

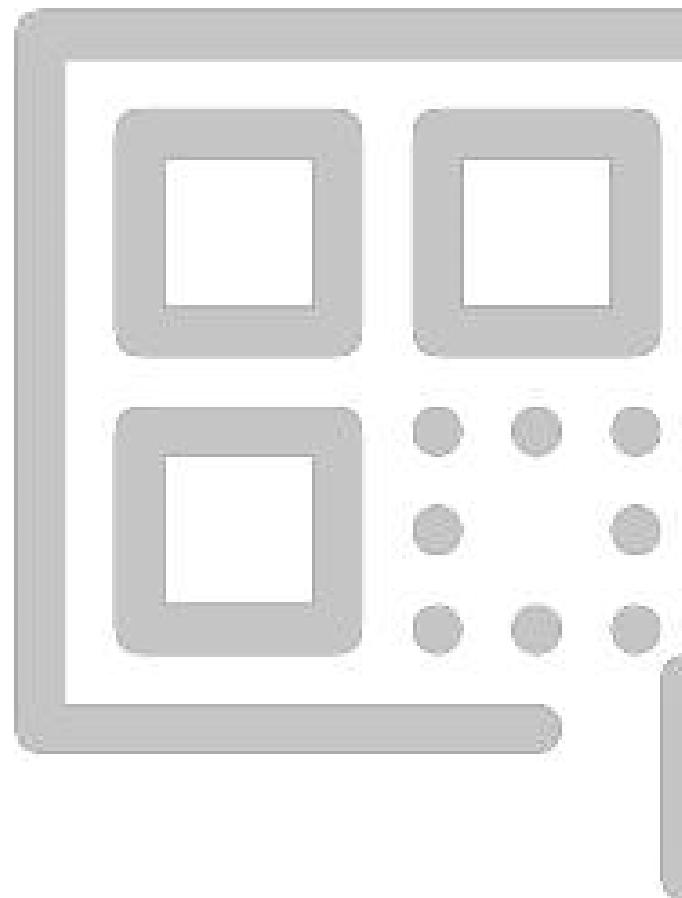
Content Management System

Ext.prd.007.10 | 11.11.2025

UPM 25.x

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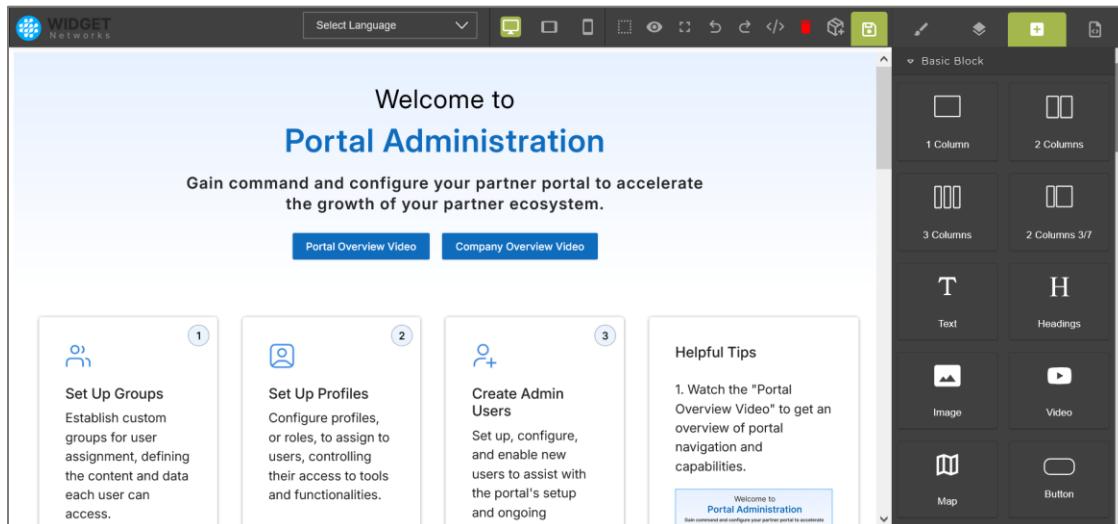
Unleash Your Imagination

Web applications or single-page applications (SPAs) have become the industry standard for HTML5-based applications and responsive websites because they tend to be more user-friendly, feel faster, and are more responsive.

As we'll see in this document, UPM's 'Content Management System' supports application developers with content-as-a-service. This means you can build your portal or microsite in minutes using a simple drag-and-drop approach, without forcing any constraints on the application itself.

UPM's 'Content Management System' - Upgrade 2.0 features an updated CMS Editor enabling an easier approach for admins and admin-end web designers to control portal look and feel (identity, colors palette, web pages, etc.) and developing marketing assets, using an extended set of simple drag-and-drop and granular tools, featuring an easier learning and operational curve. This module allows administrators to easily create and manage web and campaign content utilizing the CMS Editor which has been updated to provide a seamless experience at per with state-of-the-art professional WYSIWYG Builders/Editors to help you build dynamic and personalized portal pages and marketing content on the fly.

The CMS Editor features a widget library full of text fields, galleries, videos, maps, and more to help you build out whatever you need. Wow, your clients by add "nice-to-have" features in minutes. Live edit WYSIWYG functionality contributes to a smooth, uniquely comfortable user experience, and it also comes with a wider range of actions. Elements such as tooltips, headings, text, maps, paragraphs, images, buttons, videos, sections, banners, accordions, feature boxes, page layouts (one column, two columns, etc.), and actions such as group assignments, forms, etc. can be easily embedded. Users can manage their content and arrange elements with just a click of the mouse, dragging and dropping objects across the screen. Drag-and-drop applies to all types of content: images, text fields, videos, and a whole variety of modules and additional customization options. The feature upgrade comes power-packed with features to define and include classes and customize each element at the micro level – Layout, Position, Size, Spacing, Typography, Borders, Backgrounds, and Effects. Manage elemental layers of the page design and easily revert to the old state with dedicated Undo and Redo buttons.



Step Up to Next-Gen Web Publishing

ZINFI 'Content Management System' pairs the latest CMS trend—its unique drag-and-drop technology—with a revolutionary real-time text writing and editing feature (the WYSIWYG Editor). These features enable an improved user experience, easier and quicker content management, a highly appealing visual environment, and superior flexibility.

Drag and- Drop

'Content Management System' operates on drag-and-drop technology. This means that users can manage their content and arrange elements with just a click of the mouse, dragging and dropping objects across the screen. Drag-and-drop applies to all types of content: images, text fields, videos, and a whole variety of modules and additional customization options.

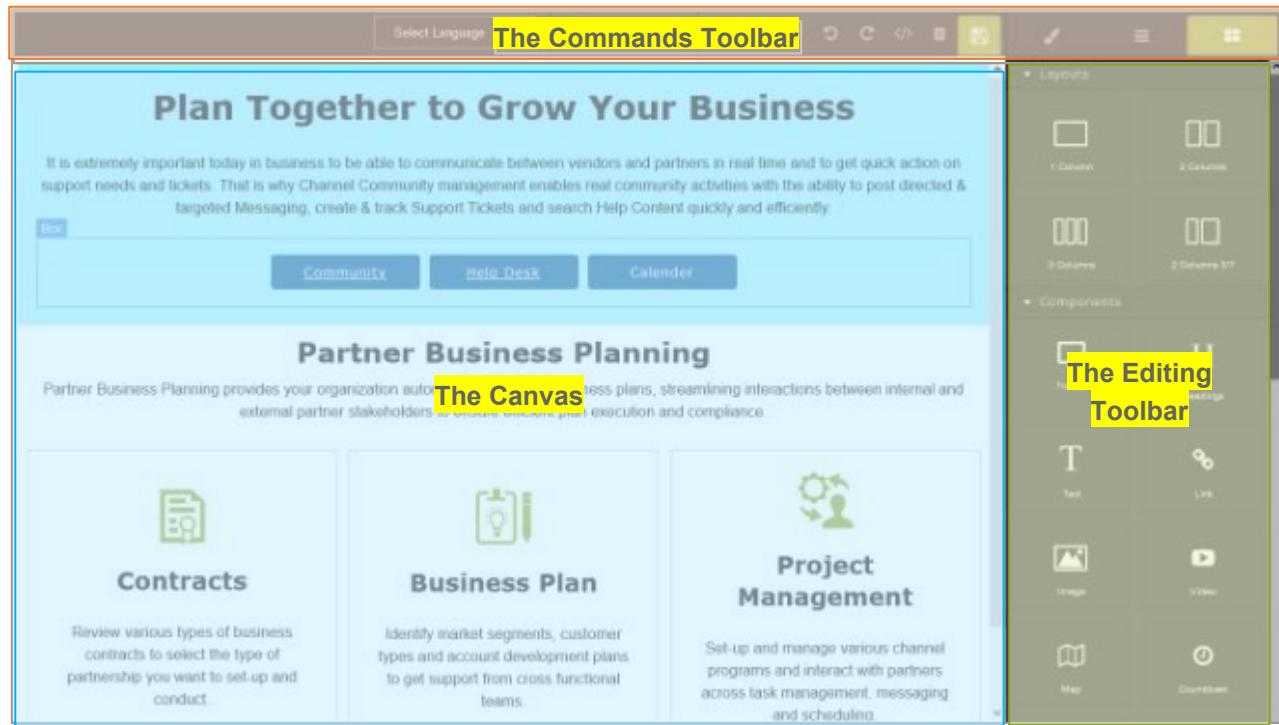
No code knowledge is required! Even if you aren't a computer geek, you can easily orient yourself within CMS. ZINFI's 'Content Management System' team developed the tool specifically with non-technical users in mind, providing a simple, user-friendly interface. 'Content Management System' drag-and-drop works like most computer programs you are familiar with. For example: To mount an image, just drag and drop it into the desired location; to change the color, just click on the appropriate icon. 'Content Management System' provides an optimal and intuitive user experience for everybody.

Drag-and-drop functionality saves you a lot of time and makes creating your website a fun, intuitive experience. Managing and rearranging your content now takes only minutes or even seconds.

Just use your mouse and your imagination.

Live Edit

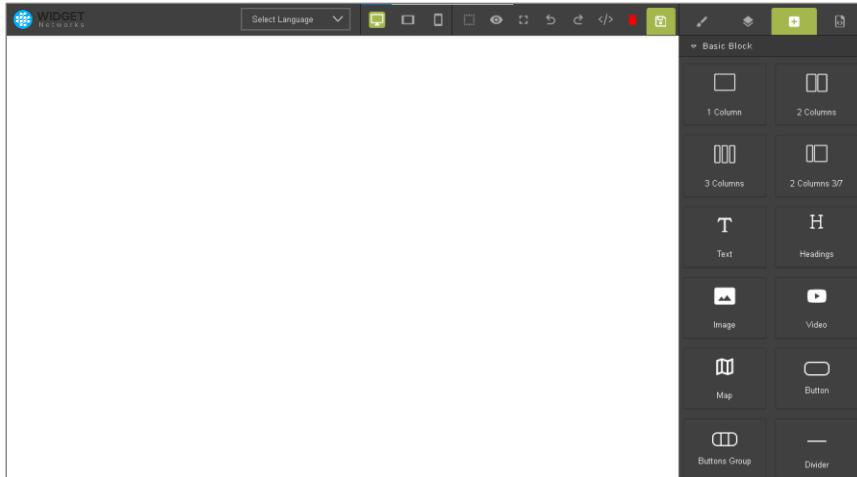
The ZINFI text writing and editing feature (WYSIWYG Editor) allows users to write, edit, and manage their content in real-time. Going “live” means you can work on the website interface itself any time you wish to—a true WYSIWYG experience!



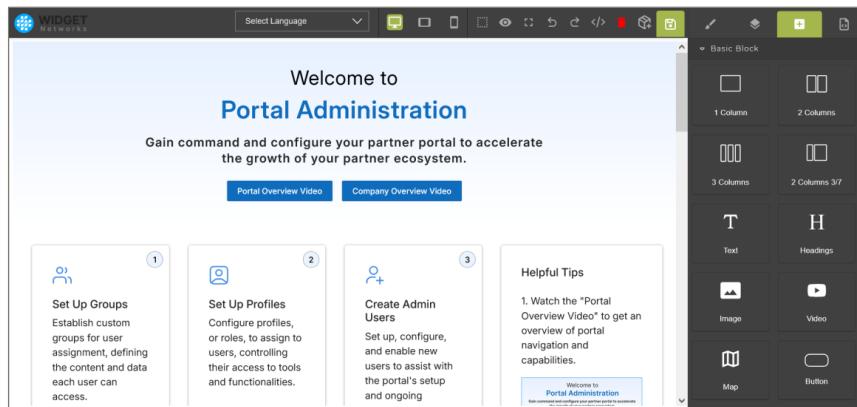
Dynamic Form Builder Using the WYSIWYG Editor

You may use the various WYSIWYG tools to add content and manage it in a simplified way. The tools are self-explanatory (as it is a standard WYSIWYG). By clicking on the “Source” button in the upper right of the tools panel, you can access the HTML view of your template and edit directly in the HTML. Uncheck “Source” to see your email rendered (with the images/graphics missing, potentially, which you can add in using the WYSIWYG tools). At this point, place your cursor in the cell/location you want your image/graphic to appear and click on the insert image tool (the small “mountain scene” looking icon).

You can use the tools on the right sidebar to insert your template content container, insert rows or columns, buttons, dividers, text areas, image areas, etc, using the draggable components shown here. They will make up the various visual areas of your template – and allow you to click inside any one of them – to access the editor tools within that element to further configure and customize the content within that section.



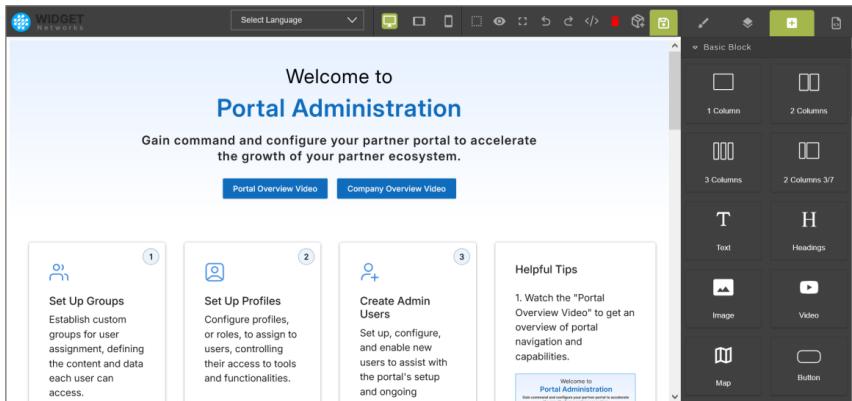
- Or you can begin by inserting HTML code into this template – if you have already designed this email offline and want to import that HTML in to start with that design and layout.



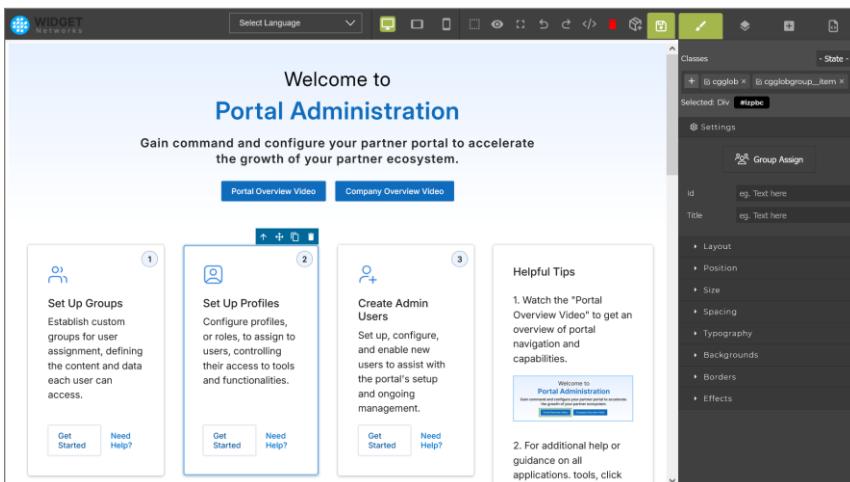
- By clicking on this icon, it opens the HTML editor window where you can insert the HTML.



- Once you insert the HTML and click on the “Import” button in the lower left of that window, it will show you the rendered version of your templates (or you can have used the tools shown in step “a” above, to have built out these sections by dragging them in from the right-hand sidebar).



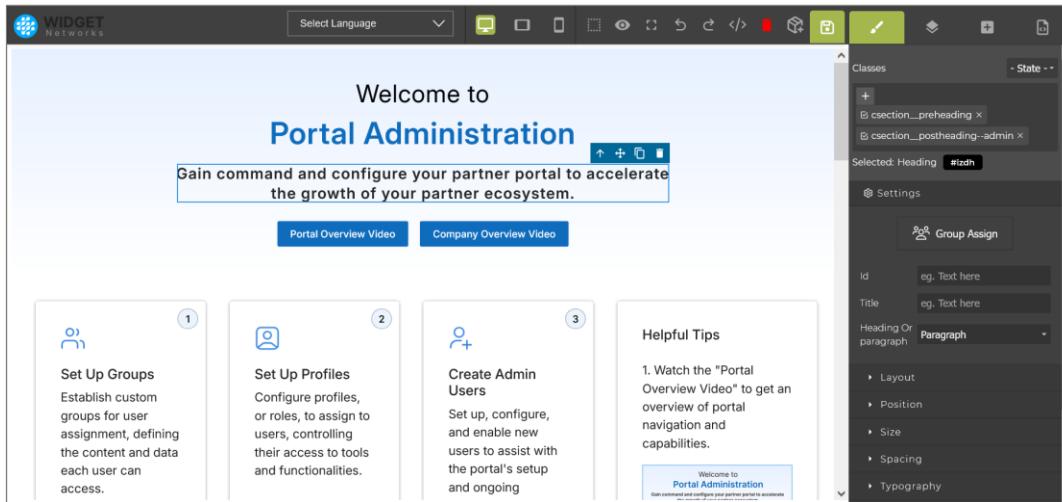
- By clicking into any of the visual composer sections (the elements on the canvas page), it will open up the basic tools for that section where you can find tools to move (drag) the section around and replace it on the page, make a duplicate of this section or delete it.



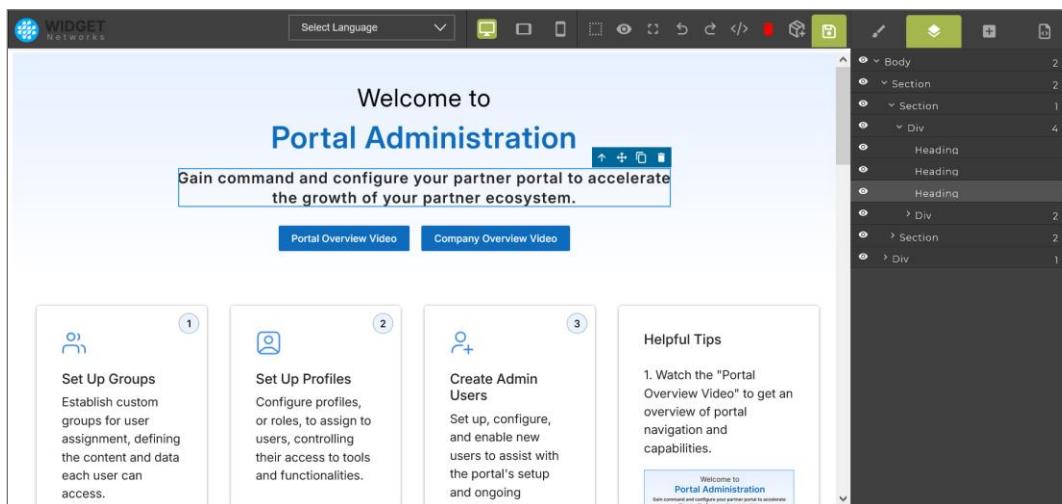
- If you double-click on the section, you are in, it will open simple WYSIWYG tools that will allow you the basic tools to manage the content in that section.



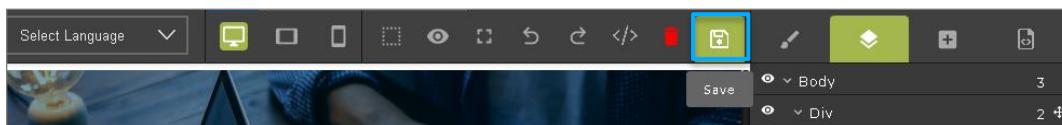
- While you are selected into a particular section, if you click on the small paint brush icon at the top of the right-hand sidebar – this will open the full suite of management tools for that section element – with such tools as dimension management (size, padding and margins of the element) typography management (all controls over the font size and family, color, text type, alignment, etc...), and decoration (element borders and backgrounds).



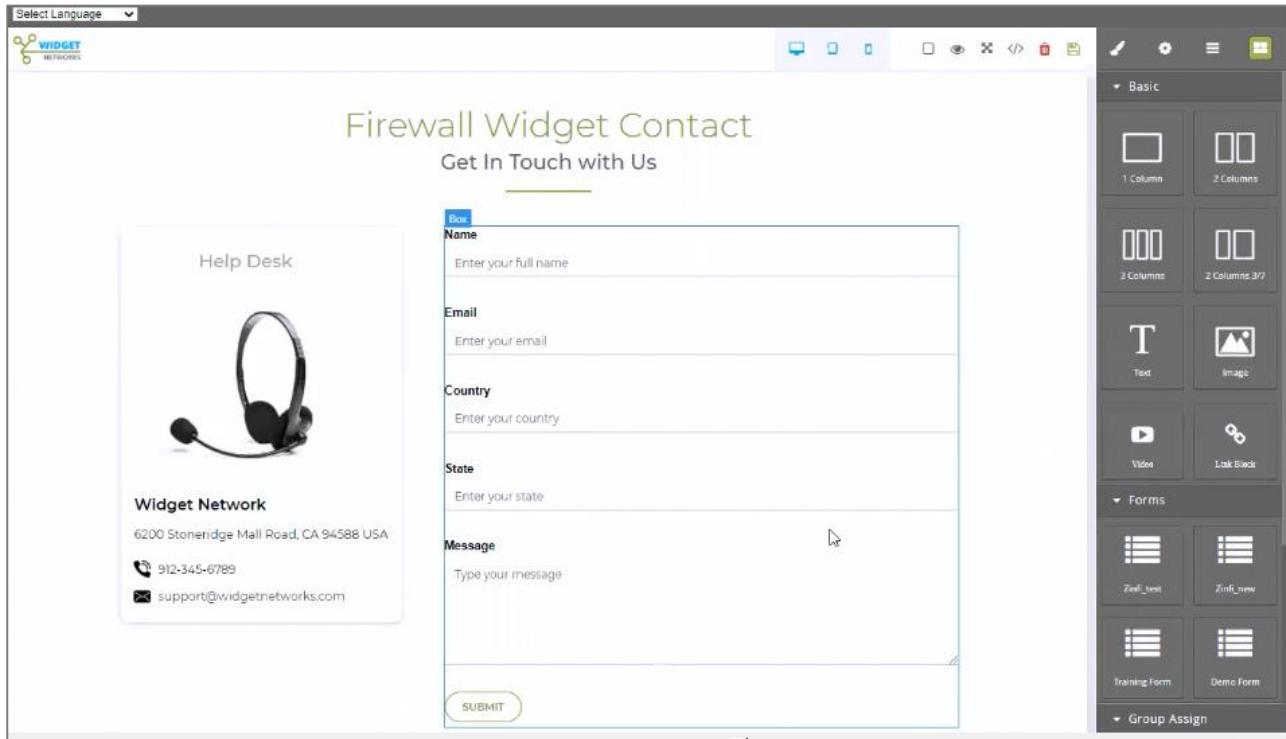
- You can also click on the Open Layer Manager tool to see the structure of your template coding, in tables, columns, and rows.



- When you are all done, click on the small disk icon in the upper right to **Save** your work.

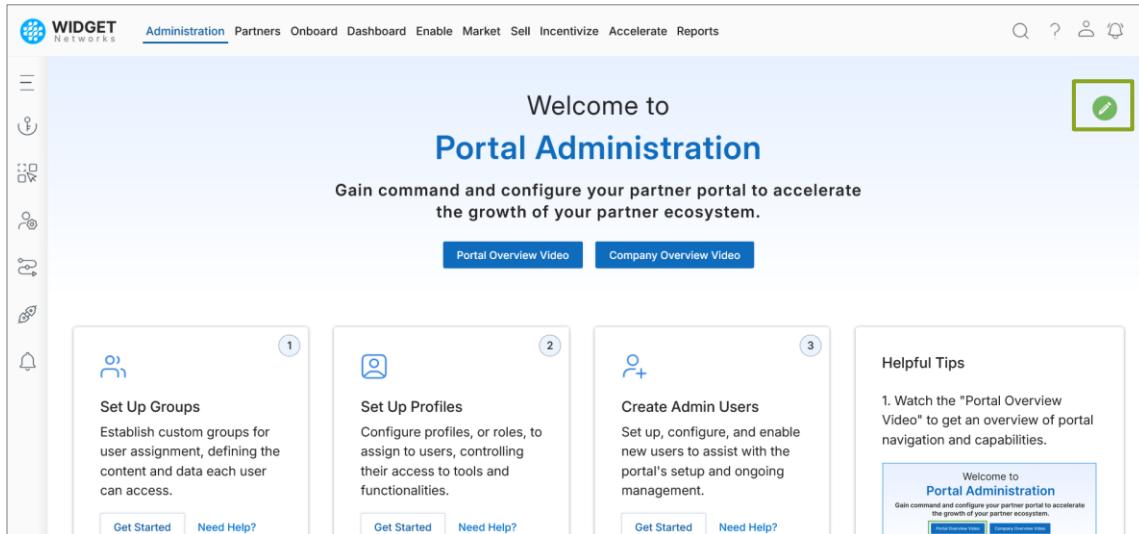


To host the Dynamic Form on a Page through 'Content Management System', we need to open the Page to View Details and traverse to Manage Content. Once the Page has opened in the CMS - HTML Editor for that specific page, we will simply Drag-Drop the applicable Dynamic Form to that Page, update the design of the Page (HTML Knowledge Required), and Click Save. The Dynamic Form can now be utilized to capture Prospect information and on completion of filling-up of information, can be set up to download an asset.

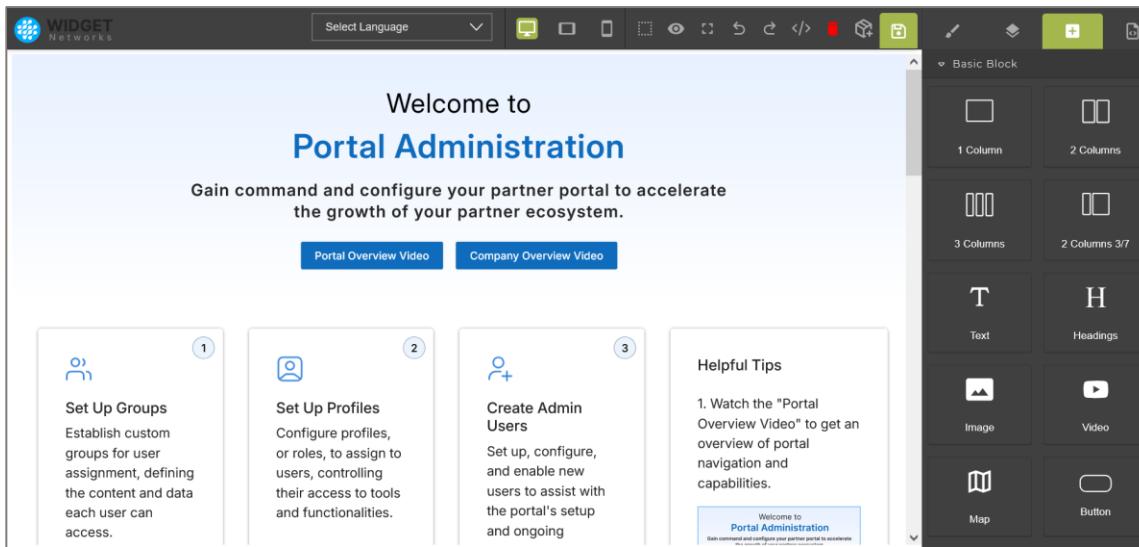


Content Page Edit for all Admin Users

- All portal admins can edit the main landing page of any zone by clicking the pencil icon at the top right corner of a landing page. The image below shows the landing page of the Onboarding Zone as an example.



- Clicking the pencil icon, will automatically open the page in edit mode in the CMS editor.



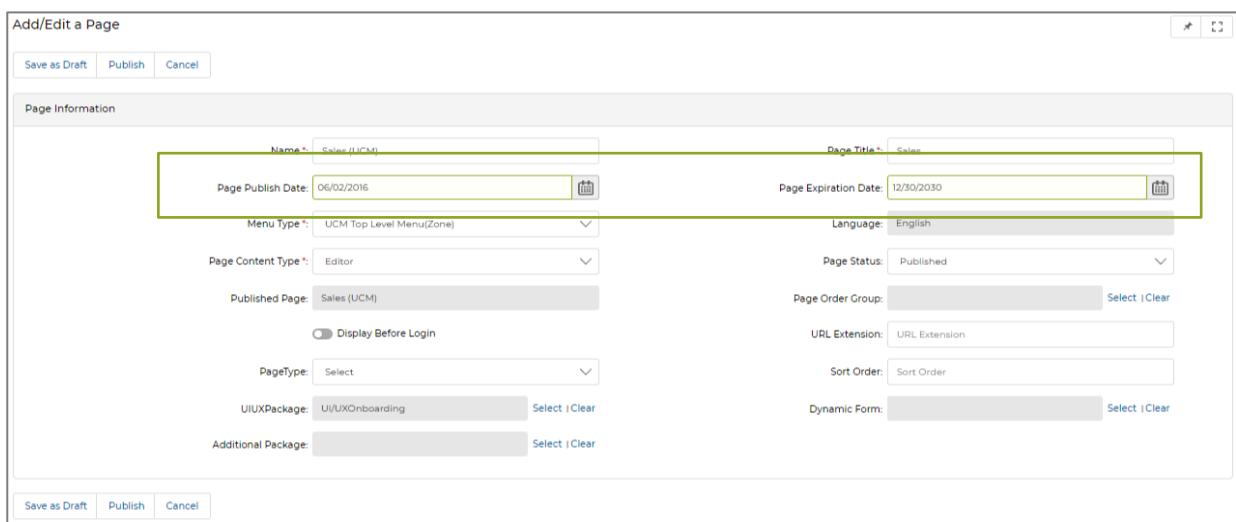
Archived Pages

- The **Archived Pages-related** list displays the list of different versions of the page created. You can click on the name of each listing to see the details of that page version. If any changes are made to the Content

of the page from the CMS Editor, the old version is stored in the archive section. If required, any of the archive pages can be restored or auto-published as per the business requirement.

— Archived Pages				
Action	Name	Page Title	Created On	Created By
	Partners -CPA	Partners	09/06/2019 11:29:30 AM	Widget CMM
	Partners -CPA	Partners	09/06/2019 11:23:28 AM	Widget CMM
	Partners -CPA	Partners	06/06/2019 11:53:09 AM	Widget CMM
	Partners -CPA	Partners	06/06/2019 11:51:25 AM	Widget CMM
	Partners -CPA	Partners	03/02/2019 6:53:57 AM	Widget CMM

- The extended-release feature set lets admins configure the automatic publication of specific Archived Pages set to auto published at a specific time and auto expired, by updating the Page Publish Date and Page Expiration Date.



The screenshot shows the 'Add/Edit a Page' interface. In the 'Page Information' section, the 'Page Publish Date' field (containing '06/02/2016') and the 'Page Expiration Date' field (containing '12/31/2030') are highlighted with a green border. Other fields visible include 'Name' (Sales (UCM)), 'Page Title' (Sales), 'Page Status' (Published), 'Page Order Group' (Select), 'Page Extension' (URL Extension), 'Sort Order' (Sort Order), and various dropdowns for 'Menu Type', 'Page Content Type', 'Published Page', 'PageType', 'UIUXPackage', and 'Additional Package'.

- An Archived Page can be edited to update the Publish and Expiration Date. Once the Publish Date is configured, the Archived Page automatically replaces the Active Page on that specific day and the Archived Page also expires as per the expiration date. Once the Archived Page expires, we can preset the Active Page - Publish Date to match the Archived Page's Expiration Date, so that automatically the Archived Page is again replaced by the Active Page.

Countries

- The **Countries-related** list shows the list of countries associated with this page. This is very important because here you are assigning which countries can see this page.

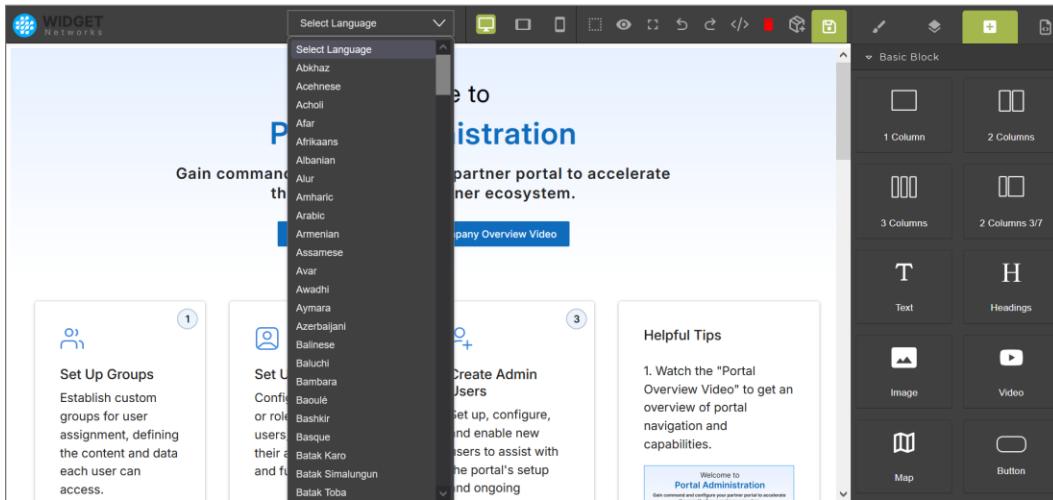
— Countries	
Action	Country Name
	Global

- If ‘Global’ as a **Country Name** is associated with a page, its visibility would be country-independent. Even if a user selects a different country name other than ‘Global’ in the **Select Country & Language** page, e.g., **United Kingdom**, still the page would be visible since **Global** is associated with the page.

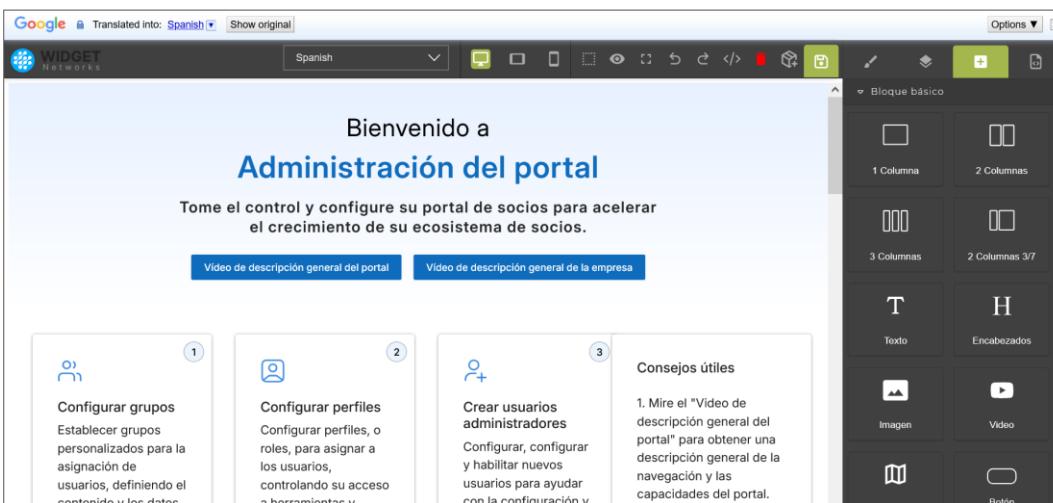
Translating Your Page into another Language

Open the Drag-n-drop CMS editor as described in the section “Using the WYSIWYG Editor” and then follow the steps defined below.

- Click on the “Select Language” Google Translate menu in the upper left of the editor window.



- Select the language you want (let's use Spanish for this example) – and you will see the page instantly translated into Spanish.

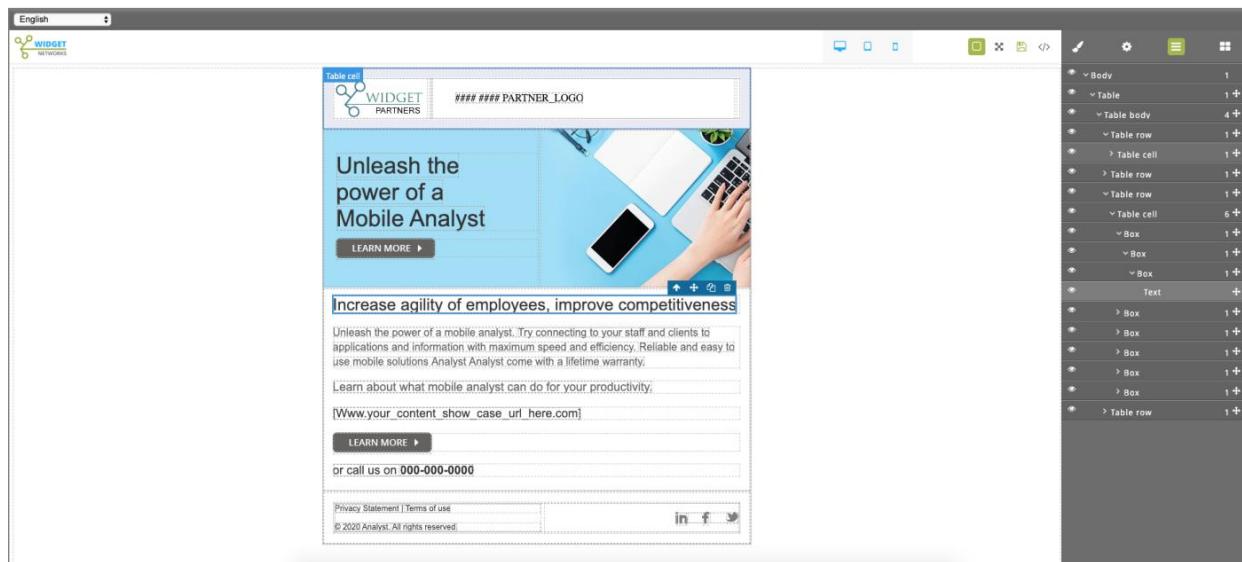


- When done, you can check the translation to make sure all the wording and phrasing is the way you want to use it – and then Save your work.



Making Zones/Sections Editable or Non-Editable

- When in the Drag & Drop CMS Editor (see section above for how to get into and use the Drag & Drop CMS Editor), identify the area/section you want to make editable or non-editable (locked down) and click on the HTML Editor icon.



- Once in the HTML editor, find the section you are going to lock or unlock for editing by your Partner.

Edit code

```

66      </font>
67      </font>
68      </font></span>
69  </h1>
70  <p id="jb88">
71      <span id="divMain5" class="ucmcontenteditable"><font id="l032h">
72          <Font id = "llen" > Unleash the power of a mobile analyst.
73      </font>
74      <font id = "igvy6" > Test connection to your staff and clients to applications and information with maximum speed and
efficiency.
75      </font>
76      <font id="l528w">
77          <font style="vertical-align: inherit;">
78              <font style="vertical-align: inherit;" class="goog-text-highlight">Reliable and easy to use mobile solutions Analyst Analyst come
with a lifetime warranty.
79      </font>
80      </font>
81      </font>
82      </font></span>
83  </p>
84  <p id="immp1">
85      <span id="divMain7" class="ucmcontenteditable"><font id="l4d4">
86          <Font id = "elmx" > Learn about what mobile analyst can do for your productivity.
87      </font>
88      </font></span>
89  </p>
90  <p id="iohcv">
91      <span id="divMain12" class="ucmcontenteditable"><font id="l2gp5">
92          <font id="lmx3z">[Www.your_content_show_case_url_here.com]
93      </font>
94      </font></span>
95  </p>

```

Update

- In the screenshot above, you can see that there is a code snippet of **class=" UPMcontenteditable"** inserted into the **** or **<div>** tag of the code.
- By having this code snippet in the **** or **<div>** tag, makes this piece of content in the template editable by the Partner (able to be edited or customized). If you navigate to the code and find this code snippet is NOT in a **** or **<div>** tag surrounding the item you wish to be editable...then add this **class=" UPMcontenteditable"**, as you see above.
- You can delete this code snippet from anywhere you find it, to make the content non-editable by your Partner, reciprocally.

Edit code

```

66      </font>
67      </font>
68      </font></span>
69  </h1>
70  <p id="jb88">
71      <span id="divMain5" class="ucmcontenteditable"><font id="l032h">
72          <Font id = "llen" > Unleash the power of a mobile analyst.
73      </font>
74      <font id = "igvy6" > Test connection to your staff and clients to applications and information with maximum speed and
efficiency.
75      </font>
76      <font id="l528w">
77          <font style="vertical-align: inherit;">
78              <font style="vertical-align: inherit;" class="goog-text-highlight">Reliable and easy to use mobile solutions Analyst Analyst come
with a lifetime warranty.
79      </font>
80      </font>
81      </font>
82      </font></span>
83  </p>
84  <p id="immp1">
85      <span id="divMain7" class="ucmcontenteditable"><font id="l4d4">
86          <Font id = "elmx" > Learn about what mobile analyst can do for your productivity.
87      </font>
88      </font></span>
89  </p>
90  <p id="iohcv">
91      <span id="divMain12" class="ucmcontenteditable"><font id="l2gp5">
92          <font id="lmx3z">[Www.your_content_show_case_url_here.com]
93      </font>
94      </font></span>
95  </p>

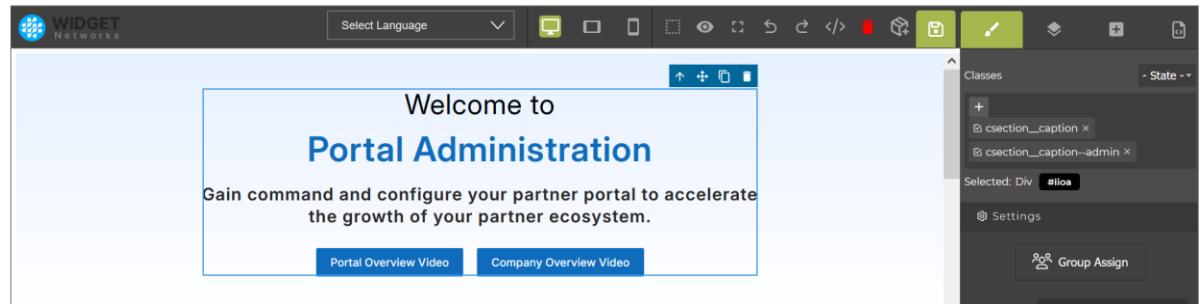
```

Update

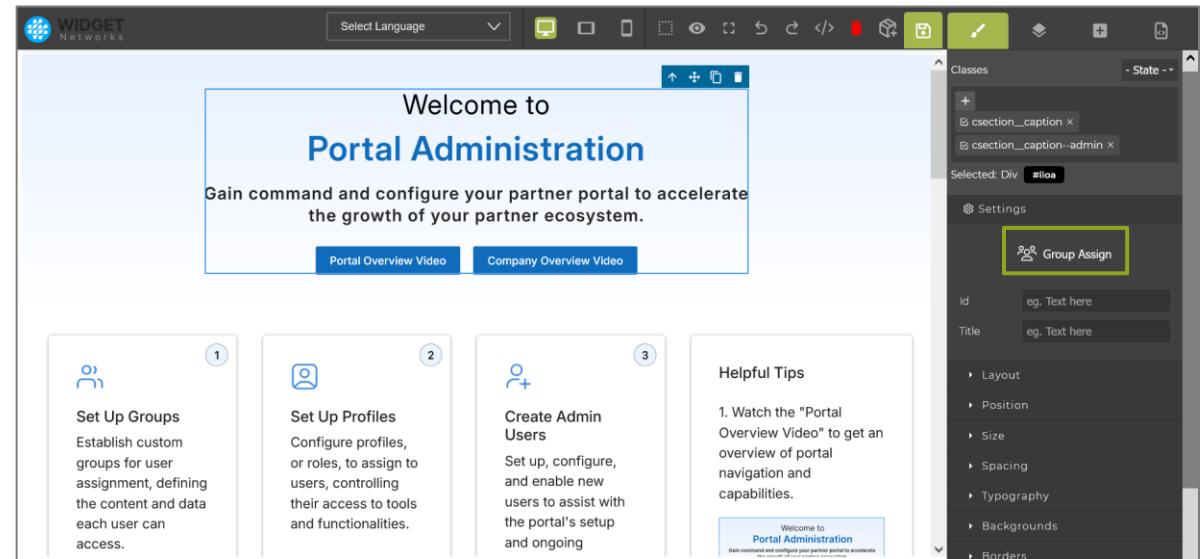
Content Page Blocks - Group Visibility / Group Assignment

CMS V4.0 is integrated with an ease-of-use functionality to assign the HTML block of a specific Page to specific Groups. Group Assignment function is integrated for the admin to select any block section in the canvas area and Group Assign to extend visibility privileges.

- This feature enables the user to make specific blocks from the contents in the CMS Editor visible to specific Groups when the same block won't be visible to other Groups.
- In the following example, we would make the following block (selected with a blue border) of content from CMS Editor visible to a specific Group as shown in the image below.



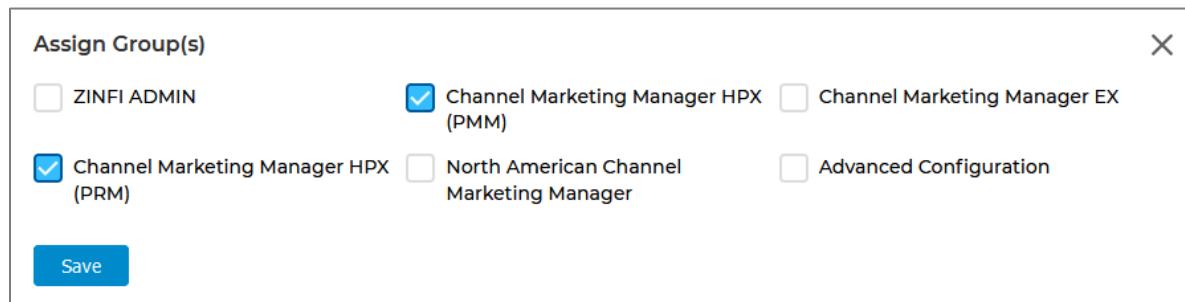
- To assign a specific block of content from CMS Editor to a specific Group, we've to select the block and click the **Group Assign** button in the left-hand panel.



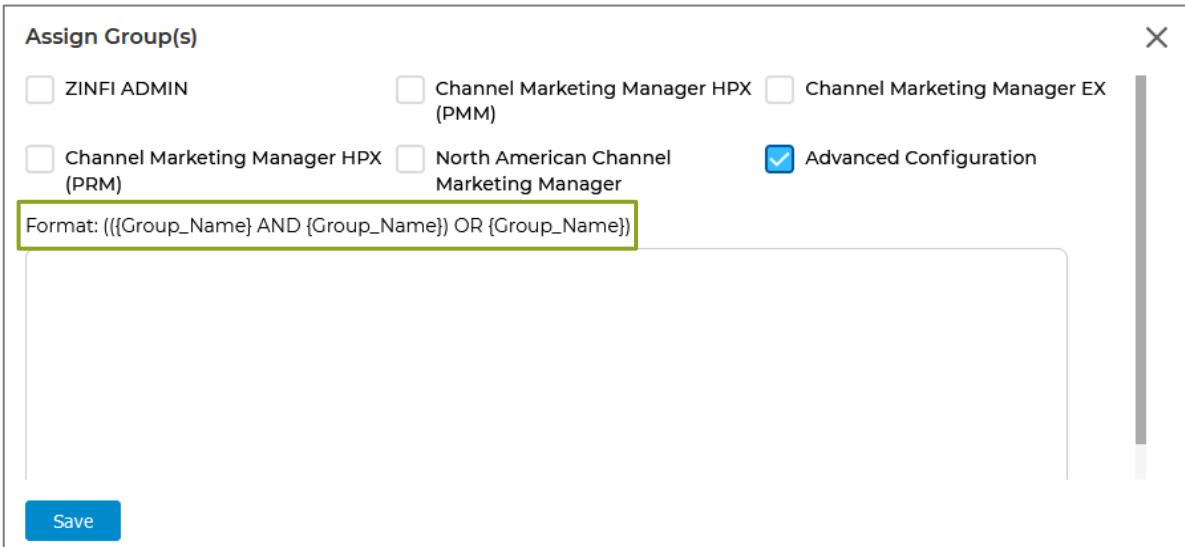
- Clicking the **Group Assign** button opens up a pop-up window where the selected block of content can be assigned to a single/multiple Group(s).



- We have to check specific Group(s) in the window and click **Save** to make the selected block of content visible to them.



- It is to be noted that in the popup window, the names of those Groups will be to whom the page has been assigned.
- Checking **Advanced Configuration** provides the additional opportunity for the user to define which **Partners** would be able to view the selected content block. The user needs to adhere to the prescribed format while defining the viewership logic.



- In the format shown in the image below, it is evident that if a User is associated with both the Groups mentioned in the format, he will be able to see the assigned block.

Assign Group(s)

ZINFI ADMIN Channel Marketing Manager HPX Channel Marketing Manager EX
 Channel Marketing Manager HPX (PMM) North American Channel Marketing Manager Advanced Configuration

Format: {{{Group_Name}} AND {{Group_Name}}} OR {{Group_Name}}
 ({{Channel Marketing Manager HPX (PMM)}} AND {{North American Channel Marketing Manager}})

Save

- In the format shown in the image below, it is evident that if a User is associated with any of the Groups mentioned in the format, he will be able to see the assigned block.

Assign Group(s)

ZINFI ADMIN Channel Marketing Manager HPX Channel Marketing Manager EX
 Channel Marketing Manager HPX (PMM) North American Channel Marketing Manager Advanced Configuration

Format: {{{Group_Name}} AND {{Group_Name}}} OR {{Group_Name}}
 ({{Channel Marketing Manager HPX (PMM)}} OR {{North American Channel Marketing Manager}})

Save

Note: The Page based on Bootstrap and structured properly utilizing HTML best practices, will be automatically re-structured without specific content and properly viewable – if it has not been assigned to a Group.

Bootstrap Support

Bootstrap is a free collection of tools for creating websites and web applications. It contains HTML- and CSS-based design templates for typography, forms, buttons, navigation, and other interface components, as well as optional JavaScript extensions.

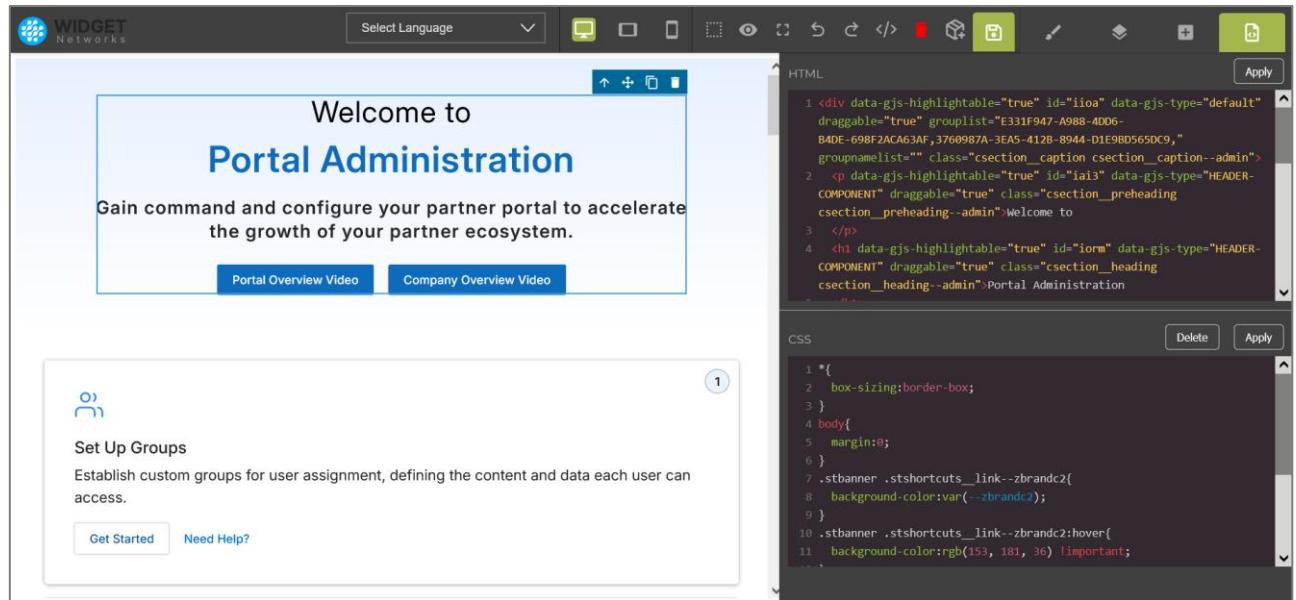
The grid is probably one of the most essential aspects of the framework. It's the basis on which the entire layout is created. Beyond that, Bootstrap's core CSS can also add helpful styling to forms, tables, buttons,

lists, and images, as well as fully functioning navigation bars, while the core JavaScript will add helpful code for creating models, carousels, alerts, pop-ups, drop-downs, and accordions.



The Block Editor

The Customize HTML block editor allows you to update the generated HTML code for the specific element and preview it as you edit to fine-tune your content.



```

1 <div data-gjs-highlightable="true" id="i10a" data-gjs-type="default">
2   dragabble="true" grouplist="E331F947-A988-4D06-
3   B40E-698F2AC634F,3760987A-3E5-412B-8944-D1E9B0565DC9,"
4   groupnamelist="" classe="csection_caption csection_ccaption--admin">
5   <p data-gjs-highlightable="true" id="i13" data-gjs-type="HEADER-
6   COMPONENT" dragabble="true" classe="csection_preamble
7   csection_preamble--admin">Welcome to
8   </p>
9   <h1 data-gjs-highlightable="true" id="i10m" data-gjs-type="HEADER-
10  COMPONENT" dragabble="true" classe="csection_heading
11  csection_heading--admin">Portal Administration

```

```

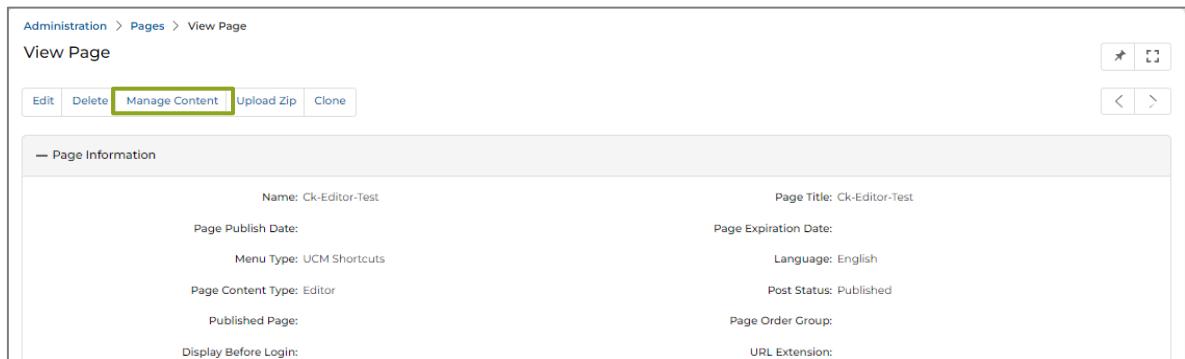
1 *{
2   box-sizing:border-box;
3 }
4 body{
5   margin:0;
6 }
7 .stbanner .stsshortcuts__link--zbrandc2{
8   background-color:var(--zbrandc2);
9 }
10 .stbanner .stsshortcuts__link--zbrandc2:hover{
11   background-color:rgb(153, 181, 36) !important;
}

```

Image Editor

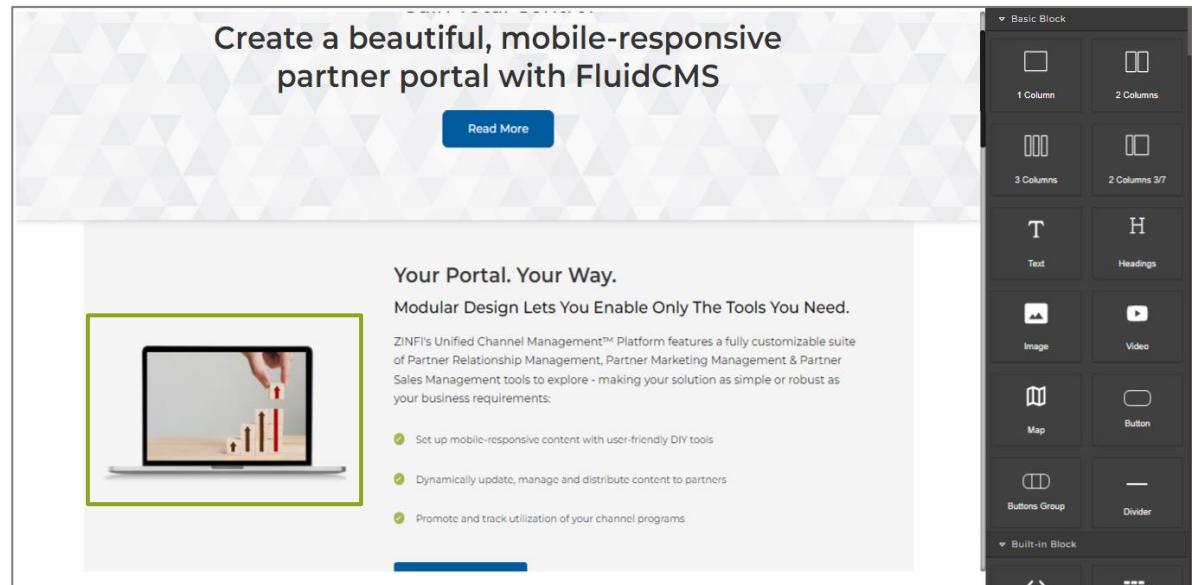
The Image Editor within the CMS interface empowers users to make direct modifications and enhancements to images at runtime while editing the HTML page using the CMS editor. It incorporates a range of editing tools such as cropping, resizing, rotating/flipping, and adding shapes or icons. This feature is particularly beneficial for users who may not possess advanced graphic design skills, enabling them to efficiently edit and optimize images within the pages. This functionality streamlines the process of updating and enhancing images without needing external graphic design software, providing a user-friendly solution for quick and effective image management via the integrated CMS Editor.

1. Clicking the **Name of any Page**, we get into its details page, where we need to click on the **Manage Content** button.



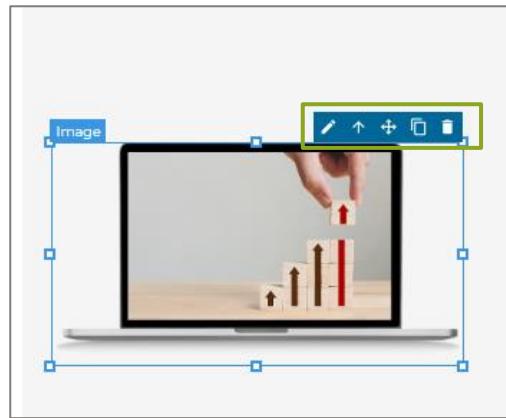
The screenshot shows the 'View Page' details for a page named 'Ck-Editor-Test'. The 'Manage Content' button is highlighted with a green box. Other buttons include 'Edit', 'Delete', 'Upload Zip', and 'Clone'. The page information section includes fields for Name, Page Title, Page Publish Date, Page Expiration Date, Menu Type, Language, Page Content Type, Post Status, Published Page, Page Order Group, Display Before Login, and URL Extension.

2. Clicking the 'Manage Content' button will take you to the **CMS Editor canvas**, where you can edit any image contained in it.

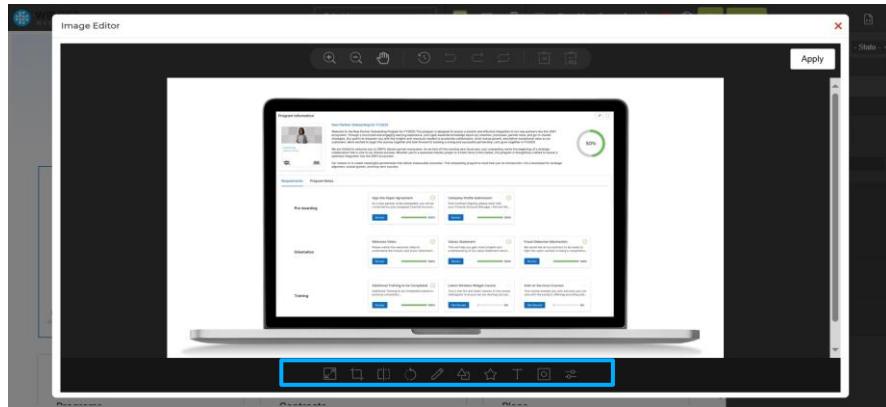


The screenshot shows the FluidCMS editor canvas. The left side features a hero image with the text 'Create a beautiful, mobile-responsive partner portal with FluidCMS' and a 'Read More' button. The right side shows a sidebar with various block types: Basic Block (1, 2, 3 columns; 2 columns 3/7), Text, Headings, Image, Video, Map, Button, Buttons Group, and Divider. The main content area contains the text 'Your Portal. Your Way.' and 'Modular Design Lets You Enable Only The Tools You Need.' It also lists three features: 'Set up mobile-responsive content with user-friendly DIY tools', 'Dynamically update, manage and distribute content to partners', and 'Promote and track utilization of your channel programs'.

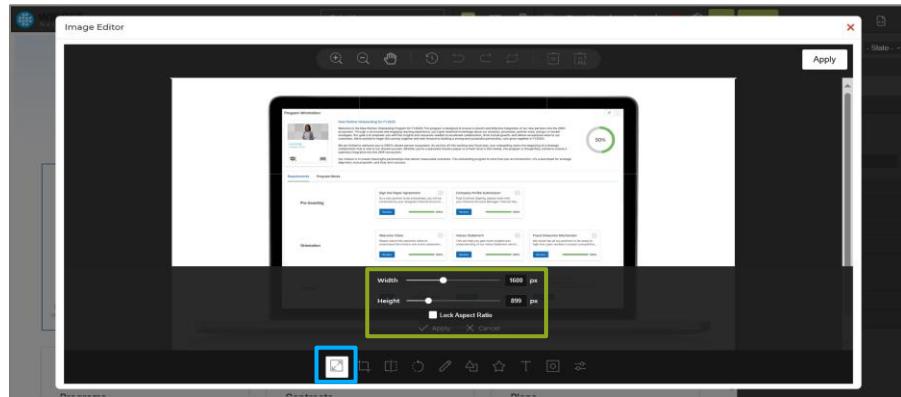
3. A single click on any image will open up the basic tools specific to that image. Within these tools, you'll find the **pencil icon** that allows you to make changes to that specific image.



4. Clicking the pencil icon will open up the full set of editing tools that will allow you to **resize**, **crop**, **rotate** **filters**, and more, catering to your specific customization needs.



5. In the example below the original image is being resized, using the **resize slider**. The **Image Editor** will scale the image proportionately so that no stretching is allowed when image sizes are adjusted.

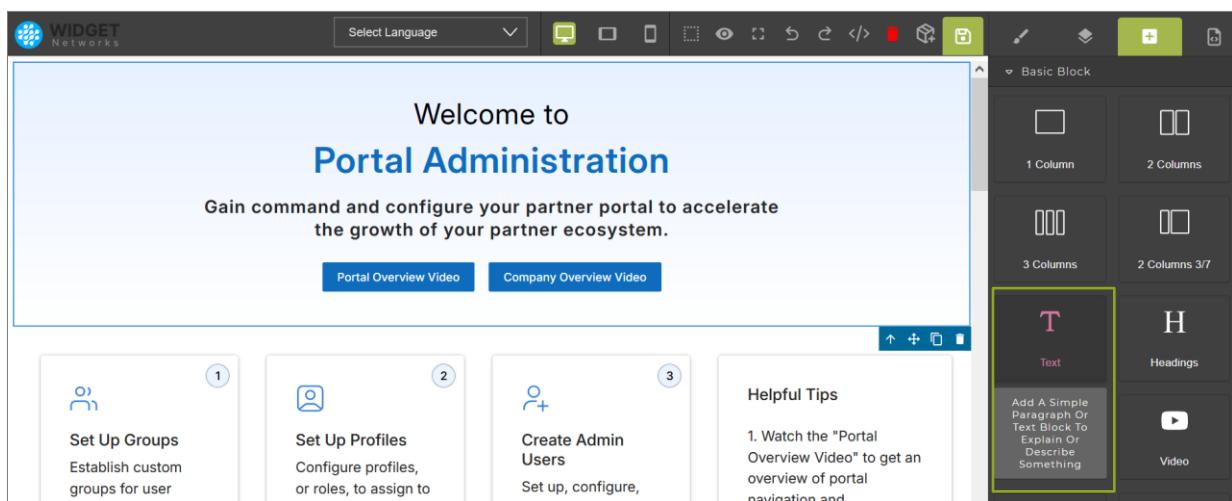


6. Once you have made all the desired changes as per your requirements, click on the **Apply** button.

Provide Tooltips for CMS Editor Components

This feature improves the usability of the CMS editor by introducing informative tooltips for key layout and content components. These tooltips provide precise descriptions of each component's purpose and functionality, helping users, especially new or non-technical ones, understand how to effectively use elements like "One Column," "Text," or "Image." The feature reduces confusion, minimizes errors, and streamlines the page-building experience by offering guidance directly within the editor interface.

1. Tooltips have now been embedded within the CMS editor interface. These appear when users hover over or interact with a CMS component name or icon.
2. Each tooltip provides a brief but informative explanation of the component's functionality, helping users understand how it contributes to page structure or content.



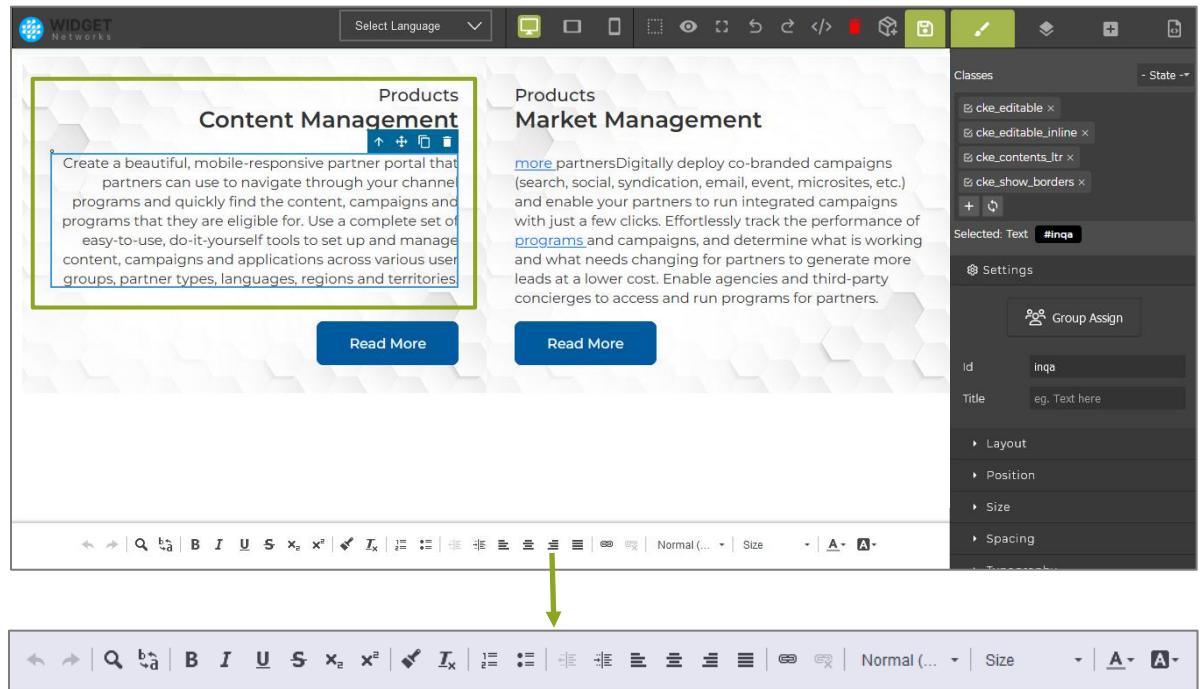
CKEditor Integration

CKEditor is a modern, feature-rich JavaScript text editor with a clean UI and can be implemented as a lightweight WYSIWYG HTML editor that can fit a wide range of use cases, from Word-like documents with large toolbars to simple toolbars with a limited set of features. CKEditor integrates a rich HTML editor for turbo HTML element edits in the UPM CMS Editor, robust file management capabilities, and collaborative features.

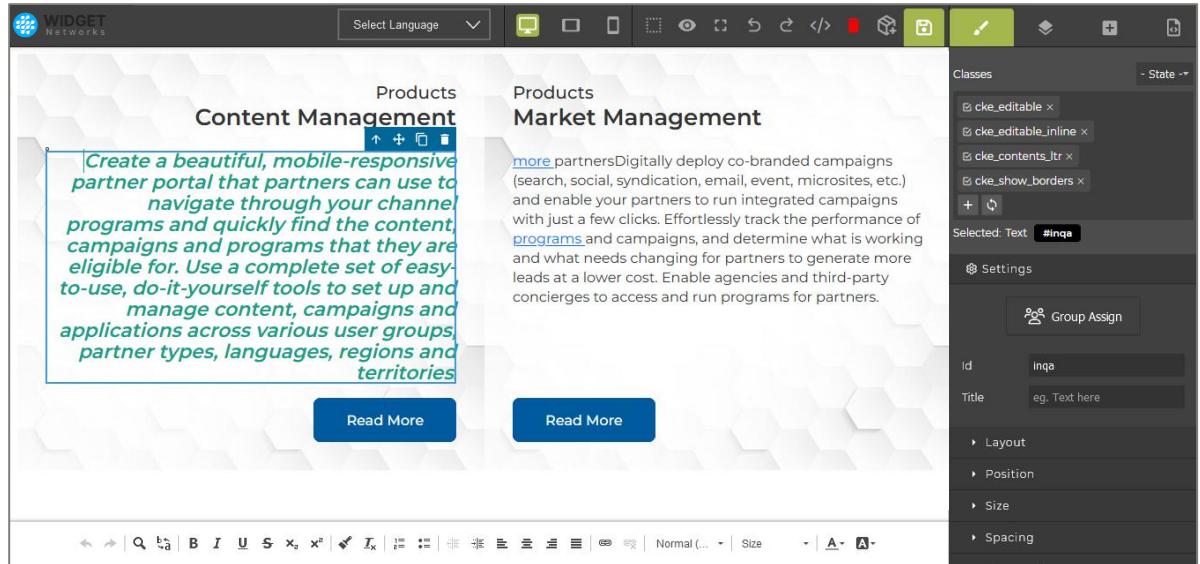
The toolbar is the most basic user interface element of CKEditor 5, which gives us convenient access to all its features. It has buttons and dropdowns that we can use to format, manage, insert, and change elements of our content.

- **Editing Text**

The integration of the Inline CKEditor allows the User to **select any text element in the HTML page and edit it in place via the CMS – Editor canvas**. Double-clicking any text block on the Editor will select it and make the CKEditor Toolbar appear at the bottom of the page.

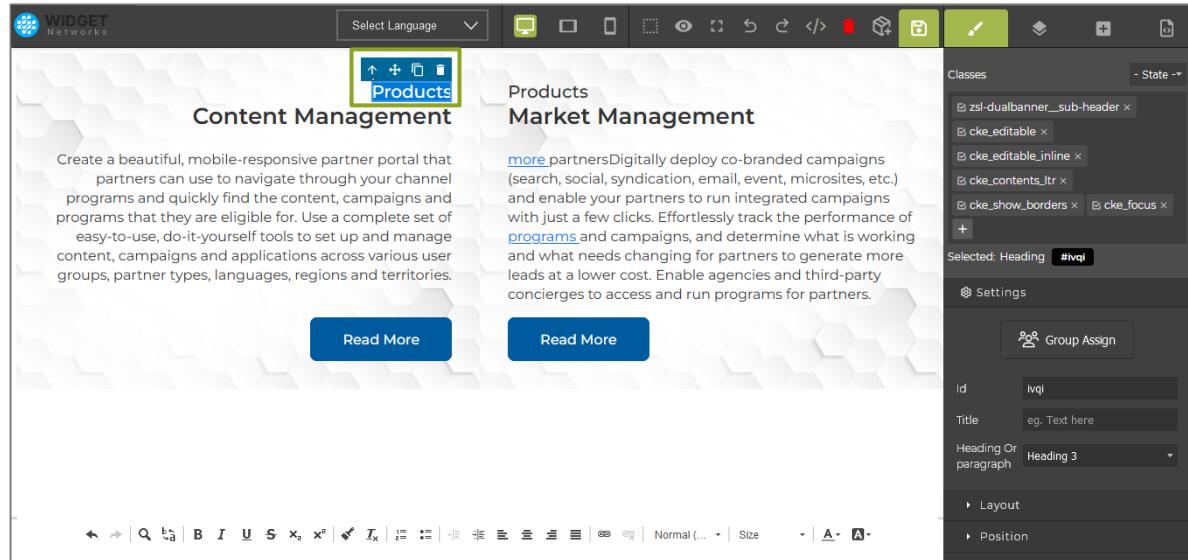


Users can utilize the Text Formatting options from the Toolbar to change the font size or its color or make it Italic or Bold. Users can also insert bullets or numbers.

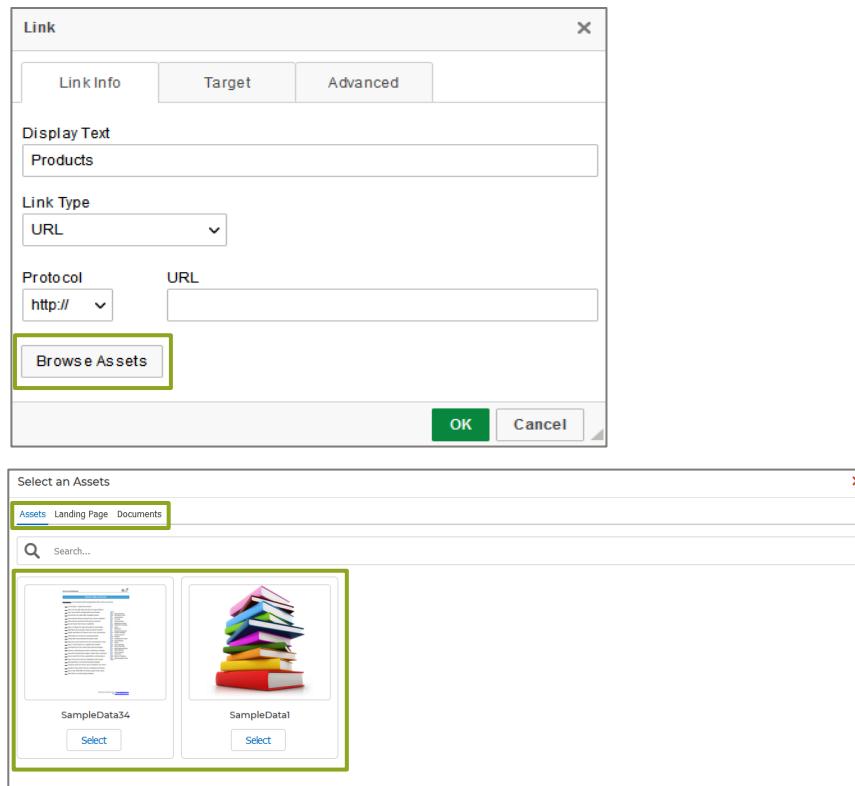


- **Attach Assets**

CKEditor Toolbar also provides the option to attach Assets with Text. The User needs to select the Text where he wants to attach the Asset. In the following example, we select the word 'Product' and click the **Link** icon in the CKEditor Toolbar.

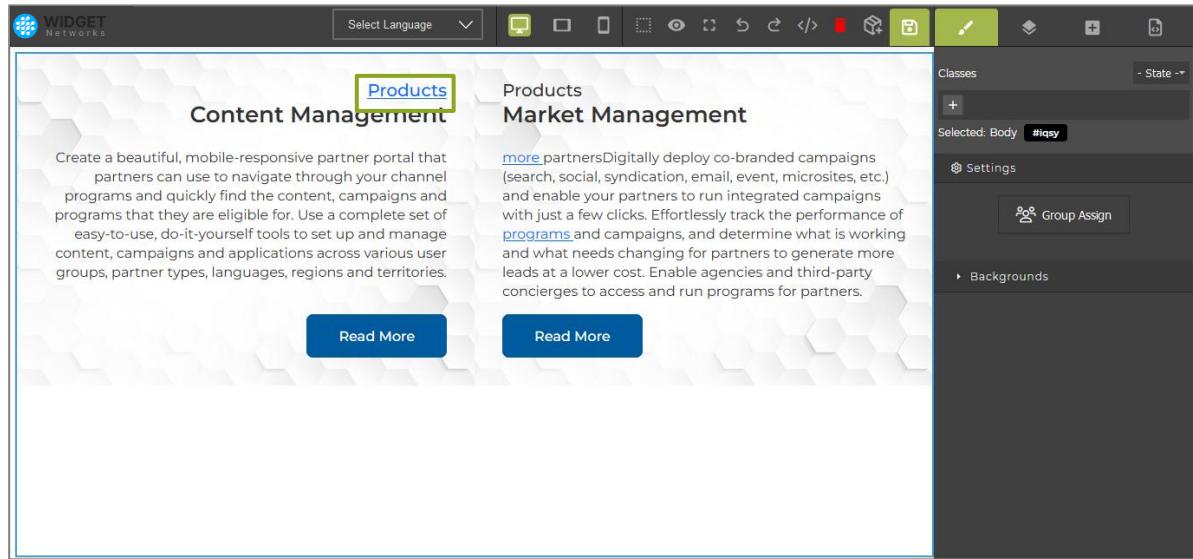


Clicking the **Link** icon will open the **Asset Linker** Window where the User needs to click the **Browse Assets** button to select Asset, Landing Page, or Document as per necessity.



Once the User selects the Asset of his choice, its URL will appear in the URL field.

Once the User clicks OK, he finds the selected Text has turned into an HTML Hyperlink which will redirect him to the Asset repository where the targeted asset is located.



CMS Enhancements

The enhanced CMS Editor now features an upgraded list of Basic Blocks – Buttons, Button Groups, and Dividers to help you build out whatever you need. Built-in Block Elements viz. Custom Code Editor, Tabs, Banners, Dual Banners, CTA Sections, Full-width CTAs, Information Cards, Horizontal Link Lists, Statistics Display, Static Alert Boxes, Testimonials, Social Links, Profile Summary, Vertical Link Lists, Address Blocks, News Blocks, Locations and Logo Gallery can be easily drag-dropped and customized with the enhanced CMS Editor. Group Assignment function is integrated for the User to select any block section in the canvas area and Group Assign to extend visibility privileges.

UPM's 'CMS' - Upgrade 4.0 features an upgraded list of Blocks. Additional CMS Static Components have been released in CMS V4 release for enhanced and ready-to-use fast-track user experience. The released components are **Slider**, **Accordion**, **Timeline**, **FAQ**, **Popups**, and **Tooltip**.

Link Type

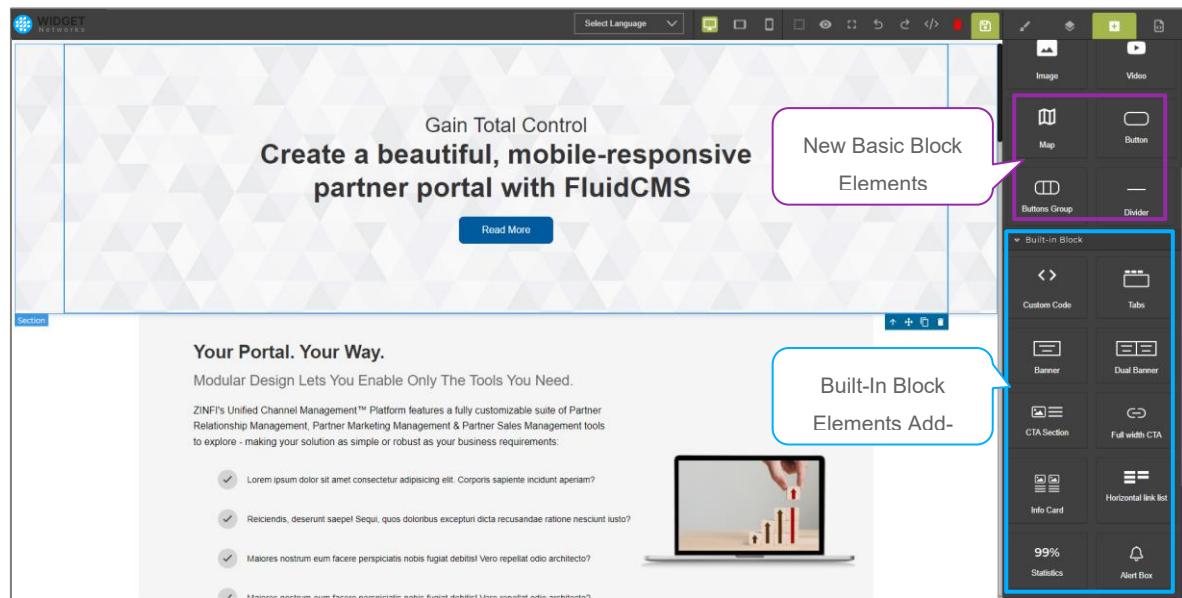
URL

Protocol

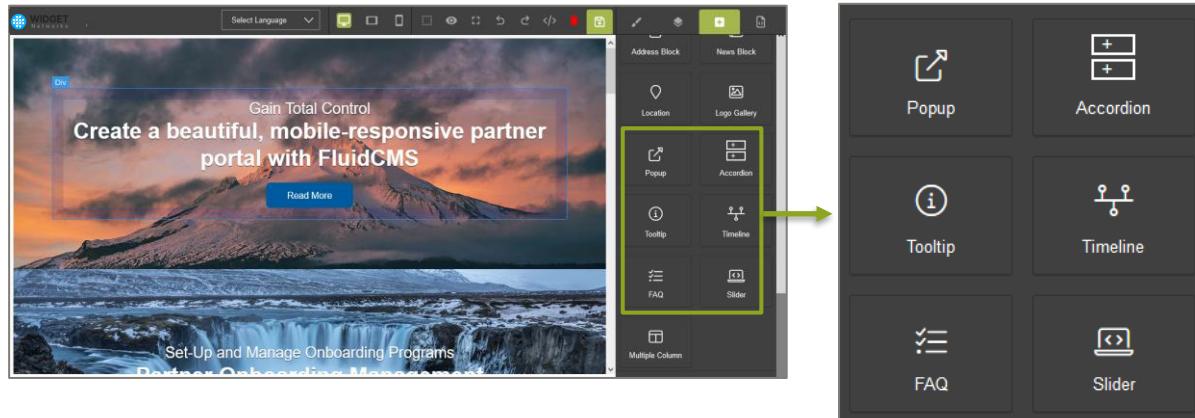
http://

URL

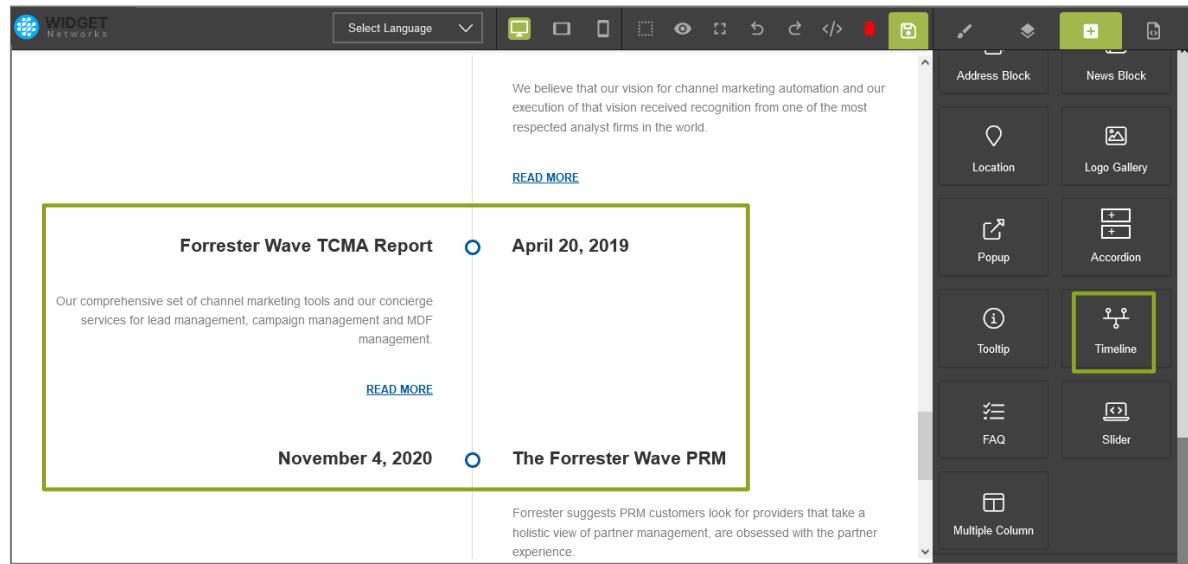
https://sitsaas.zinfo.net/conciergeundefined



- **Slider** - The **Slider** helps us to create a set of images/text in a sequence that can be traversed respectively. **Sliders** help in viewing multiple images or text without page scroll. You can click on the left-right arrows to navigate between multiple images/text in **Slider**. Mostly **Sliders** are used to reduce page scrolling when the same multiple content is there under one heading.



- **Accordion** - An **Accordion** is a type of menu that displays a list of headers stacked on top of one another. When clicked on (or triggered by a keyboard interaction or screen reader), these headers will either reveal or hide associated content.
- **Timeline** – While creating a **Timeline**, you can have a vertical timeline where the information is spread vertically (we will see examples below) Or you can have horizontal timelines that show information across the screen along the x-axis.



We believe that our vision for channel marketing automation and our execution of that vision received recognition from one of the most respected analyst firms in the world.

[READ MORE](#)

Forrester Wave TCMA Report April 20, 2019

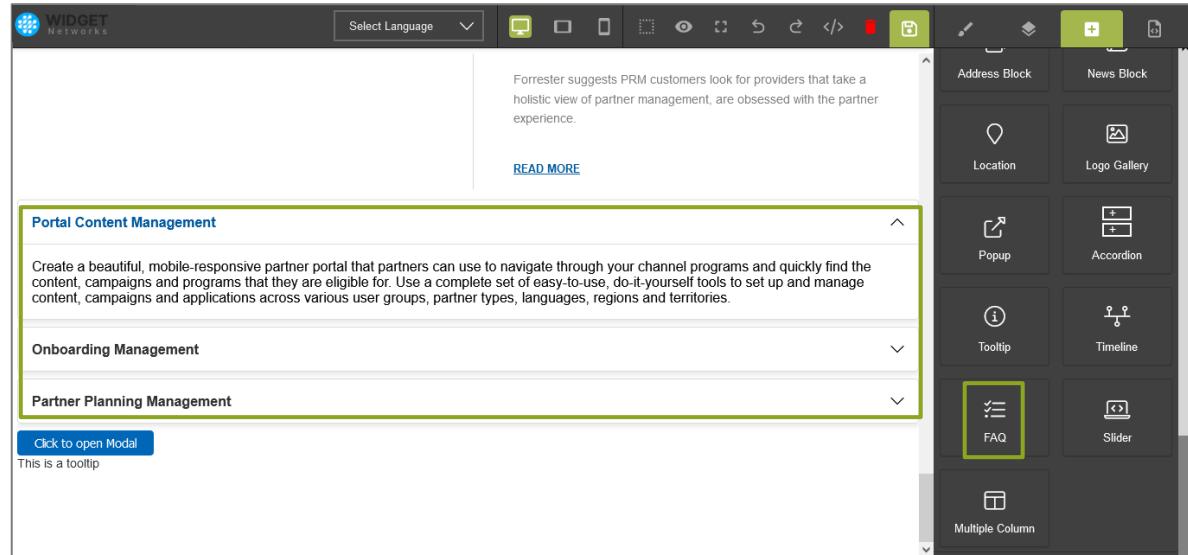
Our comprehensive set of channel marketing tools and our concierge services for lead management, campaign management and MDF management.

[READ MORE](#)

November 4, 2020 The Forrester Wave PRM

Forrester suggests PRM customers look for providers that take a holistic view of partner management, are obsessed with the partner experience.

- **FAQ** - The **Frequently Asked Questions (FAQ)** page can improve user experience. A well-crafted FAQ page anticipates any needs or questions a prospect might have. It allows visitors to find answers to all their questions in one place.



Forrester suggests PRM customers look for providers that take a holistic view of partner management, are obsessed with the partner experience.

[READ MORE](#)

Portal Content Management

Create a beautiful, mobile-responsive partner portal that partners can use to navigate through your channel programs and quickly find the content, campaigns and programs that they are eligible for. Use a complete set of easy-to-use, do-it-yourself tools to set up and manage content, campaigns and applications across various user groups, partner types, languages, regions and territories.

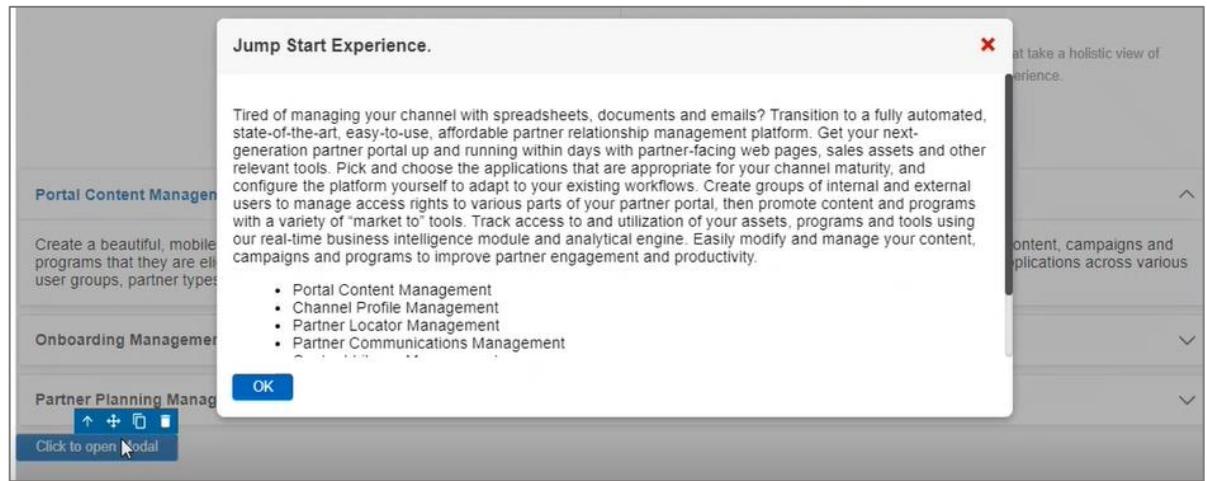
Onboarding Management

Partner Planning Management

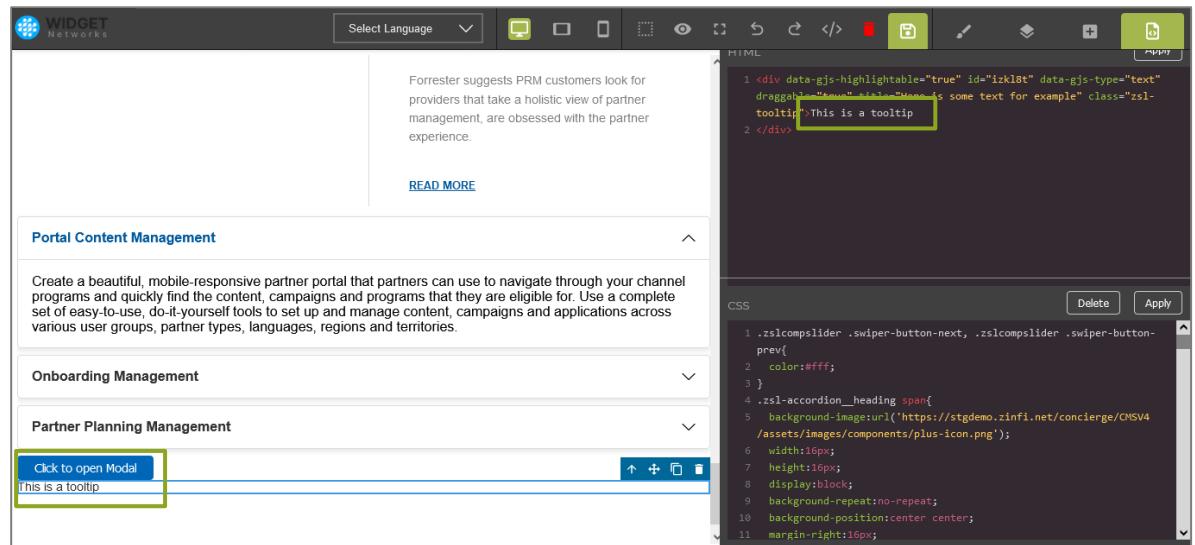
[Click to open Modal](#)

This is a tooltip

- **Popup - A Popup** is activated when an embedded button in CMS Editor is clicked and an independent window gets opened.



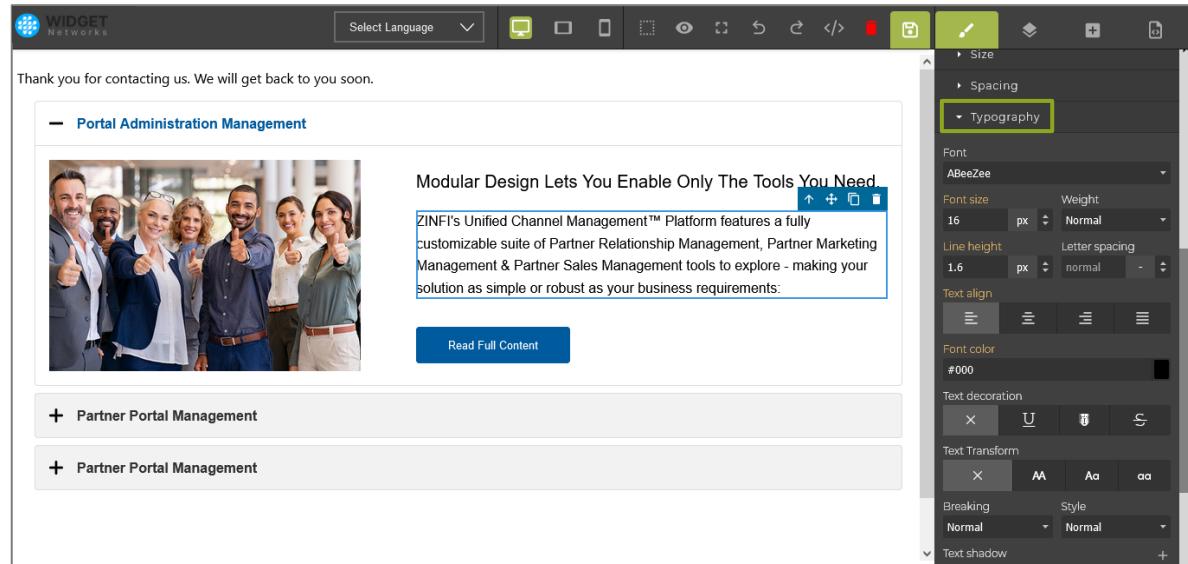
- **Tooltip – The tooltip** is used to display customized messages to the user through **Block Editor**.



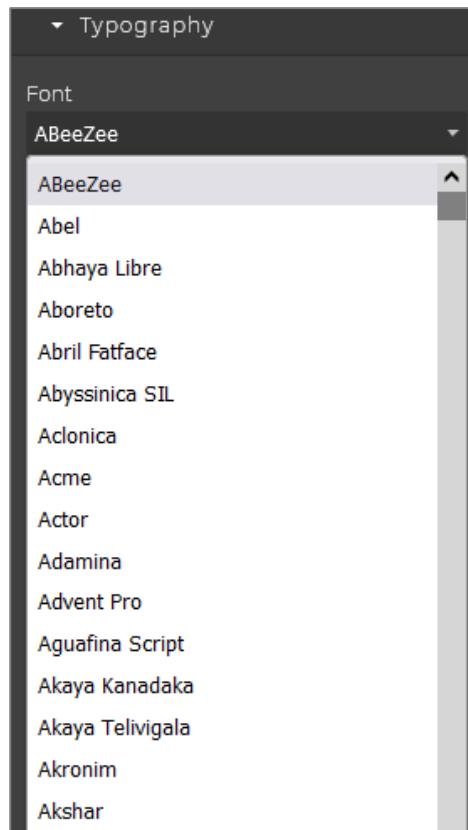
Integration of Google Web Fonts in CMS Editor

1. With the UPM Release, now we can browse the enormous Google Web Font library in our– CMS Editor and enter text rendered via the Font selected.

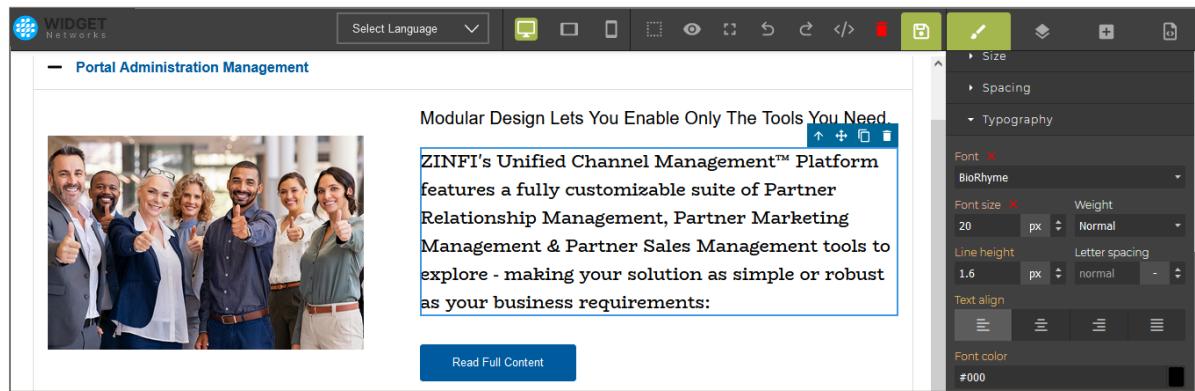
2. At the Mange Page - CMS Editor, we'll select the specific block of text whose font we want to change and click **Typography** at the right-hand panel, and a whole host of options will appear to design fonts and texts.



3. Next, we'll click on the **Font** dropdown and the whole list of Fonts becomes visible.



4. We can make use of other attributes as well, e.g. **Font size** or **Letter Spacing**. etc. along with **Font size**
5. In the image below, we've selected **Font** as **BioRhyme** and **Font size** as 20 and see that the selected block of texts has been changed as per selected attributes.

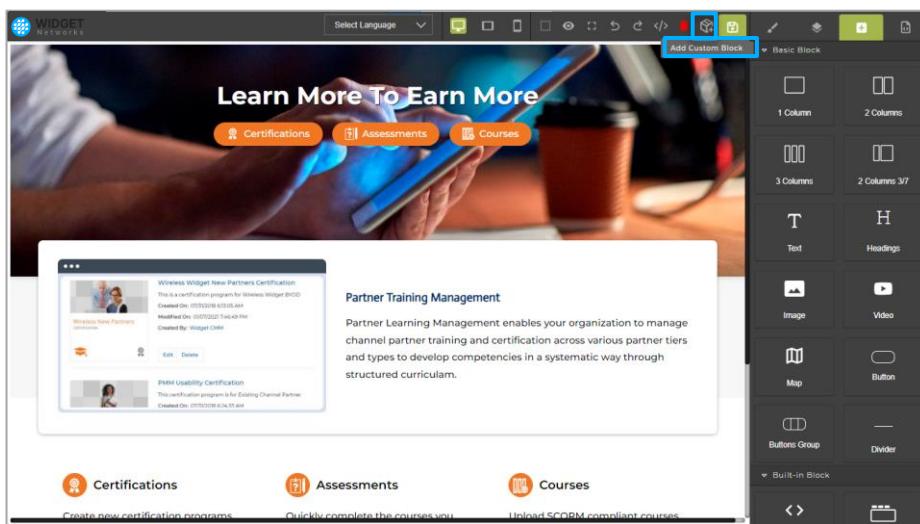


6. Once done click **Save** to save changes.

Custom Blocks

A Block in HTML represents a distinct unit, such as Text, Image, Columns, etc., each treated as an independent element with its own unique editing and formatting options. When these various elements are assembled, they collectively constitute the content that gets reflected on the page. Custom Blocks are created only to contain a set of actions or operations that are not defined in the existing 'CMS OOTB Blocks'. The predesigned custom blocks allow the user to structure the page contents as per the requirements, resulting in improved visual appeal and an enhanced user experience. Using this feature users can easily create new custom blocks and link them to any desired Category. The newly created Blocks can be found in the Editing Toolbar in the respective Category on the left-hand side.

Note: This functionality is accessible only to those User Profiles, for whom the Internal Administrator privilege is enabled.



1. Clicking the **Add Custom Block** icon a new pop-up window will appear consisting of multiple tabs to configure a Custom Block as discussed below:
 - a. **Basic Information** – This tab allows the user to provide a **Name** to the new Custom Block and associate it to an existing or a new **Category**. The **Icon** of the Custom Block can also be uploaded through this tab.

Create Custom Block

Basic Information **Component Code** **Upload Image** **Edit Control**

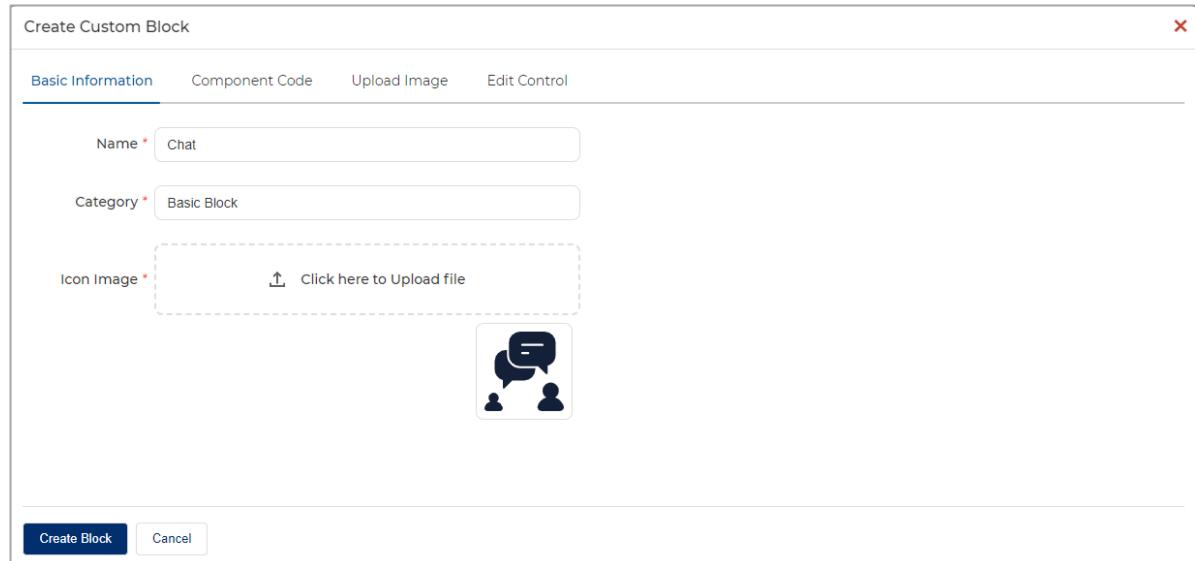
Name * Chat

Category * Basic Block

Icon Image *  Click here to Upload file



Create Block **Cancel**



- b. **Component Code** – Utilizing Component Code, Admins can implement HTML, CSS, or Java Scripts to define a Custom Block. **A Custom Block cannot be created without the implementation of custom codes.**

Create Custom Block

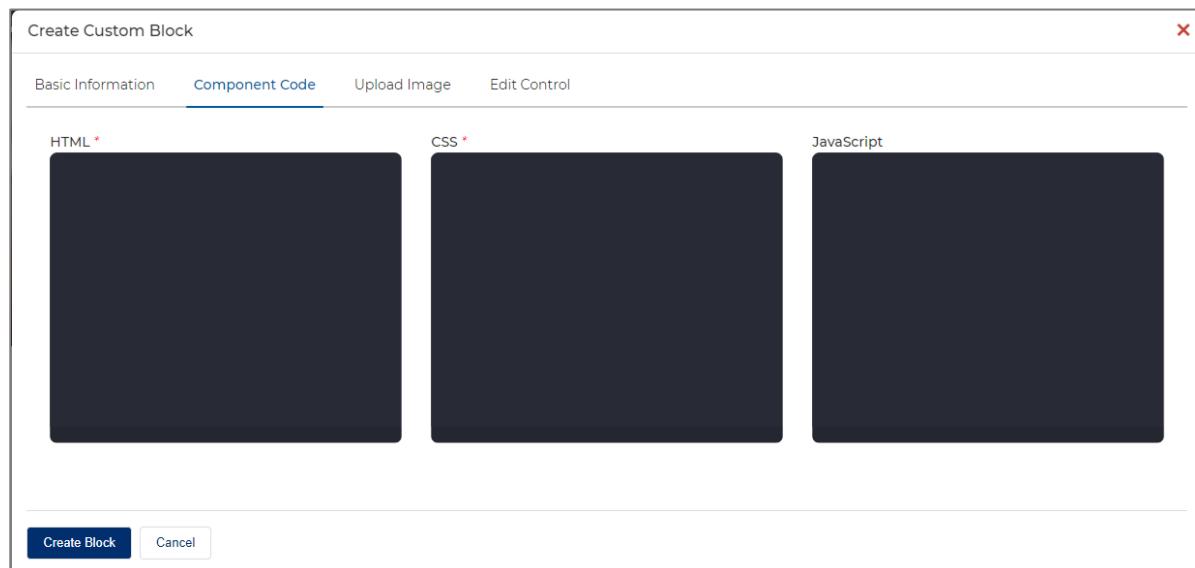
Basic Information **Component Code** **Upload Image** **Edit Control**

HTML * 

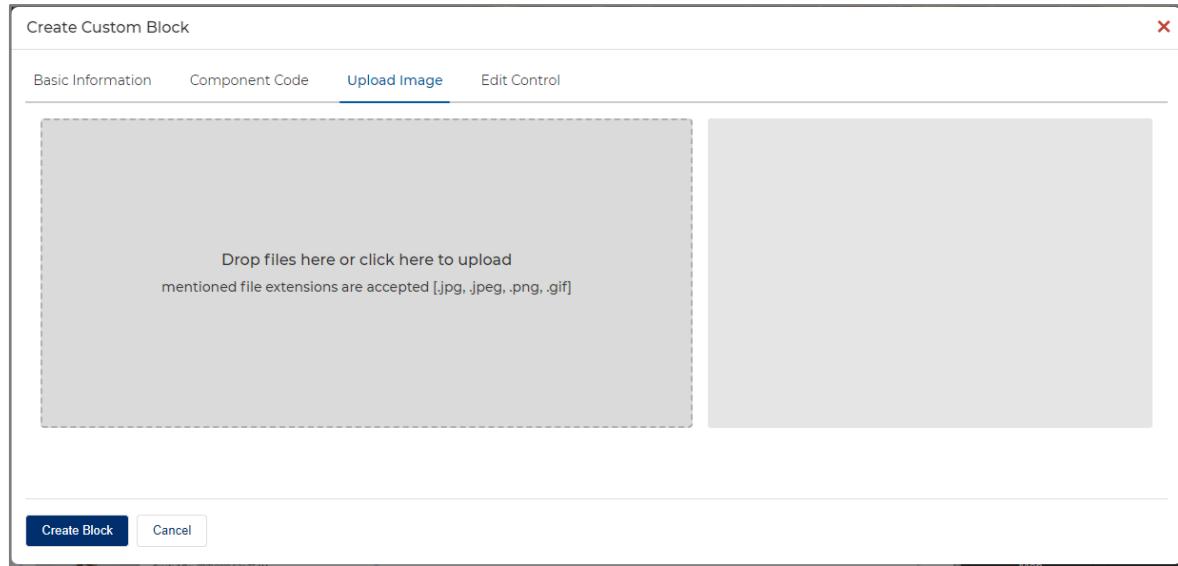
CSS * 

JavaScript 

Create Block **Cancel**



c. **Upload Image** – Associate an image with the Custom Block, so that whenever the Custom Block is drag-dropped to the Canvas - the Block is displayed with the image.



Create Custom Block

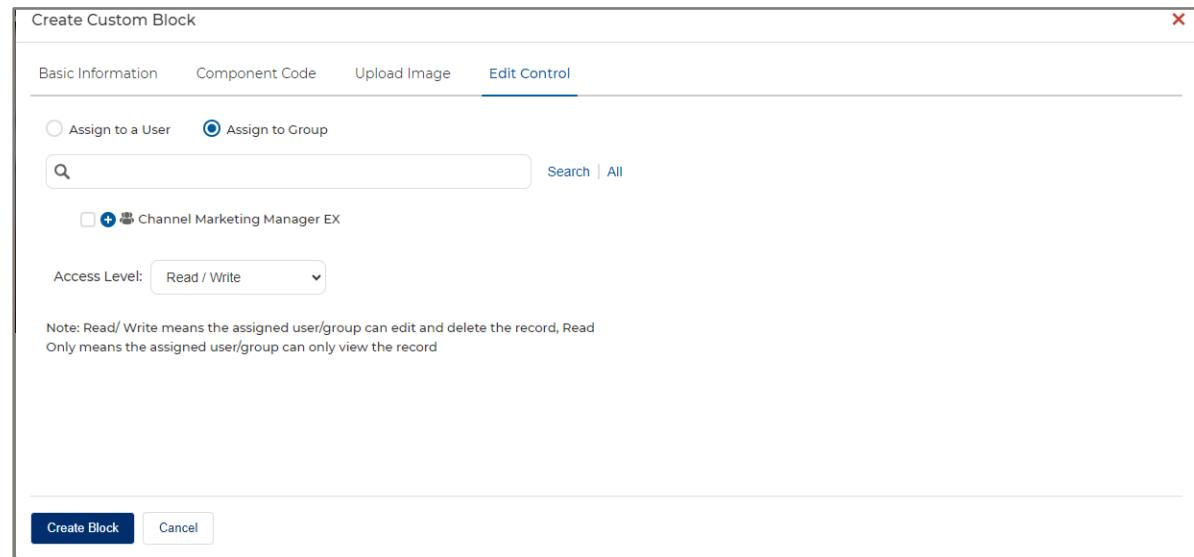
Basic Information Component Code Upload Image **Edit Control**

Drop files here or click here to upload
mentioned file extensions are accepted [.jpg, .jpeg, .png, .gif]

Create Block Cancel

d. **Edit Control** – Configure visibility and access to the Custom Block by Users or Groups. Users or Groups granted access to this block can update the Custom Block Configurations – Basic Information, Component Code, and Upload Image Only.

Note: Only the **Creator of the Block** will have access to the '**Edit Control**' Tab and will be able to **Delete the Custom Block**.



Create Custom Block

Basic Information Component Code Upload Image **Edit Control**

Assign to a User Assign to Group

 Channel Marketing Manager EX

Access Level: **Read / Write**

Note: Read/ Write means the assigned user/group can edit and delete the record, Read Only means the assigned user/group can only view the record

Create Block Cancel

Once all the required information is filled in and the **Create Block** button is clicked, the new Custom Block gets created and will be visible in the Editing Toolbar of the CMS Editor for all users.



External Script Support

UPM has seen a phenomenal experience through the releases, and with the latest release, we are making it more extensible. UPM's 'CMS' has been upgraded to support external plug-ins and extensions. Trusted external scripts can assist you in scaling up the functionality of your UPM experience, like the addition of a floater through an external pre-generated script to advertise your products to your partners.

Select	Name	Status
<input type="checkbox"/>	Google Analytics	Inactive
<input type="checkbox"/>	SEM	Inactive

The external script in the application is run with the help of an HTML header and body. Both header and body components must be made active to run the script. In the example below, an external script is used to generate an "accept cookies" option for the user (shown in yellow border) to click on.

Search Engine Friendly

ZINFI 'CMS' ensures people and search engines can find your site easily. Authors have complete control over the page URLs and can create custom metadata for pages, images, and links.

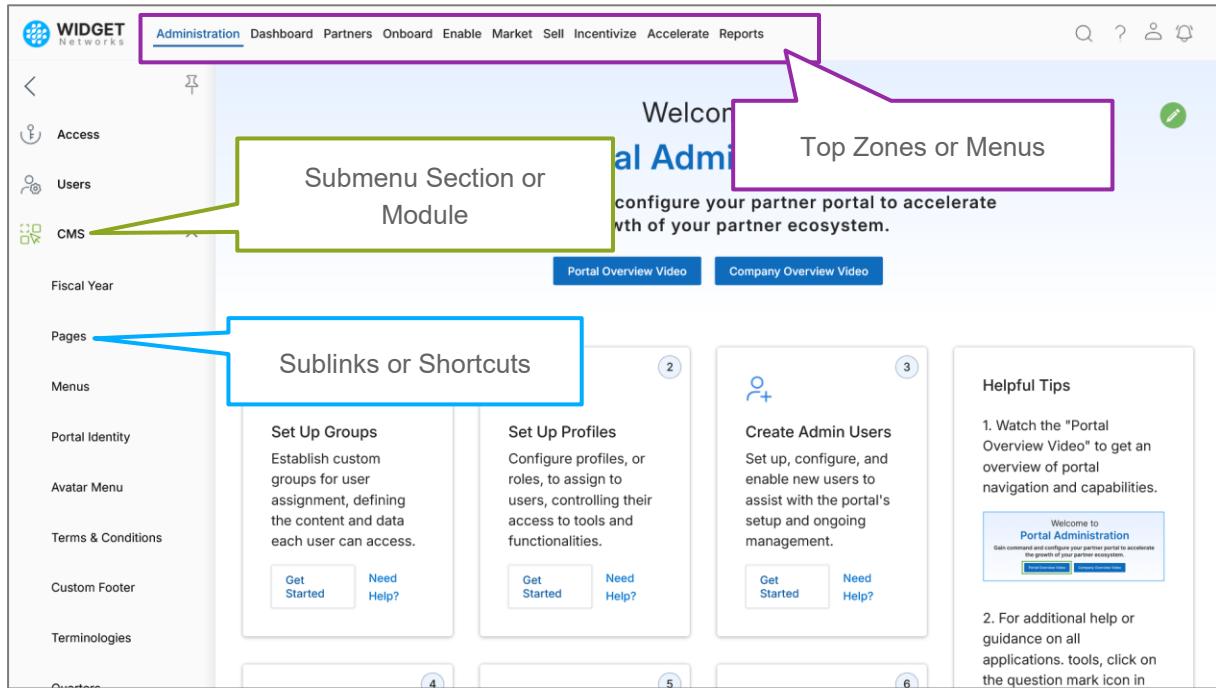
Multilingual

Let your content authors and website visitors use the language of their choice, including German, and languages reliant on Unicode such as Chinese and Arabic.

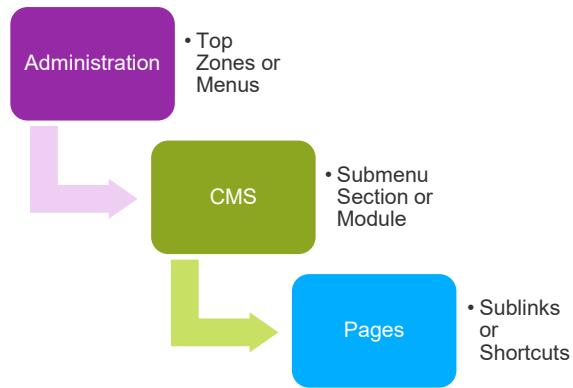
Manage Menus - User Interface and Experience

The latest DIY update features a revolutionary Menu Management user Experience and Interface for the 'CMS' Module. This makes it easy for organizations to set up the menu interface of the UPM instance using an intuitive WYSIWYG site map structure – by adding/re-arranging top-zone menus, submenu sections or modules, and sub-links or shortcuts. We can easily manage the menu structure assign content/pages and further arrange menu elements with just a click of the mouse, dragging and dropping the menu across the menu interface. As organizations create new menus and respective content for the menus, they can control access at a granular level for such menus, allowing controlled access by users and groups.

To understand the design architecture of Menus at ZINFI UPM, we will utilize the following image:



Therefore, the hierarchy of the Menus for the above example stands in the following format:



The traversal path for 'Pages' would be to click on Administration from the Top Zone of UPM, from the Left Menu – click on the CMS Submenu Section, and finally click on the Sublink to reach the specific Page of UPM – Manage Pages in our example.

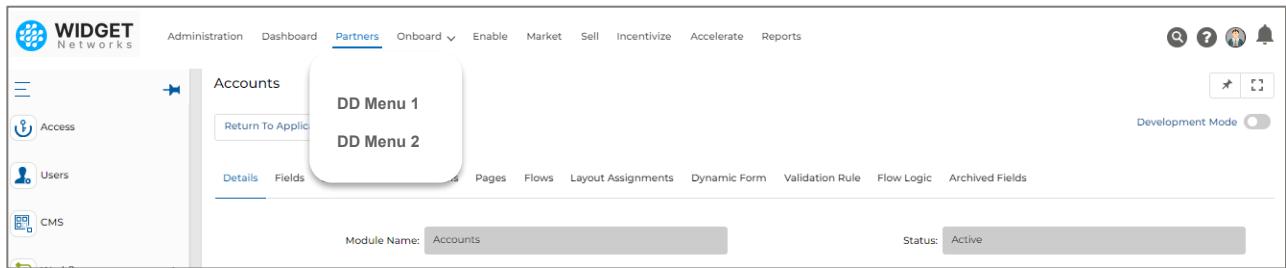
- **Top Zone > Submenu Section > Sublink**
- **E.g.: Administration > CMS > Pages**

Similarly, the association of Top Zones, SubMenu Sections, and Sublinks with respective Profiles, Groups, and Countries for visibility of the Menu structure post creation are also provided:

Menu Type	On Click Visibility Item	Association required for Visibility/Accessibility
Top Zone	Page, Module, or Custom URL	Countries and Groups
SubMenu Section	Sublink	Profiles and Top Zone Parent Menu
Sublink	URL Type, Page (List/Detail) and Module Name	Profile shortcut – Module (found under Profiles for SubMenu Section)

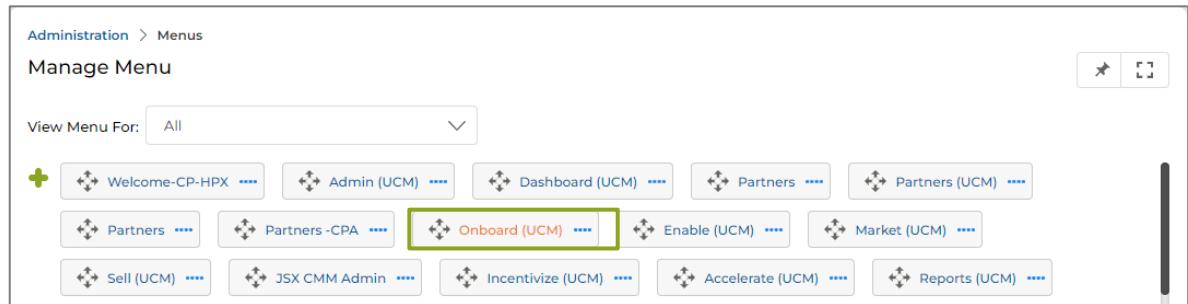
Dropdown Menus for Portal Top Zone

A drop-down menu is a list of options that is revealed only when a user interacts with the menu, by hovering over it with their cursor. The dropdown menu options descend vertically and disappear again once the user disengages from the menu.

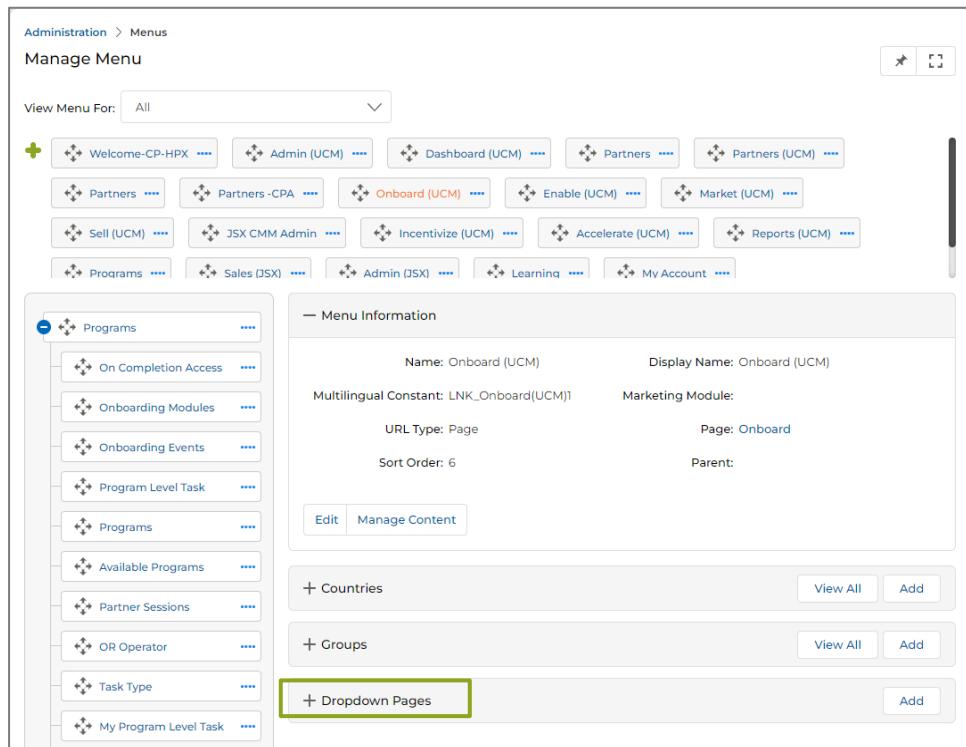


In the above example, we have created 2 Drop-Down Menu items for the Partners Top Zone Drop Down Menu.

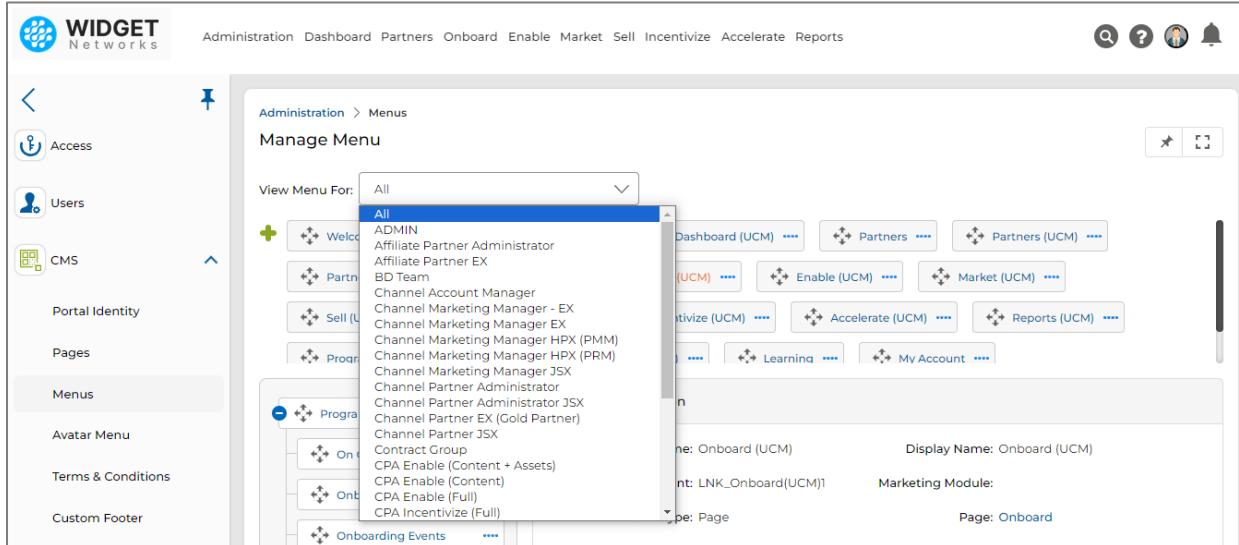
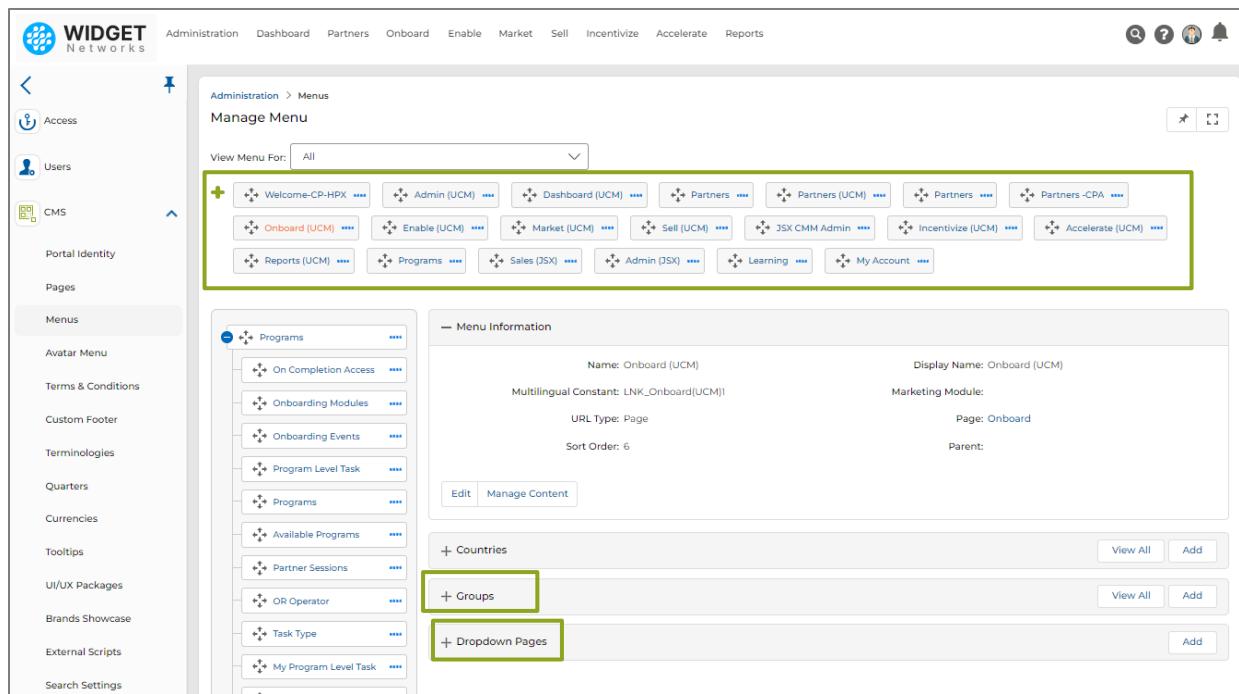
- To create a Drop-Down Menu for any Portal Top Zone Menu, traverse to Administration > CMS > Menus. Click on the Top Zone Menu Name on the “Manage Menu” page as shown in the image below.



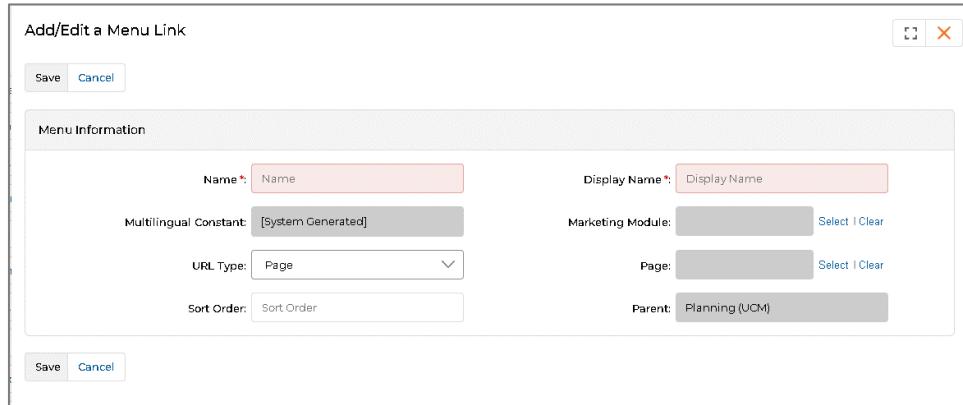
- Clicking the name of the Zone Menu, will display the following page, which contains a related list associated - “Dropdown Pages” to manage Drop Down Menus.



- Menu Management UI/UX has also been revamped to provide an intuitive UI to display Top Zone Menus as associated with User Groups. Admins now can easily select the respective User Group to have speed-fast access to the Top Zone Menus – only associated with that User Group.

- Clicking the “Add” button associated with “Dropdown Pages” will lead you to the following ‘Add/Edit a Menu Link’ page, where you need to provide information as discussed below.

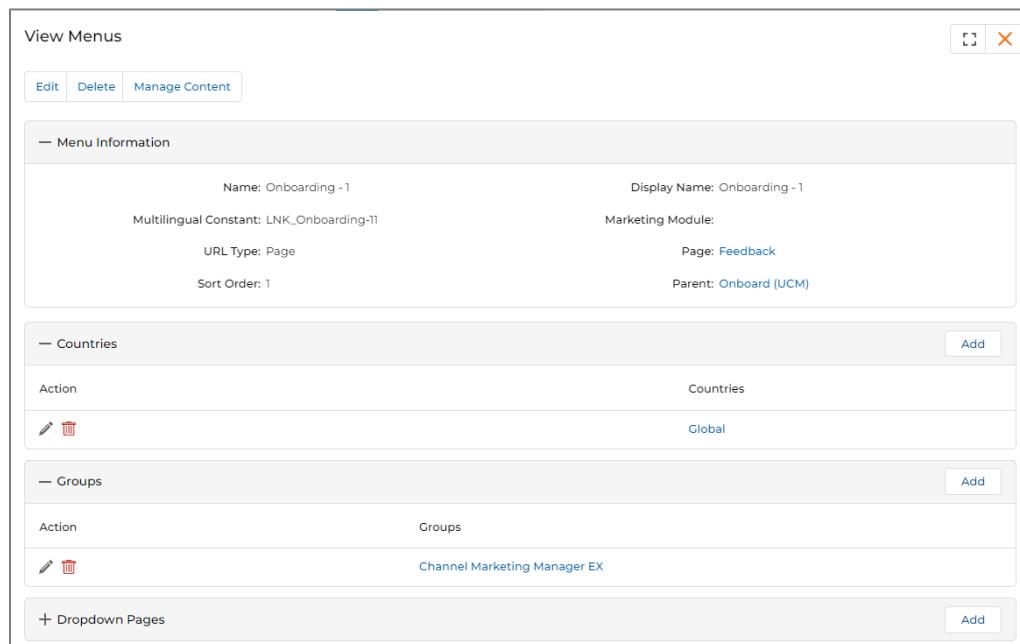


- Name:** Name of the drop-down menu.
 - Display Name:** The user-friendly name of the drop-down menu.
 - Multilingual Constant –** This is a system-generated field.
 - Marketing Module –** The marketing module (if any) where this drop-down menu can be associated.
 - URL Type –** Select “Page” as the URL Type so that a previously created page can be synced.
 - Page –** Select a previously created page that you want to associate with this drop-down menu.
 - Sort order –** The numeric value of sort order can be provided here.
 - Parent –** This field is auto-populated.
- The Manage Content** button provides the Admin user with an enhanced UI/UX to update the content of the associated page on the fly via the CMS Editor.





- Clicking the **Save** button will take you to the “View Menu Link” page, where you need to provide visibility configuration to the newly created drop-down top menu by adding “Countries” and “Groups”.



- Now the newly created drop-down menu will be associated with the respective top zone menu and will be displayed once the cursor is taken there, as shown in the image below.



Visibility Control of Top, Left, and Shortcut Menus for the UPM Mobile App

The 'Is Mobile' attribute allows administrators to manage the visibility of the Top zones, Left Menus, and Shortcut Menus for the UPM Mobile App version. This can be effortlessly achieved by toggling the 'Is Mobile' switch to enable/disable the visibility of the specific Menu Item.

- Selecting any item from the top menu, such as 'Partners,' navigates you to the interface in Fig I, where the 'Is Mobile' field is activated. This update is visible in the mobile version, illustrated in Fig ii.

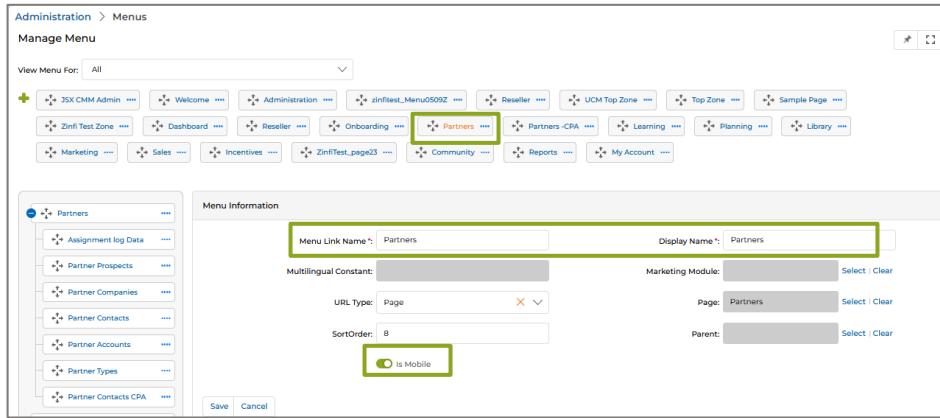


Fig i

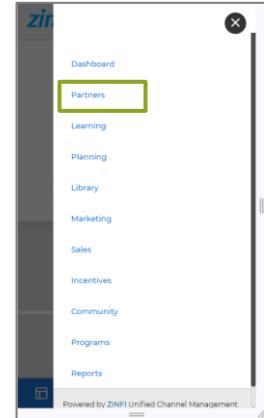


Fig ii

For the same Menu Item (i.e. Partners) in the top zone, if the 'Is Mobile' attribute is turned off, as depicted in Fig iii, it won't be visible in the Mobile version, as illustrated in Fig iv.

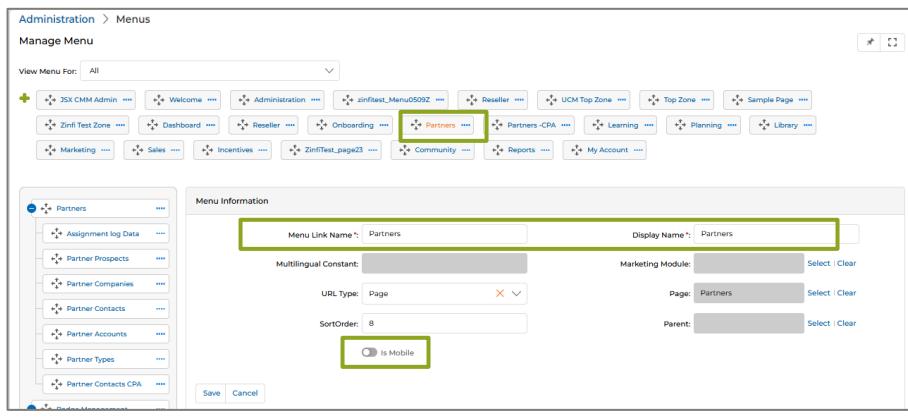


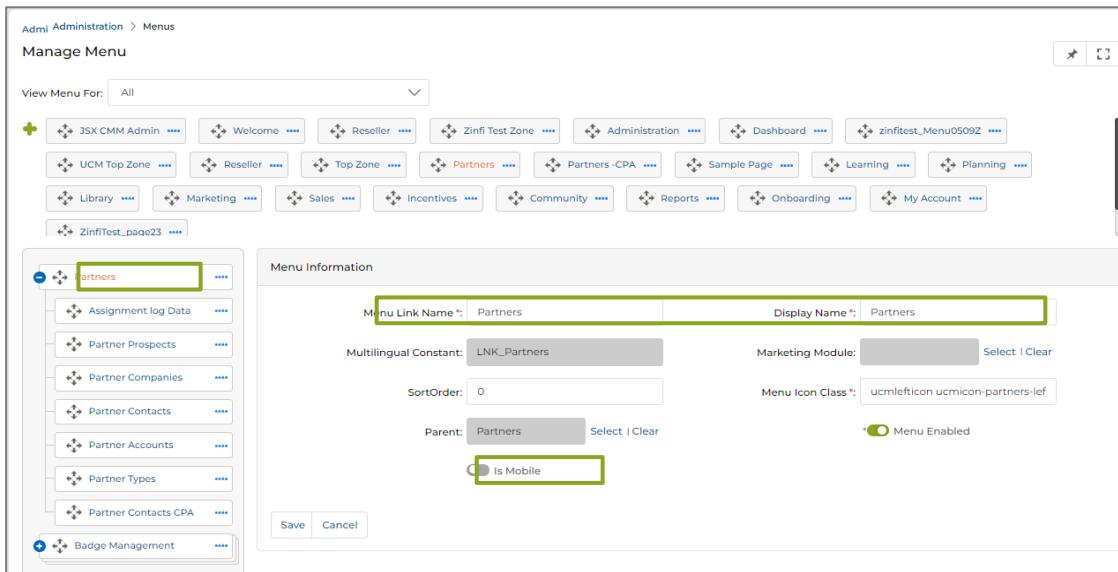
Fig iii



Fig iv

- Similarly, Submenu or Shortcut Menu Items can be enabled or disabled for the UPM Mobile.

Disable Submenus:



Admin Administration > Menus

Manage Menu

View Menu For: All

Menu Information

Menu Link Name*: Partners

Display Name*: Partners

Multilingual Constant: LNK_Partners

Marketing Module: Select | Clear

SortOrder: 0

Menu Icon Class*: ucmllefticon ucmlicon-partners-lef

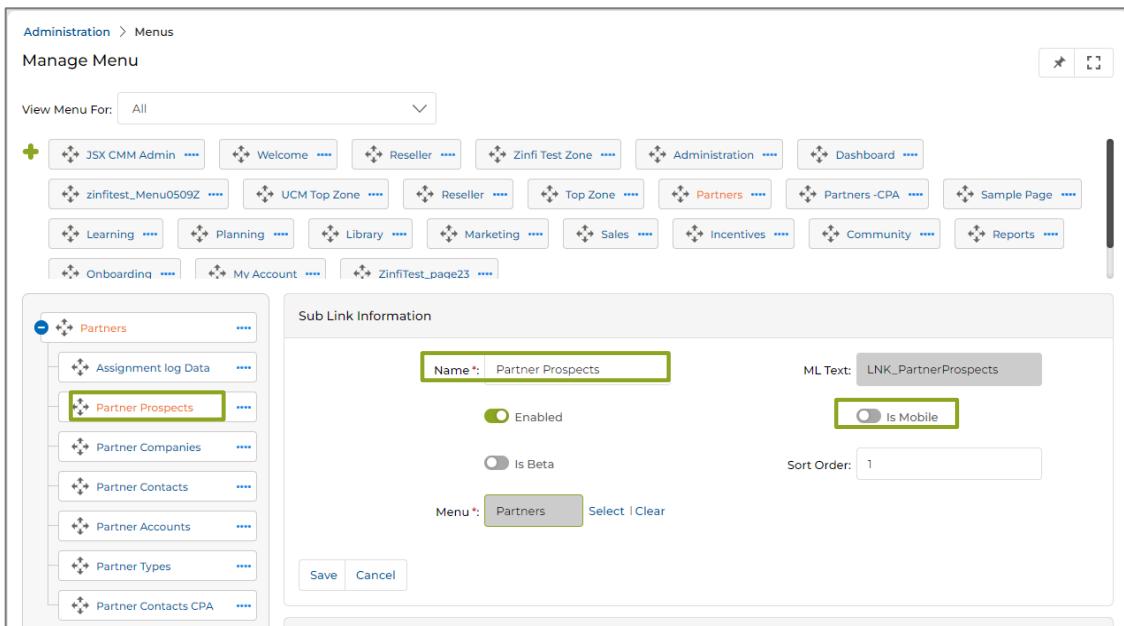
Parent: Partners

Is Mobile

Menu Enabled

Save | Cancel

Disable Shortcuts:



Administration > Menus

Manage Menu

View Menu For: All

Sub Link Information

Name*: Partner Prospects

ML Text: LNK_PartnerProspects

Enabled

Is Beta

Sort Order: 1

Menu*: Partners

Save | Cancel

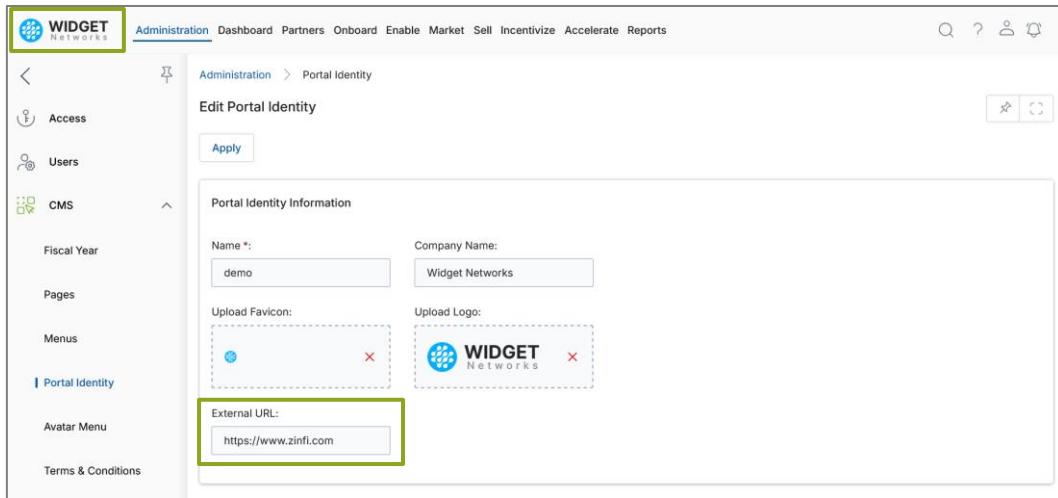
Portal Identity

'Content Management Services' comes loaded with a one-stop solution – a Portal Identity feature to brand your UPM instance with organizational logos and branding color profiles to suit your organization's ergonomics. This makes it easy for your organization to set up the UPM instance using your logs and color profiles to set up customized themes for the Portal.

Portal Identity lets you provide the Generic Name and Company name for your UPM portal and lets you manage and set up the Organizational Logo and Favicon of your Organization. The OEM Logo can be hyperlinked, and Admins have the privilege to update and provision a hyperlink to the OEM Logo, once a User clicks on the Logo, the User is automatically redirected to the URL – opened in a New Tab. Clicking the **OEM logo** will redirect the user to a new page associated with the link provided in the “External URL” box.

Note: Complete URL would be needed to redirect to the external URL- inclusive of http/https Protocols for security restrictions

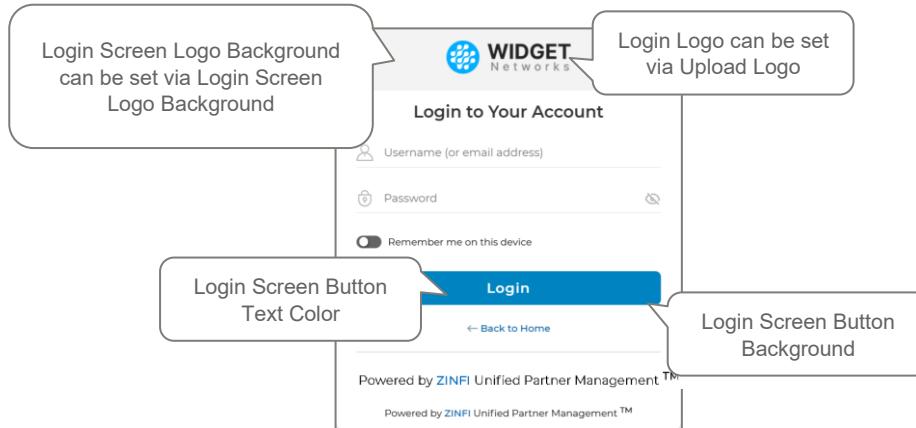
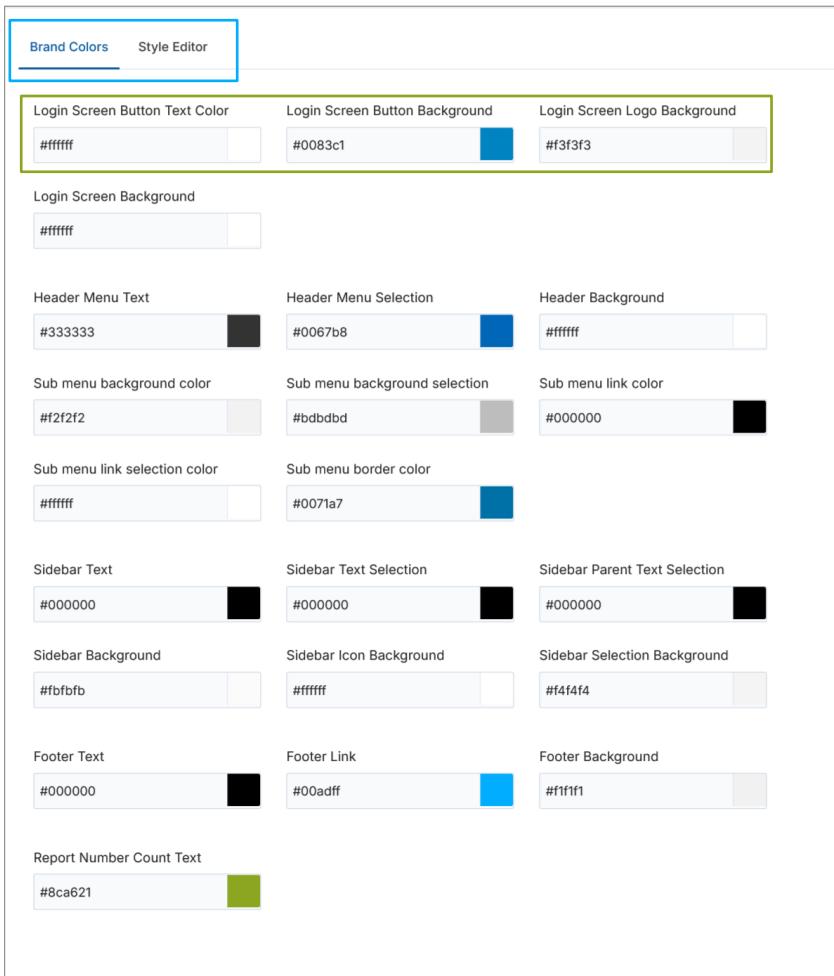
In the image shown below clicking the **OEM logo** will redirect the User to the ZINFI Portal (zinf.com) associated with the link provided in the “External URL” box.



Portal “Themes” are the color palettes you can manage, or custom create that will control the Parent Elements - Header, Left Sidebar, and Footer of the UPM UI – so that you can set up your corporate style branding throughout the portal from one central location. The **Theme Color Profiles** related list shows the list of elements in the portal, and what colors are currently assigned to them. This is where you control all the colors for a theme.

You can also brand the login screen of the portal by uploading the logo – which will be also displayed on the login screen and providing the color code value or by picking the desired color from the color picker, by clicking on a respective color profile for the specific sections as detailed below. When done, click on **Apply**

Report Number Count Text lets you manage color profiles for your UPM Business Intelligence Reports and display values in the configured color profile.

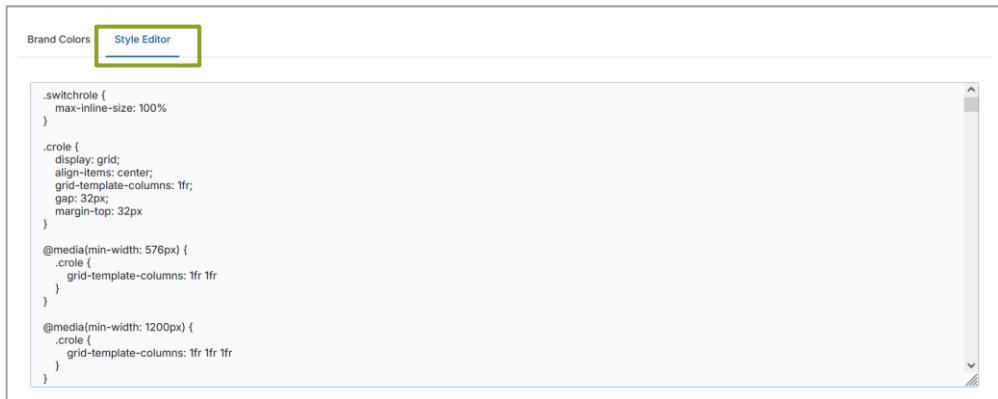
The screenshot shows the 'Brand Colors' section of the ZINFI Style Editor. It includes a 'Style Editor' tab and a 'Brand Colors' tab. The 'Brand Colors' tab is active. It displays color swatches and hex codes for various UI elements:

- Login Screen Button Text Color:** #ffffff
- Login Screen Button Background:** #0083c1
- Login Screen Logo Background:** #f3f3f3
- Login Screen Background:** #ffffff
- Header Menu Text:** #333333
- Header Menu Selection:** #0067b8
- Header Background:** #ffffff
- Sub menu background color:** #f2f2f2
- Sub menu background selection:** #bdbdbd
- Sub menu link color:** #000000
- Sub menu link selection color:** #ffffff
- Sub menu border color:** #0071a7
- Sidebar Text:** #000000
- Sidebar Text Selection:** #000000
- Sidebar Parent Text Selection:** #000000
- Sidebar Background:** #fbfbfb
- Sidebar Icon Background:** #ffffff
- Sidebar Selection Background:** #f4f4f4
- Footer Text:** #000000
- Footer Link:** #00adff
- Footer Background:** #f1f1f1
- Report Number Count Text:** #8ca621

Style Editor

The Style Editor tool facilitates the admin to edit or customize the appearance or style of the Portal. CSS and is responsible for controlling the presentation and styling of HTML elements of the UPM Portal. With our Style editor, you can edit Portal - HTML, CSS, and JavaScript code, through which you can modify the appearance of the Portal's Content and Design elements, to meet the branding requirements of your organization. This level of customization allows you to make the portal more visually appealing with your unique designs.

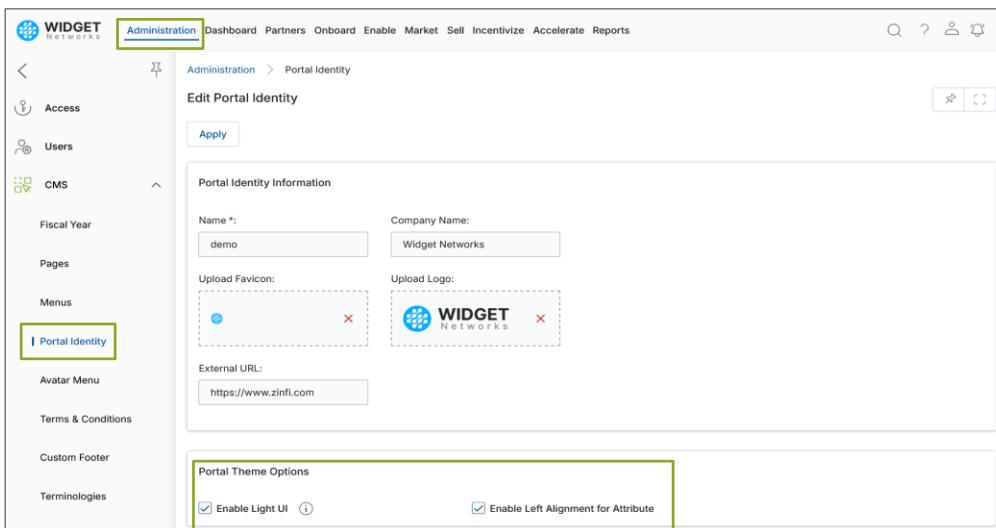
- Click Style Editor to edit/update the HTML/CSS or JavaScript of the Portal UI/UX Configuration.



- **Reset CSS** – Clicking this button allows you to reset the Style Editor Code to its previous state.

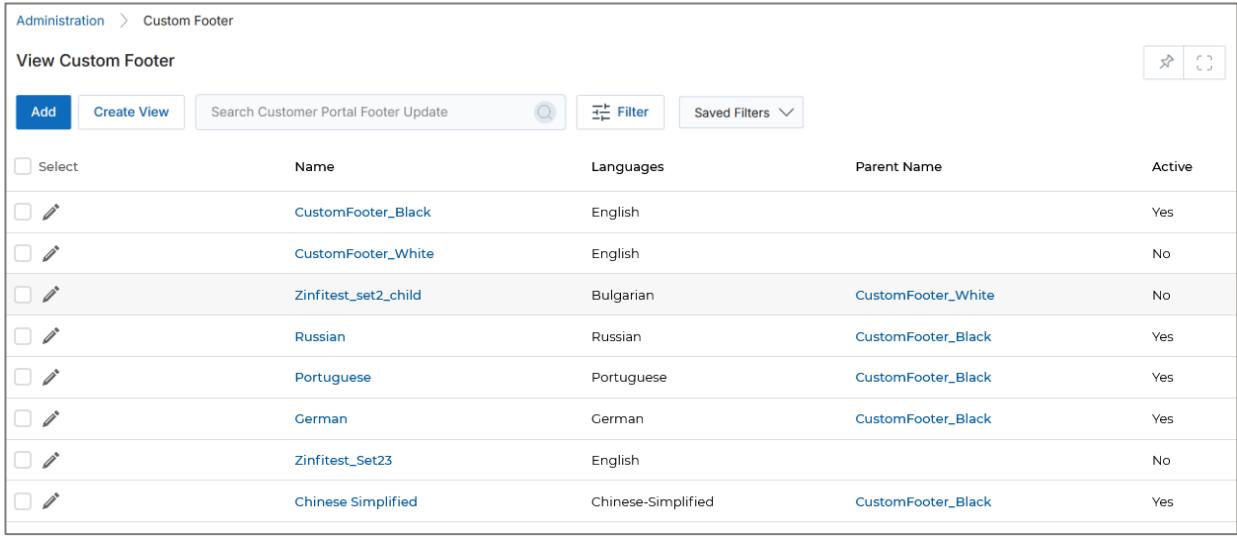
Light UI/UX and Field Label Alignment

- Under Portal Theme Options, two new configuration checkboxes are available:
 - Enable Light UI – toggles the modern UI theme.
 - Enable Left Alignment for Attributes – controls alignment of field values in record views.
- By default, both checkboxes are enabled.
- Admin users can uncheck one or both to revert to the legacy view and layout behavior.



Customizing Portal Footer

- Implementation of Custom Portal Footer feature showcases enhanced DIY prowess of UPM, where the User can configure **Before Log In** and **After Log In** Portal Footer with multi-lingual preference. Utilizing a language-based Parent-Child hierarchy, this feature offers the User the convenient option to reach out to a greater audience and thus help him to increase ROI for his business.



<input type="checkbox"/> Select	Name	Languages	Parent Name	Active
<input type="checkbox"/>	CustomFooter_Black	English		Yes
<input type="checkbox"/>	CustomFooter_White	English		No
<input type="checkbox"/>	Zinfitest_set2_child	Bulgarian	CustomFooter_White	No
<input type="checkbox"/>	Russian	Russian	CustomFooter_Black	Yes
<input type="checkbox"/>	Portuguese	Portuguese	CustomFooter_Black	Yes
<input type="checkbox"/>	German	German	CustomFooter_Black	Yes
<input type="checkbox"/>	Zinfitest_Set23	English		No
<input type="checkbox"/>	Chinese Simplified	Chinese-Simplified	CustomFooter_Black	Yes

- The presence of dual Editors in the Add/Edit section has enabled the Admin to give full coverage and design Footers for both Pre and Post Log In pages.
- The Parent Custom Portal Footer can carry in its kitty multiple Child Custom Portal Footers with a wide range of language options.

Administration > Custom Footer Update > View Custom Footer

View Custom Footer

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

Parent Footer details

— Portal Footer Information

Name: CustomFooter_Black Languages: English

UI/UX Package: [Custom Footer CSS](#)

Before Login Footer Description:



After Login Footer Description:



Active: Yes

List of Parent Footers

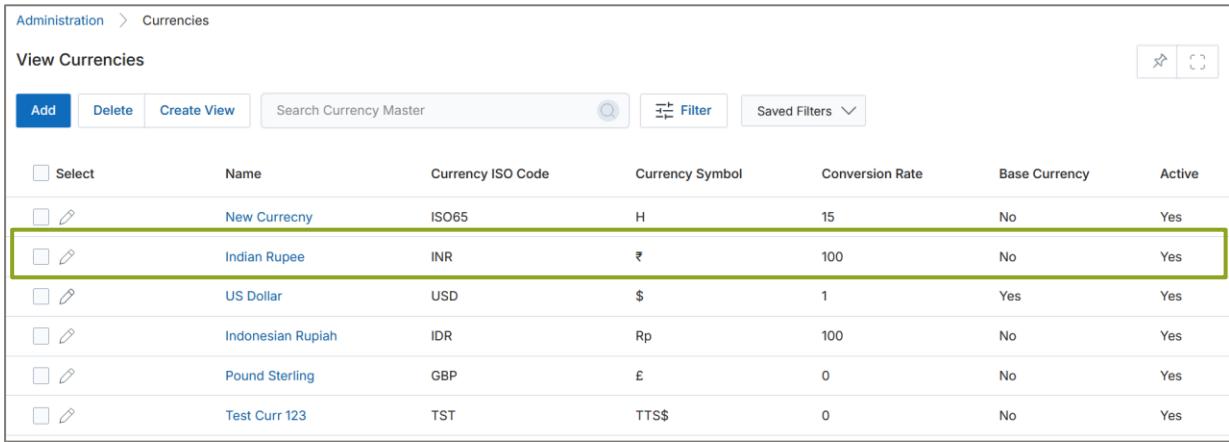
— Customer Portal Footer Update

[Add](#)

Action	Name	Languages	Parent Name	Modified On
	Russian	Russian	CustomFooter_Black	02/20/2023 6:07:24 PM
	Portuguese	Portuguese	CustomFooter_Black	02/20/2023 11:27:43 AM
	German	German	CustomFooter_Black	02/17/2023 7:39:28 PM
	Chinese Simplified	Chinese-Simplified	CustomFooter_Black	02/16/2023 1:38:03 PM

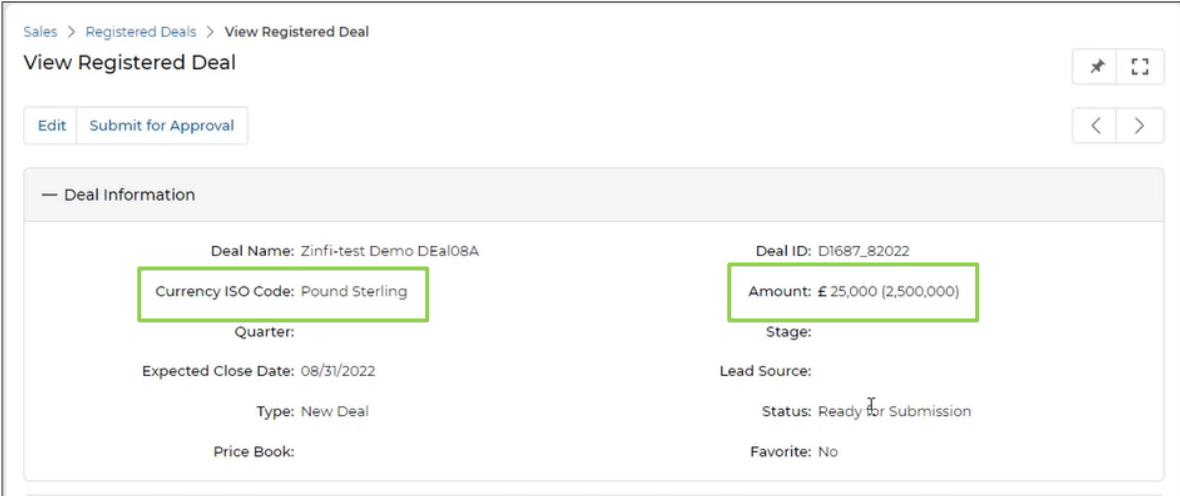
Enabling Base Currency

- The base Currency can be activated in the portal either by a) Adding a New Currency and enabling it for a base currency or b) Editing an existing currency and converting it to a base currency. In both cases, the toggle key associated with “Is Base Currency” should be enabled, and the numerical value for the “Commission Rate” should be set as 1.



<input type="checkbox"/> Select	Name	Currency ISO Code	Currency Symbol	Conversion Rate	Base Currency	Active
<input type="checkbox"/>	New Currency	ISO65	H	15	No	Yes
<input type="checkbox"/>	Indian Rupee	INR	₹	100	No	Yes
<input type="checkbox"/>	US Dollar	USD	\$	1	Yes	Yes
<input type="checkbox"/>	Indonesian Rupiah	IDR	Rp	100	No	Yes
<input type="checkbox"/>	Pound Sterling	GBP	£	0	No	Yes
<input type="checkbox"/>	Test Curr 123	TST	TTS\$	0	No	Yes

- Once a Currency is set as a base Currency it will be displayed on the View Currencies page as shown in the image above. The Conversion Rate for the other currencies relative to the base currency should be set manually when a new currency is added and set as a base currency.
- The related changes are reflected in the fields associated with Currencies in the respective modules. The image below displays the details page of a **Registered Deal** where the Currency selected is “Pound Sterling” and in the field associated with **Amount**, the figure that we find in brackets reflects the amount converted relative to the base currency.



Sales > Registered Deals > View Registered Deal

View Registered Deal

Edit | Submit for Approval

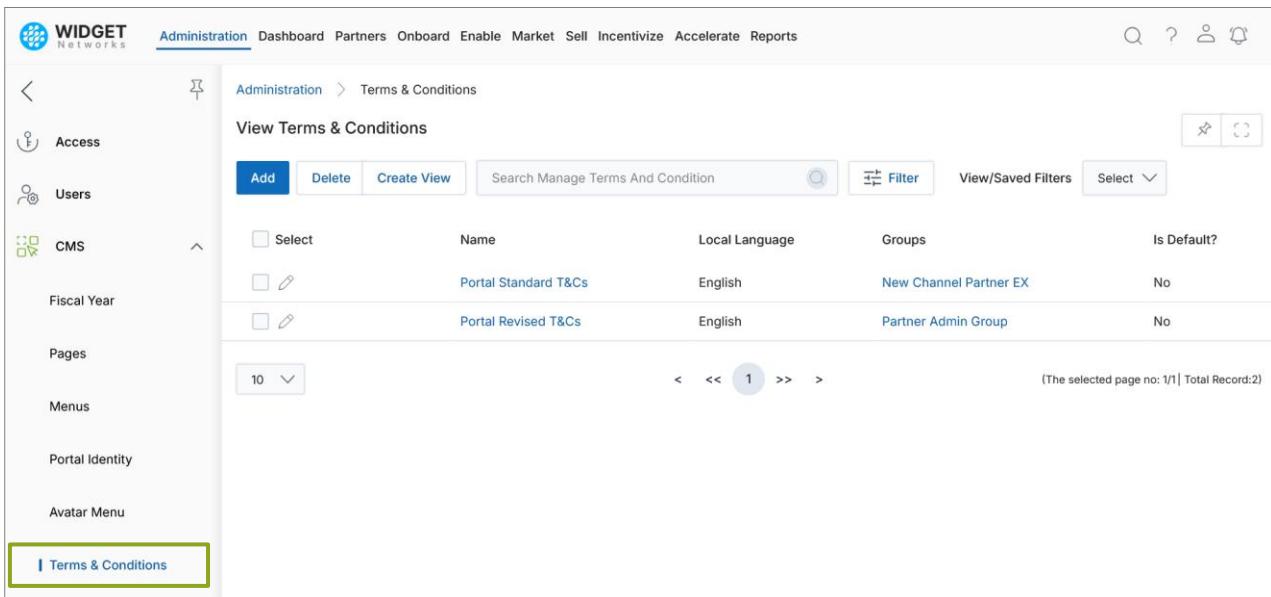
Deal Information

Deal Name: Zinfo-test Demo Deal08A	Deal ID: D1687_82022
Currency ISO Code: Pound Sterling	Amount: £ 25,000 (2,500,000)
Quarter:	Stage:
Expected Close Date: 08/31/2022	Lead Source:
Type: New Deal	Status: Ready for Submission
Price Book:	Favorite: No

Manage Terms & Conditions

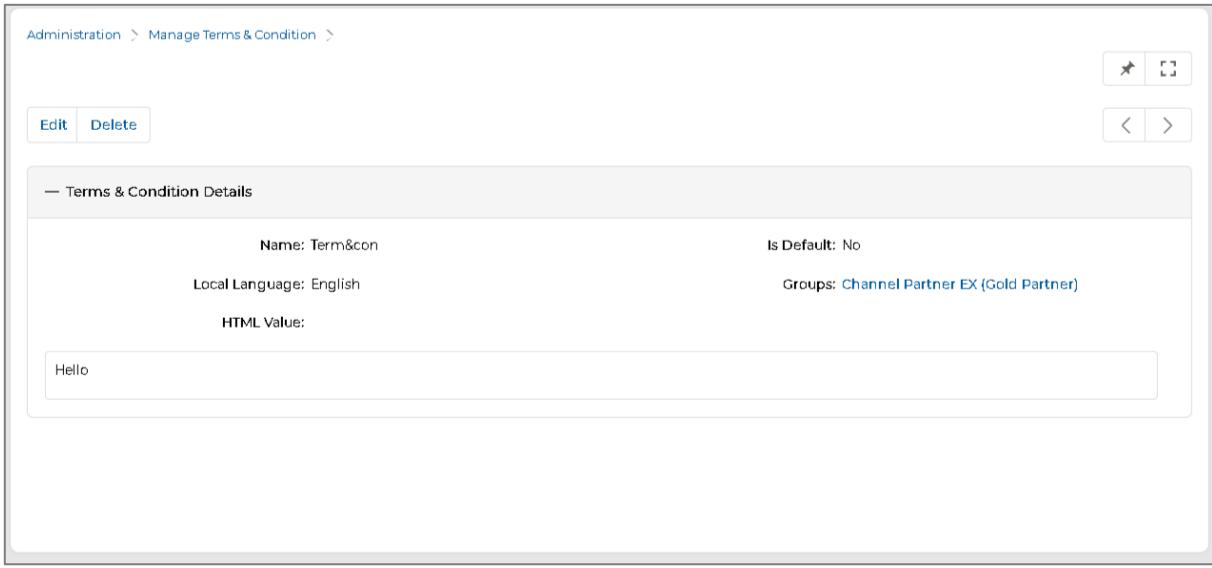
The feature associated with “Terms & Conditions” helps UPM Portal Admins to manage the Terms and Conditions which they normally want their UPM Users to Accept and Acknowledge, before using the UPM Platform, as part of the compliance rules and regulations for their organization. The **Terms and Conditions** are created based on specific **Languages** and **Groups**. Terms and Conditions created for any specific user will become applicable only when the user (allocated with the specific Group and Language) logs in to the system for the first time. If the Language and Group associated with any specific Terms and Conditions do not match with that of the user, the one that is created as default will become applicable.

- Clicking **Terms & Conditions** from the left menu will take you to the following page where multiple Terms and Conditions associated with different **Languages** and **Groups** are displayed.



Select	Name	Local Language	Groups	Is Default?
<input type="checkbox"/>	Portal Standard T&Cs	English	New Channel Partner EX	No
<input type="checkbox"/>	Portal Revised T&Cs	English	Partner Admin Group	No

- Clicking the name of any specific Terms and Conditions will take you to its details page as shown below.



Administration > Manage Terms & Condition >

— Terms & Condition Details

Name: Term&con Is Default: No

Local Language: English Groups: Channel Partner EX (Gold Partner)

HTML Value:

Hello

The details page of any specific Terms and Conditions will display the following:

- Buttons:**
 - Edit** – Allows you to open the page in the edit mode, where you can bring in changes to the fields of this “Terms and Conditions.”
 - Delete** – Helps you to remove these “Terms and Conditions.”
- Terms and Conditions Details:**
 - Name** – Shows the name of these “Terms and Conditions.”
 - Is Default** – Shows whether this “Terms and Condition” is created as a default.
 - Local Language** – Defines the Language associated with this “Terms and Condition”.
 - Groups** – Defines the Group associated with this “Term and Condition”.
 - HTML Value** – The HTML Page Design for the “Terms And Conditions”, will be displayed for acceptance.

- Clicking the **Add** and **Edit** buttons you can add a new “Terms & Condition” as well as bring in changes to an existing one as per your requirements.
- The Terms and Conditions screen also supports Portuguese translation for key action buttons, providing a localized and user-friendly experience for Portuguese-speaking users. This enhancement ensures a fully localized experience for Portuguese-speaking users. When the portal language is set to Portuguese, the CONFIRM button is dynamically translated to "ACEITAR" and the CANCEL button to "CANCELAR", allowing users to understand and act on their choices without language barriers clearly.

1. Introdução

Estes Termos e Condições ("Termos") regem o uso do nosso site. Ao acessar ou usar nosso site, você concorda em estar vinculado a estes Termos.

2. Propriedade Intelectual

Todo o conteúdo neste site, incluindo textos, gráficos, logotipos e imagens, é propriedade de [Nome da Sua Empresa] e está protegido por leis de direitos autorais.

3. Responsabilidades do Usuário

Você concorda em usar o site apenas para fins legais e a não se envolver em qualquer atividade que possa prejudicar o site ou outros usuários.

4. Limitação de Responsabilidade

Não somos responsáveis por quaisquer danos resultantes do uso ou da incapacidade de usar o site ou qualquer conteúdo fornecido.

ACEITAR

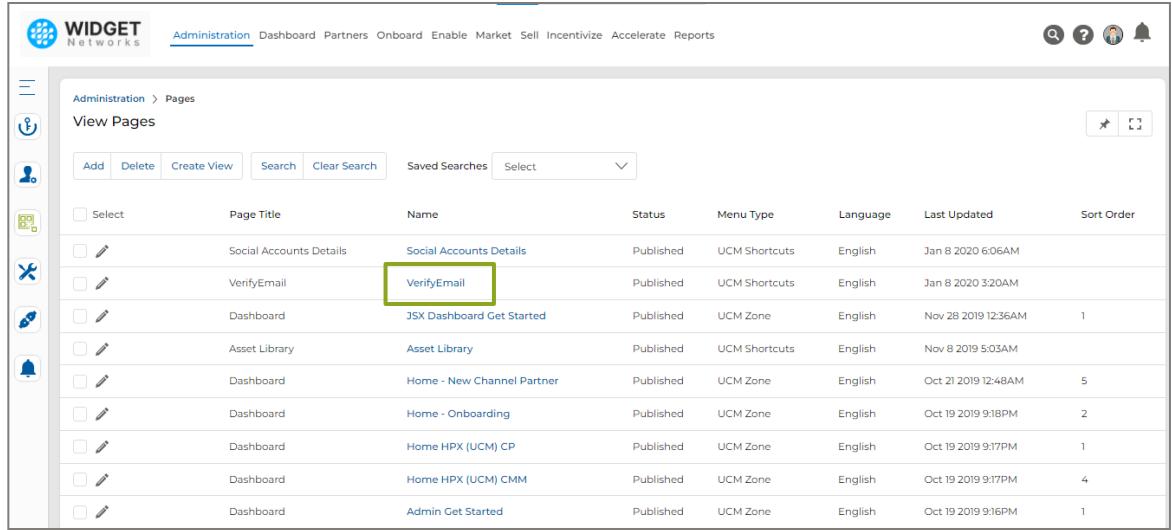
CANCELAR

External Web Syndication Link for Pages

This functionality is used to distribute information such as feature descriptions, images, and specifications or utilize Dynamic Forms embedded pages to capture records and auto-create UPM module-specific Records. Such Page Links can be generated via 'CMS' now, to be utilized without logging in to UPM and allowing OEMs and Partners to publish the information on their custom sites and capture records automatically from end-users. This functionality allows the OEM/Partner to syndicate any page and utilize it on any other online medium - without logging in to the portal. Each Page can be generated with a unique ID code by the Admin and is shared with Partners who can utilize this by concatenating with a specific URL format and distributing it worldwide.

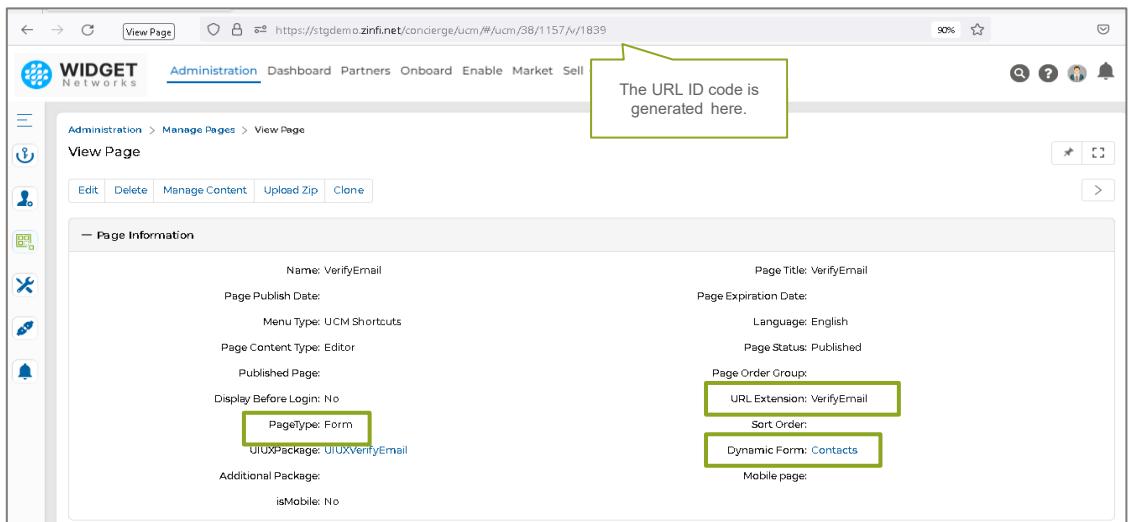
- Login as an Admin and navigate to CMS > Pages.

- The External Syndication Page ID can be generated for a newly created page or any existing page.



Select	Page Title	Name	Status	Menu Type	Language	Last Updated	Sort Order
<input type="checkbox"/>	Social Accounts Details	Social Accounts Details	Published	UCM Shortcuts	English	Jan 8 2020 6:06AM	
<input type="checkbox"/>	VerifyEmail	VerifyEmail	Published	UCM Shortcuts	English	Jan 8 2020 3:20AM	
<input type="checkbox"/>	Dashboard	JSX Dashboard Get Started	Published	UCM Zone	English	Nov 28 2019 12:36AM	1
<input type="checkbox"/>	Asset Library	Asset Library	Published	UCM Shortcuts	English	Nov 8 2019 5:03AM	
<input type="checkbox"/>	Dashboard	Home - New Channel Partner	Published	UCM Zone	English	Oct 21 2019 12:48AM	5
<input type="checkbox"/>	Dashboard	Home - Onboarding	Published	UCM Zone	English	Oct 19 2019 9:18PM	2
<input type="checkbox"/>	Dashboard	Home HPX (UCM) CP	Published	UCM Zone	English	Oct 19 2019 9:17PM	1
<input type="checkbox"/>	Dashboard	Home HPX (UCM) CMM	Published	UCM Zone	English	Oct 19 2019 9:17PM	4
<input type="checkbox"/>	Dashboard	Admin Get Started	Published	UCM Zone	English	Oct 19 2019 9:16PM	1

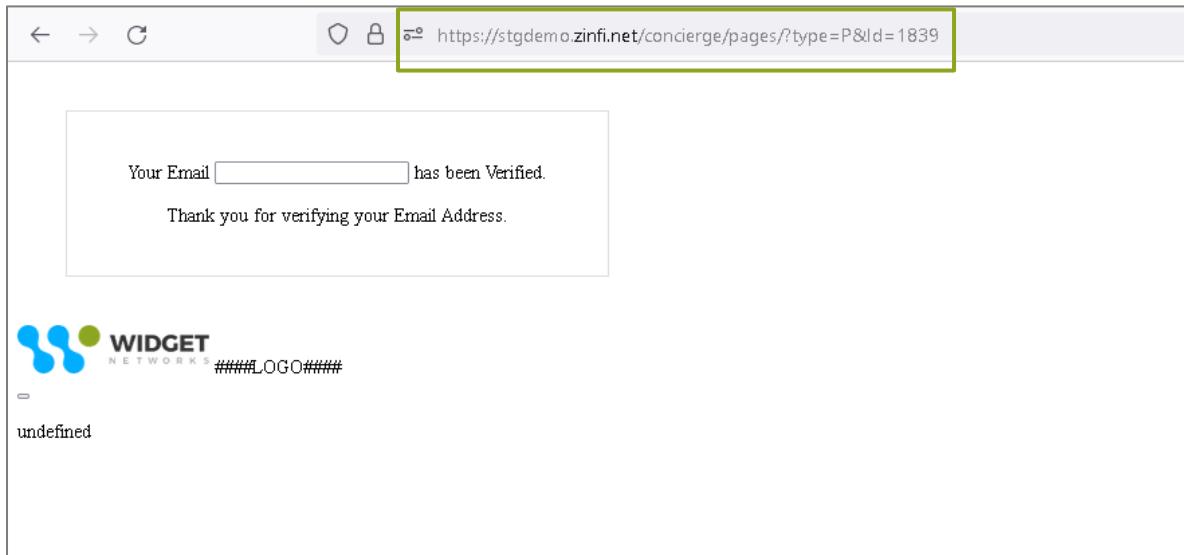
- Clicking the Name of any Page will take us to the details page where we need to click the Edit button and verify the following:
 - The field 'URL Extension' should always contain relevant data (with any naming convention). If NULL, then the Page cannot be accessed externally (pre-login UPM) via the Syndication Link.
 - If 'Form' is tagged to 'Page Type' then a Dynamic Form needs to be associated with the Page.
 - The 'Status' of the Page should always be a 'Published' one.



Name:	VerifyEmail	Page Title:	VerifyEmail
Page Publish Date:		Page Expiration Date:	
Menu Type:	UCM Shortcuts	Language:	English
Page Content Type:	Editor	Page Status:	Published
Published Page:		Page Order Group:	
Display Before Login:	No	URL Extension:	VerifyEmail
Page Type:	Form	Sort Order:	
UIUX Package:	UIUXVerifyEmail	Dynamic Form:	Contacts
Additional Package:		Mobile page:	
isMobile:	No		

- Once published, the Page ID code generated in the URL, is shared with the relevant Users/Partners. This ID is embedded/concatenated within a special URL format – to form the Syndication Link and is shared externally with users – who access the page without logging into UPM.

URL Format for Page Syndication: <https://stgdemo.zinfo.net/concierge/pages/?type=P&Id=1839>

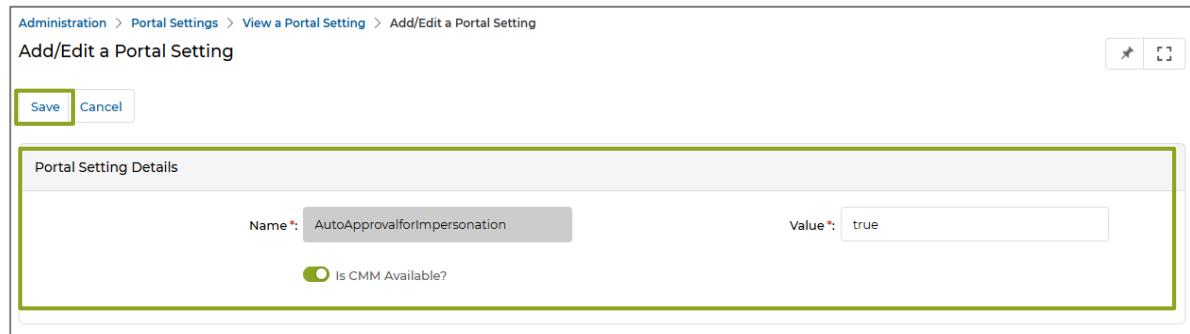


Portal Settings – Different Types

Impersonation Request Portal Setting

- a. Under the **Portal Setting Details** section, provide the required data for the following fields. We add this Portal Setting which will enable the Admin to impersonate the Partner User account without getting approval from the requested Partner. Setting the Value in this Portal Setting to 'True' will enable the Admin to impersonate a Partner User account without getting approval from the requested Partner once the Admin clicks Request Impersonation button from the User's details page. Once the Value is set to 'False', the auto-approval of Impersonation of Partner User account will no longer be possible. The Admin will be unable to Impersonate Partner User account till the Partner approves the Impersonation request.
- b. **Name:** Name of the Portal Setting.
- c. **Value:** Provide value in this field. In this example we put value either as 'true' or 'false'. If value is provided as 'true', then the Admin's impersonation request for Partner User account gets auto-approved and eliminates the necessity to get approval from the requested Partner User. But, if the value is set as 'False', then the Admin needs to get approval from the Partner User to impersonate his account.
- d. **Is CMM Available:** Enable this toggle key if CMM is available.

Click on **Save** when done.



Administration > Portal Settings > View a Portal Setting > Add/Edit a Portal Setting

Add/Edit a Portal Setting

Save Cancel

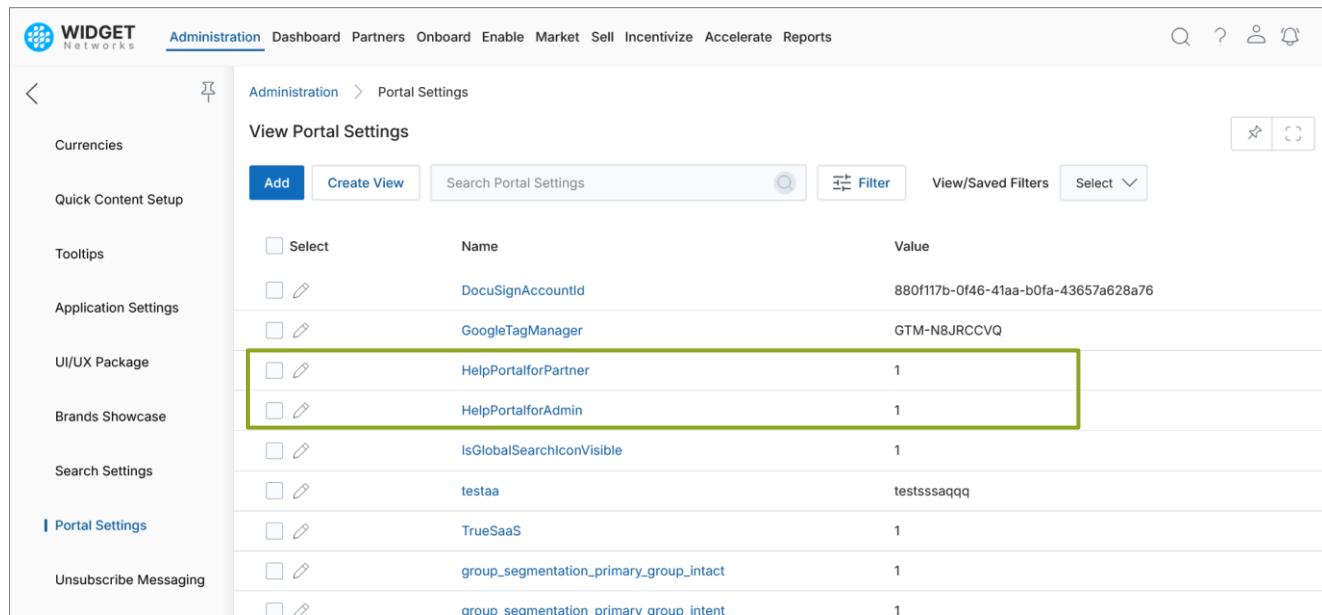
Portal Setting Details

Name*: AutoApprovalforImpersonation Value*: true

Is CMM Available?

Help icons Visibility for Admins and Partners Portal Settings

The Help icon for Admins and Partners can be managed from the Portal Settings which can be reached by navigating **Administration > CMS > Portal Settings**.



Administration Dashboard Partners Onboard Enable Market Sell Incentivize Accelerate Reports

Administration > Portal Settings

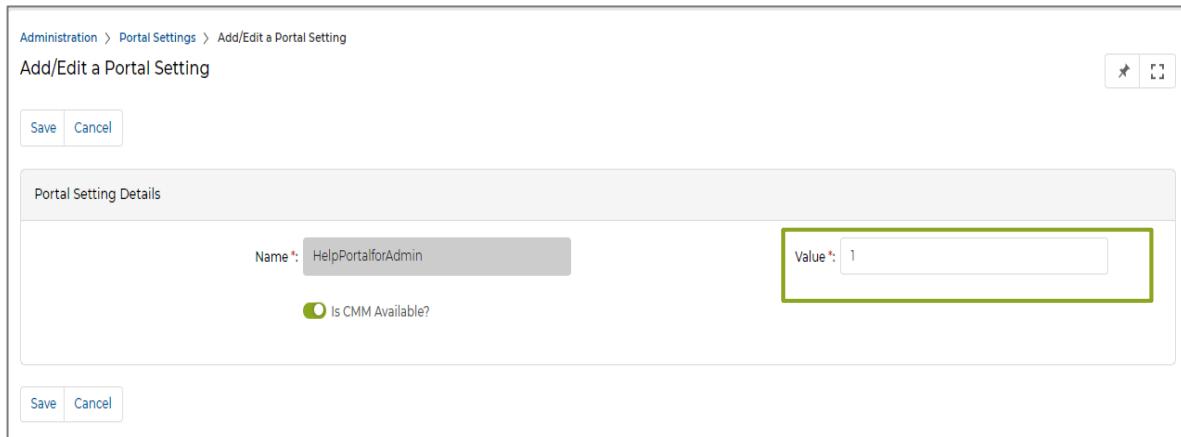
Add Create View Search Portal Settings Filter View/Saved Filters Select

View Portal Settings

	Name	Value
<input type="checkbox"/> <input type="pencil"/>	DocuSignAccountId	880f117b-0f46-41aa-b0fa-43657a628a76
<input type="checkbox"/> <input type="pencil"/>	GoogleTagManager	GTM-N8JRCCVQ
<input type="checkbox"/> <input type="pencil"/>	HelpPortalforPartner	1
<input type="checkbox"/> <input type="pencil"/>	HelpPortalforAdmin	1
<input type="checkbox"/> <input type="pencil"/>	IsGlobalSearchIconVisible	1
<input type="checkbox"/> <input type="pencil"/>	testaa	testsssaqqq
<input type="checkbox"/> <input type="pencil"/>	TrueSaaS	1
<input type="checkbox"/> <input type="pencil"/>	group_segmentation_primary_group_intact	1
<input type="checkbox"/> <input type="pencil"/>	group_segmentation_primary_group_intent	1

1. To manage the Help icon for Admin users, click on the pencil icon next to 'Help Portal for Admin', and you'll be directed to the subsequent page.

- i. To ensure that the help icon (?) is visible to Admin users, set the 'Value' to 1.



Administration > Portal Settings > Add/Edit a Portal Setting

Add/Edit a Portal Setting

Save Cancel

Portal Setting Details

Name*: HelpPortalforAdmin

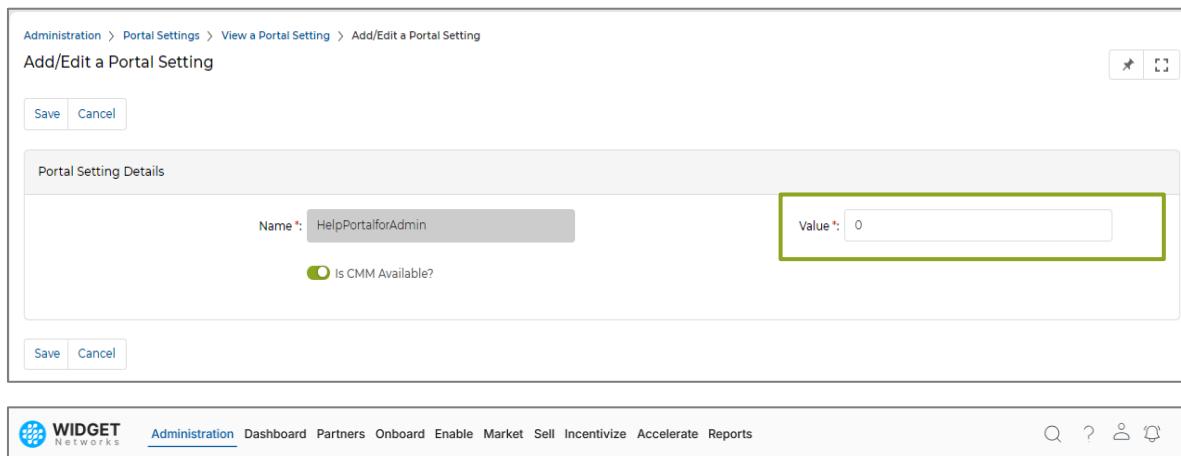
Value*: 1

Is CMM Available?

Save Cancel



- ii. The visibility of the Help icon to admin users can also be restricted by changing the 'Value' to 0.



Administration > Portal Settings > View a Portal Setting > Add/Edit a Portal Setting

Add/Edit a Portal Setting

Save Cancel

Portal Setting Details

Name*: HelpPortalforAdmin

Value*: 0

Is CMM Available?

Save Cancel

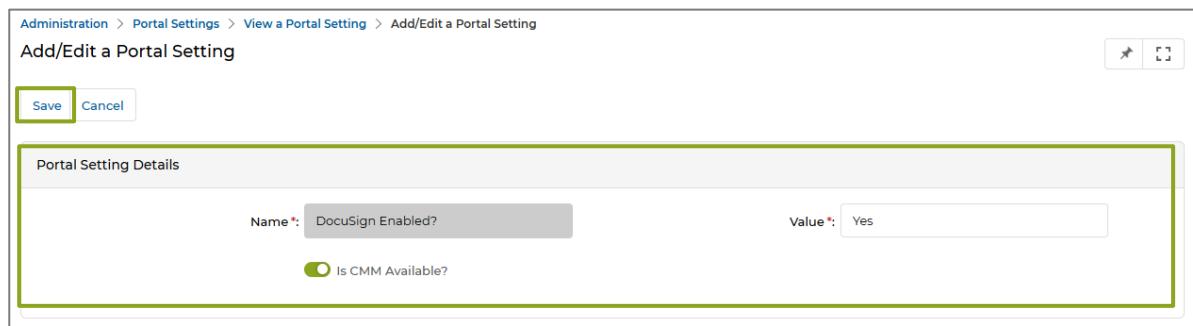
WIDGET Networks Administration Dashboard Partners Onboard Enable Market Sell Incentivize Accelerate Reports

2. In a similar way, administrators can control the visibility of the Help icon for Partner users by selecting the pencil icon adjacent to the 'Help Portal for Partner' and changing the 'Values' to 1 and 0, respectively.

Enable/Disable DocuSign in Partner Contract

- a. Enabling 'DocuSign Enabled?' The Portal Setting allows the Admin to integrate DocuSign with the Contract for Partners. With this feature enabled, the Admin will be able to upload DocuSign-integrated Contracts which the Partners sign digitally. Post signature, both Admin and Partner will be able to download the digitally signed document.
- b. If the Admin doesn't want to use DocuSign in Contracts, then he will have to disable the 'DocuSign Enabled?' Portal Setting. Such Contracts don't need the Partners' digital signature. Partners can give consent to such Contracts by clicking 'I Agree & Accept' button.
- c. **Name:** Name of the Portal Setting.
- d. **Value:** To Enable this Portal Setting, Admin needs to put Value as 'Yes'. This will enable the Admin to create DocuSign-integrated Contracts. To disable this Portal Setting, the Admin needs to put Value as 'No'.

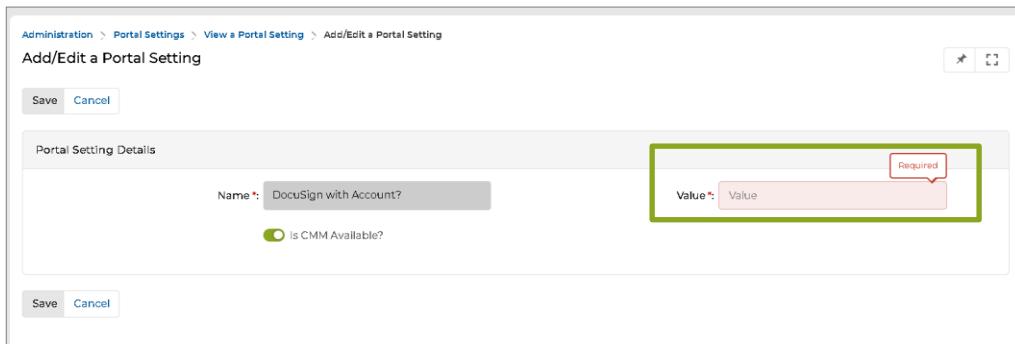
Click on **Save** when done.



The screenshot shows the 'Add/Edit a Portal Setting' page. The 'Name' field is set to 'DocuSign Enabled?' and the 'Value' field is set to 'Yes'. The 'Is CMM Available?' checkbox is checked. The 'Save' button is highlighted with a green box.

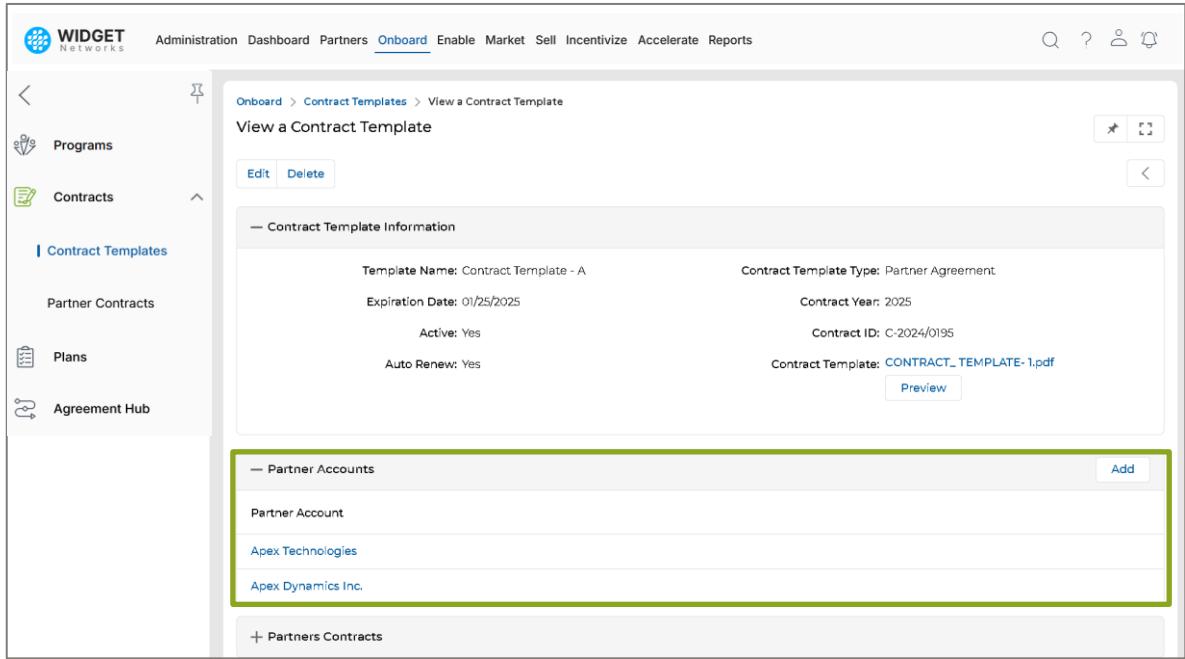
Enable/Disable DocuSign with Account

The DocuSign with Account feature allows administrators to enable or disable DocuSign integration for contract templates linked to specific Partner Accounts. This integration ensures that pre-configured signees from the Partner Account can e-sign contracts in a predefined order. Administrators must assign signees to a Partner Account using the user lookup field before linking it to a template and setting up the order of the signees. This integration can be efficiently managed by navigating to **Administration > CMS > Portal Settings** and updating the 'Value' of 'DocuSign with Account' to Yes or No, as detailed below.



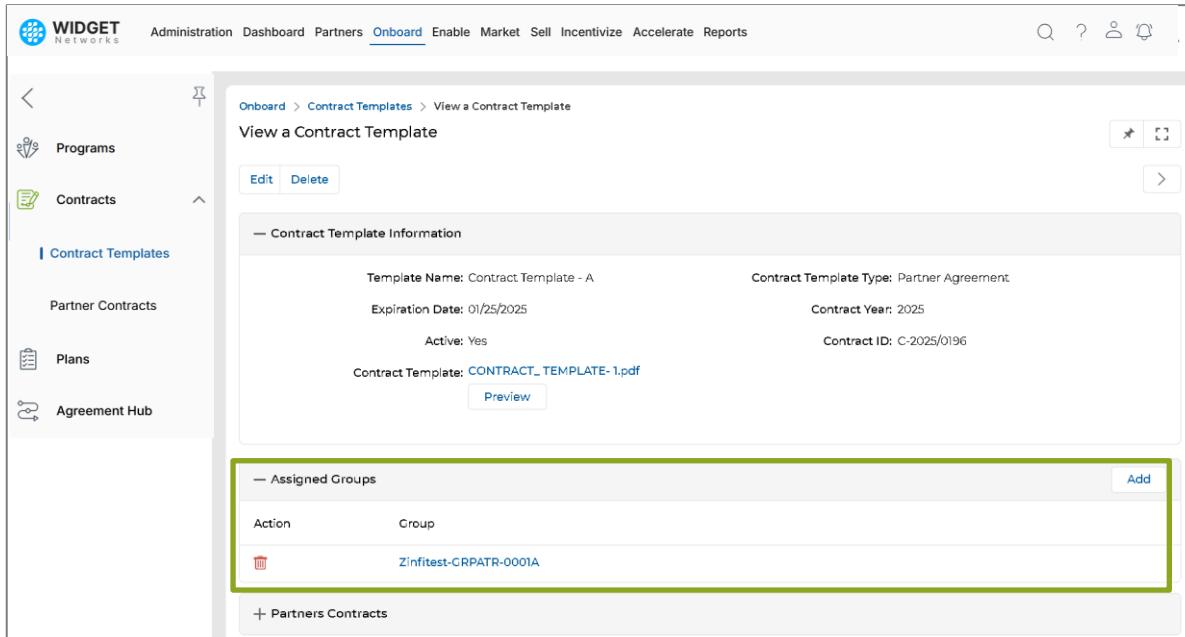
The screenshot shows the 'Add/Edit a Portal Setting' page. The 'Name' field is set to 'DocuSign with Account?' and the 'Value' field is empty with a red 'Required' error message. The 'Is CMM Available?' checkbox is checked. The 'Save' button is highlighted with a green box.

a. **Enable DocuSign with Account:** Setting the portal value to 'Yes' allows administrators to create DocuSign-integrated contract templates under Onboard > Contracts > Contract Templates. These templates can be assigned to specific partner accounts, enabling digital signatures and simplifying contract execution.



The screenshot shows the ZINFO Onboard interface. The left sidebar includes 'Programs', 'Contracts' (selected), 'Contract Templates' (highlighted in blue), 'Partner Contracts', 'Plans', and 'Agreement Hub'. The main content area is titled 'View a Contract Template' under 'Onboard > Contract Templates > View a Contract Template'. It displays 'Contract Template Information' with fields: Template Name: Contract Template - A, Expiration Date: 01/25/2025, Active: Yes, Auto Renew: Yes; Contract Template Type: Partner Agreement, Contract Year: 2025, Contract ID: C-2024/0195, Contract Template: CONTRACT_TEMPLATE-1.pdf. Below this is a 'Partner Accounts' section with 'Add' and 'Delete' buttons, listing 'Partner Account' entries: Apex Technologies and Apex Dynamics Inc. A green box highlights this section.

b. **Disable DocuSign with Account:** Setting the portal value to 'No' and clicking Save disables DocuSign integration for contract templates at the Partner Account level. Instead, administrators can configure contract templates for specific groups.



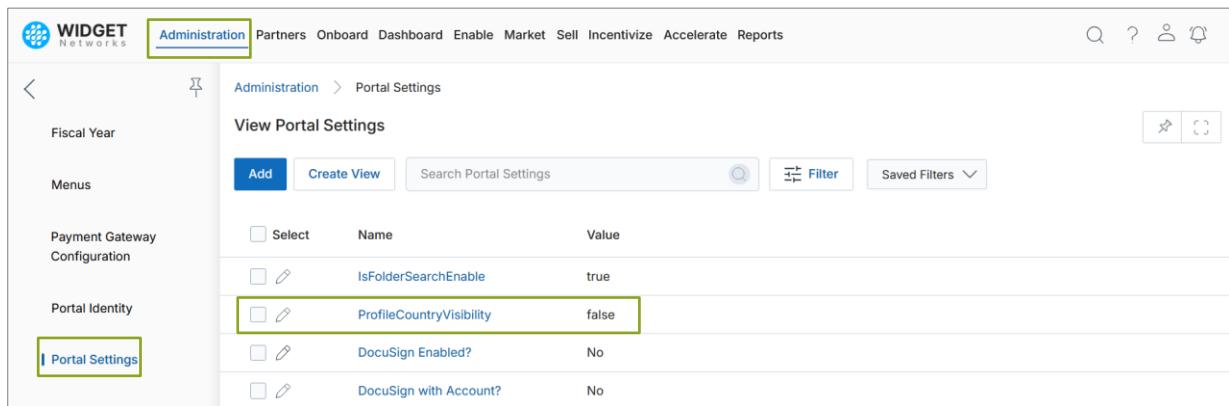
The screenshot shows the ZINFO Onboard interface. The left sidebar includes 'Programs', 'Contracts' (selected), 'Contract Templates' (highlighted in blue), 'Partner Contracts', 'Plans', and 'Agreement Hub'. The main content area is titled 'View a Contract Template' under 'Onboard > Contract Templates > View a Contract Template'. It displays 'Contract Template Information' with fields: Template Name: Contract Template - A, Expiration Date: 01/25/2025, Active: Yes; Contract Template Type: Partner Agreement, Contract Year: 2025, Contract ID: C-2025/0196, Contract Template: CONTRACT_TEMPLATE-1.pdf. Below this is an 'Assigned Groups' section with 'Add' and 'Delete' buttons, listing 'Action' and 'Group' entries: a trash icon and 'Zinfitest-CRPATR-0001A'. A green box highlights this section.

- c. This feature streamlines contract customization, ensuring flexibility and efficiency in managing partner agreements.

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

‘Profile Country Visibility’ Portal Setting

- This Portal Setting can be reached by navigating **Administration > CMS > Portal Settings**. This takes us 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.

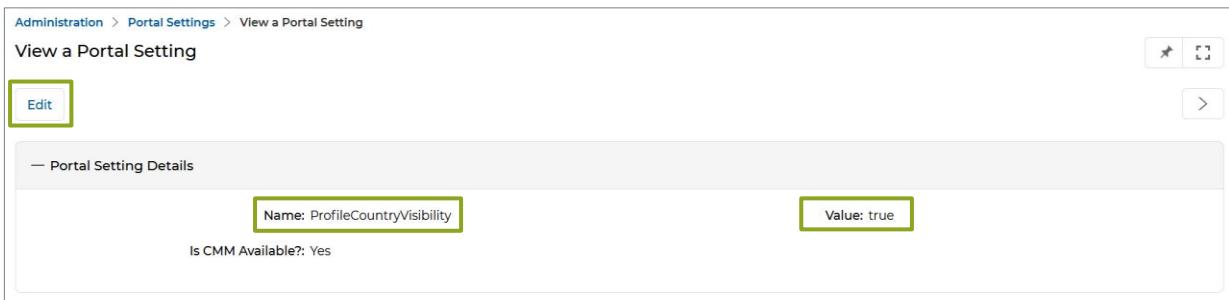


Select	Name	Value
<input type="checkbox"/>	IsFolderSearchEnable	true
<input checked="" type="checkbox"/>	ProfileCountryVisibility	false
<input type="checkbox"/>	DocuSign Enabled?	No
<input type="checkbox"/>	DocuSign with Account?	No

Enable the ‘Profile Country Visibility’ Portal Setting

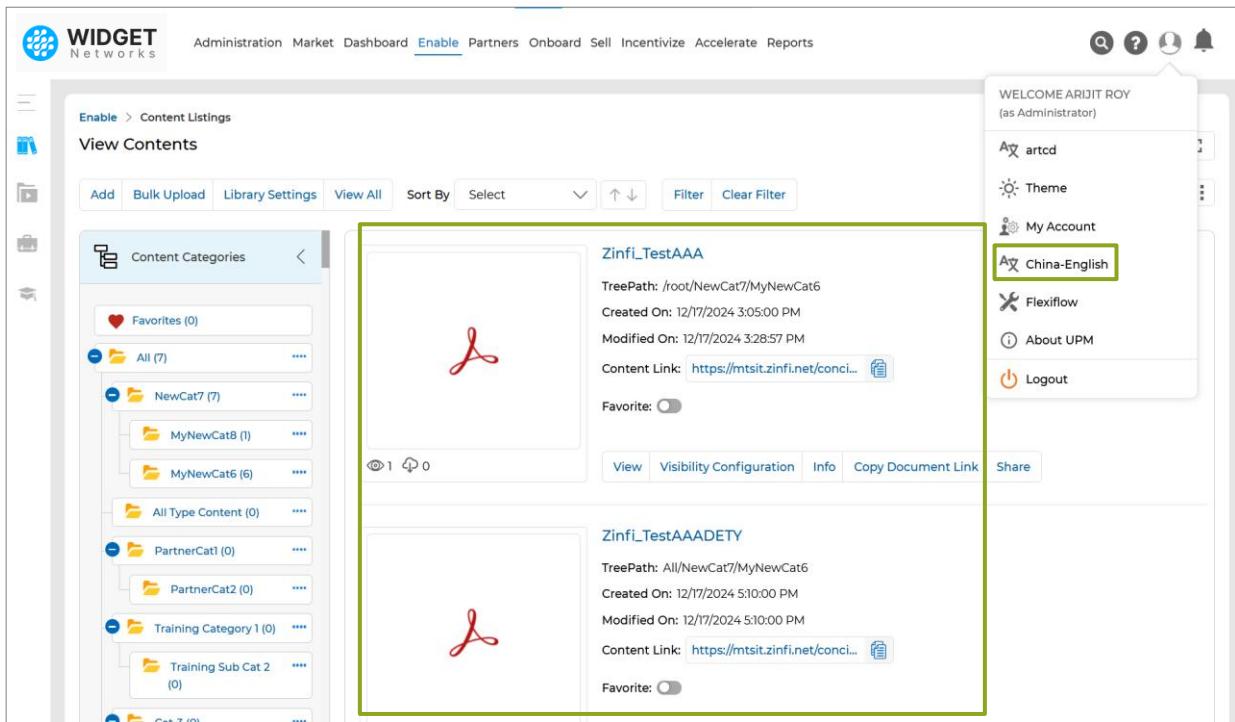
- Enabling this Portal Setting ensures that content visibility in the Content Library is determined solely by the countries specified in the user’s profile.
- Once on the **View a Portal Setting** page, click the **Edit** button. To enable the Portal Setting, provide value in the value field.
- To enable 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.



Name: ProfileCountryVisibility	Value: true
Is CMM Available?: Yes	

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



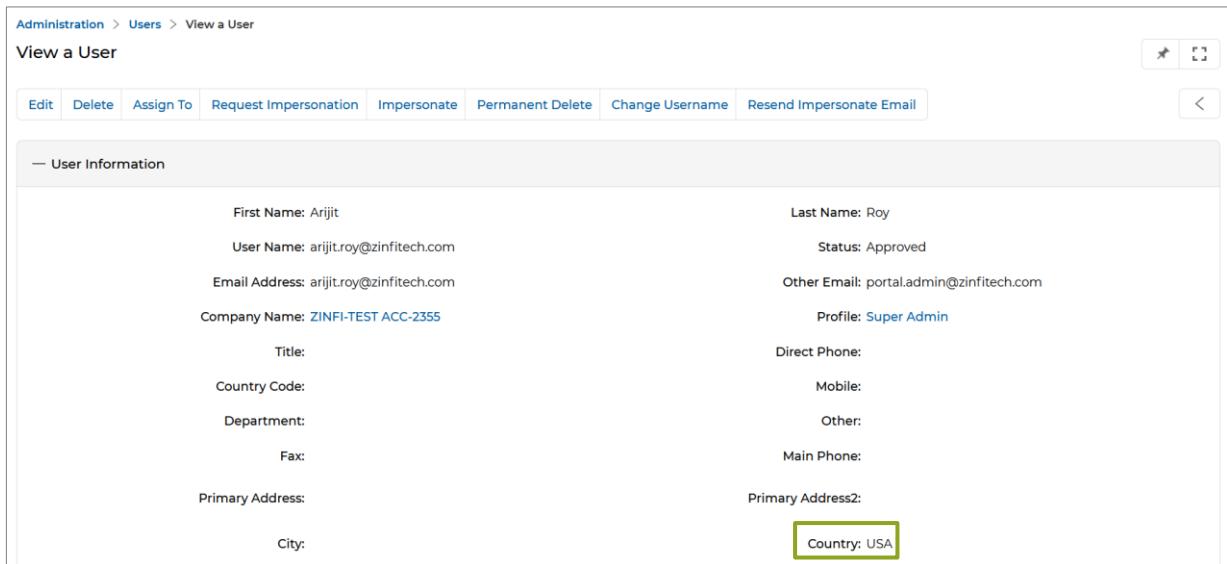
The screenshot shows the Zinfi Enable Content Listings page. On the left, there is a sidebar with 'Content Categories' and a list of categories like 'Favorites (0)', 'All (7)', 'NewCat7 (7)', 'MyNewCat8 (1)', 'MyNewCat6 (6)', 'All Type Content (0)', 'PartnerCat1 (0)', 'PartnerCat2 (0)', 'Training Category 1 (0)', 'Training Sub Cat 2 (0)', and 'Cat 1 (0)'. The main area displays two content items:

- 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...>
Favorite:
- 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...>
Favorite:

On the right, there is a sidebar with the following options:

- WELCOME ARIJIT ROY (as Administrator)
- artcd
- Theme
- My Account
- China-English** (highlighted with a green box)
- Flexflow
- About UPM
- Logout

- 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.



Administration > Users > View a User

View a User

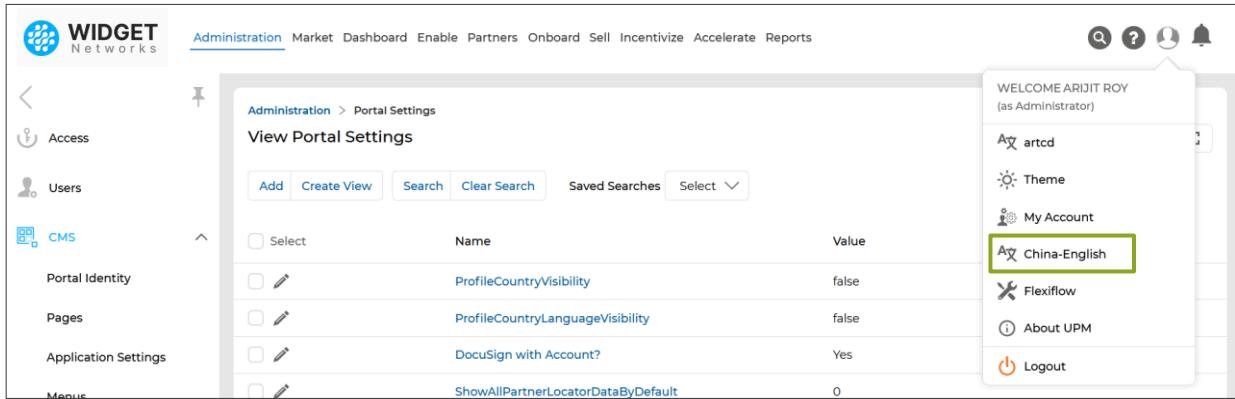
Edit Delete Assign To Request Impersonation Impersonate Permanent Delete Change Username Resend Impersonate Email

— User Information

First Name:	Arijit	Last Name:	Roy
User Name:	arijit.roy@zinfitech.com	Status:	Approved
Email Address:	arijit.roy@zinfitech.com	Other Email:	portal.admin@zinfitech.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		

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 Market Dashboard Enable Partners Onboard Sell Incentivize Accelerate Reports

WELCOME ARIJIT ROY
(as Administrator)

artcd

Theme

My Account

China-English

Flexflow

About UPM

Logout

Administration > Portal Settings

View Portal Settings

Add Create View Search Clear Search Saved Searches Select

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

Access

Users

CMS

Portal Identity

Pages

Application Settings

Menu

- 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

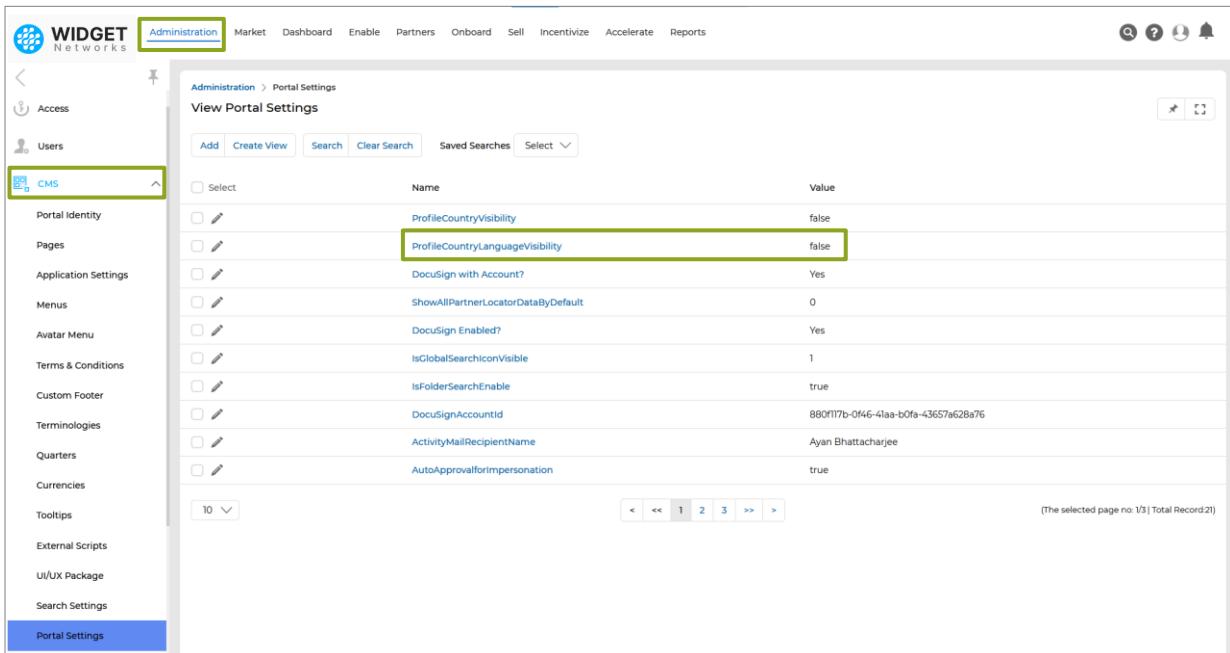
Value: false

Is CMM Available?: Yes

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.



Administration > Portal Settings

View Portal Settings

Add Create View Search Clear Search Saved Searches Select ▾

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
<input type="checkbox"/>	DocuSign Enabled?	Yes
<input type="checkbox"/>	IsGlobalSearchIconVisible	1
<input type="checkbox"/>	IsFolderSearchEnable	true
<input type="checkbox"/>	DocuSignAccountId	880f117b-0f46-41aa-b0fa-43657a62Ba76
<input type="checkbox"/>	ActivityMailRecipientName	Ayan Bhattacharjee
<input type="checkbox"/>	AutoApprovalforImpersonation	true

10 ▾

< << 1 2 3 >> >

(The selected page no: 1/3 | Total Record 21)

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.



Administration > Portal Settings > View a Portal Setting

View a Portal Setting

Edit

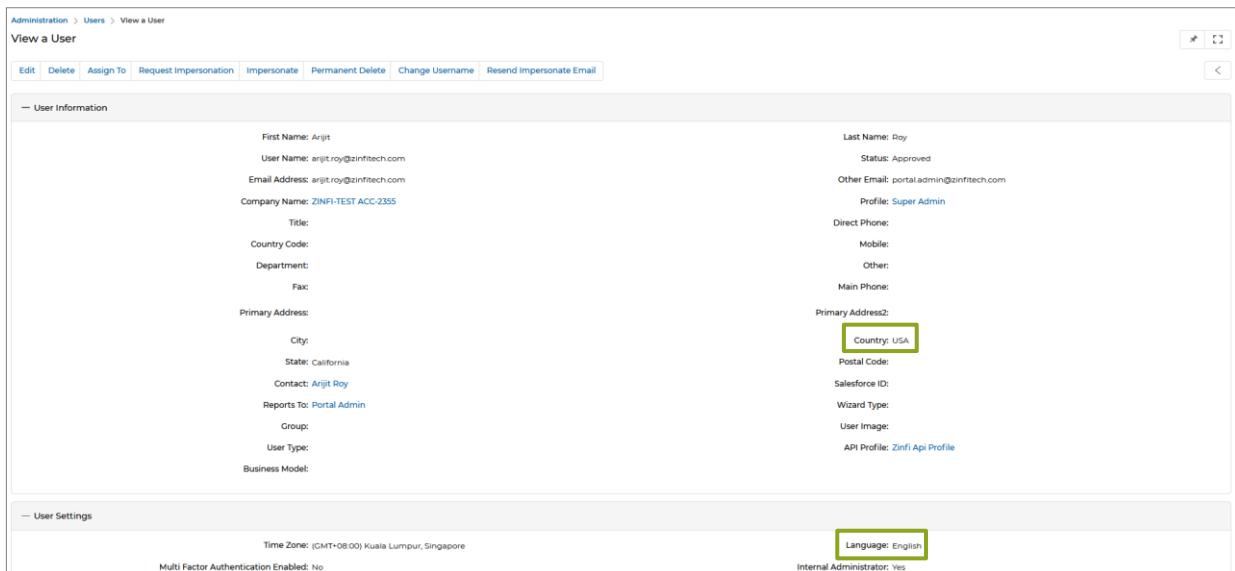
— Portal Setting Details

Name: ProfileCountryLanguageVisibility

Value: true

Is CMM Available?: Yes

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



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: Arjit Last Name: Roy
User Name: arjit.roy@zinfitech.com Status: Approved
Email Address: arjit.roy@zinfitech.com Other Email: portal.admin@zinfitech.com
Company Name: ZINFI-TEST ACC-2355 Profile: Super Admin
Title: Direct Phone:
Country Code: Mobile:
Department: Other:
Fax: Main Phone:
Primary Address:
City: Primary Address:
State: California Country: USA
Contact: Arjit Roy Postal Code:
Reports To: Portal Admin Salesforce ID:
Group: Wizard Type:
User Type: User Image:
Business Model: API Profile: Zinfi Api Profile

— User Settings

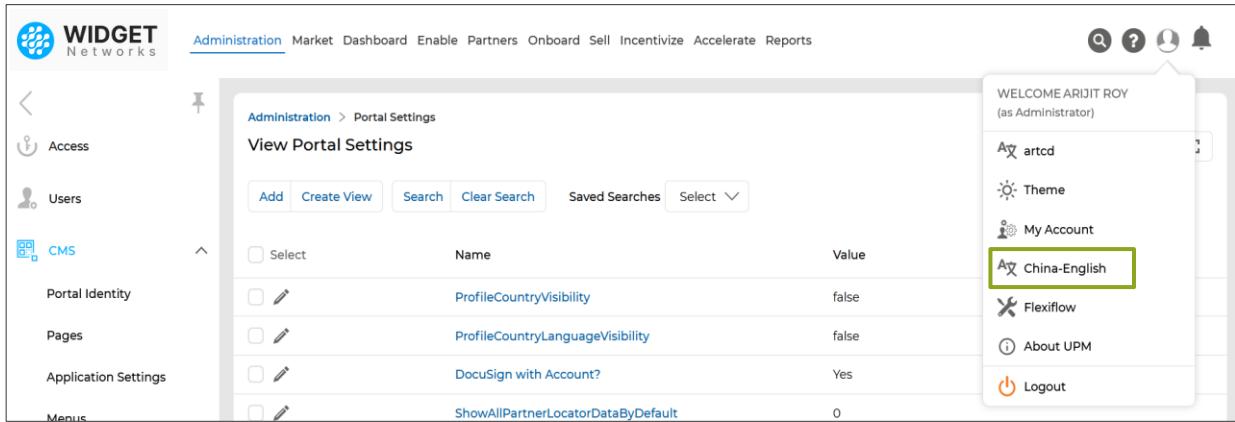
Time Zone: (GMT+08:00) Kuala Lumpur, Singapore Language: English
Multi Factor Authentication Enabled: No Internal Administrator: Yes

- 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

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

- 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.



Administration > Portal Settings > View a Portal Setting

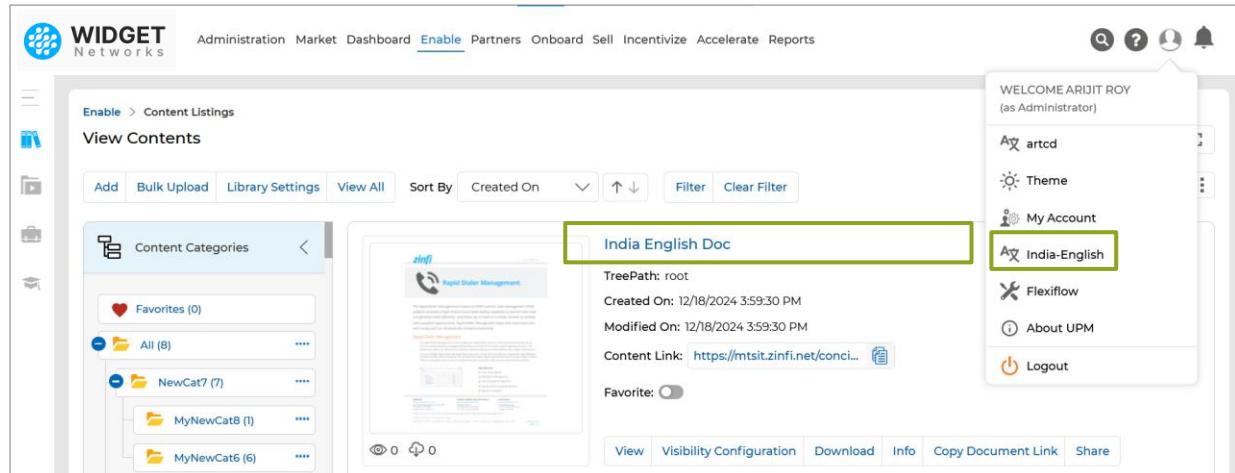
View a Portal Setting

Edit

Portal Setting Details

Name: ProfileCountryLanguageVisibility	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 Created On Filter Clear Filter

Content Categories

- Favorites (0)
- All (8)
- NewCat7 (7)
- MyNewCat8 (1)
- MyNewCat6 (6)

India English Doc

TreePath: root

Created On: 12/18/2024 3:59:30 PM

Modified On: 12/18/2024 3:59:30 PM

Content Link: <https://ntsitzinf.net/conci...>

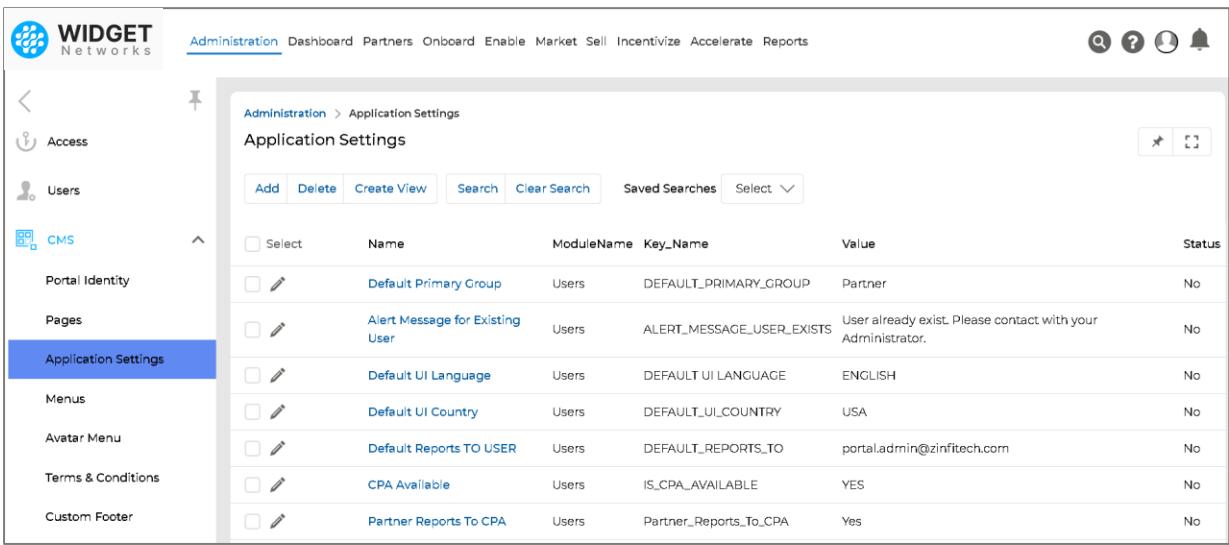
Favorite:

View Visibility Configuration Download Info Copy Document Link Share

Application Settings

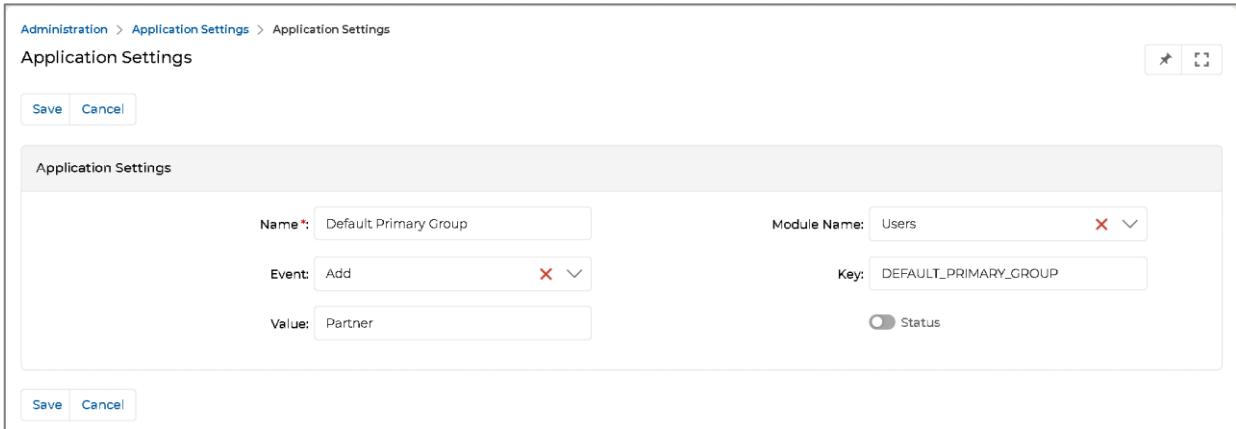
Entity-level default settings refer to pre-configured settings defined for UPM entities (users, partners, or records) while creating or editing entity records. Admins can manage entity-level settings from a single interface, applying them consistently across the platform. They can assign default values for fields like a user's primary group, ensuring that new users or entities automatically adopt the right attributes, such as role assignments or reporting structures. This reduces manual intervention and ensures uniformity across records. The feature allows toggling between enabled or disabled settings, giving administrators flexibility in managing field values based on the organization's evolving needs.

1. To explore this feature, navigate to **Administration > CMS > Application Settings**. The 'Application Settings' page displays all previously created settings.



Select	Name	ModuleName	Key_Name	Value	Status
<input type="checkbox"/>	Default Primary Group	Users	DEFAULT_PRIMARY_GROUP	Partner	No
<input type="checkbox"/>	Alert Message for Existing User	Users	ALERT_MESSAGE_USER_EXISTS	User already exist. Please contact with your Administrator.	No
<input type="checkbox"/>	Default UI Language	Users	DEFAULT_UI_LANGUAGE	ENGLISH	No
<input type="checkbox"/>	Default UI Country	Users	DEFAULT_UI_COUNTRY	USA	No
<input type="checkbox"/>	Default Reports TO USER	Users	DEFAULT_REPORTS_TO	portal.admin@zinfitech.com	No
<input type="checkbox"/>	CPA Available	Users	IS_CPA_AVAILABLE	YES	No
<input type="checkbox"/>	Partner Reports To CPA	Users	Partner_Reports_To_CPA	Yes	No

2. To view the details of an existing 'Application Setting,' simply click on the name of the specific setting. Click the 'Add' button to create a new 'Application Setting' for a particular module. If you need to modify an existing setting, click the pencil icon next to the corresponding 'Application Setting.'



Name*: Default Primary Group	Module Name: Users
Event: Add	Key: DEFAULT_PRIMARY_GROUP
Value: Partner	Status: No

The fields utilized to configure an 'Application Setting' are outlined below:

- a. **Name** – Provide the Name of the specific 'Application setting'.

- b. **Module Name** – Select the Application Name for which we want to define the App setting.
- c. **Event** – Select the specific record operation to trigger the configuration. The available options are Add and Edit.
- d. **Key** – The Field of the Application for which we want to set the default value.
- e. **Value** – Enter the default value for the Application - Key/Field defined above.
- f. **Status** – Use the toggle switch next to 'Status' to activate or deactivate the 'Application Setting' as needed.
- g. **Save** – After filling in all the information, click the Save button.

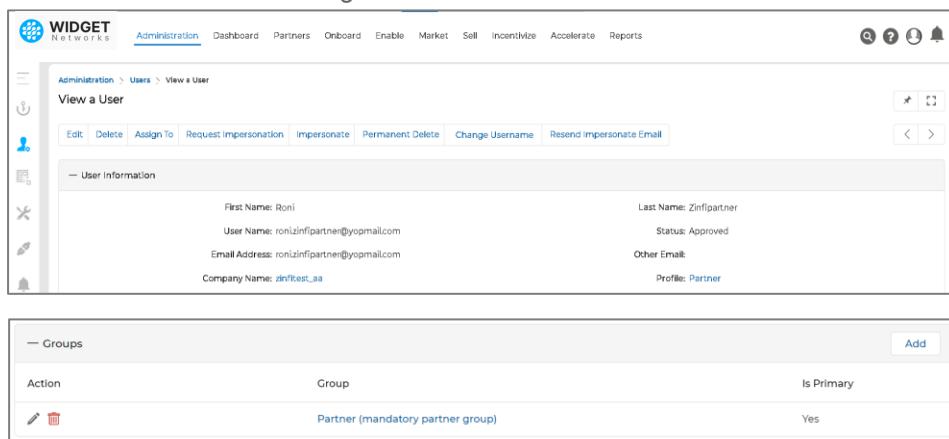
Example Use Case:

The image above displays an 'Application Setting' for the user application so that the user's primary group will automatically be set to 'Partner' whenever a new user is added.

Here's a breakdown of the key elements:

- **Module Name:** This setting applies to the 'Users' application, affecting user-related configurations.
- **Event:** The event is set to 'Add', indicating that the configuration will be triggered when a new user is created.
- **Key:** The 'Key' is identified as DEFAULT_PRIMARY_GROUP, representing the field—the default Primary Group (of the User) attribute—that will be automatically populated with the default value.
- **Value:** The default value assigned. When a new user is added, their primary group will automatically be set to 'Partner'.
- **Status:** The toggle switch shows that this application setting is activated (enabled), meaning it is in effect.

The image below shows that when a new user is created, it is automatically assigned to the default Primary Group, designated as 'Partner,' defined in the 'Application Setting.' This ensures that all newly registered users are seamlessly auto integrated into the system with the appropriate group association, streamlining their access and role within the organization.



The screenshot displays the ZINFO application interface. The top navigation bar includes links for Administration, Dashboard, Partners, Onboard, Enable, Market, Sell, Incentivize, Accelerate, and Reports. The current page is 'Administration > Users > View a User'. The user profile for 'Ron' shows the following details:

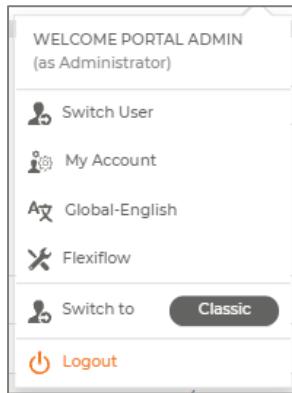
- First Name: Ron
- Last Name: Zinfopartner
- User Name: ron@zinfopartner@yopmail.com
- Email Address: ron@zinfopartner@yopmail.com
- Company Name: zinfo@east_aa
- Status: Approved
- Other Email:
- Profile: Partner

Below the user profile, a 'Groups' section is shown. It lists a single group entry:

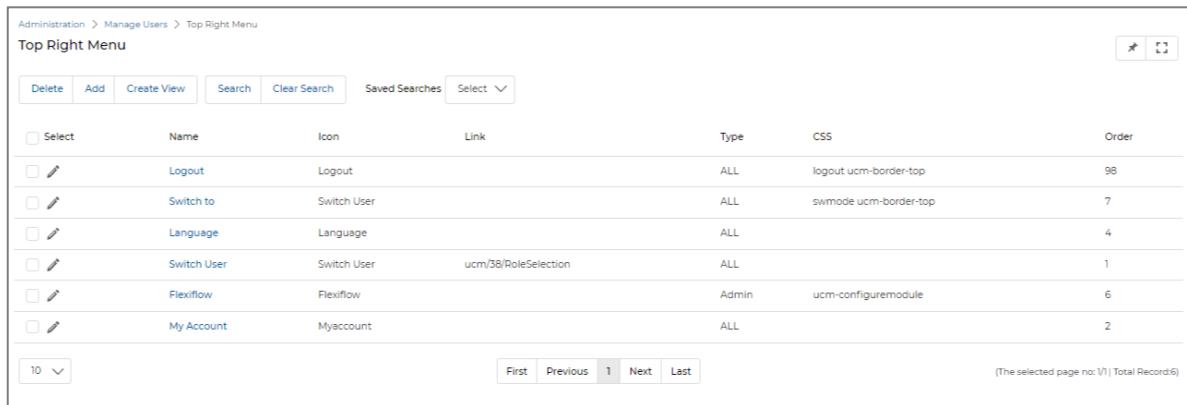
Action	Group	Is Primary
	Partner (mandatory partner group)	Yes

Manage Avatar Menu

The User has the option to select fast-track options in the My Account settings, which are available by clicking on the Avatar Image/Profile Image. The availability and the order of the options viz. Switch user, My Account, FlexiFlow, etc. can be easily managed by the respective user.

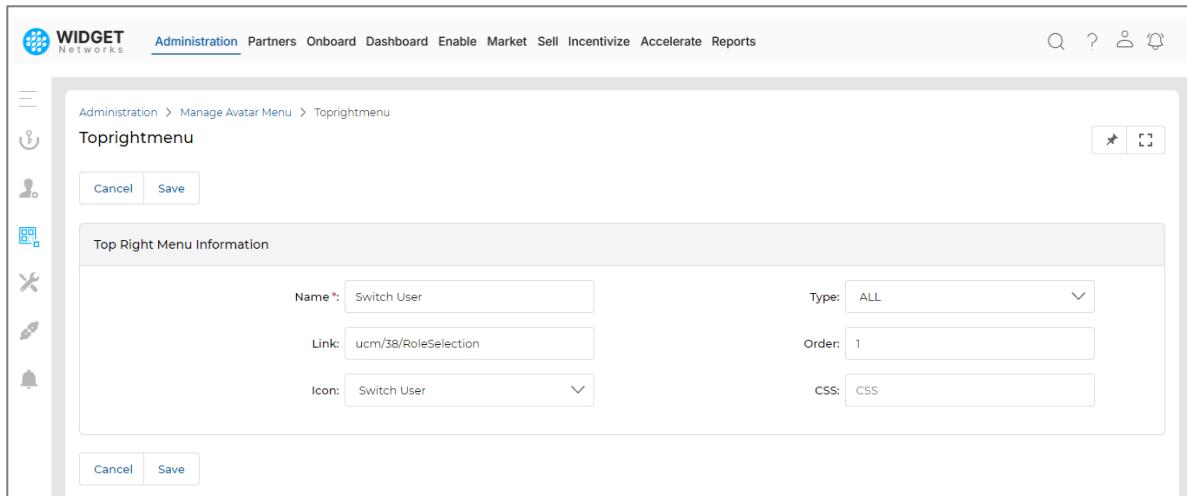


- To manage the Menu options, we traverse to Administration -> CMS -> Avatar Menu



Select	Name	Icon	Link	Type	CSS	Order
<input type="checkbox"/>	Logout	Logout		ALL	logout ucm-border-top	98
<input type="checkbox"/>	Switch to	Switch User		ALL	swmode ucm-border-top	7
<input type="checkbox"/>	Language	Language		ALL		4
<input type="checkbox"/>	Switch User	Switch User	ucm/38/RoleSelection	ALL		1
<input type="checkbox"/>	Flexiflow	Flexiflow		Admin	ucm-configuremodule	6
<input type="checkbox"/>	My Account	Myaccount		ALL		2

- Menu Links can be easily added, updated, and deleted from the Top Right Menu management module.

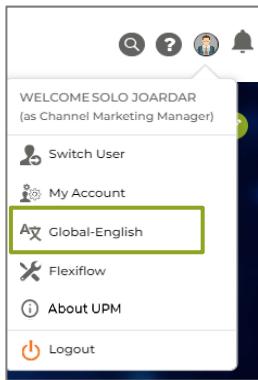


- By clicking Add/Edit, the following parameters for the specific Menu option can be configured:
 1. **Name:** Name of the Menu option.
 2. **Link:** Path or URL where you want the link in the menu to direct to when clicked.
 3. **Type:** The Menu option would be applicable for Partner, Admin, or All.
 4. **Icon:** Choose the Icon for the Menu Option.
 5. **CSS:** CSS preset for the Menu option.
 6. **Order:** Set the order of the Menu Option in the List of Options.

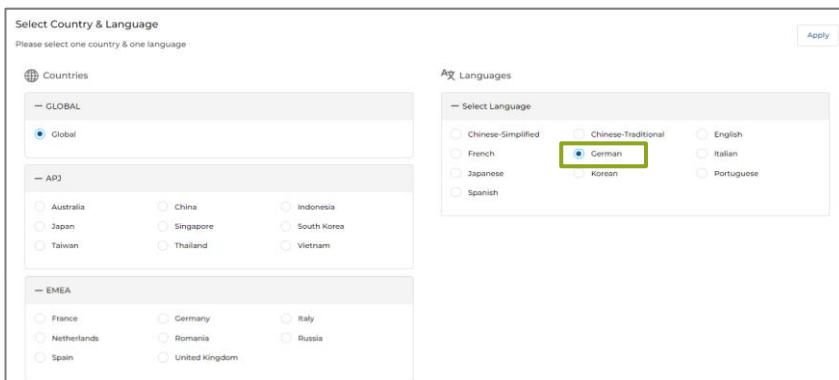
Avatar Menu Labels are auto translated to the selected Language

The UPM Avatar icon displays Menu quick links viz. 'My Account', 'Country Language', 'Workflow', etc., and these are all displayed in **English** by default. With this release, now these quick links are multilingual-ready and are automatically updated as per the Language selected by the User.

- Clicking the **Profile** icon on the top left will display a pop-up as shown in the image below.

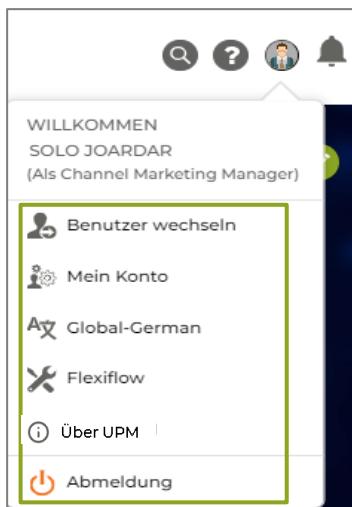


- When you click on '**Global English**' you'll be directed to a page where you can modify the language in which the quick links are presented.



Note: Supported Languages: Chinese-Simplified, Chinese-Traditional, English, French, German, Italian, Japanese, Korean, Portuguese, Spanish

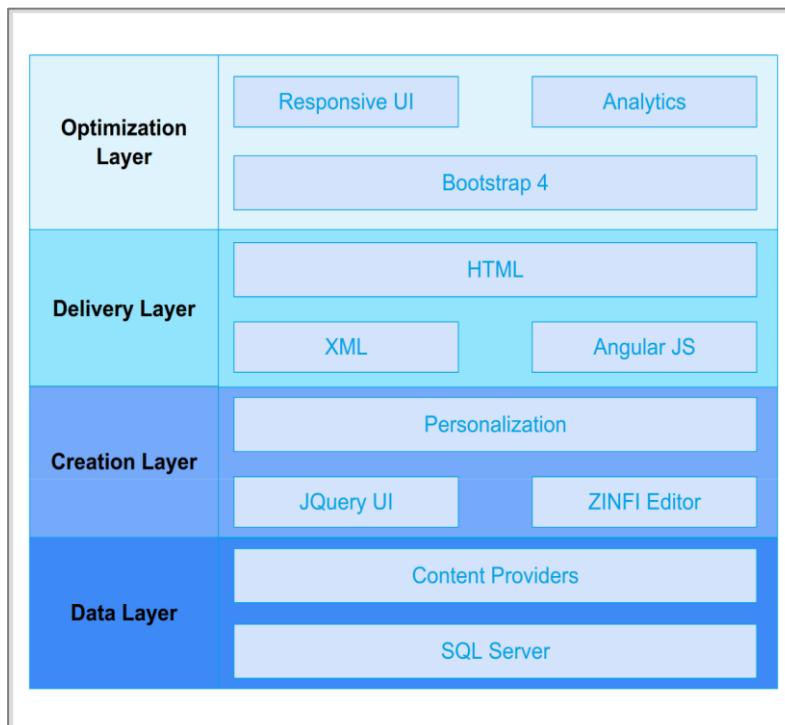
- Selecting the **German language** from this page and then clicking on the **Apply** button will update the language in which the quick links are presented.



Modular Architecture

ZINFI 'Content Management System' operates on a modular architecture that is very simple, yet powerful. This software offers users the opportunity to extend their website's capabilities as well as the tools they need to accomplish it.

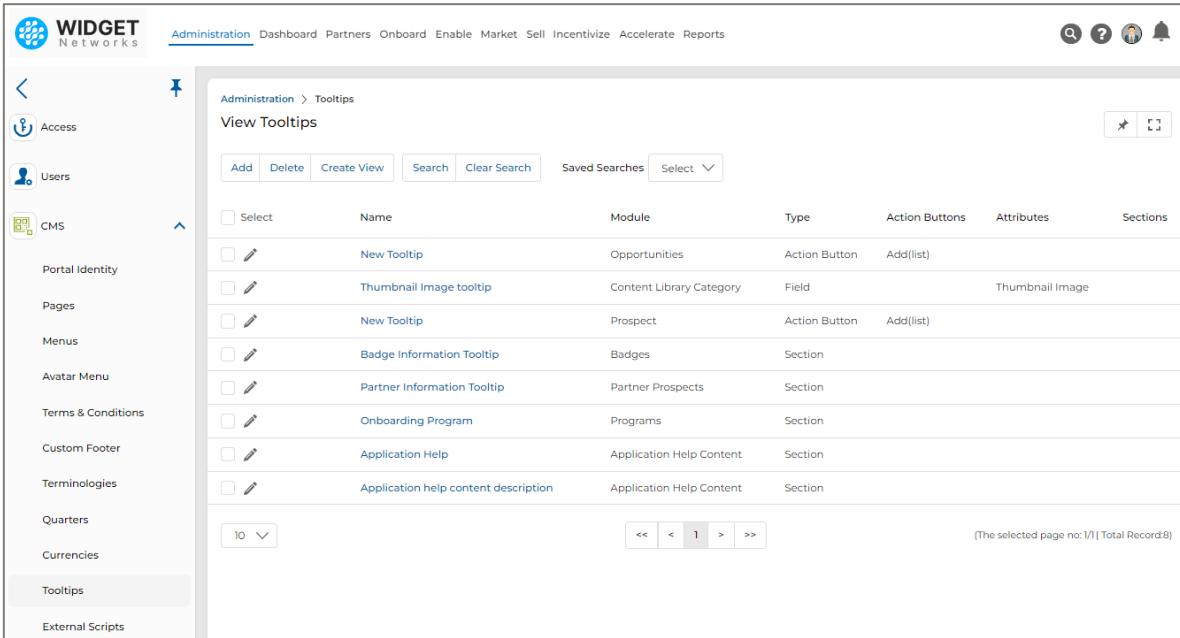
The modular architecture is valuable because it scales well with your needs and adjustments. If your brand has gained broader awareness and needs to be fueled by richer customization—including multimedia and other features—the modular architecture of 'CMS' gives you the flexibility to make that happen.



Tooltip

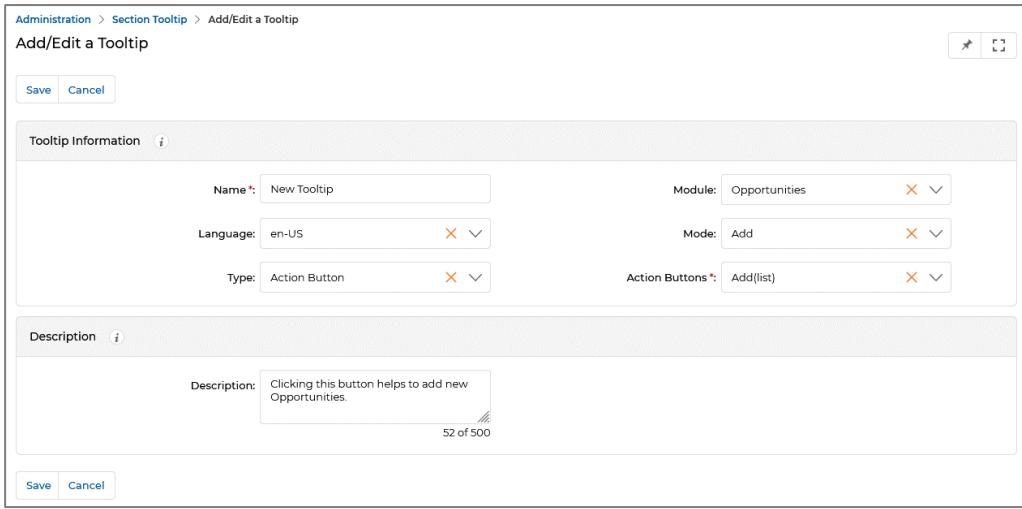
Tooltips are blocks of text that appear when hovering over certain elements of a page. UPM extends the usability of Tooltips with the integration of tooltips for All Action Buttons. Custom tooltips can now be defined as an Action Button and can be utilized as a useful tool for expanding abbreviations that a general reader may not be familiar with.

1. Click on **Administration** on the top menu.
2. Click on **CMS > Tooltips** from the left menu bar to reach the **View Tooltips** page.



Select	Name	Module	Type	Action Buttons	Attributes	Sections
<input type="checkbox"/>	New Tooltip	Opportunities	Action Button	Add(list)		
<input type="checkbox"/>	Thumbnail Image tooltip	Content Library Category	Field		Thumbnail Image	
<input type="checkbox"/>	New Tooltip	Prospect	Action Button	Add(list)		
<input type="checkbox"/>	Badge Information Tooltip	Badges	Section			
<input type="checkbox"/>	Partner Information Tooltip	Partner Prospects	Section			
<input type="checkbox"/>	Onboarding Program	Programs	Section			
<input type="checkbox"/>	Application Help	Application Help Content	Section			
<input type="checkbox"/>	Application help content description	Application Help Content	Section			

3. Click on the **Add** button on the **View Tooltips** page to create a new **Action Button** tooltip.



Administration > Section Tooltip > Add/Edit a Tooltip

Add/Edit a Tooltip

Tooltip Information

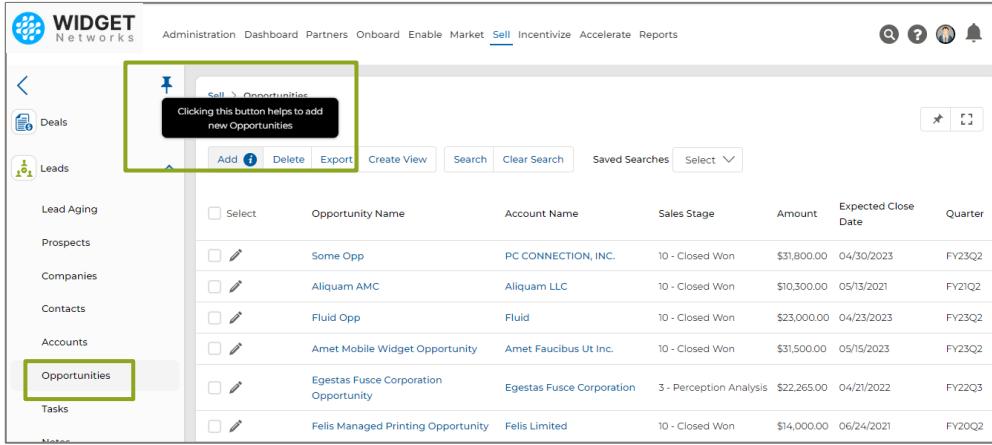
Name: <input type="text" value="New Tooltip"/>	Module: <input type="text" value="Opportunities"/>
Language: <input type="text" value="en-US"/>	Mode: <input type="text" value="Add"/>
Type: <input type="text" value="Action Button"/>	Action Buttons: <input type="text" value="Add(list)"/>

Description

Description: Clicking this button helps to add new Opportunities.

4. Click on **Save** when done.

5. Once we visit the **View Opportunities** page in the Sales module and hover the mouse pointer over the Tooltip icon associated with the Add button, we find the Tooltip Description pops up.

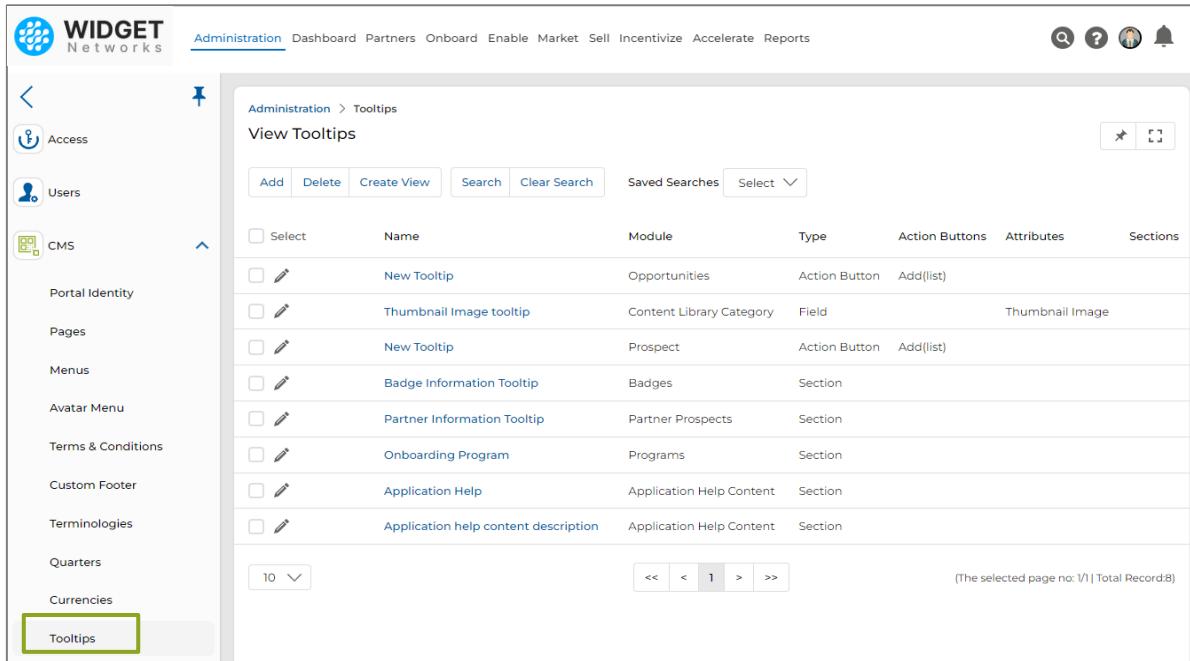


Select	Opportunity Name	Account Name	Sales Stage	Amount	Expected Close Date	Quarter
<input type="checkbox"/>	Some Opp	PC CONNECTION, INC.	10 - Closed Won	\$31,800.00	04/30/2023	FY23Q2
<input type="checkbox"/>	Aliquam AMC	Aliquam LLC	10 - Closed Won	\$10,300.00	05/13/2021	FY21Q2
<input type="checkbox"/>	Fluid Opp	Fluid	10 - Closed Won	\$23,000.00	04/23/2023	FY23Q2
<input type="checkbox"/>	Amet Mobile Widget Opportunity	Amet Faucibus Ut Inc.	10 - Closed Won	\$31,500.00	05/15/2023	FY23Q2
<input type="checkbox"/>	Egestas Fusce Corporation Opportunity	Egestas Fusce Corporation	3 - Perception Analysis	\$22,265.00	04/21/2022	FY22Q3
<input type="checkbox"/>	Felis Managed Printing Opportunity	Felis Limited	10 - Closed Won	\$14,000.00	06/24/2021	FY20Q2

Create Tooltips for Filters Pane

Tooltips are blocks of text that appear when hovering over certain page elements. UPM 24.2 extends the usability of Tooltips in Filter Pane. Custom Tooltips can now be defined for various Filter Pane attributes to clarify the usage and functionality of the attribute(s).

- Click on **Administration** on the top menu.
- Click on **CMS > Tooltips** from the left menu bar to reach the **View Tooltips** page.



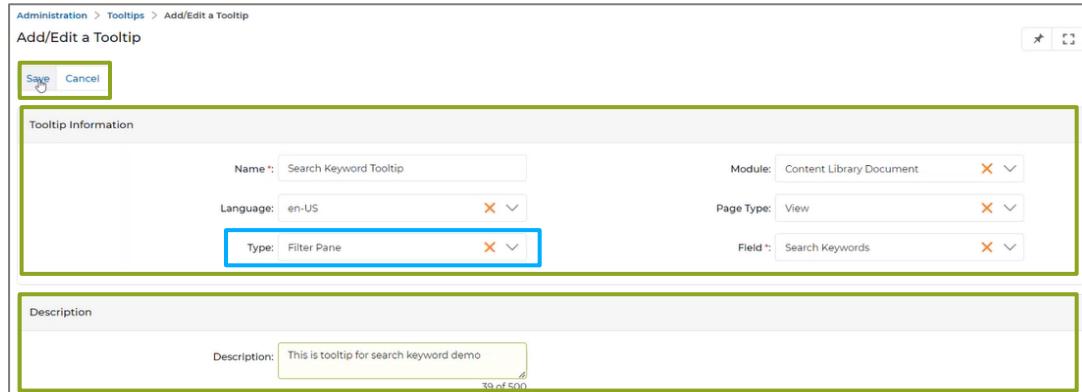
Select	Name	Module	Type	Action Buttons	Attributes	Sections
<input type="checkbox"/>	New Tooltip	Opportunities	Action Button	Add(list)		
<input type="checkbox"/>	Thumbnail Image tooltip	Content Library Category	Field		Thumbnail Image	
<input type="checkbox"/>	New Tooltip	Prospect	Action Button	Add(list)		
<input type="checkbox"/>	Badge Information Tooltip	Badges	Section			
<input type="checkbox"/>	Partner Information Tooltip	Partner Prospects	Section			
<input type="checkbox"/>	Onboarding Program	Programs	Section			
<input type="checkbox"/>	Application Help	Application Help Content	Section			
<input type="checkbox"/>	Application help content description	Application Help Content	Section			

- Click the **Add** button on the **View Tooltips** page to create a new Tooltip for Filter Pane.

View Tooltips			
<input type="checkbox"/> Select	Name	Module	Section/Attribute
<input type="checkbox"/> 	Badge Information Tooltip	Badges	Badge_Management_obj Information
<input type="checkbox"/> 	Partner Information Tooltip	Partner Prospects	Partner Information
<input type="checkbox"/> 	Onboarding Program	Programs	Program Details
<input type="checkbox"/> 	Application Help	Application Help Content	Application Help Content Information
<input type="checkbox"/> 	Application help content description	Application Help Content	Description

- Once you are on the Add or Edit page, here are the available fields:

- Tooltip Information:**



Administration > Tooltips > Add/Edit a Tooltip

Add/Edit a Tooltip

Save Cancel

Tooltip Information

Name: Search Keyword Tooltip

Module: Content Library Document

Language: en-US

Page Type: View

Type: Filter Pane

Field: Search Keywords

Description

Description: This is tooltip for search keyword demo

- Name:** The name of this tooltip.
- Module:** What module will this tooltip appear in?
- Language:** What language is this tooltip written in, and what language should this appear in based on the user's UI language?
- Page Type:**
 - Both:** Both the options below
 - Add:** The tooltip should appear with the option to Add a record in this section.
 - View:** The tooltip should appear with the option to View a record in this section.
- Type:**
 - Section:** Attach this tooltip to a section.
 - Field:** Attach this tooltip to a field.
 - Header:** Attach this tooltip to a header.
 - Filter Pane:** Attach the tooltip to a Filter pane. (In this example, we're adding a Tooltip in the Search Keywords field in the Filter pane in the listing page of Content Library.)

ii. Description:

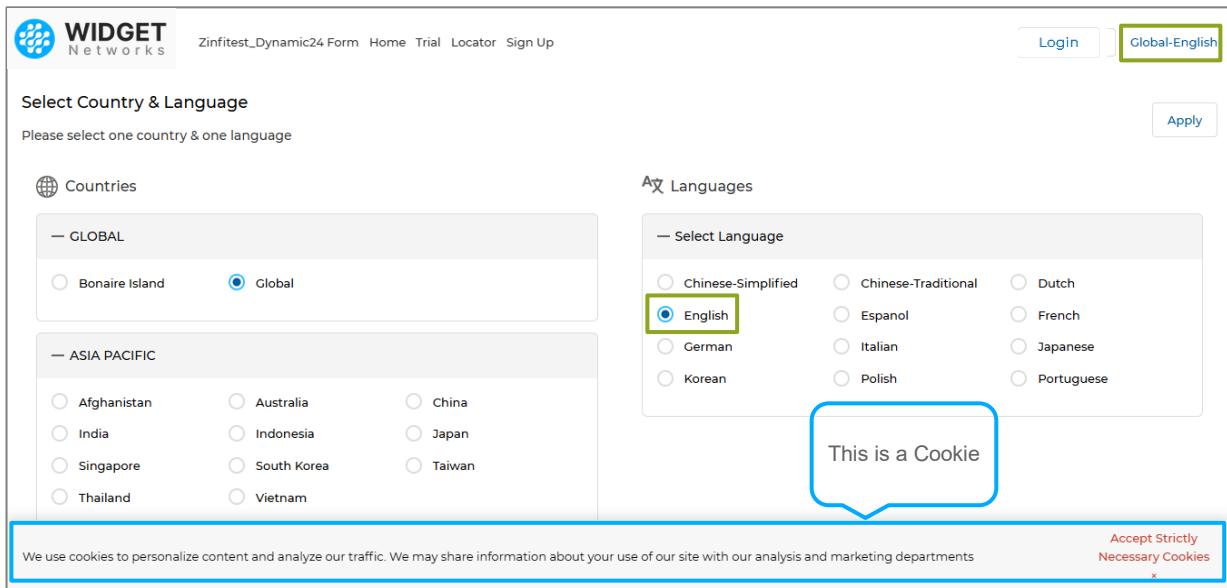
Description: This is where you put in the content of what you want the tooltip to say.

- Click on **Save** when done.
- Once we visit the **View Opportunities** page, open the Filter Pane in the Sales module, and hover the mouse pointer over the Tooltip icon associated with the Add button, we find the Tooltip Description pops up.

Make Cookie Message Translatable

Cookie policies can be complex, especially for users who are not fluent in the language the website primarily presents. Cookie messages are translatable. Translating the cookie message into multiple languages helps ensure that users understand the purpose of cookies, their rights regarding data privacy, and how their information will be used. A translated cookie message helps ensure legal compliance, improves user understanding and experience, increases consent rates, expands global reach, fosters trust, and enhances brand reputation.

- The cookie message displayed at the bottom of the UPM portal is multilingual-ready and automatically updated as per the Language selected by the User on the **Select Country & Language** page.
- In the image below, the cookie message is displayed in English since the User has selected English as the language.



The screenshot shows the 'Select Country & Language' page for the 'Zinfitest_Dynamic24 Form' on the 'Widget Networks' website. The 'Languages' section is highlighted with a green border. The 'English' radio button is selected. A blue speech bubble tooltip is overlaid on the page, containing the text 'This is a Cookie'.

Select Country & Language
 Please select one country & one language

Countries

- GLOBAL**
 - Bonaire Island
 - Global
- ASIA PACIFIC**
 - Afghanistan
 - Australia
 - China
 - India
 - Indonesia
 - Japan
 - Singapore
 - South Korea
 - Taiwan
 - Thailand
 - Vietnam

Languages

Select Language

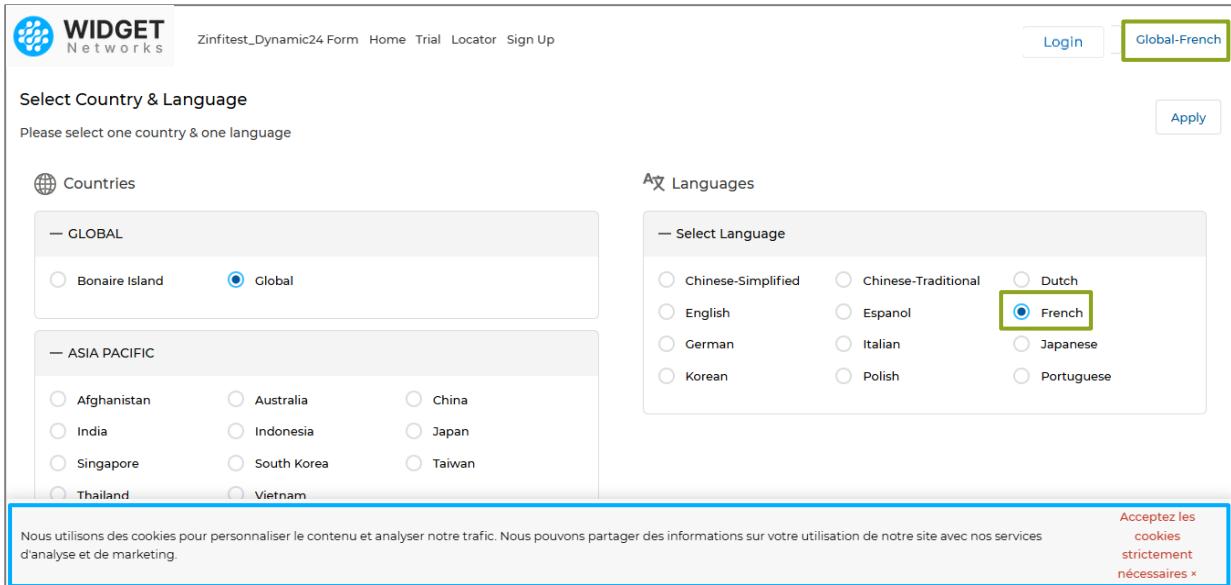
- Chinese-Simplified
- Chinese-Traditional
- Dutch
- English
- Espanol
- French
- German
- Italian
- Japanese
- Korean
- Polish
- Portuguese

This is a Cookie

We use cookies to personalize content and analyze our traffic. We may share information about your use of our site with our analysis and marketing departments

Accept Strictly Necessary Cookies

- If the User changes the language to any other language from English, e.g., French, the cookie display message will also be auto-translated to French.



Widget Networks Zinfitest_Dynamic24 Form Home Trial Locator Sign Up Login Global-French

Select Country & Language

Please select one country & one language

Apply

Countries

— GLOBAL

Bonaire Island Global

— ASIA PACIFIC

Afghanistan Australia China
 India Indonesia Japan
 Singapore South Korea Taiwan
 Thailand Vietnam

Languages

— Select Language

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

Nous utilisons des cookies pour personnaliser le contenu et analyser notre trafic. Nous pouvons partager des informations sur votre utilisation de notre site avec nos services d'analyse et de marketing.

Acceptez les cookies strictement nécessaires x