has installed UPM for Android, iOS, or another mobile OS but isn't using it. These alerts can consist of text, icons, and sounds, depending on the device type. If an administrator enables push notifications for your organization, individual users can still choose whether to receive push notifications on their devices.

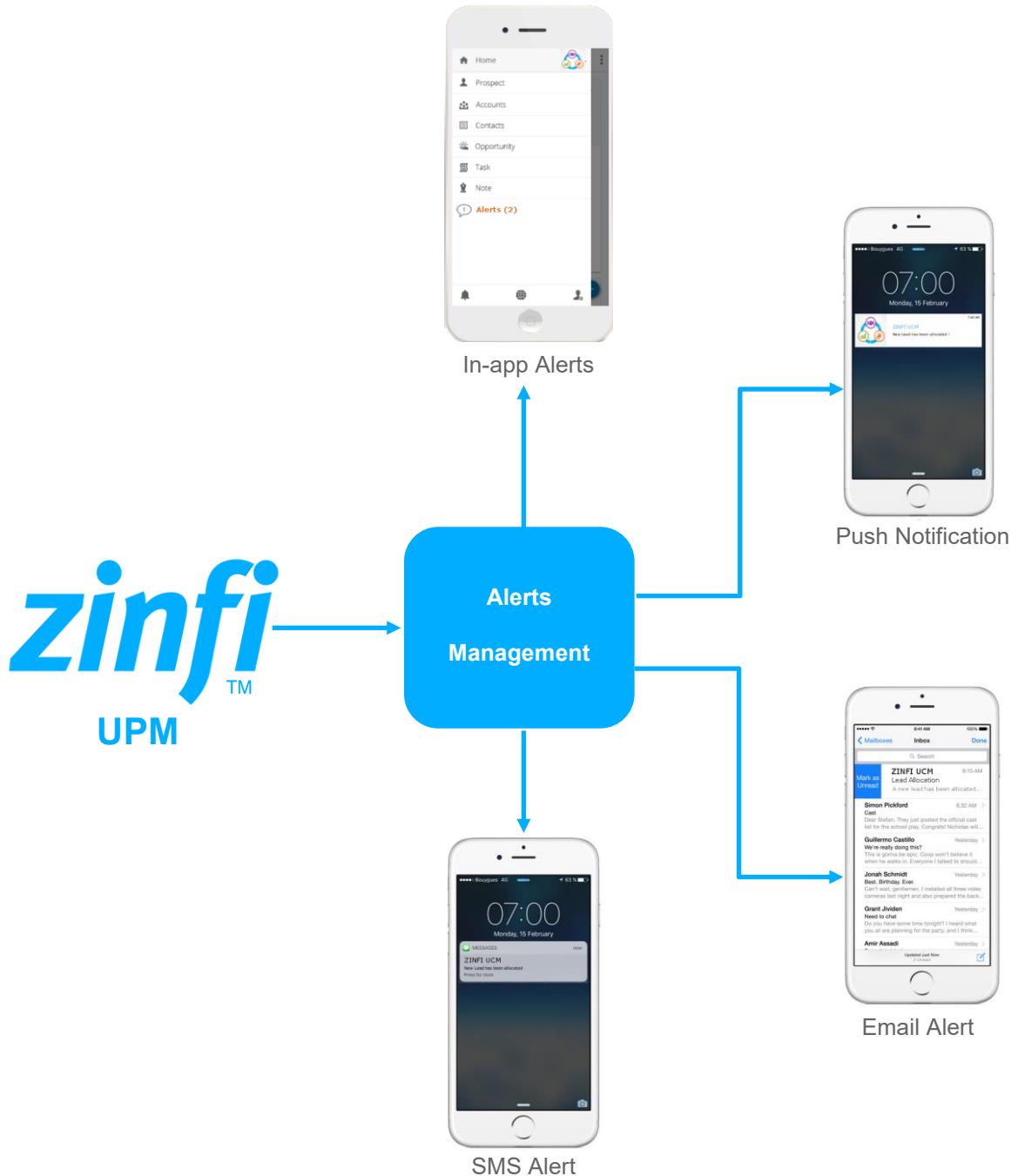
Email Alerts

Administrators can generate email alerts by setting up an automated process for sending messages to designated recipients. Setup typically involves the designation of standard email text and a list of recipients. You can associate email alerts with processes, flows, workflow rules, or approval processes.

Email alerts are normally sent to leads/contacts and users in the organization. When you associate an email notification with a workflow rule, the selected email is automatically sent to the chosen recipients when the rule is triggered for records meeting the criteria specified in the rule.

SMS Alerts

SMS alerts are the most widely used medium for modern consumers operating across channels and mobile devices, and you can easily send them to your partner/user base using UPM tools. You can customize message templates and optimize each bulk SMS that you send to your segmented list of partners or users.



Features

UPM's native functionality provides configurable business or ad-hoc alerts. Alerts management enables users to create and maintain alerts, so end-users are promptly notified when they need to be.

Alerts are configurable to work with all UPM record types, including custom entities, and take the form of in-app alerts, push notifications, email alerts, and SMS alerts.

Users can create and maintain multiple alerts customized (e.g., by language) for specific locations and regions.

Alerts can easily be added through UPM's workflow engine to UPM records based on specific criteria.

Users can specify an expiration date, frequency, and object-on-action alert parameters.

Deactivated alerts can be accessed via alert history and can be reactivated or used as templates as needed.

UPM Alerts

Functionality

UPM alerts can be set up to be sent instantly or based on a specific criterion—e.g. when a new lead has been assigned or registered or a market development fund (MDF) application has been approved. The content of alerts can be easily customized, and links can be integrated to facilitate responses. UPM alerts can apply to, but are not limited, to the following contexts:

UPM System Alerts

The following UPM alerts can easily be integrated into workflows to help streamline operations:

Notification of a won opportunity

When an opportunity has been won, a confirmation alert congratulates the team, and/or alerts team members to take the next steps.

Notification of request approval

Deal and MDF approval requests trigger alerts to managers and decision-makers. When the approval request is received, notification of receipt can be sent back to UPM through the provided links.

Notification of new lead and follow-up

Whenever a lead is created or assigned to a specific user, an alert is generated to remind the user to follow up on the lead.

Notification that a lapsed support case has been escalated.

If a lead has not been dealt with promptly or within the agreed-upon parameters in the SLA, an alert is sent to provide an early warning and remind the user to take action.

Notifications related to custom entities.

UPM alerts are designed to take advantage of the built-in workflow functionality of UPM. You can easily create your alerts and approvals based on your business's specific needs and the entities you have in your UPM instance.

UPM alerts leverage the power and speed of instant email and message alerts and provide a user-friendly means of providing internal team members and UPM partners with timely information. Alerts can speed up response times to events and changes in your business environment, and they help ensure that your channel marketing data is always accurate and up to date.

UPM Notifications

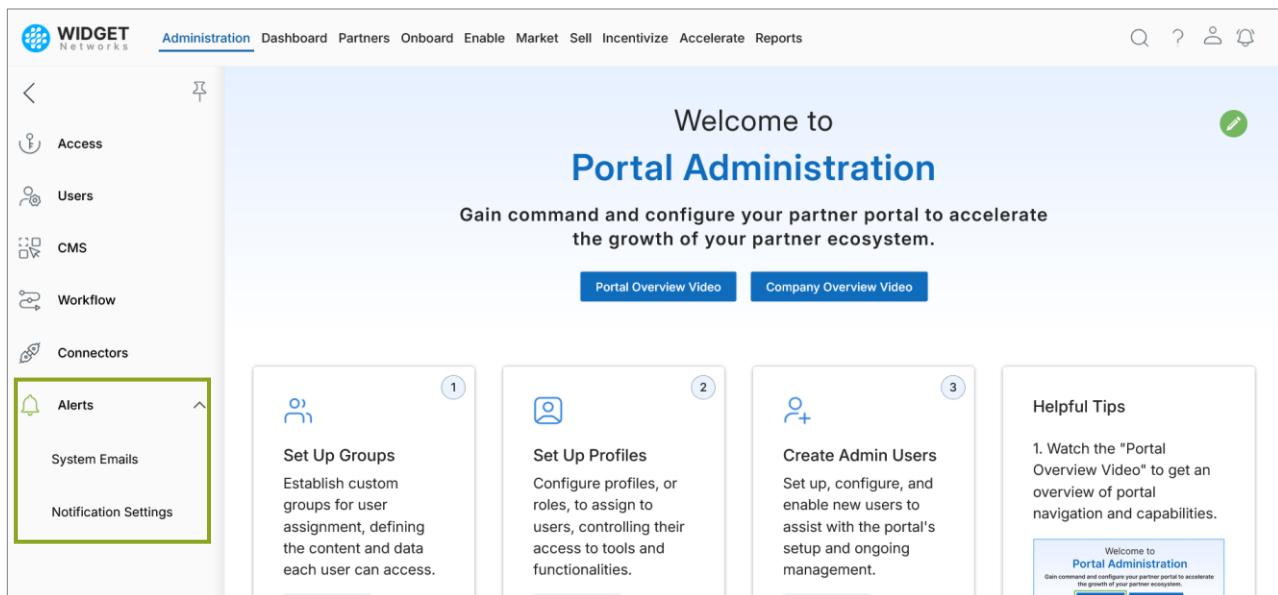
Security alerts provide information about security-related issues involving the UPM platform or a specific partner instance.

- Security alerts can be used to broadly distribute information about security issues and service outages relevant to all UPM partners.

- Security alerts can also be used to notify designated recipients of suspicious activity involving a specific user's Salesforce instance that may require further investigation by your organization.
- Security alerts can also notify designated recipients of confirmed or reasonably suspected breaches of data hosted on UPM.

Configuration

The Alerts module can be accessed through the Administration zone of UPM by clicking on **Administration > Alerts**.



Alerts

System Emails

Notification Settings

Welcome to
Portal Administration

Gain command and configure your partner portal to accelerate the growth of your partner ecosystem.

Portal Overview Video

Company Overview Video

Helpful Tips

1. Watch the "Portal Overview Video" to get an overview of portal navigation and capabilities.

Portal Overview Video
Company Overview Video

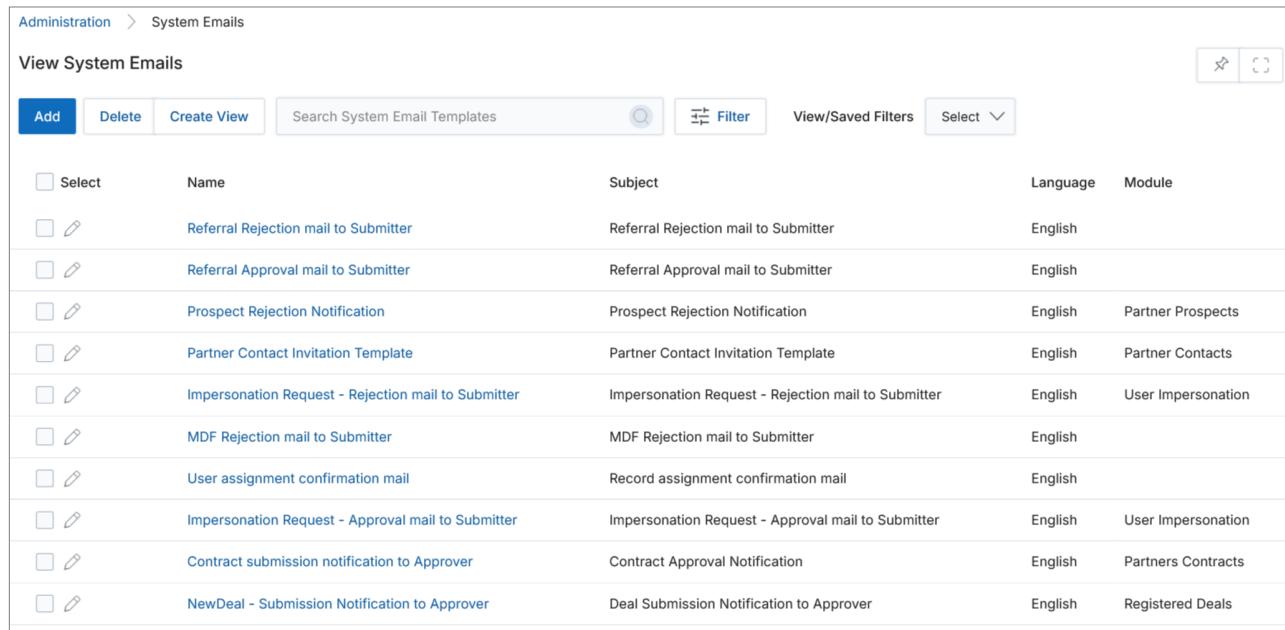
The Alerts page is divided into two sub-sections:

System Emails – Emails and SMS messages are stand-alone alerts that can be received by users who don't have the mobile app and are not logged in.

Notification Settings – On this page, users can configure in-app UPM alerts to be received and viewed by users after they have logged in to the app.

Manage System Emails (Alerts Accessible through Email/SMS)

The View System Emails page shows a list of existing email alerts (1). Users can add, delete, and copy emails, as well as create a view, search, or clear search (2). For each email, UPM shows the email name, subject language, and module name.



<input type="checkbox"/> Select	Name	Subject	Language	Module
<input type="checkbox"/>	Referral Rejection mail to Submitter	Referral Rejection mail to Submitter	English	
<input type="checkbox"/>	Referral Approval mail to Submitter	Referral Approval mail to Submitter	English	
<input type="checkbox"/>	Prospect Rejection Notification	Prospect Rejection Notification	English	Partner Prospects
<input type="checkbox"/>	Partner Contact Invitation Template	Partner Contact Invitation Template	English	Partner Contacts
<input type="checkbox"/>	Impersonation Request - Rejection mail to Submitter	Impersonation Request - Rejection mail to Submitter	English	User Impersonation
<input type="checkbox"/>	MDF Rejection mail to Submitter	MDF Rejection mail to Submitter	English	
<input type="checkbox"/>	User assignment confirmation mail	Record assignment confirmation mail	English	
<input type="checkbox"/>	Impersonation Request - Approval mail to Submitter	Impersonation Request - Approval mail to Submitter	English	User Impersonation
<input type="checkbox"/>	Contract submission notification to Approver	Contract Approval Notification	English	Partners Contracts
<input type="checkbox"/>	NewDeal - Submission Notification to Approver	Deal Submission Notification to Approver	English	Registered Deals

View System Email Details

The View System Email page gives users the option to 'Edit', 'Delete', 'Clone', 'Send Test Mail' and, View metadata associated with the email, View Template Content, and Create and View localized versions of the email.

Administration > System Emails > View System Email

View System Email

[Edit](#) [Delete Test](#) [Clone](#) [Send Test Email](#)

— System Email Information

System Email Name: Impersonation Request - Submission Notification to Approver Language: English

Subject: Impersonation Request - Submission Notification to Approver Mail From:

Mail To:

Bcc:

Physical File: No Active: Yes

Module: User Impersonation

Parent Template:

— Template Content

Template Content:



Description:

— Localized Versions

[Add](#)

No Data Found

- **Send Test Email** – This button provides an added advantage to the admin user to check the functionality of the specific system email template for user notification purposes. Clicking this button will display the 'Send Test Email' pop-up window where the admin can simply type in the name of any recipient and click on 'Send Mail' he can instantly check whether the mail engine is functioning properly, and it reaches the inbox of the recipient from where he can also preview the mail template accordingly.

Send Test Email [X](#)

Recipient Name *:

[Send Mail](#) [Cancel](#)

Add/Edit System Email/SMS

System email and SMS messages are created by specifying message details as seen in (1) in the figure below:

- System email name
- Application name.
- Subject of the email/SMS.
- Mail from, mail to, CC, and BCC senders/recipients associated with the alert.
- Status: either activated or de-activated.
- You may also select a parent template if you have one by using the dropdown menu.

Users can create email template content, view the Template Content, and save or cancel changes.

Email and SMS carriers must be configured through the CENTRI engine before sending. The system can be set up to send users a notification listing all outbound messages that have failed for at least 24 hours; a fresh notification is sent every 24 hours until you cancel the request. Failed messages are deleted from the failed outbound messages list after 7 days. Before they are removed, you can delete them yourself or request that they be retried again.

Administration > System Emails > View System Email > Add/Edit a System Email

Add/Edit a System Email

Save Cancel

System Email Information

System Email Name *	Impersonation Request - Submission Notification to Approver	Language *	X
Subject *	Impersonation Request - Submission N	Mail From:	Mail From
Mail To:	Mail To	CC:	CC
Bcc:	Bcc	Active *	Yes X
<input type="checkbox"/> Physical File		Module:	User Impersonation X
Parent Template: <input style="background-color: #ccc; border: 1px solid #ccc; padding: 2px 5px;" type="button" value="Select"/> <input style="background-color: #ccc; border: 1px solid #ccc; padding: 2px 5px;" type="button" value="Clear"/>			

Template Content

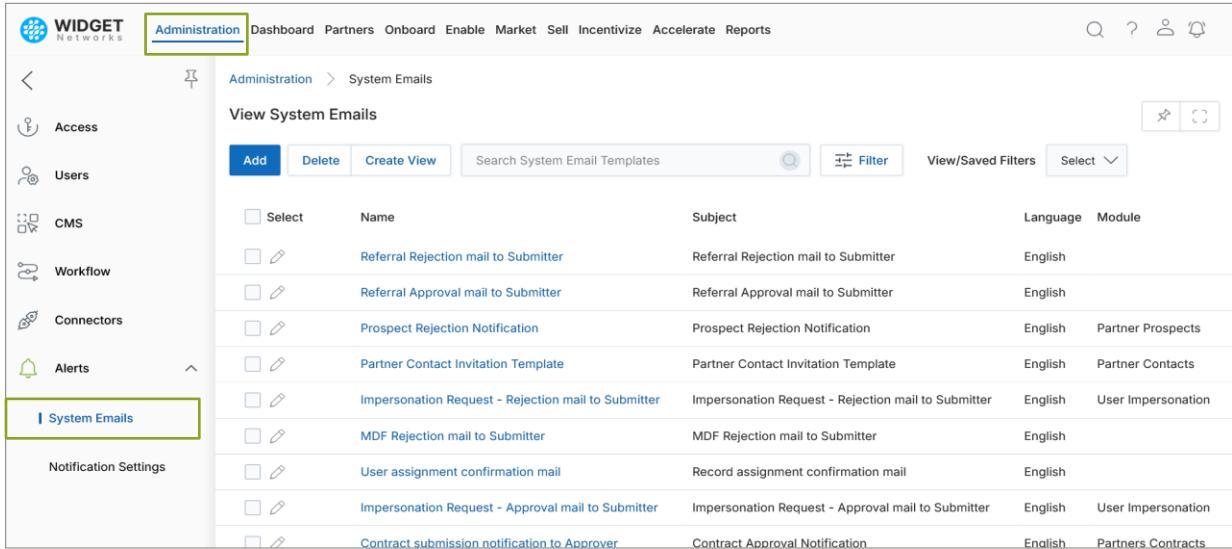
Template Content:	<div style="border: 1px solid #ccc; padding: 5px; height: 300px; width: 300px;"> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;"> <input style="border: 1px solid #ccc; padding: 2px 5px;" type="button" value="Source"/> <input style="border: 1px solid #ccc; padding: 2px 5px;" type="button" value="HTML"/> <input style="border: 1px solid #ccc; padding: 2px 5px;" type="button" value="Text"/> </div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;"> <input style="border: 1px solid #ccc; padding: 2px 5px;" type="button" value="X"/> <input style="border: 1px solid #ccc; padding: 2px 5px;" type="button" value="B"/> <input style="border: 1px solid #ccc; padding: 2px 5px;" type="button" value="I"/> <input style="border: 1px solid #ccc; padding: 2px 5px;" type="button" value="U"/> <input style="border: 1px solid #ccc; padding: 2px 5px;" type="button" value="S"/> <input style="border: 1px solid #ccc; padding: 2px 5px;" type="button" value="x"/> <input style="border: 1px solid #ccc; padding: 2px 5px;" type="button" value="x"/> <input style="border: 1px solid #ccc; padding: 2px 5px;" type="button" value="T"/> </div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;"> <input style="border: 1px solid #ccc; padding: 2px 5px;" type="button" value="="/> <input style="border: 1px solid #ccc; padding: 2px 5px;" type="button" value=";"/> <input style="border: 1px solid #ccc; padding: 2px 5px;" type="button" value=";"/> <input style="border: 1px solid #ccc; padding: 2px 5px;" type="button" value=";"/> </div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;"> <input style="border: 1px solid #ccc; padding: 2px 5px;" type="button" value="B"/> <input style="border: 1px solid #ccc; padding: 2px 5px;" type="button" value="I"/> <input style="border: 1px solid #ccc; padding: 2px 5px;" type="button" value="U"/> <input style="border: 1px solid #ccc; padding: 2px 5px;" type="button" value="S"/> <input style="border: 1px solid #ccc; padding: 2px 5px;" type="button" value="x"/> <input style="border: 1px solid #ccc; padding: 2px 5px;" type="button" value="x"/> <input style="border: 1px solid #ccc; padding: 2px 5px;" type="button" value="T"/> </div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;"> <input style="border: 1px solid #ccc; padding: 2px 5px;" type="button" value="="/> <input style="border: 1px solid #ccc; padding: 2px 5px;" type="button" value=";"/> <input style="border: 1px solid #ccc; padding: 2px 5px;" type="button" value=";"/> </div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;"> <input style="border: 1px solid #ccc; padding: 2px 5px;" type="button" value="Font"/> <input style="border: 1px solid #ccc; padding: 2px 5px;" type="button" value="Size"/> </div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;"> <input style="border: 1px solid #ccc; padding: 2px 5px;" type="button" value="A"/> <input style="border: 1px solid #ccc; padding: 2px 5px;" type="button" value="A"/> </div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;"> <input style="border: 1px solid #ccc; padding: 2px 5px;" type="button" value="Image"/> </div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;"> <p>Hello ##NAME##</p> <p>An Impersonation Request has been submitted.</p> <p>Click Here to access the Approval/Re</p> </div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;"> <pre>body table tbody tr td table tbody tr td p</pre> </div> </div>	Description:	<input style="width: 200px; height: 40px;" type="text"/>
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Save Cancel

AI-embedded Text Content Generator for ZINFI Editor

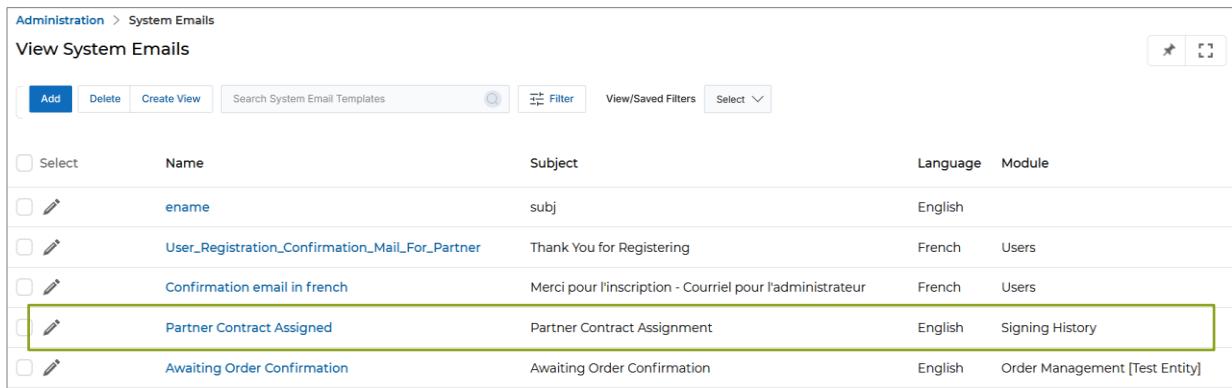
The introduction of the AI-embedded text content generator brings numerous advantages, enhancing both efficiency and user experience.

- After logging into UPM, the user navigates to **Administration > Alerts > System Emails**.



Select	Name	Subject	Language	Module
<input type="checkbox"/>	Referral Rejection mail to Submitter	Referral Rejection mail to Submitter	English	
<input type="checkbox"/>	Referral Approval mail to Submitter	Referral Approval mail to Submitter	English	
<input type="checkbox"/>	Prospect Rejection Notification	Prospect Rejection Notification	English	Partner Prospects
<input type="checkbox"/>	Partner Contact Invitation Template	Partner Contact Invitation Template	English	Partner Contacts
<input type="checkbox"/>	Impersonation Request - Rejection mail to Submitter	Impersonation Request - Rejection mail to Submitter	English	User Impersonation
<input type="checkbox"/>	MDF Rejection mail to Submitter	MDF Rejection mail to Submitter	English	
<input type="checkbox"/>	User assignment confirmation mail	Record assignment confirmation mail	English	
<input type="checkbox"/>	Impersonation Request - Approval mail to Submitter	Impersonation Request - Approval mail to Submitter	English	User Impersonation
<input type="checkbox"/>	Contract submission notification to Approver	Contract Approval Notification	English	Partners Contracts

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



Select	Name	Subject	Language	Module
<input type="checkbox"/>	ename	subj	English	
<input type="checkbox"/>	User_Registration_Confirmation_Mail_For_Partner	Thank You for Registering	French	Users
<input type="checkbox"/>	Confirmation_email in french	Merci pour l'inscription - Courriel pour l'administrateur	French	Users
<input type="checkbox"/>	Partner Contract Assigned	Partner Contract Assignment	English	Signing History
<input type="checkbox"/>	Awaiting Order Confirmation	Awaiting Order Confirmation	English	Order Management [Test Entity]

- On the **Template Content editor** on the details page, the user clicks the **Custom Button**, which launches the **Draft with AI** window.

Administration > System Emails > Add/Edit a System Email

Add/Edit a System Email

Save Cancel

System Email Information

System Email Name*: Partner Contract Assigned

Language*: English

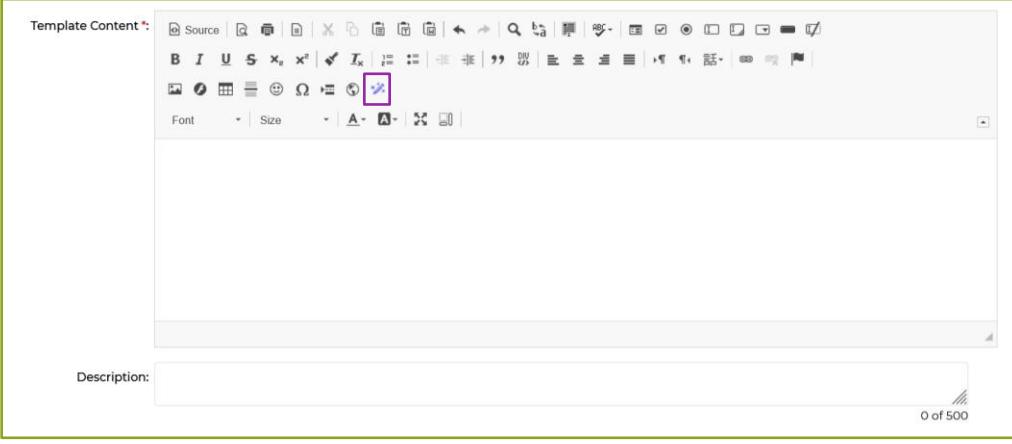
Subject*: Partner Contract Assignment

Active*: Yes

Module: Signing History

Parent Template: Select | Clear

Template Content

Template Content*: 

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

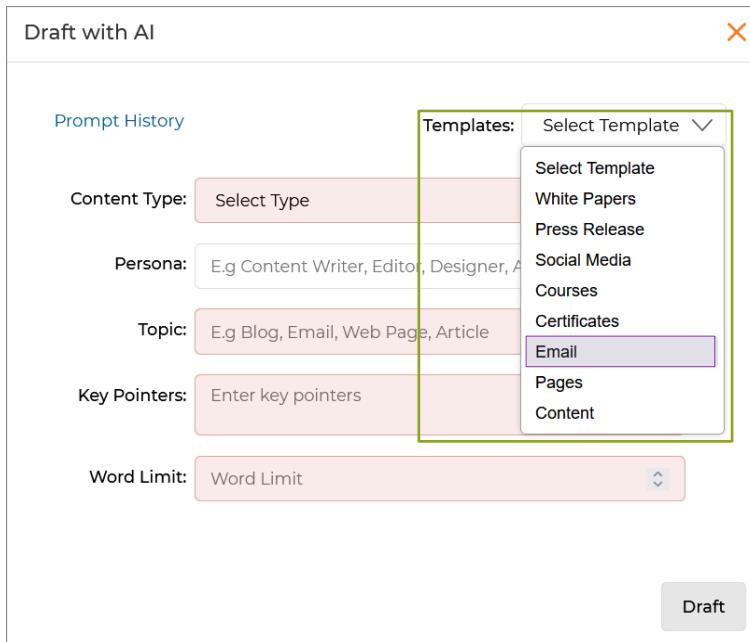
Topic: E.g Blog, Email, Web Page, Article

Key Pointers: Enter key pointers

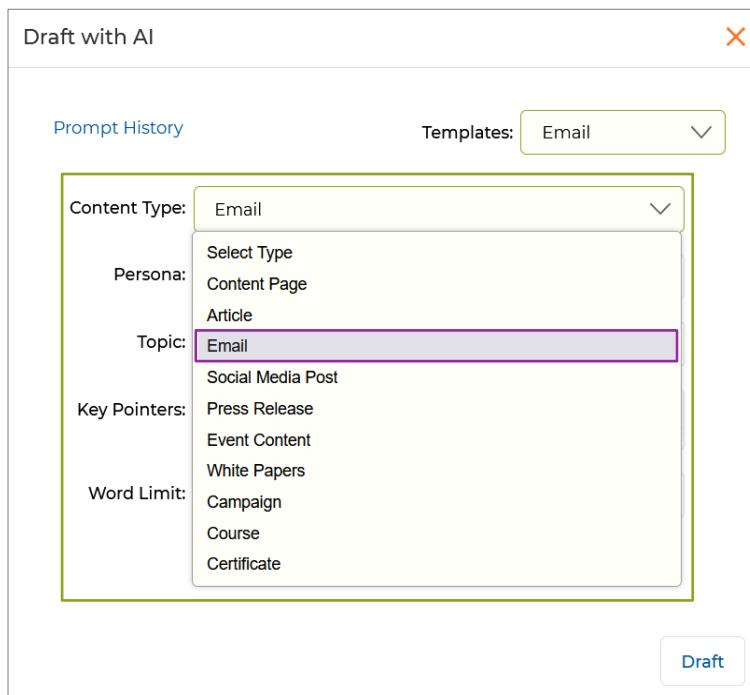
Word Limit: Word Limit

Draft

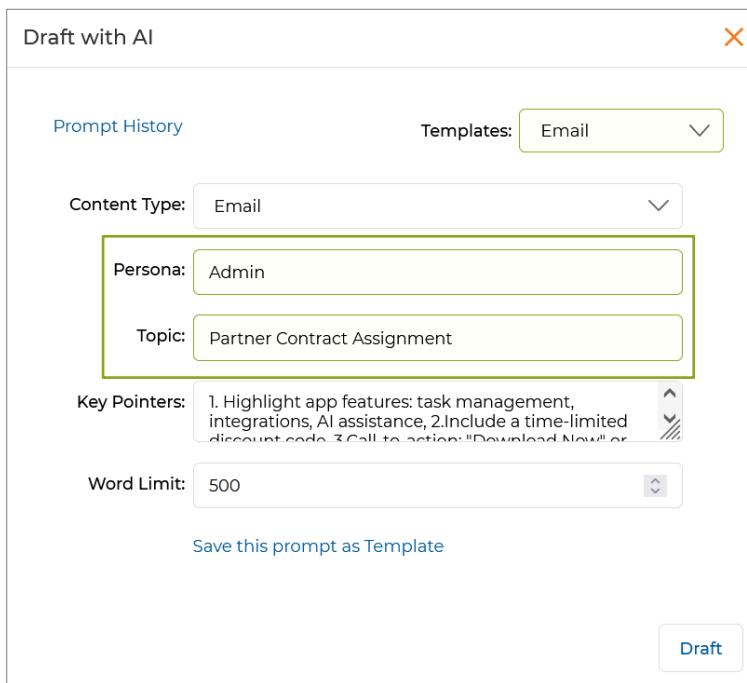
- We can select the type of template we want to use from the Templates dropdown menu. The available template types are White Papers, Press Releases, Social Media, Courses, Certificates, Emails, Pages, and Contents. For this example, we select Email.



- 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

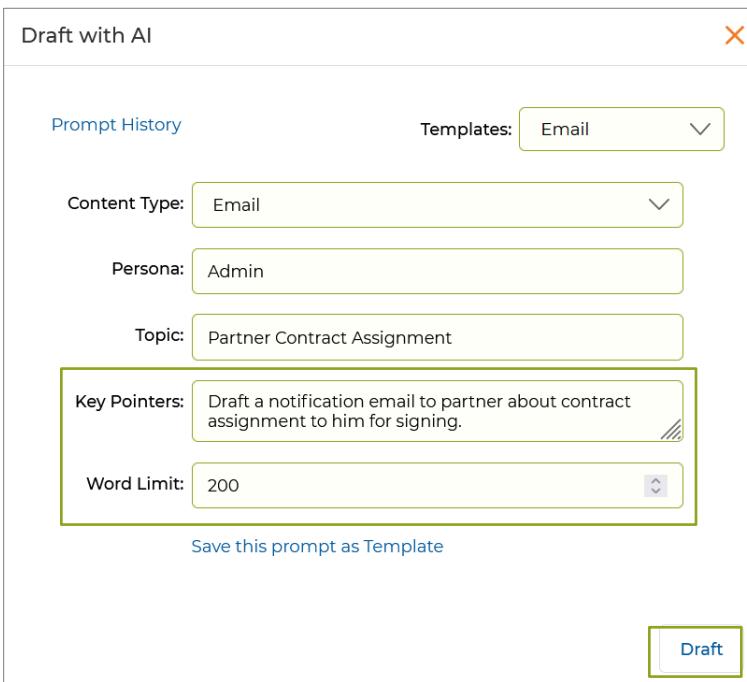
Key Pointers: 1. Highlight app features: task management, integrations, AI assistance, 2. Include a time-limited discount code, 3. Call to action: "Download Now" or...

Word Limit: 500

Save this prompt as Template

Draft

- In the Key Pointers field, the textual instruction to draft the email has to be provided.
- A word limit 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 editor window.
- Click Insert to insert the content on the Template Content editor.

Draft with AI

#AI generated content

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

System Email Information

System Email Name: Language:

Subject: Active:

Module: Parent Template:

Template Content

Template Content:

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.

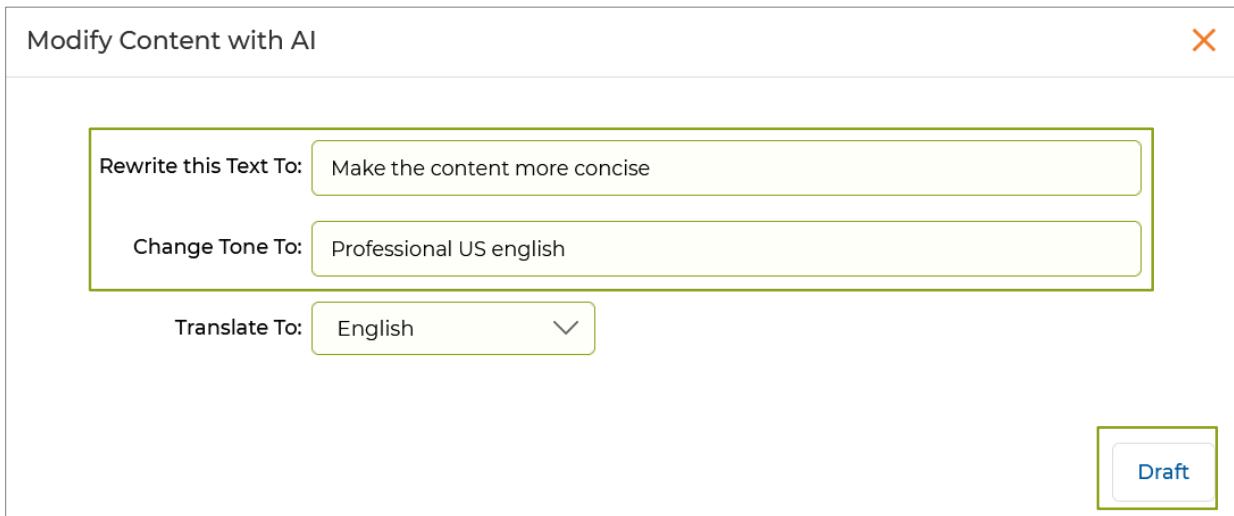
As a valued partner, your agreement and signature are essential to formalize this arrangement. We kindly request that you review the contract and provide us with your signed copy at your earliest convenience.

body

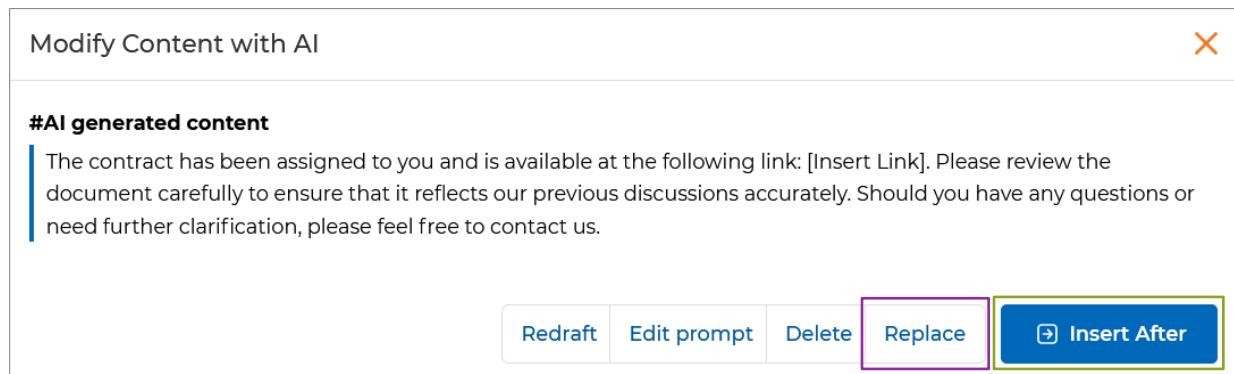
Description:

Save Cancel

- To edit a specific section of the content, the user selects the text to be modified and clicks the Custom 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:

Source | <img alt="Font weight increment icon

- 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 ▾

- Select
- Chinese-Simplified
- Chinese-Traditional
- English
- Espanol
- French
- German
- Italian
- Japanese
- Korean
- Portuguese

Draft

We hope this signature. The contract reflects our p body p

pleased to inform you that a new contract has been prepared and is ready for your review. The document outlines the revised terms and conditions of our continued partnership and collaboration. The updated contract is available at the following link: [Insert Link]. Please review the document and let us know if you have any questions or need further clarification, please feel free to reach out.

- 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.

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

Auto addition of Approver Name in Impersonate Request Email

- Whenever a User approves a User Impersonation request submitted by the Admin/Submitter, the Admin/Submitter will receive a System Email notification confirming the approval of the request with the name of the Approver/User.
- By using an embedded template, the System Email will auto-include the name of the Approver/User while sending the notification.
- Relevant Hash-codes have been used to dynamically populate the name of the Approver/User while triggering the Email.
- The System Email will use the following template shown in the image below while sending the email notification to the Admin/Submitter.

Administration > System Emails > View System Email

View System Email

Edit Delete Clone Send Test Email

— System Email Information

System Email Name: Impersonation Request - Approval mail to Submitter Language: English

Subject: Impersonation Request - Approval mail to Submitter Mail From:

Mail To: CC:

Bcc: Active: Yes

Physical File: No Module: User Impersonation

Parent Template:

— Template Content

Template Content:

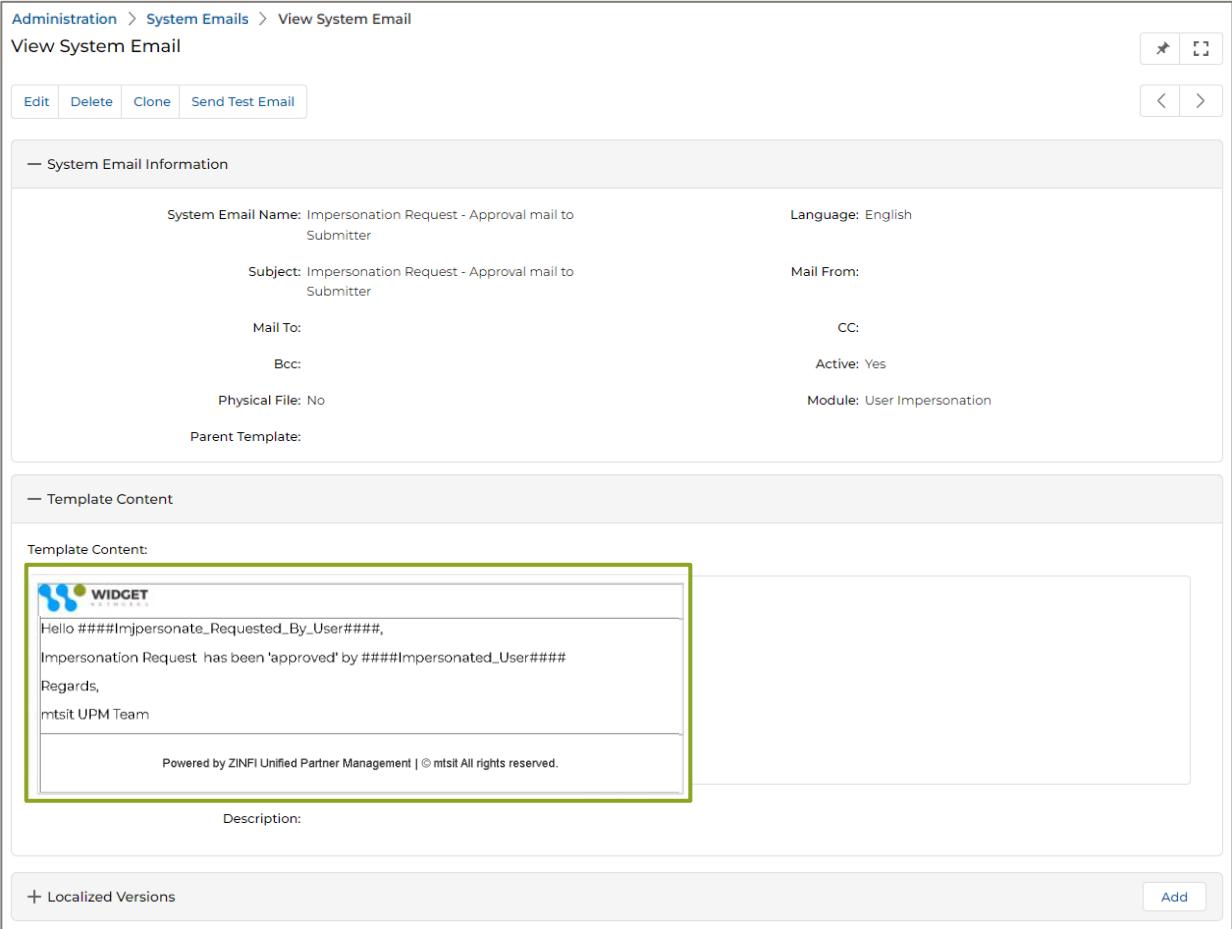


Hello #####Impersonate_Requested_By_User#####,
 Impersonation Request has been 'approved' by #####Impersonated_User#####
 Regards,
 mtsit UPM Team

Powered by ZINFO Unified Partner Management | © mtsit All rights reserved.

Description:

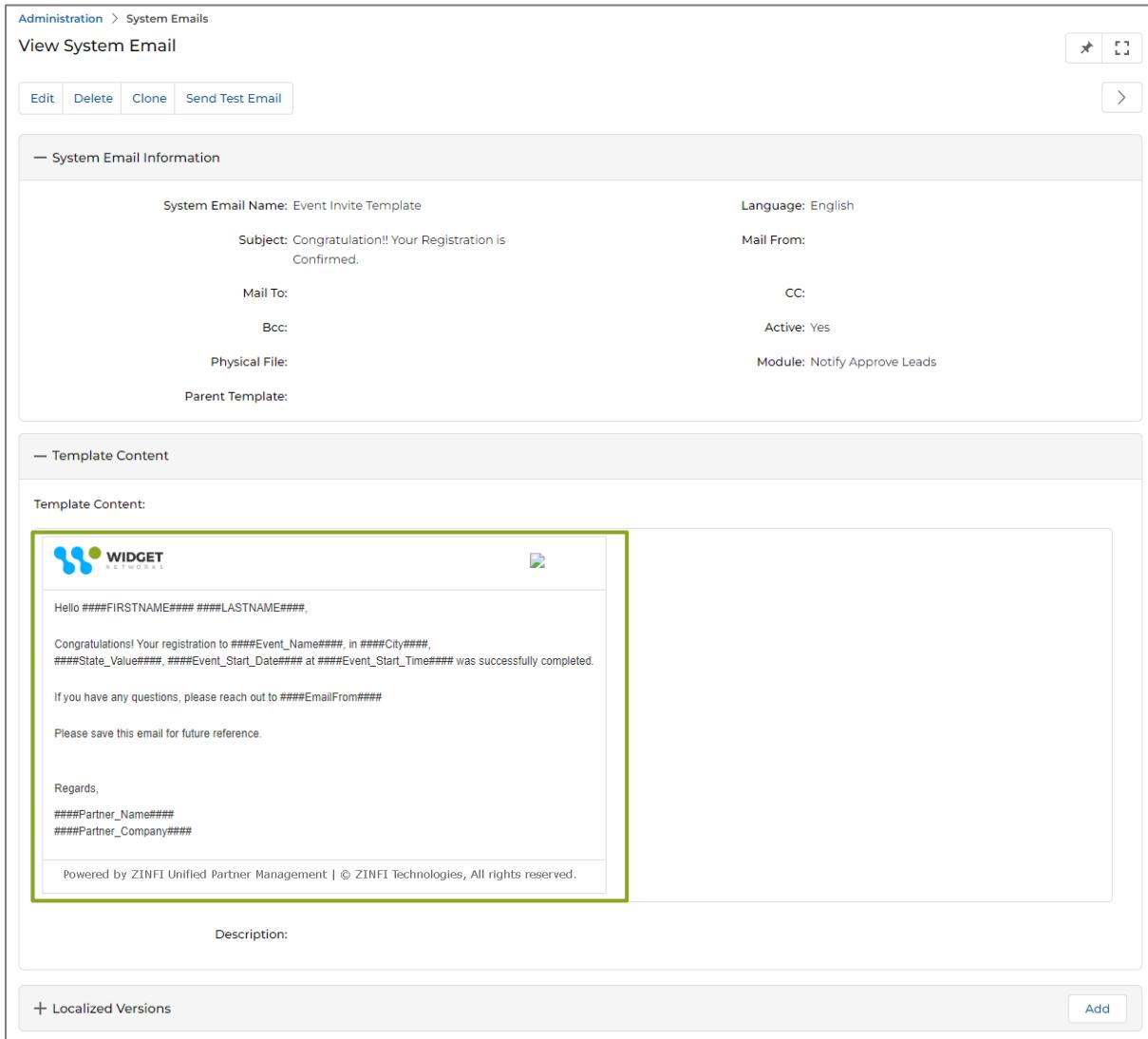
+ Localized Versions Add



Configurable Hash Codes for Event Invite/Content

- Whenever a prospective invitee registers for an Event, the System Email triggers an Event Invite Email, confirming the successful registration for the Event. The Event Invite Template will auto-include details of the Event viz. Name of the Event, Event Date and Time, Host City, and State (if it's a Physical (Offline) Event).
- Similarly, relevant details of an Online Webinar Event Confirmation Email will be auto populated with the Name of the Event, Event Webinar Link, Event Date/Time, and the Sender's and the Recipient's Name.

The Event Email Template is integrated with relevant Hash-codes to populate the (above) Event information dynamically. The Event Email Template and the Hash Codes can be managed from the System Email Details View by the Admin only.



Administration > System Emails

View System Email

Edit Delete Clone Send Test Email

System Email Information

System Email Name: Event Invite Template

Language: English

Subject: Congratulations! Your Registration is Confirmed.

Mail From:

Mail To:

CC:

Bcc:

Active: Yes

Physical File:

Module: Notify Approve Leads

Parent Template:

Template Content

Template Content:

WIDGET NETWORKS

Hello #####FIRSTNAME##### ####LASTNAME#####.

Congratulations! Your registration to #####Event_Name#####, in #####City#####, #####State_Value#####, #####Event_Start_Date##### at #####Event_Start_Time##### was successfully completed.

If you have any questions, please reach out to #####EmailFrom#####

Please save this email for future reference.

Regards,

#####Partner_Name#####
#####Partner_Company#####

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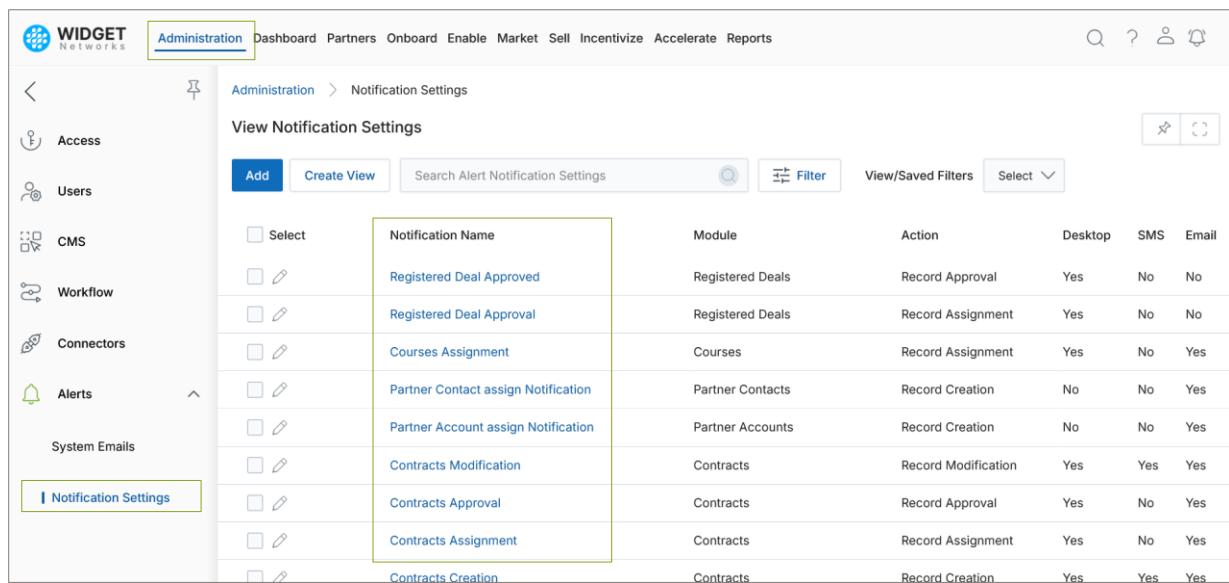
Description:

Localized Versions

Add

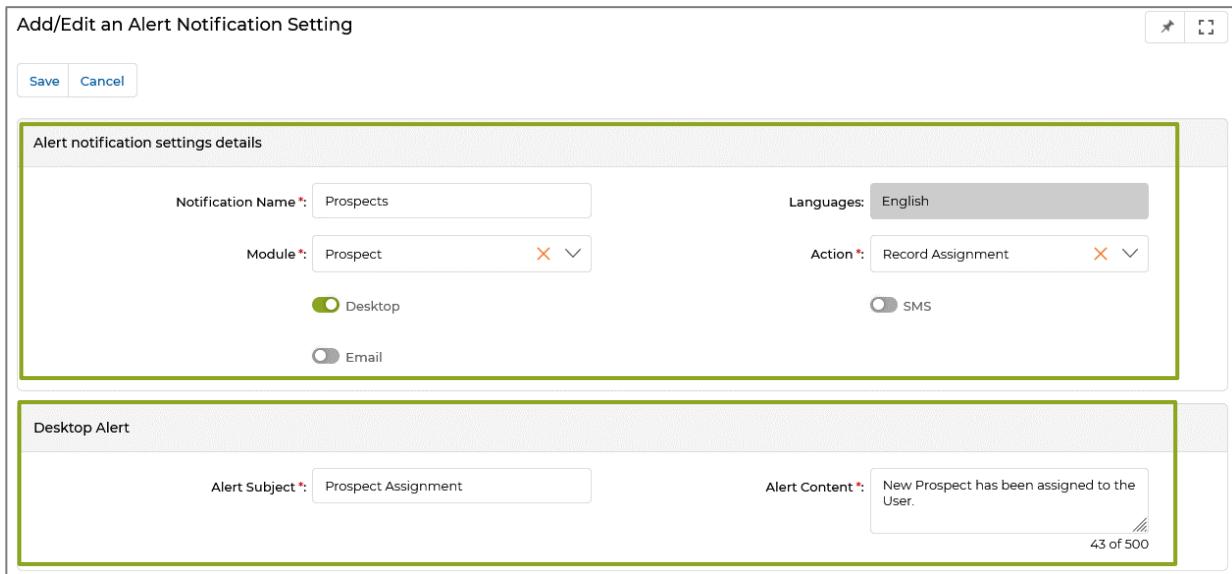
Enhanced Notifications Management for UPM Applications

1. UPM features a Notifications Management Application by providing an extensive UI/UX for the configuration of Alerts to notify your users know when certain events occur or when you want to share information. UPM alerts utilize the ZINFO platform's connected aSaaS (adaptive SaaS) framework to set up localized alert templates.
2. Click **Administration > Alerts > Notification Settings** to reach the **View Notification Settings** page which lists all the Alert Notifications.



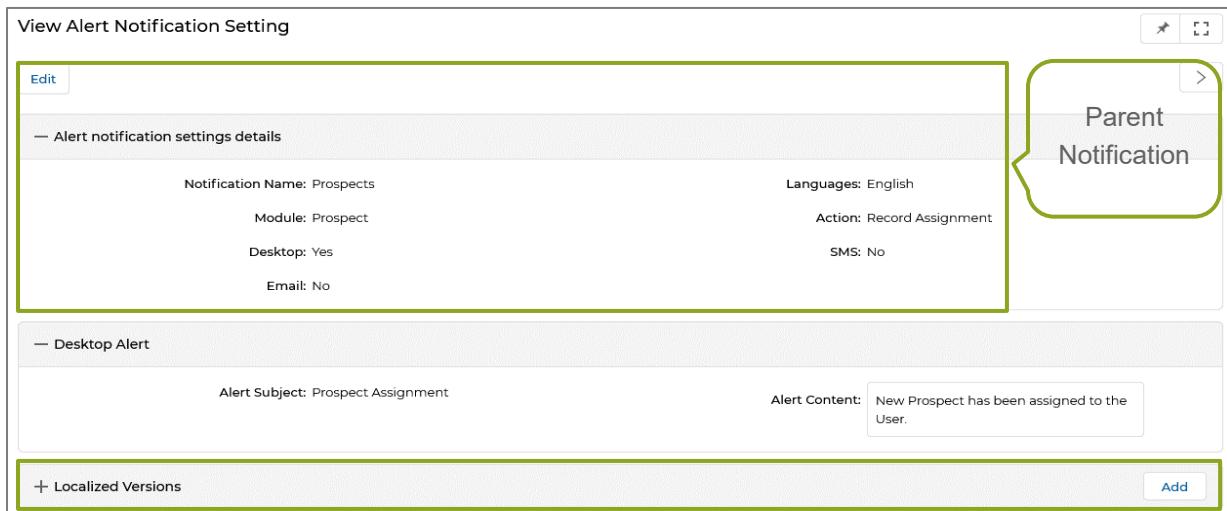
Notification Name	Module	Action	Desktop	SMS	Email
Registered Deal Approved	Registered Deals	Record Approval	Yes	No	No
Registered Deal Approval	Registered Deals	Record Assignment	Yes	No	No
Courses Assignment	Courses	Record Assignment	Yes	No	Yes
Partner Contact assign Notification	Partner Contacts	Record Creation	No	No	Yes
Partner Account assign Notification	Partner Accounts	Record Creation	No	No	Yes
Contracts Modification	Contracts	Record Modification	Yes	Yes	Yes
Contracts Approval	Contracts	Record Approval	Yes	No	Yes
Contracts Assignment	Contracts	Record Assignment	Yes	No	Yes
Contracts Creation	Contracts	Record Creation	Yes	Yes	Yes

- Click on the **Add** button on the **View Notification Settings** page and reach **Add/Edit an Alert Notification Setting** page, where we'll create a new **Parent Alert Notification**.
- This Alert Notification by default uses the English language.
- In the following example, we'll create an Alert Notification which would only be triggered when a Prospect is assigned to the Channel Partner by Admin.



- Once done, click on **Save**. This will take us back to the **View Alert Notification Setting** page, where we can add new Alerts in the **Localized Versions-related** list in languages other than English. These are known as **Child Notifications** associated with the **Parent Notification** which is in English language.

7. This facility helps the Admin to reach out to the maximum number of Users using different languages in UPM.



View Alert Notification Setting

Alert notification settings details

Notification Name: Prospects
Module: Prospect
Desktop: Yes
Email: No

Languages: English
Action: Record Assignment
SMS: No

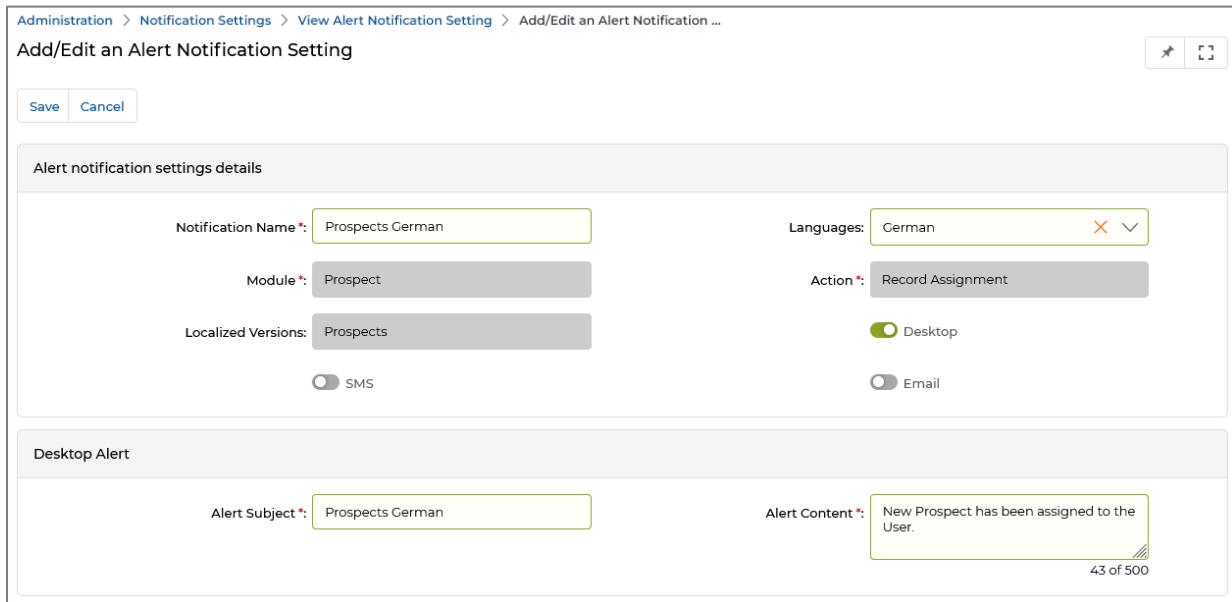
Desktop Alert

Alert Subject: Prospect Assignment
Alert Content: New Prospect has been assigned to the User.

Localized Versions

8. Clicking the **Add** button in **Localized Versions** will take you to the **Add/Edit an Alert Notification Setting** page.
9. Here, in the **Languages** dropdown **English** won't be available. We can select languages other than English. In this example, we've selected **German**.

10. Once done click **Save**.



Administration > Notification Settings > View Alert Notification Setting > Add/Edit an Alert Notification ...

Add/Edit an Alert Notification Setting

Alert notification settings details

Notification Name*: Prospects German
Module*: Prospect
Localized Versions: Prospects

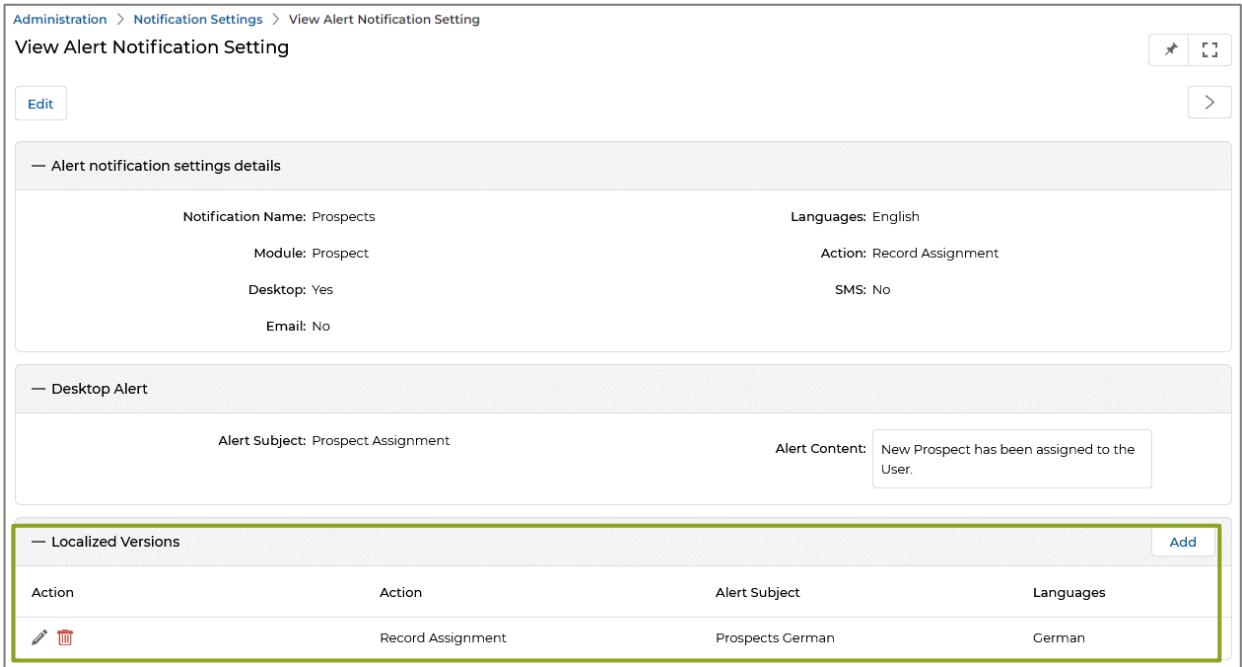
Languages: German
Action*: Record Assignment

Desktop
 SMS
 Email

Desktop Alert

Alert Subject*: Prospects German
Alert Content*: New Prospect has been assigned to the User.

11. After returning to the **View Alert Notification Setting** page, we'll see a new Alert Notification Setting has been created in the **Localized Versions-related** list.

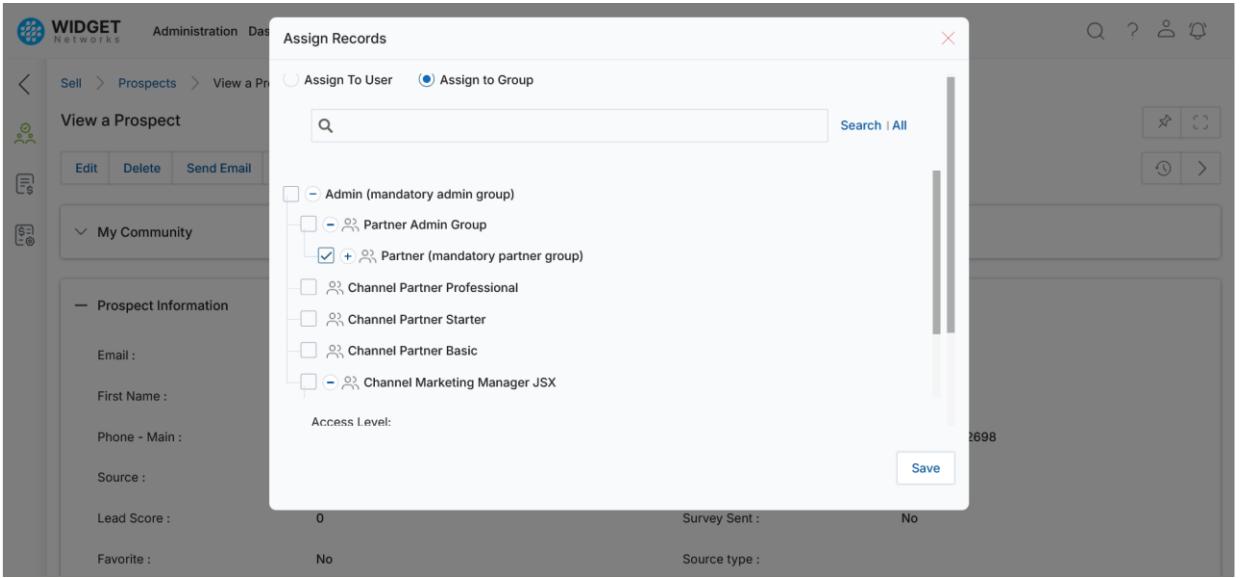


The screenshot shows the 'View Alert Notification Setting' page with the following details:

- Alert notification settings details:**
 - Notification Name: Prospects
 - Module: Prospect
 - Desktop: Yes
 - Email: No
 - Languages: English
 - Action: Record Assignment
 - SMS: No
- Desktop Alert:**
 - Alert Subject: Prospect Assignment
 - Alert Content: New Prospect has been assigned to the User.
- Localized Versions:**

Action	Action	Alert Subject	Languages
	Record Assignment	Prospects German	German

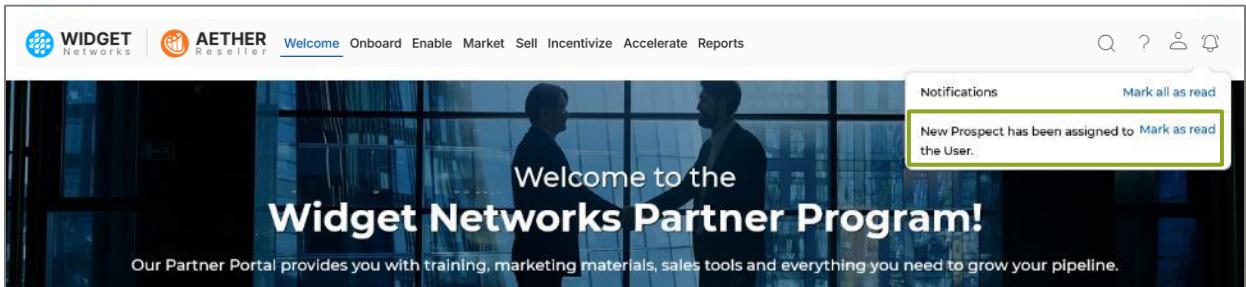
12. We now go to **Sell > Leads > Prospects** to assign a Prospect to specific Users.



The screenshot shows the 'Assign Records' dialog box with the following interface:

- Assign To:** Assign To User (radio button) is selected, but Assign To Group (radio button) is also present.
- Search Bar:** A search bar with the placeholder 'Search | All'.
- Group Selection:** A tree view of groups:
 - Admin (mandatory admin group) (unchecked)
 - Partner Admin Group (unchecked)
 - Partner (mandatory partner group) (checked)
 - Channel Partner Professional (unchecked)
 - Channel Partner Starter (unchecked)
 - Channel Partner Basic (unchecked)
 - Channel Marketing Manager JSX (unchecked)
- Save Button:** A 'Save' button at the bottom right.

13. Once the Prospect is assigned to the User, he will get a Notification Alert and by clicking the bell icon he will see the specific Alert. Here the User has selected the English language in UPM.



14. Likewise, once the User logs in with the German language selection in UPM, he will also get to see the notification.



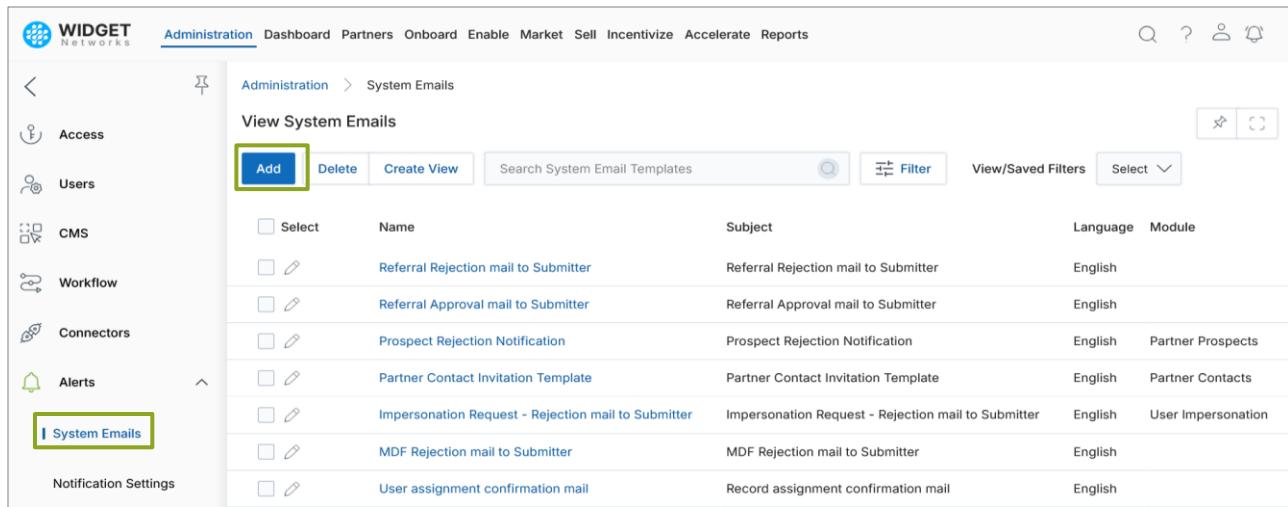
Localized Version for "Forgot Password" Email

1. UPM comes feature-packed with a multi-lingual authentication functionality, which supports forgotten password emails in localized versions. If users forget their password to log in to UPM, they can click the "Forgot Password" link on the pre-login page. By doing so, they'll initiate the process to generate a One-Time Password (OTP), which will be sent to their registered email address. Providing OTP notification in the user's local language ensures they understand the message promptly, reducing the risk of errors or misunderstandings during the authentication process. Sending OTP notifications in the user's preferred language can enhance trust and confidence in the UPM's security measures, reassuring users that their information is handled carefully.

UPM allows the Admin to configure the email containing OTP in localized languages besides English, e.g., Italian, Spanish, etc.

2. Click **Administration > Alerts > System Emails.**

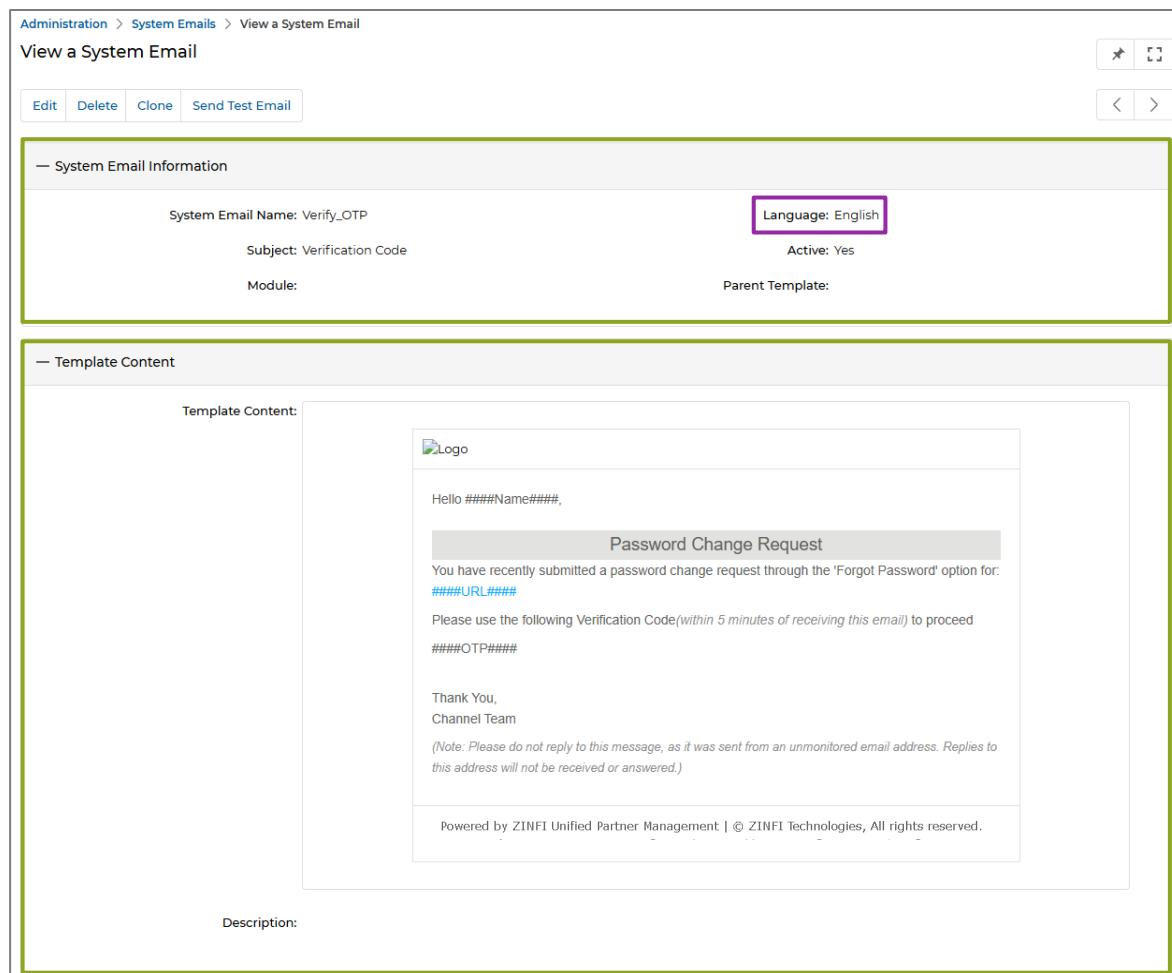
3. To Add a new System Email – click on the **Add** button at the top of the View System Emails page, which takes the user to the **Add/Edit a System Email** page.



The screenshot shows the 'View System Emails' page. On the left, there is a sidebar with categories: Access, Users, CMS, Workflow, Connectors, Alerts, and System Emails (which is selected and highlighted with a green box). The main area shows a table of system emails with columns for Name, Subject, Language, and Module. The 'Add' button is highlighted with a green box. The table data is as follows:

	Name	Subject	Language	Module
<input type="checkbox"/>	Referral Rejection mail to Submitter	Referral Rejection mail to Submitter	English	
<input type="checkbox"/>	Referral Approval mail to Submitter	Referral Approval mail to Submitter	English	
<input type="checkbox"/>	Prospect Rejection Notification	Prospect Rejection Notification	English	Partner Prospects
<input type="checkbox"/>	Partner Contact Invitation Template	Partner Contact Invitation Template	English	Partner Contacts
<input type="checkbox"/>	Impersonation Request - Rejection mail to Submitter	Impersonation Request - Rejection mail to Submitter	English	User Impersonation
<input type="checkbox"/>	MDF Rejection mail to Submitter	MDF Rejection mail to Submitter	English	
<input type="checkbox"/>	User assignment confirmation mail	Record assignment confirmation mail	English	

4. Initially, the Admin configures an email for the English language Users.



The screenshot shows the 'View a System Email' page. The top navigation bar includes 'Edit', 'Delete', 'Clone', and 'Send Test Email'. The main area is divided into two sections: 'System Email Information' and 'Template Content'.

System Email Information:

- System Email Name: Verify OTP
- Subject: Verification Code
- Module:
- Language: English (highlighted with a purple box)
- Active: Yes
- Parent Template:

Template Content:

The template content area shows the following text:

```


Hello ####Name####,  

Password Change Request  

You have recently submitted a password change request through the 'Forgot Password' option for:  

####URL####  

Please use the following Verification Code(within 5 minutes of receiving this email) to proceed  

####OTP####  

Thank You,  

Channel Team  

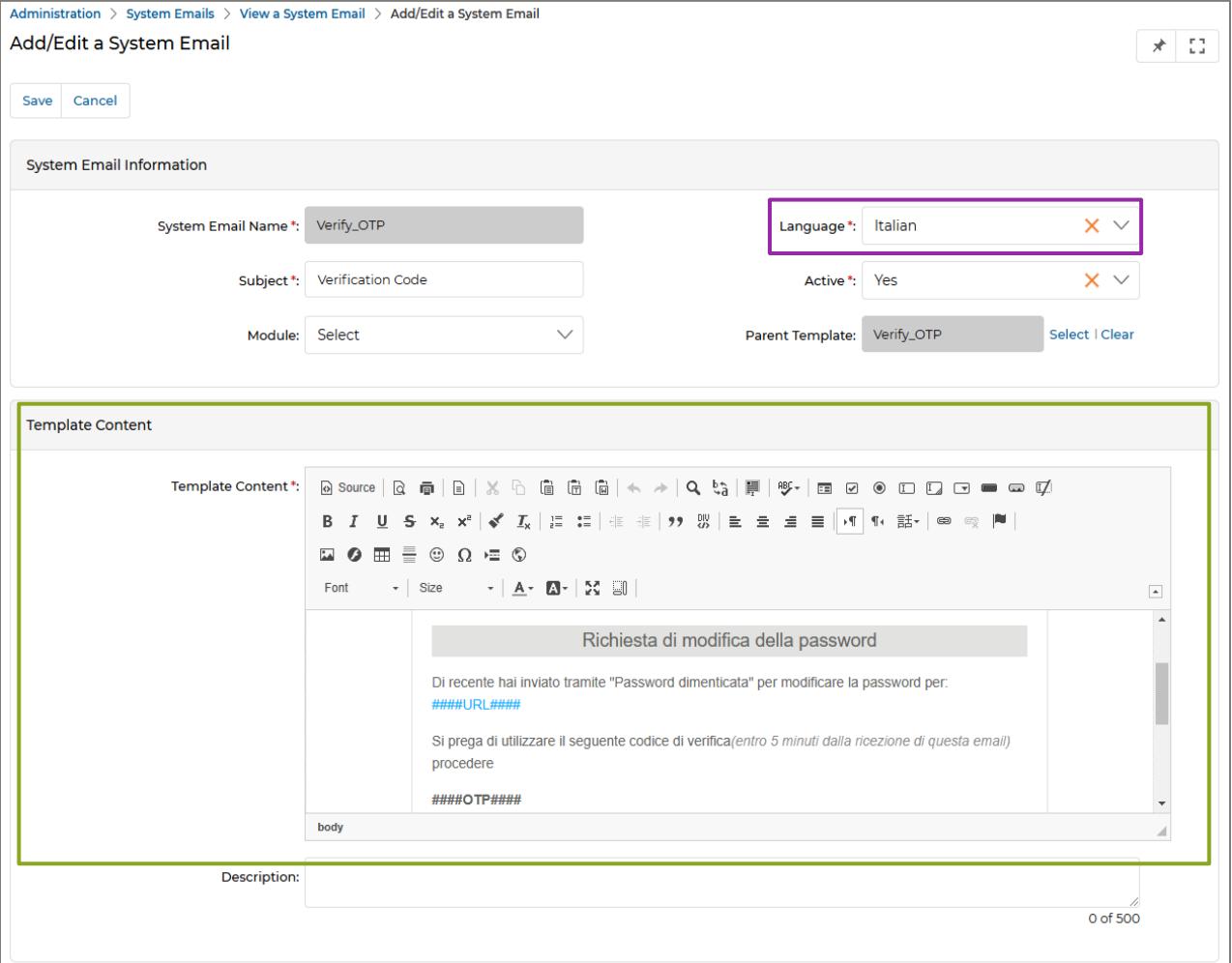
(Note: Please do not reply to this message, as it was sent from an unmonitored email address. Replies to this address will not be received or answered.)  

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```

Description:

5. Now, the Admin adds a localized version to this email where the selected language is Italian.



Administration > System Emails > View a System Email > Add/Edit a System Email

Add/Edit a System Email

Save Cancel

System Email Information

System Email Name *: Verify OTP

Language *: Italian

Subject *: Verification Code

Active *: Yes

Module: Select

Parent Template: Verify OTP

Select | Clear

Template Content

Template Content *:

Richiesta di modifica della password

Di recente hai inviato tramite "Password dimenticata" per modificare la password per:
#####URL#####

Si prega di utilizzare il seguente codice di verifica (entro 5 minuti dalla ricezione di questa email) per procedere

#####OTP#####

body

Description:

0 of 500

6. Once the Admin saves the newly created System Email, it will appear in English in the related parent System Emails.

Administration > System Emails > View a System Email

View a System Email

Edit Delete Clone Send Test Email

— System Email Information

System Email Name: Verify OTP
Subject: Verification Code
Module:
Language: English
Active: Yes
Parent Template:

— Template Content

Template Content:

Logo

Hello #####Name#####,

Password Change Request

You have recently submitted a password change request through the 'Forgot Password' option for:
#####URL#####

Please use the following Verification Code(*within 5 minutes of receiving this email*) to proceed
#####OTP#####

Thank You,
Channel Team

(Note: Please do not reply to this message, as it was sent from an unmonitored email address. Replies to this address will not be received or answered.)

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Description:

— Localized Versions

Add

Action	Name	Language	Module	Active
 	Verify OTP	Italian		Yes

7. Now, when the User updates the preferred Language in the UPM Platform to Italian – the User record is updated as provided below. Now, the User will receive the OTP notification in Italian.

Administration > Users > View a User

View a User

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

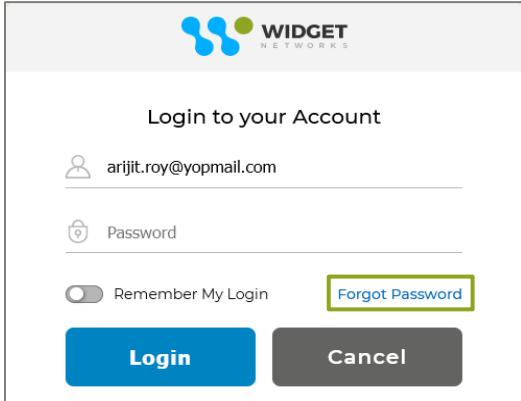
— User Information

First Name: Arijit	Last Name: Roy
User Name: arijit.roy@yopmail.com	Status: Approved
Email Address: arijit.roy@yopmail.com	Other Email:
Company Name: Abc2355	Profile: Partner
Title:	Direct Phone:
Country Code:	Mobile:
Department:	Other:
Fax:	Main Phone:
Primary Address:	Primary Address2:
City: California	Country: USA
State: California	Postal Code:
Contact: Arijit Roy	Salesforce ID:
Reports To: Arijit Roy	Wizard Type:
Group: Partner (mandatory partner group)	User Image:
User Type: Partner User	API Profile:
Business Model:	

— User Settings

Time Zone: (GMT-08:00) Pacific Time (US & Canada)	Language: Italian
Multi Factor Authentication Enabled: No	Internal Administrator: No
T&C Accepted: Yes	Internal User (Non-Admin): No
Is User Profile Locked?: No	Failed Login Count: 0
Forgot Password Count: 0	Created by: Arijit Roy
Modified by: Arijit Roy	Legacy Login: Yes

8. Now, from the pre-log-in page of the UPM, the User clicks the 'Forgot Password' link.



WIDGET NETWORKS

Login to your Account

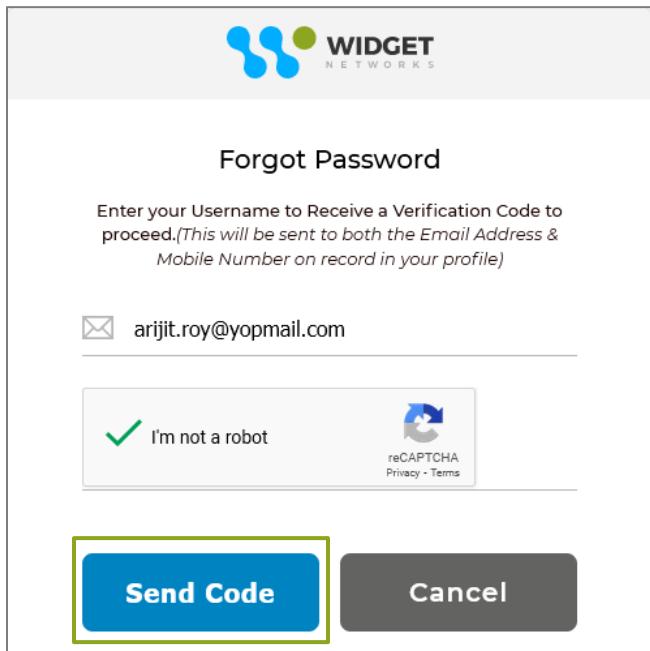
arijit.roy@yopmail.com

Password

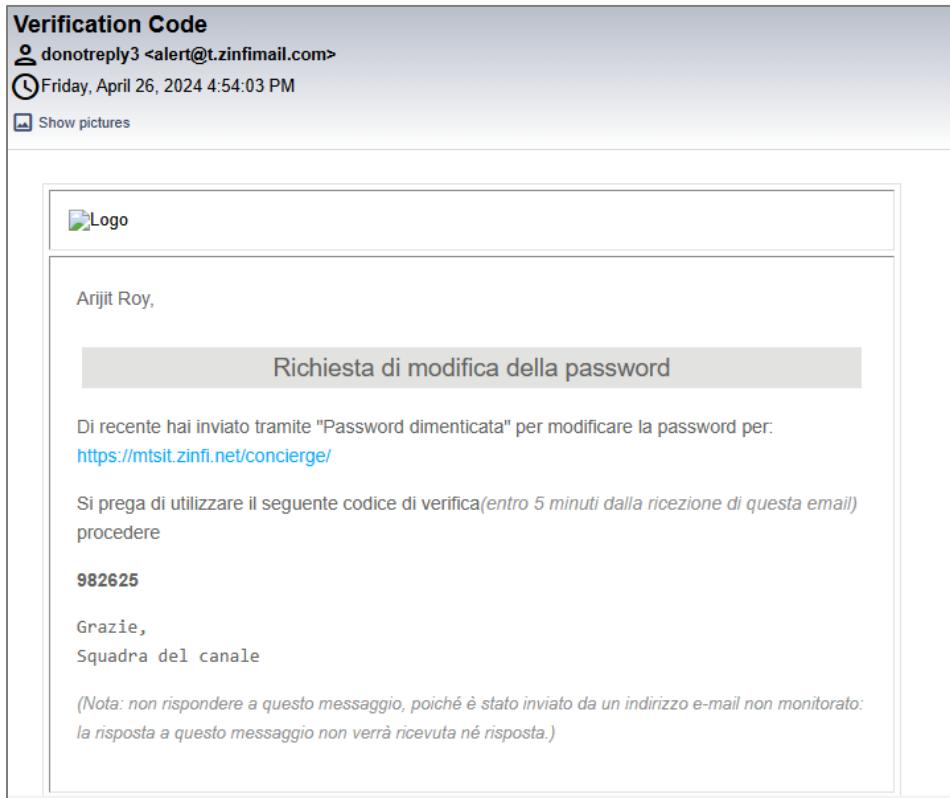
Remember My Login **Forgot Password**

Login **Cancel**

9. Clicking the 'Forgot Password' link allows the User to send OTP to the registered email ID.



10. The User receives the OTP email in Italian - as his selected language in the User profile was set as Italian.



Enhanced Password Reset Email Instructions with Token Expiry Guidance

The system automatically sends a welcome email whenever a new partner registers on the platform and their status is approved. This email includes a secure link allowing the partner to set or reset their password. Many partners often overlook this email or delay acting on it. Since the password reset link is time-sensitive and expires after 24 hours, attempts to use the link beyond this window result in errors, preventing successful password resets. Email delivery might sometimes be delayed due to system or network factors, causing partners to receive the reset email later than expected. This delay increases the likelihood of expired tokens and user frustration. Detailed instructions have been incorporated into the password reset email to mitigate these issues. **These instructions explicitly inform partners that the password reset link remains valid for only 24 hours from the time of receipt.**

The email now guides users on what to do if their reset link expires – they are advised to revisit the login page and initiate the password reset process again to generate a fresh reset link.

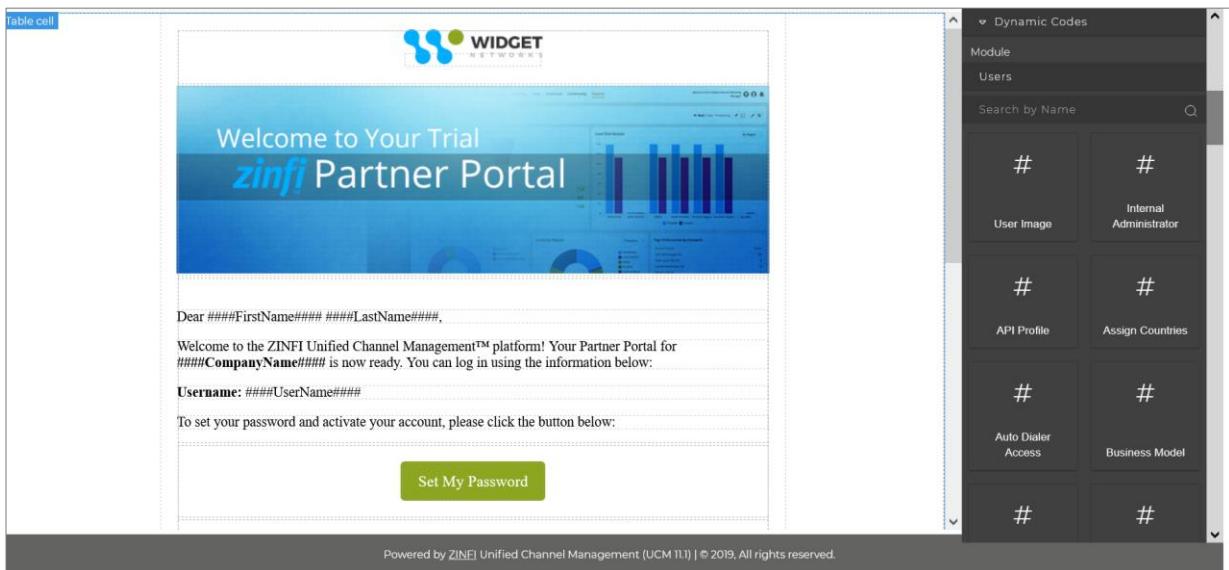
- Navigate to Administration > Alerts > System Emails and go to the details page of the Password Reset Email, where we find the updated instructions informing partners that the reset link is valid for only 24 hours from the time it is received.
- The Password Reset Email also includes clear and helpful instructions for users on what to do if their reset link expires, encouraging them to revisit the login page and start the password reset process anew to obtain a fresh, valid link.

The screenshot shows the ZINFI Administration interface under the 'System Emails' section. The 'User_Registration_Confirmation_Mail_For_Partner' email is selected. The 'Template Content' tab is active, showing the HTML code for the confirmation email. The code includes a 'Set My Password' button and a note: 'Important: This activation link is valid for 24 hours only. If the link has expired, please follow these steps to reset your password: 1. Go to the login page. 2. Click on "Forgot Password?" 3. Enter your email address (your username). 4. Follow the instructions in the password reset email you receive.' Below this, there is a 'Need Help?' section with contact information: Email: support@zinf.com and Phone: +1 (888) 946-3474. The footer of the email template reads: 'We look forward to helping you get the most out of your partner experience with us. Best regards, ZINFI Sales Team'.

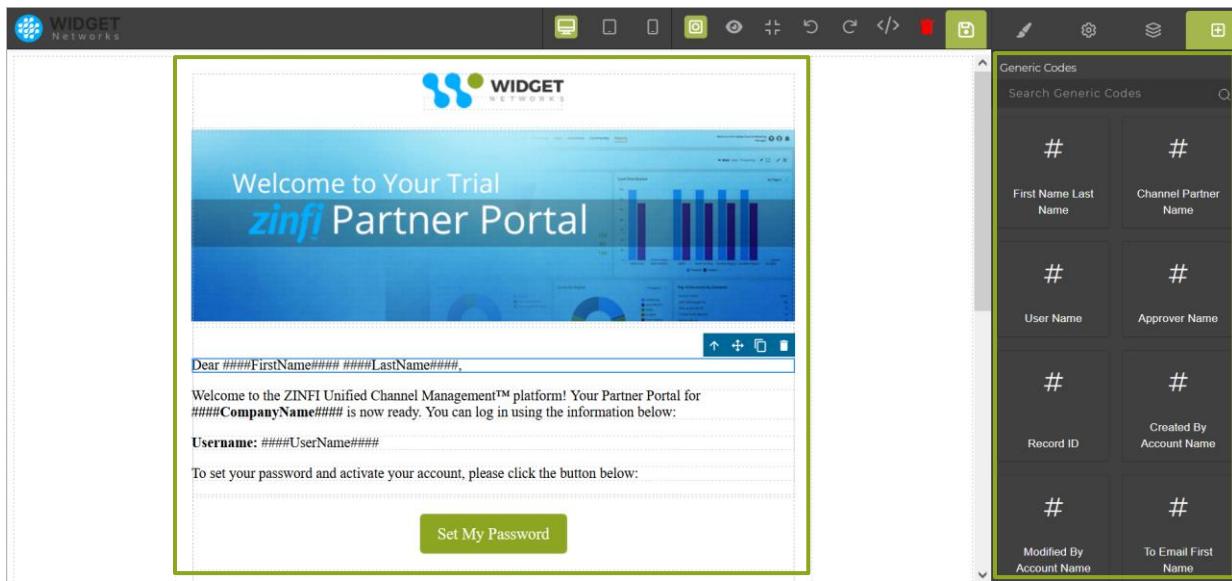
Manage System Email Templates via CMS Editor

Email templates previously managed through the classic CKEditor interface are now seamlessly integrated into the CMS Editor – the same interface used for managing broader content applications in UPM. This shift allows for a much richer, more visual, and dynamic email composition experience, eliminating the formatting constraints of traditional rich-text editing.

- When editing a system email (e.g., User Registration Confirmation), users are now directed to the CMS Editor interface.
- This editor provides a drag-and-drop structure with full layout control and visual editing, aligning with how CMS pages are managed in UPM.



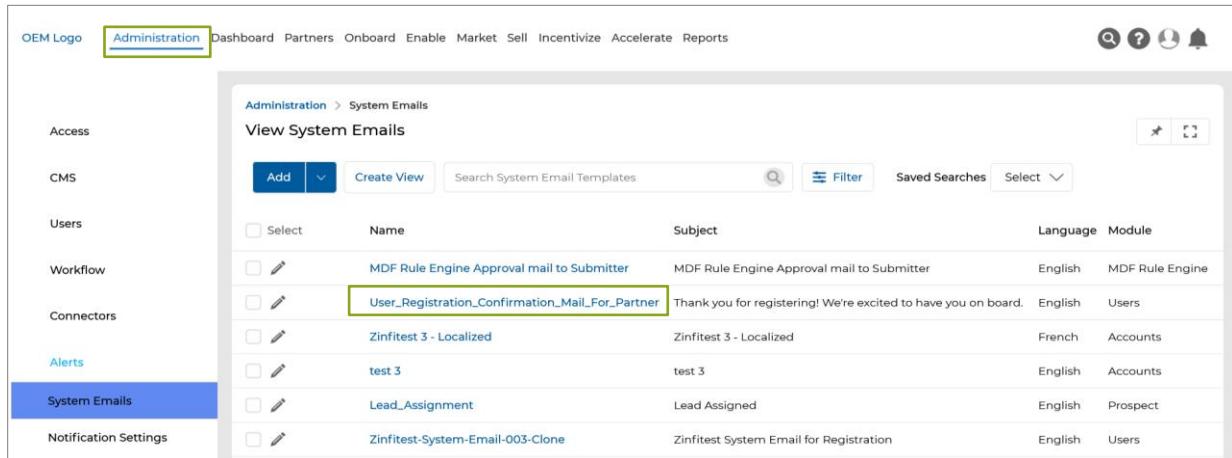
- Each System Email is mapped to a specific application (e.g., Users, Prospect, MDF Rule Engine).
- In the CMS Editor, a dedicated panel on the right displays hash code blocks relevant only to that selected application.
- These hash codes (e.g., #####UserName#####, #####CompanyName#####) are pulled dynamically from workflow field configurations associated with that application.
- This reduces clutter and makes selecting appropriate dynamic values faster and more accurate.
- You will also see the Generic Codes section – a list of user-independent hash codes (placeholders) that can be dragged-and-dropped directly into the template.



Email Template Preview Feature

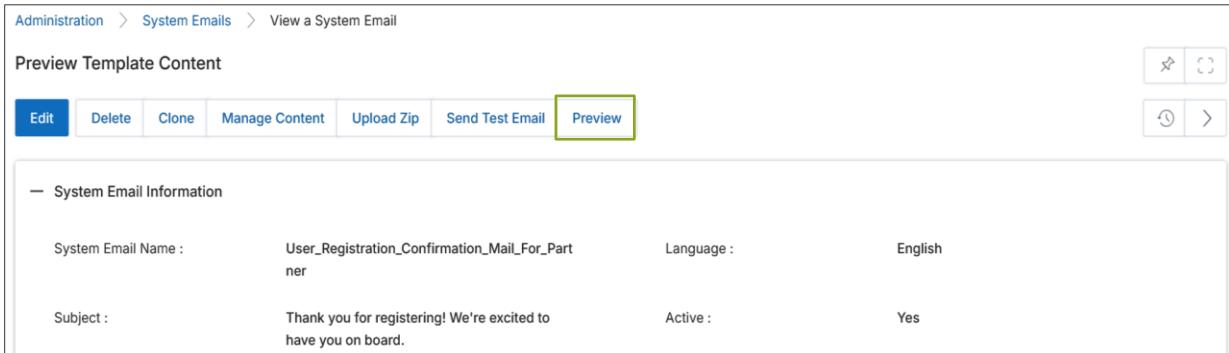
To improve accuracy and confidence during email template creation, a Preview option for System Emails has been introduced in the ZINFI platform. This feature enables an instant view of how an email template will appear when received, including the representation of dynamic content, by admin users.

- Go to Administration > System Emails.



Select	Name	Subject	Language	Module
<input type="checkbox"/>	MDF Rule Engine Approval mail to Submitter	MDF Rule Engine Approval mail to Submitter	English	MDF Rule Engine
<input type="checkbox"/>	User_Registration_Confirmation_Mail_For_Partner	Thank you for registering! We're excited to have you on board.	English	Users
<input type="checkbox"/>	Zinfitest 3 - Localized	Zinfitest 3 - Localized	French	Accounts
<input type="checkbox"/>	test 3	test 3	English	Accounts
<input type="checkbox"/>	Lead_Assignment	Lead Assigned	English	Prospect
<input type="checkbox"/>	Zinfitest-System-Email-003-Clone	Zinfitest System Email for Registration	English	Users

- Select an email template from the list.



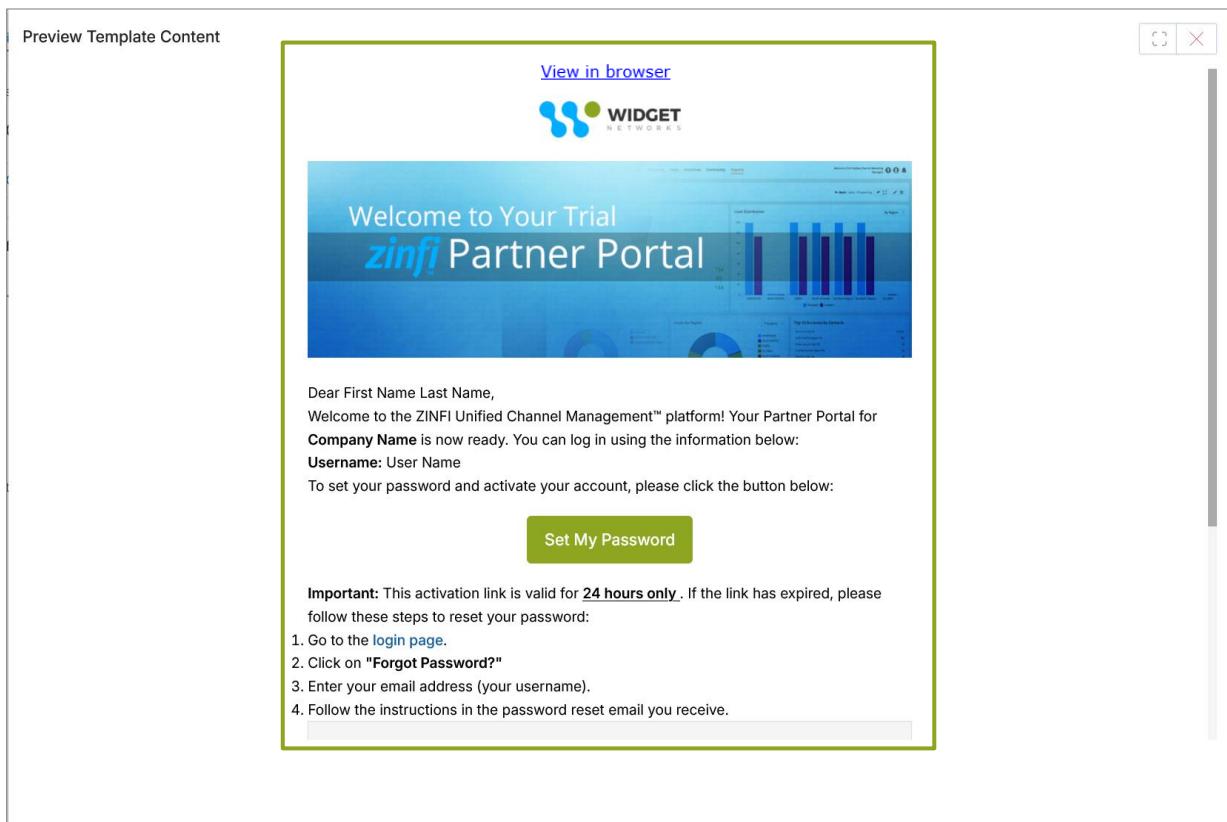
Administration > System Emails > View a System Email

Preview Template Content

System Email Name : User_Registration_Confirmation_Mail_For_Partner Language : English

Subject : Thank you for registering! We're excited to have you on board.

- Click the Preview button.
- Clicking the button opens the email in preview mode, displaying the exact layout as it would appear to the recipient.



Preview Template Content

[View in browser](#)

 WIDGET NETWORKS

Welcome to Your Trial
zinfo Partner Portal

Dear First Name Last Name,
Welcome to the ZINFO Unified Channel Management™ platform! Your Partner Portal for **Company Name** is now ready. You can log in using the information below:
Username: User Name
To set your password and activate your account, please click the button below:

[Set My Password](#)

Important: This activation link is valid for 24 hours only. If the link has expired, please follow these steps to reset your password:
1. Go to the [login page](#).
2. Click on "Forgot Password?"
3. Enter your email address (your username).
4. Follow the instructions in the password reset email you receive.

- All dynamic placeholders (e.g., <FirstName>, <LastName>, and <UserName>) are replaced by their corresponding field labels (e.g., First Name, User Name) during preview.
- Each system email now includes a "View in Browser" link - displayed prominently at the top of the email body. When clicked, the link opens a web version of the email in a browser tab, preserving all layout, formatting, and branding elements.

⚠ EXTERNAL EMAIL ⚠

[View in browser](#)

 **WIDGET**
NETWORKS



Dear First Name Last Name,
Welcome to the ZINFI Unified Channel Management™ platform! Your Partner Portal for **Company Name** is now ready. You can log in using the information below:
Username: User Name
To set your password and activate your account, please click the button below:



Dear First Name Last Name,
Welcome to the ZINFI Unified Channel Management™ platform! Your Partner Portal for **Company Name** is now ready. You can log in using the information below:
Username: User Name
To set your password and activate your account, please click the button below:

[Set My Password](#)

Important: This activation link is valid for **24 hours only**. If the link has expired, please follow these steps to reset your password:

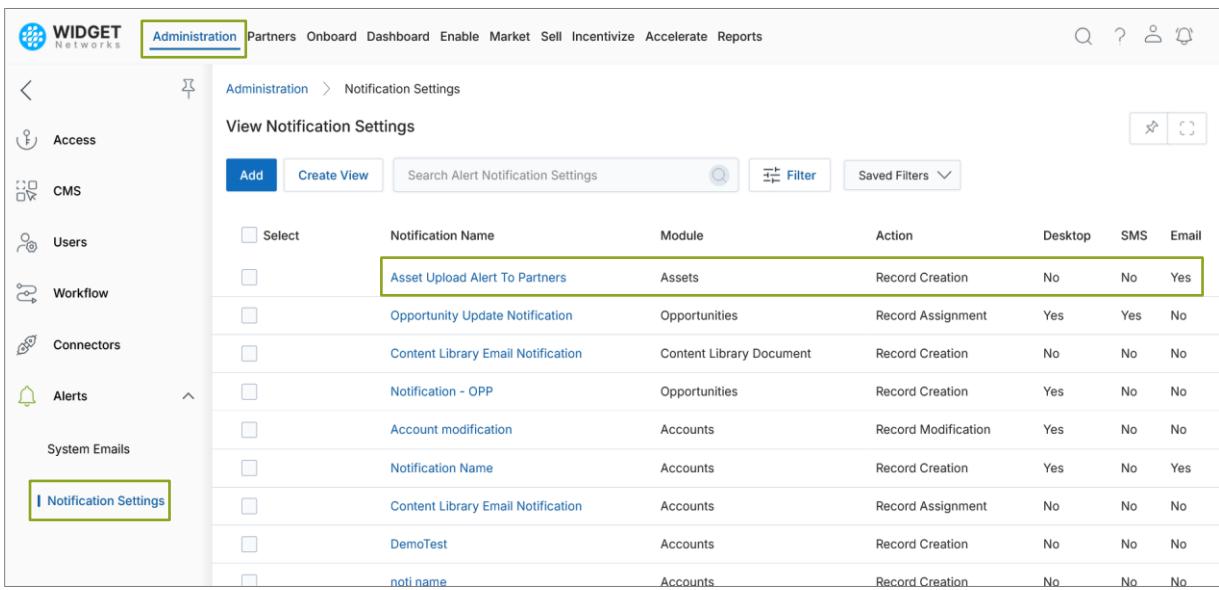
1. Go to the [login page](#).
2. Click on "Forgot Password?"
3. Enter your email address (your username).
4. Follow the instructions in the password reset email you receive.

Email Notification for Bulk Assets Uploaded in a Time Frame

The Email Notification for Assets feature automatically sends an email alert for all assets uploaded within a defined time frame. Admin users can configure notification settings and email templates so that partners receive consolidated updates on newly uploaded assets. These notifications include direct links to the published assets in the specific time period, enabling partners to access and co-brand them without additional navigation.

Admins can define the notification frequency as monthly or quarterly, ensuring that partners are informed at the end of each selected period about all the assets published during that time.

- In the Notification Settings section, the Admin configures an alert for the Assets application with the action set to “Record Creation.”



Select	Notification Name	Module	Action	Desktop	SMS	Email
<input type="checkbox"/>	Asset Upload Alert To Partners	Assets	Record Creation	No	No	Yes
<input type="checkbox"/>	Opportunity Update Notification	Opportunities	Record Assignment	Yes	Yes	No
<input type="checkbox"/>	Content Library Email Notification	Content Library Document	Record Creation	No	No	No
<input type="checkbox"/>	Notification - OPP	Opportunities	Record Creation	Yes	No	No
<input type="checkbox"/>	Account modification	Accounts	Record Modification	Yes	No	No
<input type="checkbox"/>	Notification Name	Accounts	Record Creation	Yes	No	Yes
<input type="checkbox"/>	Content Library Email Notification	Accounts	Record Assignment	No	No	No
<input type="checkbox"/>	DemoTest	Accounts	Record Creation	No	No	No
<input type="checkbox"/>	noti name	Accounts	Record Creation	No	No	No

- The Admin enables the email toggle and selects or customizes an email template for the notification.
- Partners receiving the email can view a clickable Name Link for each asset, allowing them to land directly on the corresponding asset details page.
- If the Admin selects a monthly frequency, partners receive an email listing all assets published within that month on the last day of the month.
- If the Admin selects a quarterly frequency, partners receive an email on the last day of the quarter listing all assets published.

