

Identity and Access Management

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UPM 25.x

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Overview

ZINFI's UPM platform is used by many different user groups that execute the channel management processes of individual organizations. UPM includes a variety of Access tools that are provided to manage access by sales, customer service, and marketing departments to create, modify, update, and remove records in the UPM database.

The accuracy of UPM data is a key driver for integrating Access solutions across the UPM system. Our UPM solution enables a tiered, delegated administration model, whereby customers have access to self-service workflows for registering, creating new identities, inviting partners/users, and authorizing partners/users.

Managing the complexities of security administration is another primary concern of the UPM platform. The foundation of the platform's security management is a role-based access control model. ZINFI UPM provides a set of security features that define permissions for access to the data as well as to the features and Applications of UPM.

Role-based security ensures that data is accessible to users based on organizational hierarchy. Profiles are created to ensure that users have permission to access only the features, Applications, and data administration tools that are relevant to them. The establishment of groups allows organizations to extend data-level access to other users with similar job profiles.

Acronyms

CMM Channel Marketing Manager

The primary channel marketing lead for portal and campaign content management and necessary Application setup for CPA, CP, NCP, etc.

CPA Channel Partner Administrator

The primary administrator from the partner organization is in charge of managing user access, lead distribution, incentives management, etc.

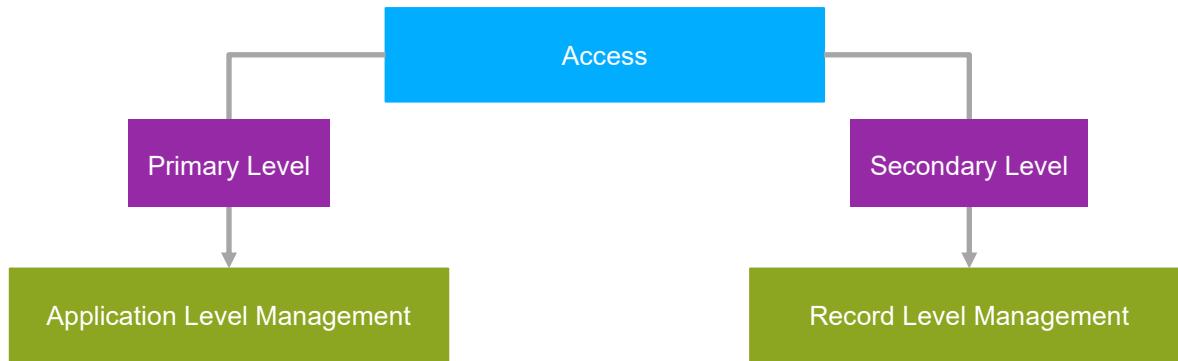
CP Channel Partner

A user from a partner organization with appropriate access rights for various Applications, which have been set by CMM and CPA.

PMC Partner Marketing Concierge

Engages and supports partners in various activities including running campaigns, partner support, etc.

Base Architecture



UPM's Access features can be used to control user access to transactions (such as converting an opportunity) and activities related to an object type (such as creating or deleting a product). UPM also provides a framework for controlling **User** access to individual business objects, and for controlling the use of those business objects with respect to **Profiles** and **Groups**.

User: A user is an individual who manages records within the organization.

Profiles: Profiles in UPM determine which users can access Applications as well as which operations the users can perform within those Applications. When configuring profile settings in UPM, an administrator may choose to enforce restrictions for entire Applications or selected fields on the records in an Application, as explained in the following sections. To fully leverage UPM's security model, both permission types can be used together for a given role and be effectively used by your organization.

Groups: Groups are collections of users. These are used to simplify management; a change in the access rights assigned to a group is automatically applied to all users in that group.

The access control engine in ZINFI's UPM is an authorization concept that exists at two levels of abstraction:

With **Application-level permissions (governed by profile)**, administrators can create different profiles and assign regular users to the profiles. UPM adheres to the most restrictive policy to determine the user's appropriate access levels. Profiles control multiple layers of actions pertaining to Applications and access for users/groups within the UPM:

With **record-level permissions (governed by group)**, UPM's Record Visibility configurator intelligently assists administrators in setting up and restricting access at the record level. Layouts of pages can be effectively configured via UPM's state-of-the-art Workflow configuration tool to designate the fields (of a record) to be accessible by a user in an application:

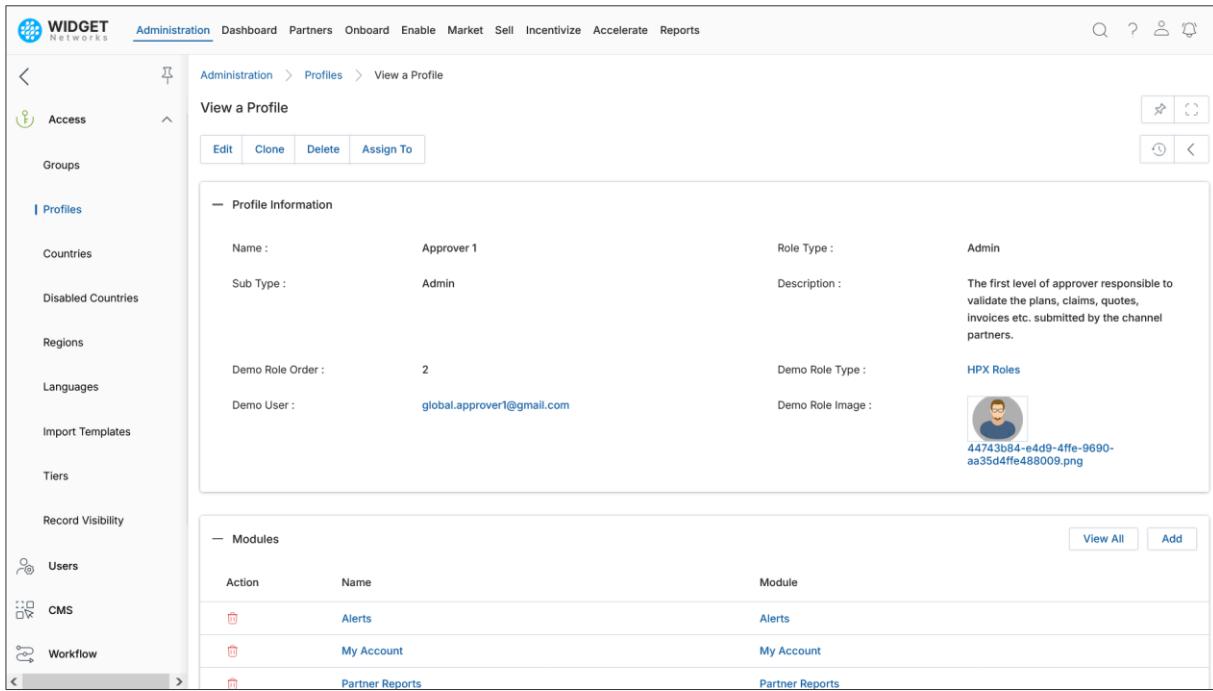
Application-Level Management

Application-level management defines which users see which business Applications/objects and forms the initial level of Access. Application-level management allows you to easily control access to individual Applications by specific users (Refer Fig. 2). You can allow your partners to manage access to Applications like prospects, contacts, accounts, MDF, companies, etc., while at the same time, you remain in control of the finer levels of information with access to reports.

Application-level management is driven by the following parameter(s):

Parameter(s)	Description	Additional Comments
Application(s)	Identifies which Applications the profile will be associated with. (Ref. Fig. 1)	Applications (courses, opportunities, content library, etc.) can be added to the specific profile with the respective Application display name.

Application Level



The screenshot shows the ZINFO application-level management interface. The left sidebar includes sections for Access, Groups, Profiles, Countries, Disabled Countries, Regions, Languages, Import Templates, Tiers, Record Visibility, Users, CMS, and Workflow. The main content area is titled 'View a Profile' and shows 'Profile Information' with fields for Name (Approver 1), Role Type (Admin), Sub Type (Admin), Description (The first level of approver responsible to validate the plans, claims, quotes, invoices etc. submitted by the channel partners.), Demo Role Order (2), Demo Role Type (HPX Roles), Demo User (global.approver1@gmail.com), and Demo Role Image (a placeholder image with a unique ID: 44743b84-e4d9-4ffe-9690-aa35d4ffe488009.png). Below this is a 'Modules' section with a table:

Action	Name	Module
Alerts	Alerts	Alerts
My Account	My Account	My Account
Partner Reports	Partner Reports	Partner Reports

Figure 1: Add Applications to Profile Access

Administration > Profiles > View a Profile

View a Profile

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

[Star](#) [Copy](#)

[Edit](#) [Back](#)

— Profile Information

Name :	Approver 1	Role Type :	Admin
Sub Type :	Admin	Description :	The first level of approver responsible to validate the plans, claims, quotes, invoices etc. submitted by the channel partners.
Demo Role Order :	2	Demo Role Type :	HPX Roles
Demo User :	global.approver1@gmail.com	Demo Role Image :	 44743b84-e4d9-4ffe-9690-aa35d4ffe488009.png

Figure 2: Selection of Role Type for a specific Application

Administration > Profiles > View a Profile > View Profile Module

View Profile Module

[Star](#) [Copy](#)

[Edit](#) [Add](#)

— Profile Module

Module ID :	Alerts	Profile ID :	Approver 1
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— Module Shortcuts

Action	Shortcut	Add
	View Alerts	Add

Figure 3: Adding Application Shortcuts 1

Application-level access is the most restrictive of all access levels and shortcuts can be created to be displayed in UPM's left menu bar (refer to Fig. 3). It provides read-only or read-write permission to users for each Application residing in the application, as depicted in *Figure 4*.

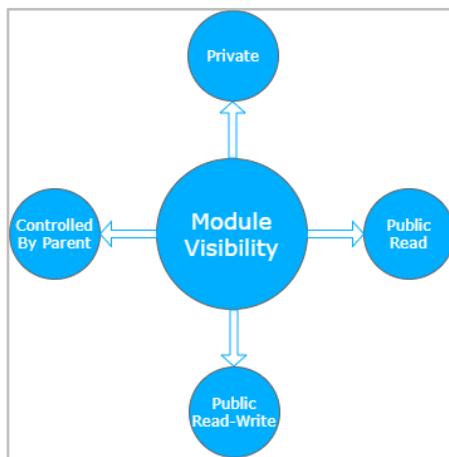


Figure 4: Application-Level Permissions

Private

This is the default level of access given to each Application. With the access level set to **Private**, a user can perform the following actions:

- View (read) his/her record.
- Modify (write) his/her record.
- Delete his/her record.

Note: Throughout the application, for all access levels, records can only be deleted by that record's owner—i.e., the user who has created the record.

If any Application has this privilege and there is no rule for that Application or no manual sharing assigned with the user/group, then only those record(s) that are created by that user him/herself will be visible to that user. Beyond this, Group Specific Rule and Sharing Rule can also be applied for that Application.

Public Read

With the access level set to **Public Read**, all records are made visible to all users only in read-only mode. Hence, a user can perform the following actions:

- Can view any user's created record.
- Cannot edit other user's records, since they would be available in read-only mode.

Note: Records can be modified only by setting a custom rule and/or manual sharing.

Public Read-Write

With the access level set to **Public Read-Write**, all records are made visible to all users in read-write mode. Hence, a user can perform the following actions:

- Can **view** any user's created record.
- Can **edit** any user's created record.

Note: In the hierarchical image depicted, Application Visibility is at the bottom of the hierarchy. Therefore, if there is Public Read-Write permission for any Application, then there is no need to set up any rule for that Application.

Controlled By Parent

With the access level set to **Controlled By Parent**, the access properties of the parent Application are applied to the child (target) Application. That means if the parent Application has **Public Read** access, then for a specific parent record, all the child records would be viewable by all users.

To make this clearer, let's consider the Application **Notes**. When the Notes Application is attached to the Prospect Application (having Public Read permission), all users would be able to view every note attached by multiple users against a specific prospect.

Record-Level Management

In UPM, different types of groups (sets of users) can be created to manage a set of common records. Users associated with a specific group can access the records shared with a particular group and perform any necessary operations on those records.

In UPM, Record Visibility is typically used to control which groups of users can access a record (see Figure 7). However, using record-level, group-based permissions, an administrator may choose to extend the purpose of groups to control who can perform certain operations on a record. When enabled, regular users can control a record's visibility to grant access such as viewing, editing, exporting, importing, and deleting permission to specific users or user groups through the following:

- Group Specific Rule
- Sharing Rule
- Manual Sharing

Group-Specific Rule

The specific Rule (see Figure 5) is a vertical approach that provides read-only or read-write permission to groups bound by this rule. Users belonging to those groups gain access to the group's assigned permission.

The rule is categorized into three types:

- Group Hierarchy
- Group Based

- Admin Visibility

Note: After the assignment of this rule to a group, the **Primary** group of users belonging to that group will be affected. Users under **Additional Group** will not be affected.

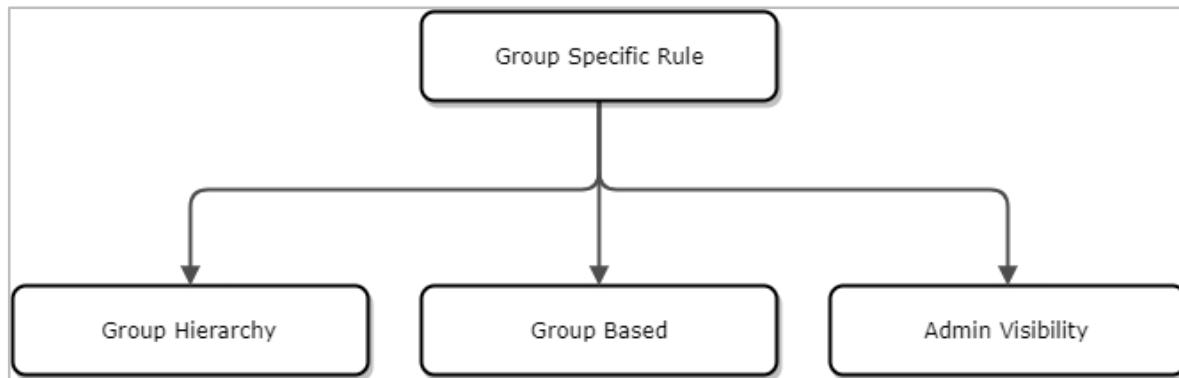


Figure 5: Group Specific Rule Categorization

Group Hierarchy

Group Hierarchy enables the record visibility of a specific group to its immediate members vertically in the hierarchy chain in read-write mode.

For example, in Figure 6 below, let's say we have enabled **Group Hierarchy** initiating from group CMM for group **PMC** for the Application **Contacts**. Considering the hierarchical order of groups (in the same vertical hierarchy chain) wherein CP reports to CPA, and CPA reports to PMC, users of group PMC will be able to view user records under groups CPA and CP in read-write mode. Similarly, CPA will be able to view user records under group CP in read-write mode but will not be able to view records under group CPA.

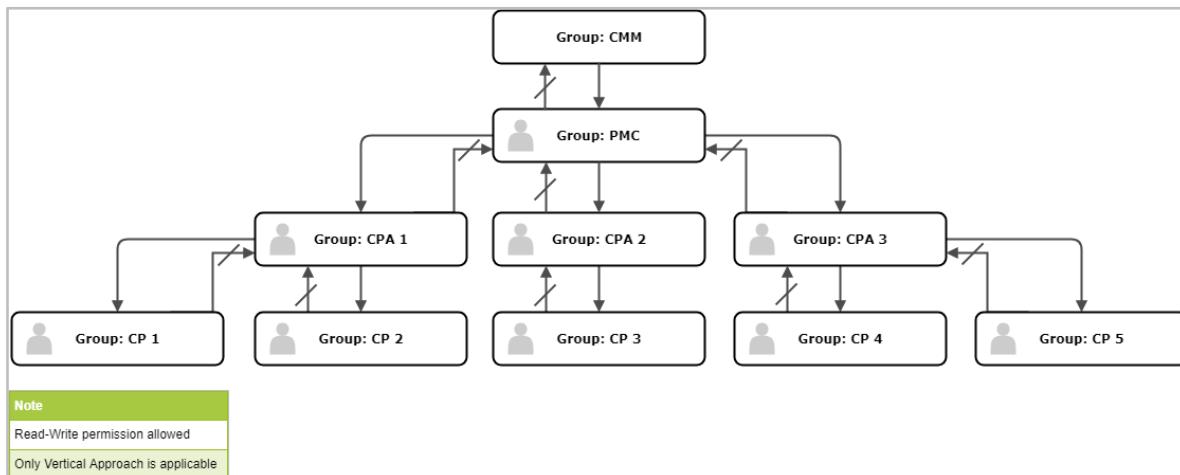


Figure 6: An Example of Group Hierarchy

Group Based

Group-based rules enable record visibility for a group's own members when enabled against a specific group in read-only mode. A user's own records would have read-write permission only.

For example, let's say we have enabled **Group Based** in the Application **Documents** for group **CP**. In that case, the logged-in user (if he/she is a member of the CP group) can access the records created by others who are associated with the CP group in read-only mode.

Admin Visibility

Admin Visibility refers to the highest authority given to any group under Group Specific Rule. This approach is implemented at both the Application level and the group level. If any group has this privilege, then the users under this group can access all the records of that Application with read-write permission.

For example, if we enable **Admin Visibility** in the Application **Accounts** for group **CMM**, then all the members of group CMM can access all the records of the Application Accounts with read-write privilege.

Sharing Rule

Sharing Rule is a horizontal approach to Record Visibility Management which enables sharing of records to different groups, either by group name or by criteria. The sharing Rule is applied at the Application level.

There are two types of Sharing Rules:

- Group Based assignment.
- Criteria-based Based assignment.

Group Based Assignment

This feature (see Figure 9) is used to create a rule to assign all records of a group to another group, either in read-only or read-write mode for a specific Application. Assigning records to multiple groups can be done by creating multiple rules for that Application.

Criteria Based Assignment

This feature (see Figure 10) is used to share records of any group to a specific group for a specific Application, based on one or more criteria, either in read-only or read-write mode. The criteria are applied to specific fields of that Application. Records can be assigned to multiple groups by creating multiple rules for that Application.

Record Level - List of Figures

View Record Visibility

Back / View Record Visibility  

Edit Sharing Rule Group Specific Rule

— Record Visibility Information

Module Name: Onboarding Default Access:

Enable User Hierarchy: No

Add/Edit Sharing Rule: Onboarding

Back / Add/Edit Sharing Rule: Onboarding  

Step 1: Rule Name

Rule Name: Description:

Step 2: Select Your Rule Type

Rule Type: Based on group Based on criteria

Step 3: Select Records To Be Shared by Group

Share From (Group): Select | Clear

Step 4: Select Users To Share With by Group

Share With (Group): Select | Clear Access Mode:

Save | Cancel

Add/Edit Sharing Rule: Onboarding

Back / Add/Edit Sharing Rule: Onboarding  

Step 1: Rule Name

Rule Name: Description:

Step 2: Select Your Rule Type

Rule Type: Based on group Based on criteria

Step 3: Select Records To Be Shared by Group

Rule Type:

Fields	Operator	Value	Action
<input type="text"/>	equals	<input type="text"/>	AND <input type="button" value="Remove"/>
<input type="button" value="Add Row"/>			

Step 4: Select Users To Share With by Group

Share With (Group): Select | Clear Access Mode:

Save | Cancel

Figure 7: Group Specific Rule

Manage Group Specific Rules: Onboarding			
Group Name	Group Hierarchy	Group Based	Admin Visibility
ApprovalFlow	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Channel Marketing Manager 3SX (PMM)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Business Plan TestGroup	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Partner - Platinum	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Channel Partner 3SX (PMM)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Partner Marketing Concierge	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BD Team	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Channel Partner Administrator	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
New Channel Partner	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Figure 8: Sharing Rule - Group Base

Manual Sharing

Manual Sharing is the broadest access provided in the hierarchical structure of Record Visibility Management. Manual sharing provides additional access beyond the organization-wide defaults and sharing rules.

Manual Sharing is applied at the record level. With this approach, we can assign any record to any user or group with read-only or read-write permission.

How Do I Apply Manual Sharing?

To apply Manual Sharing, go to the **details page** of a record, and then click on **Assign To**. The options for manual sharing will appear and then you can select the necessary criteria to achieve the level of sharing required.

Applications for Which Record Visibility Can Be Implemented

Record Visibility is implemented for the following zones and Applications:

- Sales:** Prospects, Contacts, Accounts, Opportunities, Assets, Tasks, Notes, Documents
- Marketing:** Products, Campaigns, Assets, Emails, Web Syndication
- Profile:** Partner Prospects, Partner Contacts, Partner Accounts, User Management
- CMS** Application for the top menu

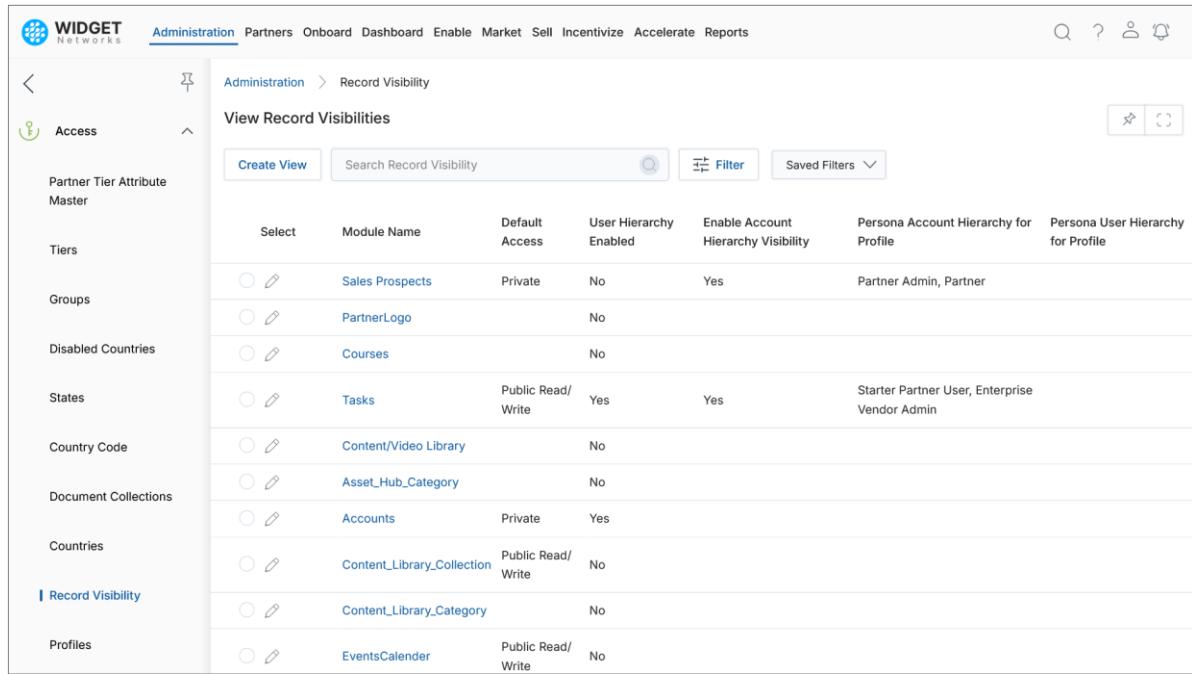
Application-Level Activity

Application Name	Default Access	User Hierarchy	Sharing Rule	Group Hierarchy	Group Based	Admin Visibility	Manual Sharing
Accounts	✓	✓	✓	✓	✓	✓	✓
Asset Management	✓	✓	✓	✓	✓	✓	✓
Business Plan	✗	✗	✗	✗	✗	✓	✗

Campaign Management	✓	✓	✓	✓	✓	✓	✓
Contacts	✓	✓	✓	✓	✓	✓	✓
Contracts	✗	✗	✗	✗	✗	✓	✗
Documents	✓	✓	✓	✓	✓	✓	✗
Emails	✓	✓	✓	✓	✓	✓	✓
Engage	✓	✓	✓	✓	✓	✓	✗
Notes	✓	✓	✓	✓	✓	✓	✓
Opportunities	✓	✓	✓	✓	✓	✓	✓
Partner Accounts	✓	✓	✓	✓	✓	✓	✓
Partner Contacts	✓	✓	✓	✓	✓	✓	✓
Partner Prospects	✓	✓	✓	✓	✓	✓	✓
Products	✓	✓	✓	✓	✓	✓	✓
Prospects	✓	✓	✓	✓	✓	✓	✓
Syndication	✓	✓	✓	✓	✓	✓	✓
System Email	✗	✗	✗	✗	✗	✓	✗
Task Management	✓	✓	✓	✓	✓	✓	✓
Tier Management	✗	✗	✗	✗	✗	✓	✗
Training Management	✗	✗	✗	✗	✗	✓	✗
User Management	✓	✓	✓	✓	✓	✓	✗

Record Visibility

1. Click on **Administration** on the top menu.
2. Click on **Access > Record Visibility** from the left menu bar.

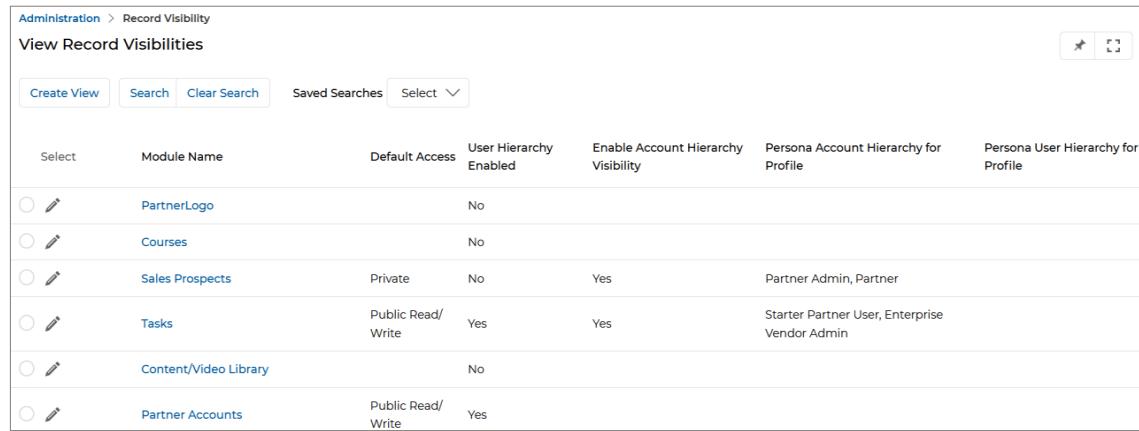


Module Name	Default Access	User Hierarchy Enabled	Enable Account Hierarchy Visibility	Persona Account Hierarchy for Profile	Persona User Hierarchy for Profile
Sales Prospects	Private	No	Yes	Partner Admin, Partner	
PartnerLogo		No			
Courses		No			
Tasks	Public Read/Write	Yes	Yes	Starter Partner User, Enterprise Vendor Admin	
Content/Video Library		No			
Asset_Hub_Category		No			
Accounts	Private	Yes			
Content_Library_Collection	Public Read/Write	No			
Content_Library_Category		No			
EventsCalender	Public Read/Write	No			

View Record Visibility

1. The top part of the page provides some actions:
 - a. **Create View** – This lets you create your view with a set of columns as needed.
 - b. **Search** – Opens a new pop-up window where you can put search criteria to find desired records.
 - c. **Clear Search** – Clears the search made.
 - d. **Saved Searches** – Shows a list of saved searches in the search dropdown. When selected, two more options are shown:
 - i. **Edit** – Provides the option to update the selected search name.
 - ii. **Delete** – Deletes the selected search name from the search drop-down.
2. For each record in the grid, if you click on:

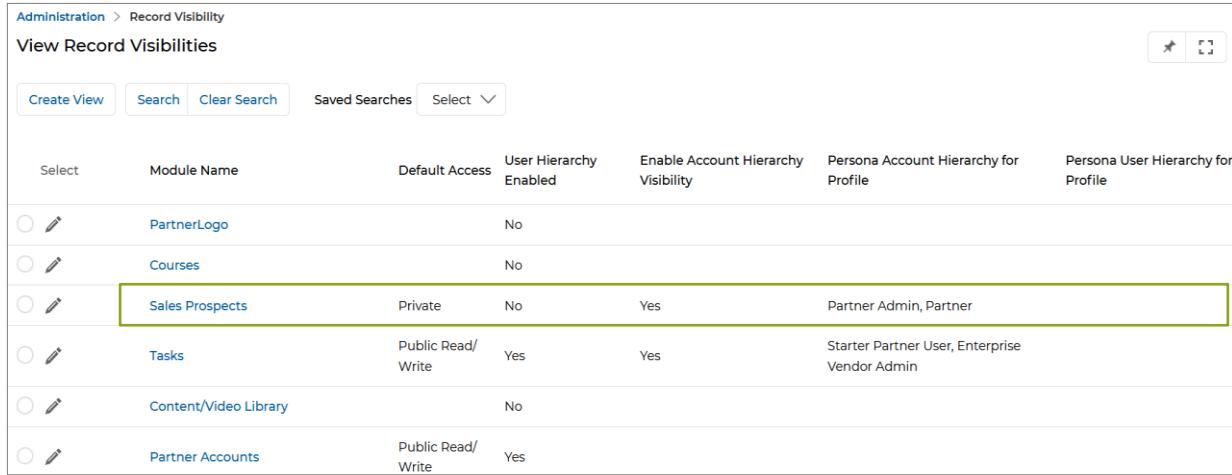
a. **Application Name** – Opens the Applications' details page.



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

View Record Visibility Details

1. Click on the **Name/Title** of any Records Visibility (in this example Sales Prospects) listing to see the details page.



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

2. Once in the details page, you will see various buttons and sections, such as:

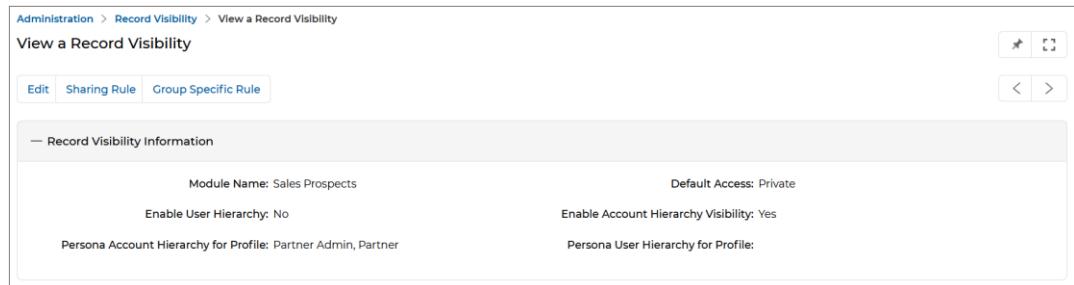
a. **Buttons:**

- Edit** – Open the page in Edit mode to update field values.
- Sharing Rule** – Rules shared with groups/users. Please refer to the “Applying Sharing Rule” section for more details.
- Group Specific Rule** – Click to Manage Group Specific Rules for the specific Application.

b. **Record Visibility Information:**

- Module Name** – Name of the Application.
- Default Access** – Type of access given to the rule. The available list of access types is Public Read/Write, Public Read, Controlled by Parent, and Private.

- iii. **Enable User Hierarchy** – Accessibility of the rule given to the user or not.
- iv. **Enable Account Hierarchy Visibility** - Select 'yes' to Enable Account Hierarchy Visibility for the Sales Prospects.
- v. **Persona Account Hierarchy for Profile** - Select the Profiles of the Parent Partner Account, which can view the records of the Child Partner Accounts.
- vi. **Persona User Hierarchy for Profile** - Select the Profiles of the Parent Partner Account, which can view the records of the Child Partner Accounts.

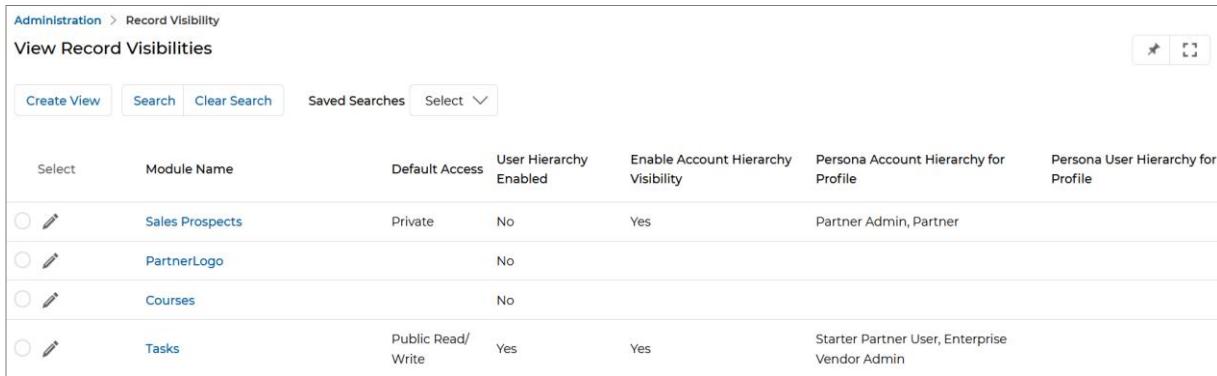


The screenshot shows the 'View a Record Visibility' page with the following details:

- Module Name: Sales Prospects
- Default Access: Private
- Enable User Hierarchy: No
- Enable Account Hierarchy Visibility: Yes
- Persona Account Hierarchy for Profile: Partner Admin, Partner
- Persona User Hierarchy for Profile: (empty)

Edit Record Visibility Details

1. To **Edit** an existing Record Visibility record (in this example Sales Prospects) – click on the small pencil icon on the View Record Visibility page.

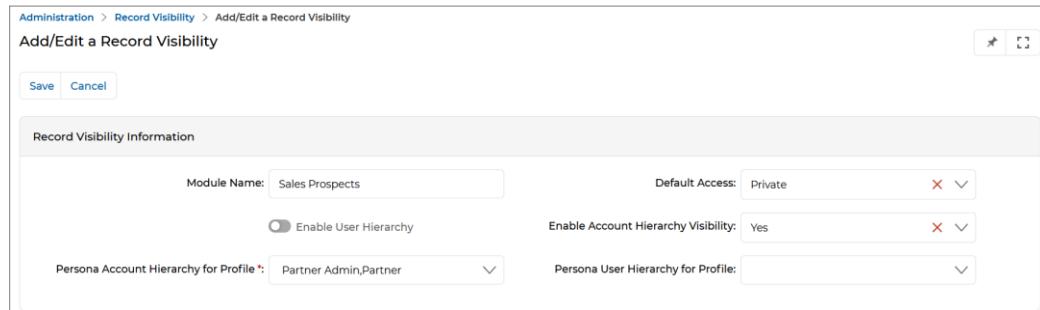


The screenshot shows the 'View Record Visibility' page with the following table of record visibility entries:

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

2. Once you are in the **Add/Edit a Record Visibility** page, you will see various buttons and sections such as:
 - Buttons:**
 - Save** – Saves the current page information.
 - Cancel** – Quits the page without saving the updated information.
 - Record Visibility Information:**
 - Module Name** – Name of the Application.

ii. **Default Access** – Type of access given to the rule. The available list of access types is Public Read/Write, Public Read, Controlled by Parent, and Private.



The screenshot shows the 'Add/Edit a Record Visibility' page. At the top, there are 'Save' and 'Cancel' buttons. Below that is a section titled 'Record Visibility Information' with the following fields:

- Module Name: Sales Prospects
- Default Access: Private
- Enable User Hierarchy: (unchecked)
- Enable Account Hierarchy Visibility: Yes
- Persona Account Hierarchy for Profile: Partner Admin, Partner
- Persona User Hierarchy for Profile: (dropdown menu open)

iii. **Enable User Hierarchy** – Accessibility of the rule given to the user or not.

iv. **Enable Account Hierarchy Visibility** - Select 'yes' to Enable Account Hierarchy Visibility for the Sales Prospects.

v. **Persona Account Hierarchy for Profile** - Select the Profiles of the Parent Partner Account, which can view the records of the Child Partner Accounts.

vi. **Persona User Hierarchy for Profile** - Select the Profiles of the Parent Partner Account, which can view the records of the Child Partner Accounts.

3. Once you are done, click **Save**.

Enable Account Level Visibility for an Entity

It is very convenient to set up and configure visibility for all records of a specific UPM Application using Workflow. Enable Account Level Visibility feature updated at Workflow offers a unique solution – once enabled for a UPM Application by the Admin, all Users/Partners mapped to the same Account will have visibility to all records of that Application, irrespective of the creator/adder of that record for that Application.

The Admin opens the Application in Development Mode at Workflow and accesses the Details section. If the Admin wants to grant permission to let all the Partners/Users mapped to the same Account and residing at the same access level - view records of that specific Entity/Application – irrespective of the Creator/Record Adder, he needs to enable the toggle key - Enable Account Level Visibility, respective to the Object/Entity ex.: Prospect. Enabling the toggle key will grant permission to all Users/Partners mapped to the specific Account to view all records – irrespective of the Creation Owner; and click Save. Disabling the toggle key will only allow the Admin and the Creator of the Record – Partner/User to view the record.

Therefore, Prospect records created by any Partner User/Contact mapped to the same Account will be visible to all Partner Users/Contacts mapped to that Account.

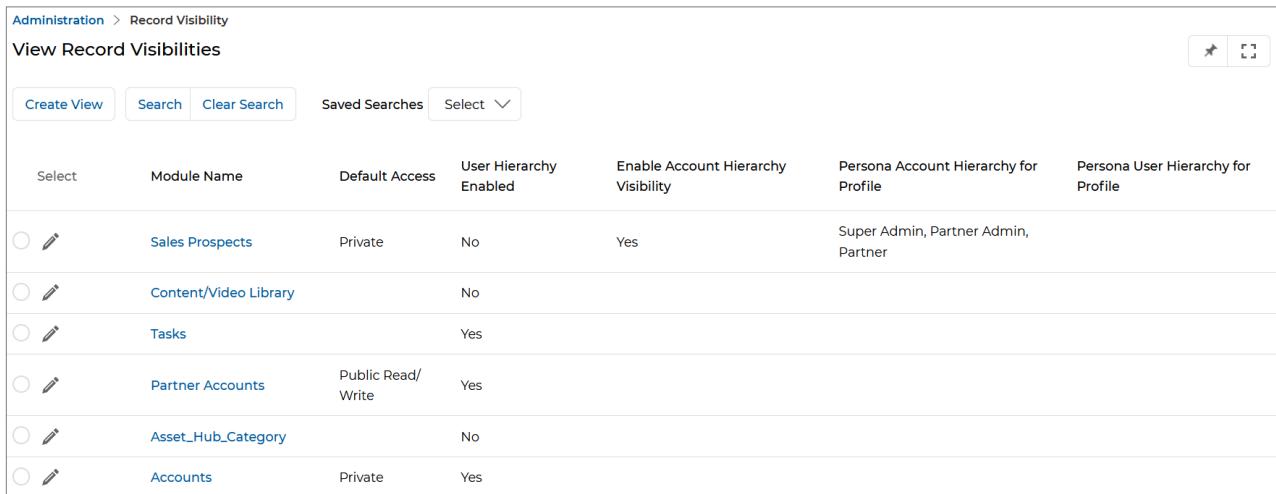
Record Visibility settings are enabled by default for every new application, allowing admins to immediately configure Visibility Setting Rules, such as hierarchy or group-specific access rules.

Whenever a new application is created, it will appear in the Record Visibility application, allowing admins to control settings such as:

- Default Access
- User Hierarchy settings
- Group-specific rules for record access

Administration > Record Visibility

View Record Visibilities

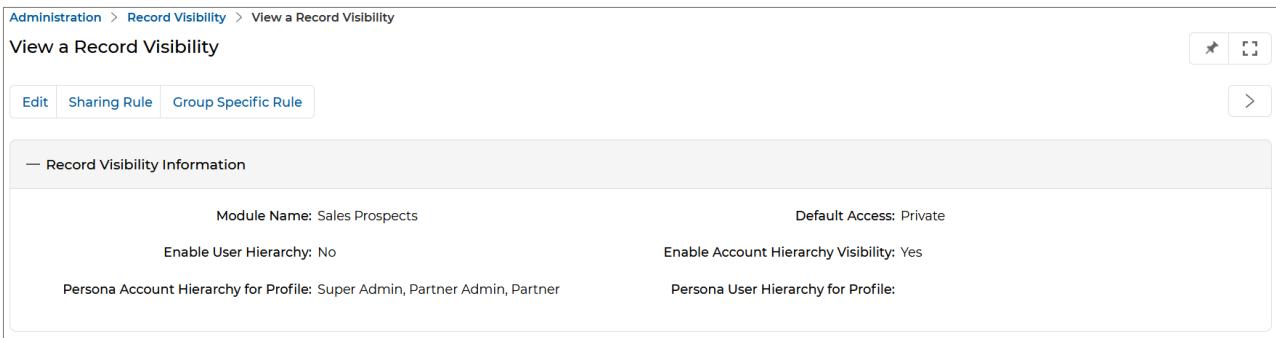


The table displays the following data:

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

Administration > Record Visibility > View a Record Visibility

View a Record Visibility



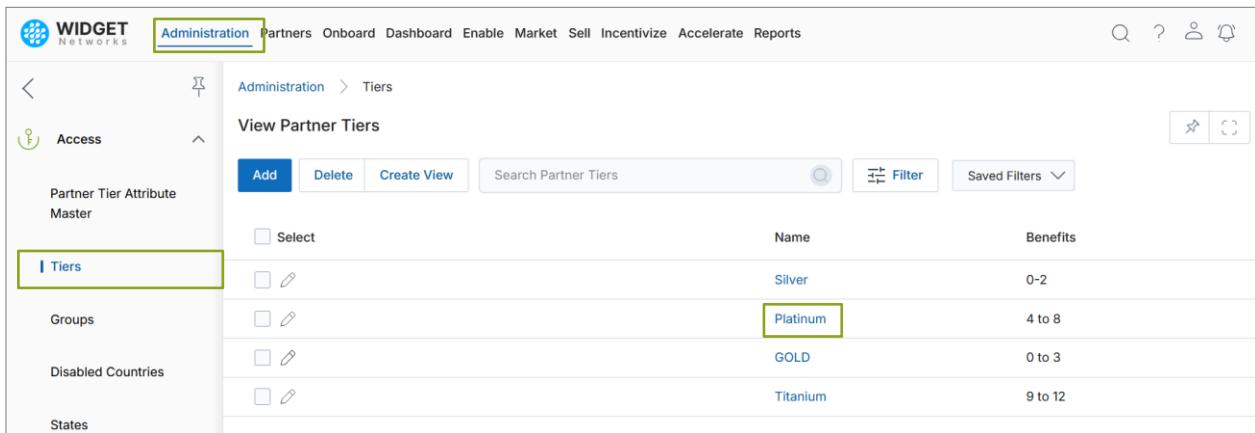
The page shows the following configuration for the Sales Prospects module:

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

Automatic Partner Tier Assignment Based on Partner Score

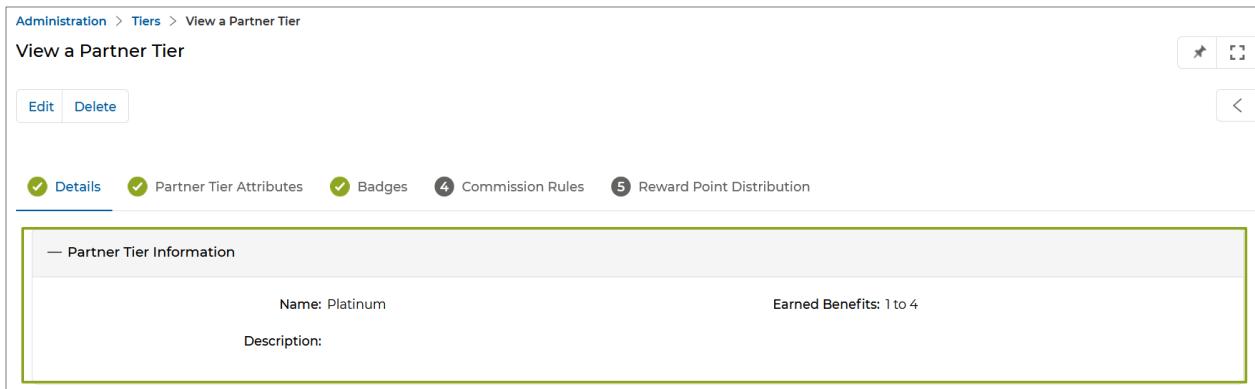
The Automatic Partner Tier Assignment feature streamlines partner management by assigning a partner tier to the Partner Account based on the partner's score. This functionality is configurable within the Partner Tier Attributes settings via Access Management, where administrators can define rules and conditions for tier assignments.

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



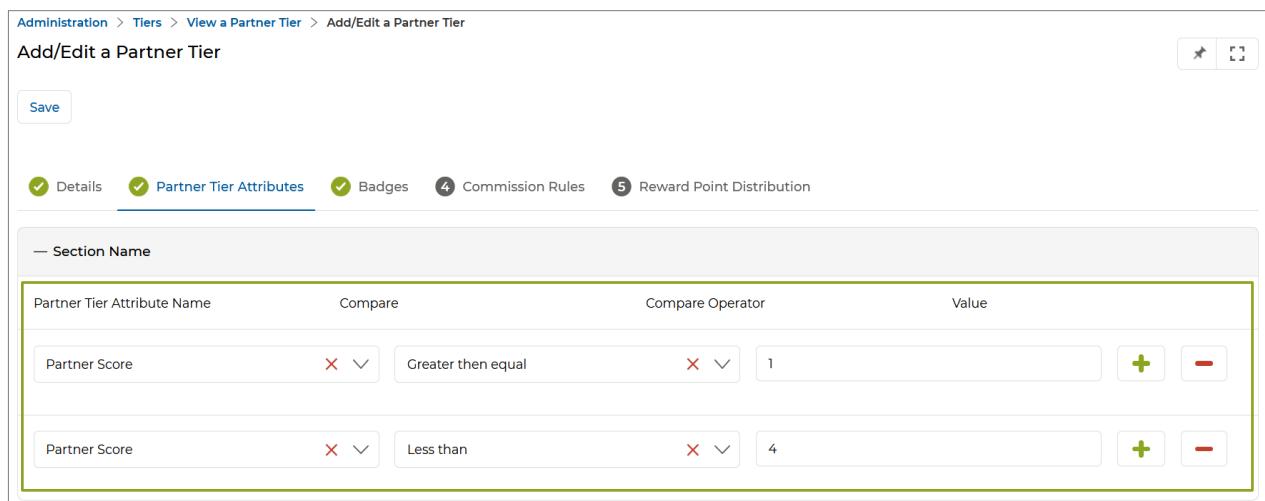
	Name	Benefits
<input type="checkbox"/>	Silver	0-2
<input type="checkbox"/>	Platinum	4 to 8
<input type="checkbox"/>	GOLD	0 to 3
<input type="checkbox"/>	Titanium	9 to 12

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



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

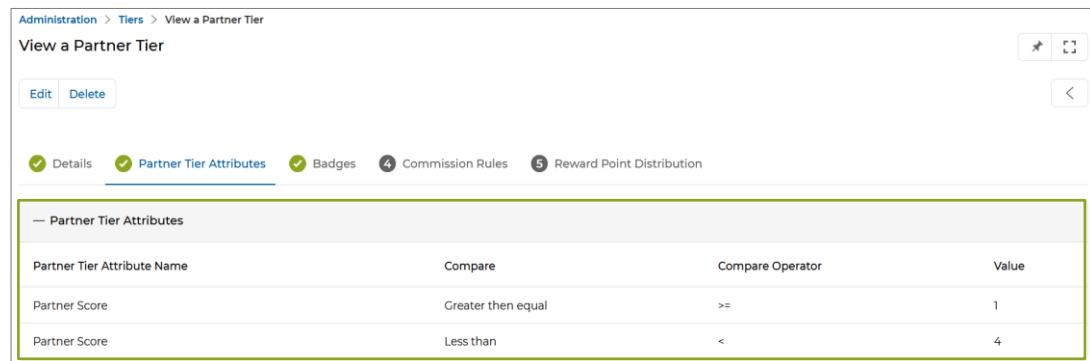
- The following Partner Tier Attributes are defined as –



Partner Tier Attribute Name	Compare	Compare Operator	Value
Partner Score	Greater then equal	1	+ -
Partner Score	Less than	4	+ -

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

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



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

- We navigate to **Partners > Partners > Partner Accounts** to reach the **View Partner Accounts** page, listing all Partner Accounts.

- We go to the **Add/Edit a Partner Account** page of a Partner Account and view the **Partner Score** and **Partner Tier**, which are not yet configured.

Partners > Partner Accounts > View a Partner Account

View a Partner Account

Edit Delete Clone Assign To Partner Account Locator Scorecard

— Partnership Information

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

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

Partners > Partner Accounts > View a Partner Account

View a Partner Account

Edit Delete Clone Assign To Partner Account Locator Scorecard

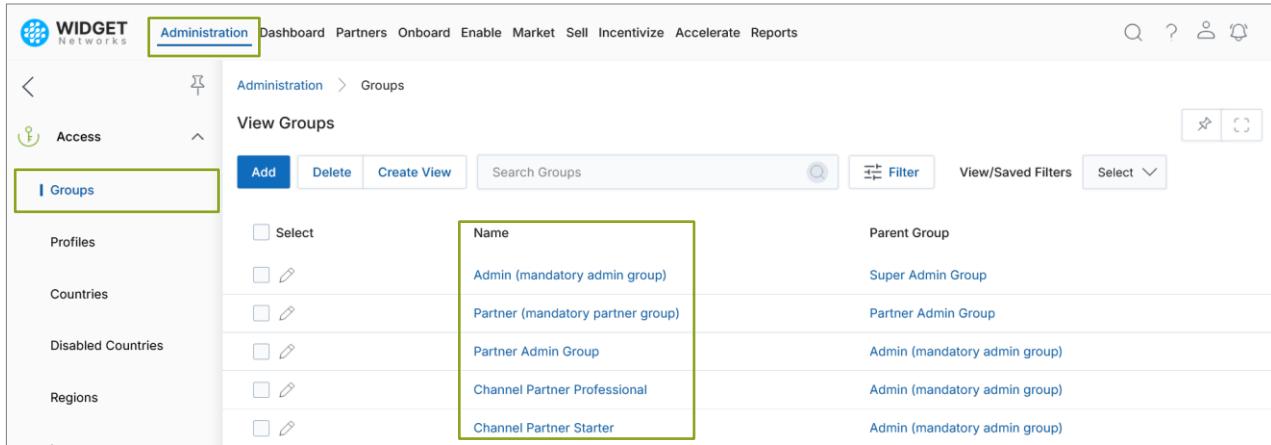
— Partnership Information

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

Auto Group Assignment based on Attributes

This feature offers significant benefits by automating group assignments based on Group Attributes such as 'Country' and 'Partner Tier', reducing manual effort and ensuring accuracy.

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

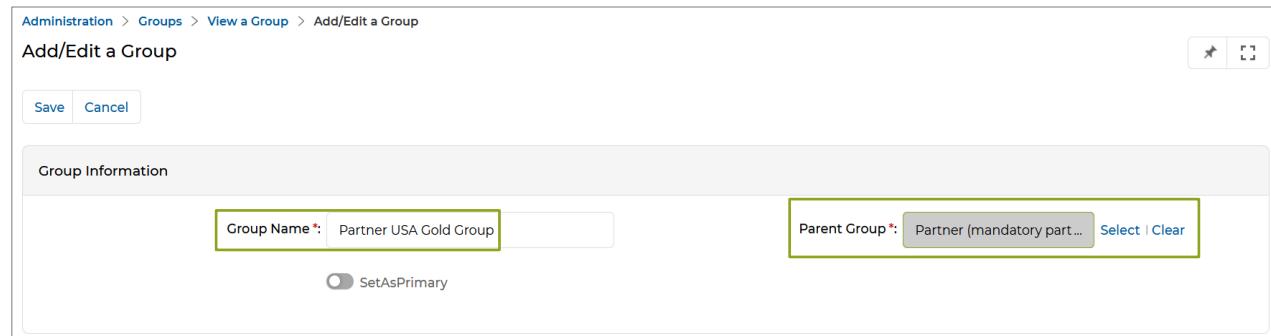


Name	Parent Group
Admin (mandatory admin group)	Super Admin Group
Partner (mandatory partner group)	Partner Admin Group
Partner Admin Group	Admin (mandatory admin group)
Channel Partner Professional	Admin (mandatory admin group)
Channel Partner Starter	Admin (mandatory admin group)

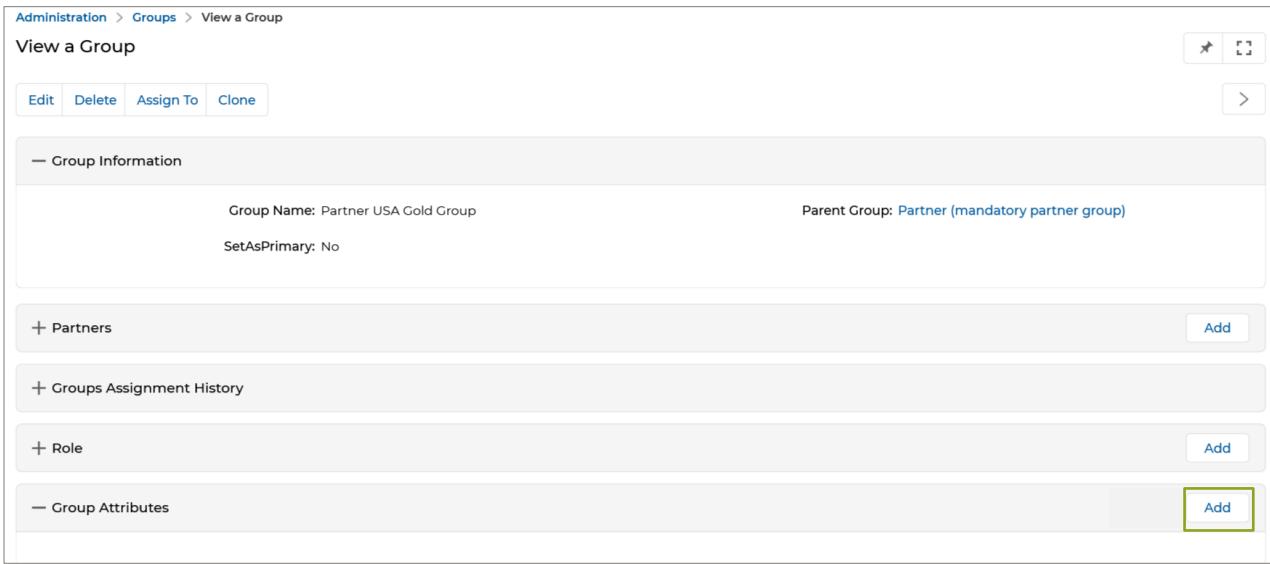
- We click the Add button and reach the Add/Edit Group page, where we can create a new Group.



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



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



Administration > Groups > View a Group

View a Group

Edit Delete Assign To Clone

Group Information

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

SetAsPrimary: No

+ Partners Add

+ Groups Assignment History

+ Role Add

— Group Attributes Add

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



Administration > Groups > View a Group > Group Attributes

Group Attributes

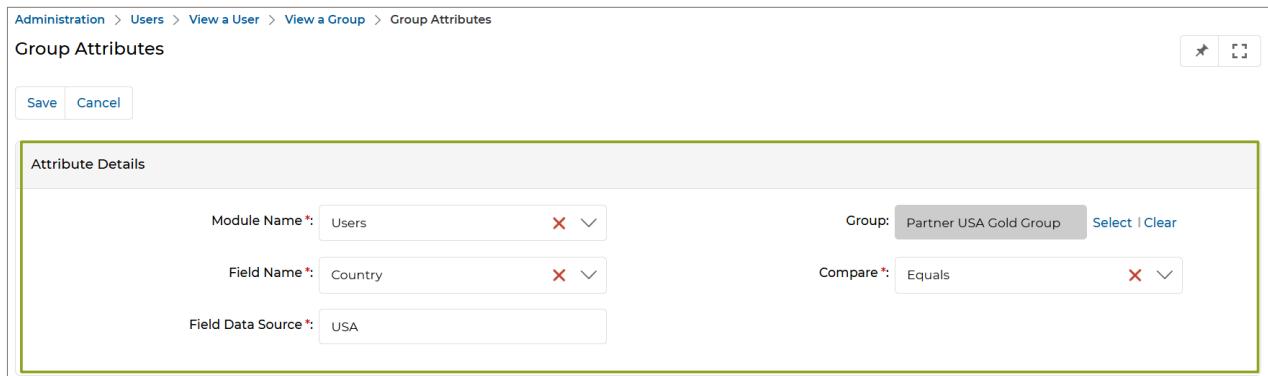
Save Cancel

Attribute Details

Module Name *:	Partner Accounts	Group:	Partner USA Gold Group
Field Name *:	Partner Tier	Compare *:	Equals
Value *:	Gold	4 of 4000	

- **Module Name:** This specifies that in this example, the attribute applies to the **Partner Accounts** module, meaning the condition is evaluated for Partner Account records.
- **Field Name:** This attribute is used to filter Partner Accounts based on their **Partner Tier**.
- **Value:** The system will check if the **Partner Tier** value is **Gold** and apply the attribute condition accordingly.
- **Group:** Any Partner Account that meets the condition (**Partner Tier = Gold**) will be automatically assigned to the **Partner USA Gold Group**.

- **Compare:** The system will assign the Partner Tier based on the selected comparison operator. In this case, we use **Equals**, meaning only Partner Accounts where the **Partner Tier** exactly matches the specified value will meet the criteria. Other available comparison operators include **Not Equals**, **Like**, **In**, and **Contains**.
- Similarly, we define the value of another Group Attribute in the Attribute Details section by providing details in the following fields:



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

Group Attributes

Attribute Details

Module Name:

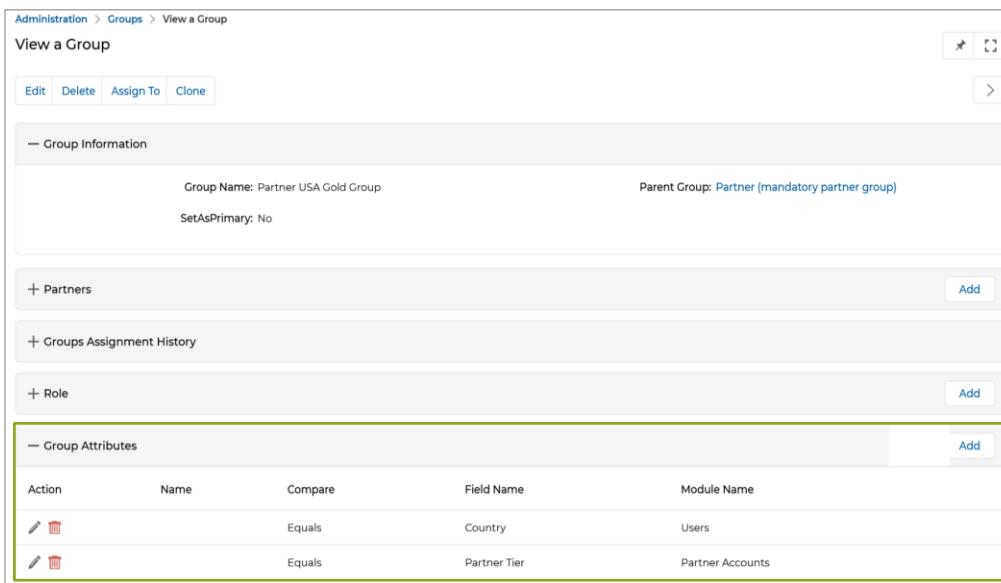
Group:

Field Name:

Compare:

Field Data Source:

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



Administration > Groups > View a Group

View a Group

Edit Delete Assign To Clone

Group Information

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

SetAsPrimary: No

Partners

Groups Assignment History

Role

Group Attributes

Action	Name	Compare	Field Name	Module Name
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	Equals	Country	Users	
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	Equals	Partner Tier	Partner Accounts	

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

Administration > Users > View a User

View a User

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

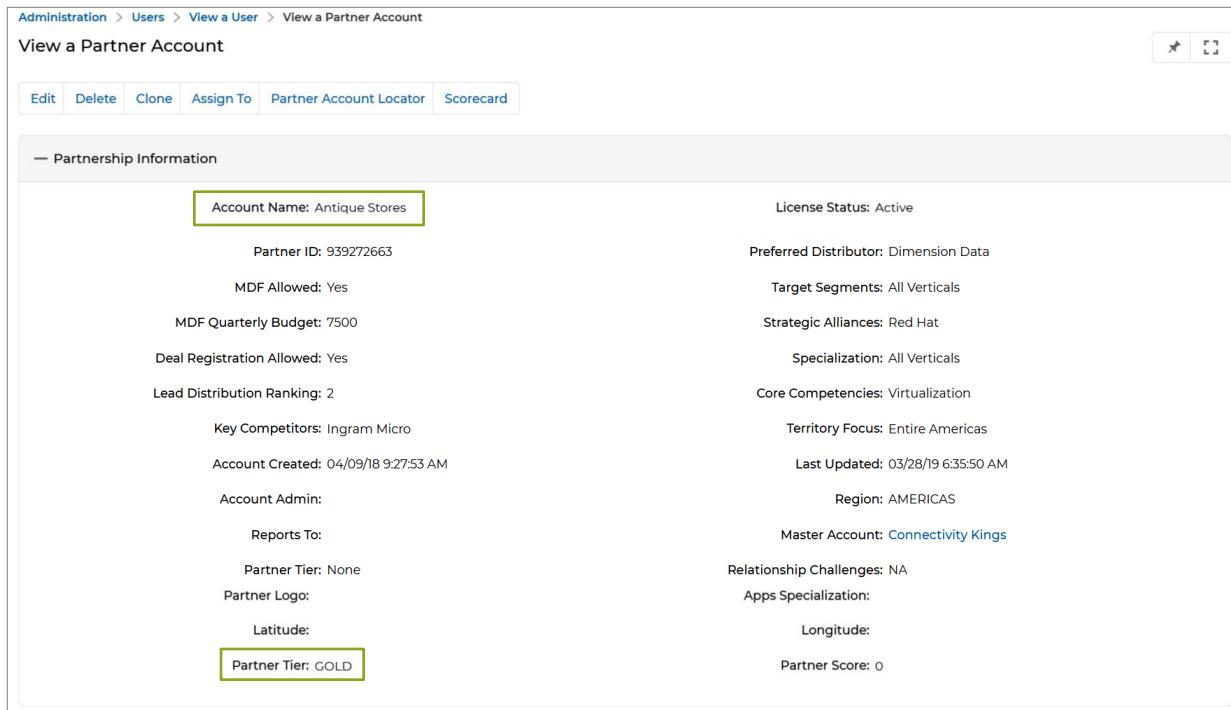
— User Information

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

— User Settings

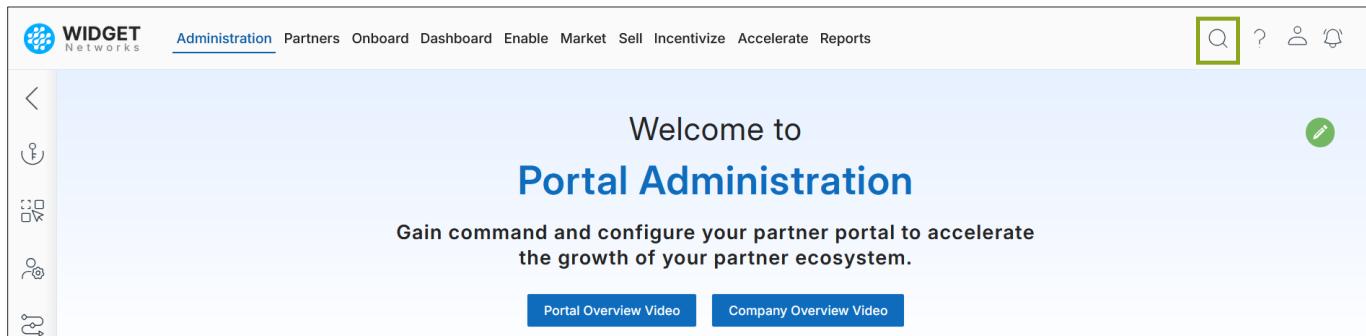
— Groups

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

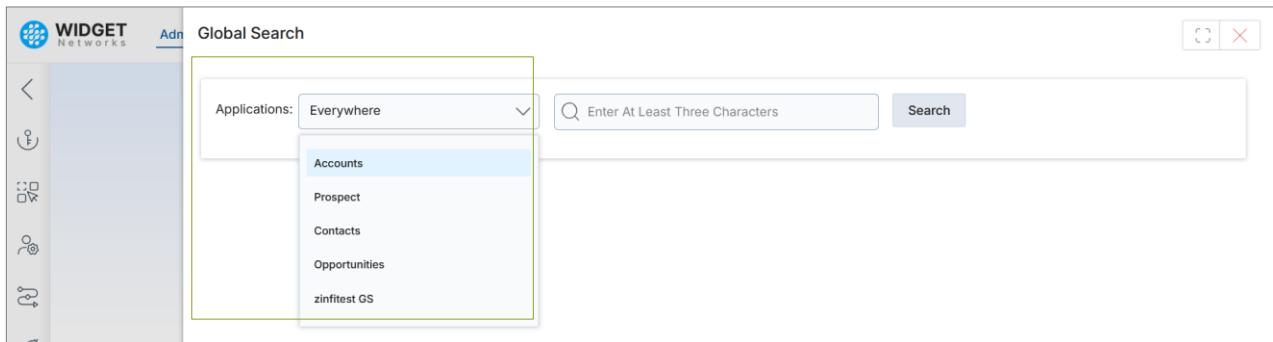


Global Search of Assigned Applications

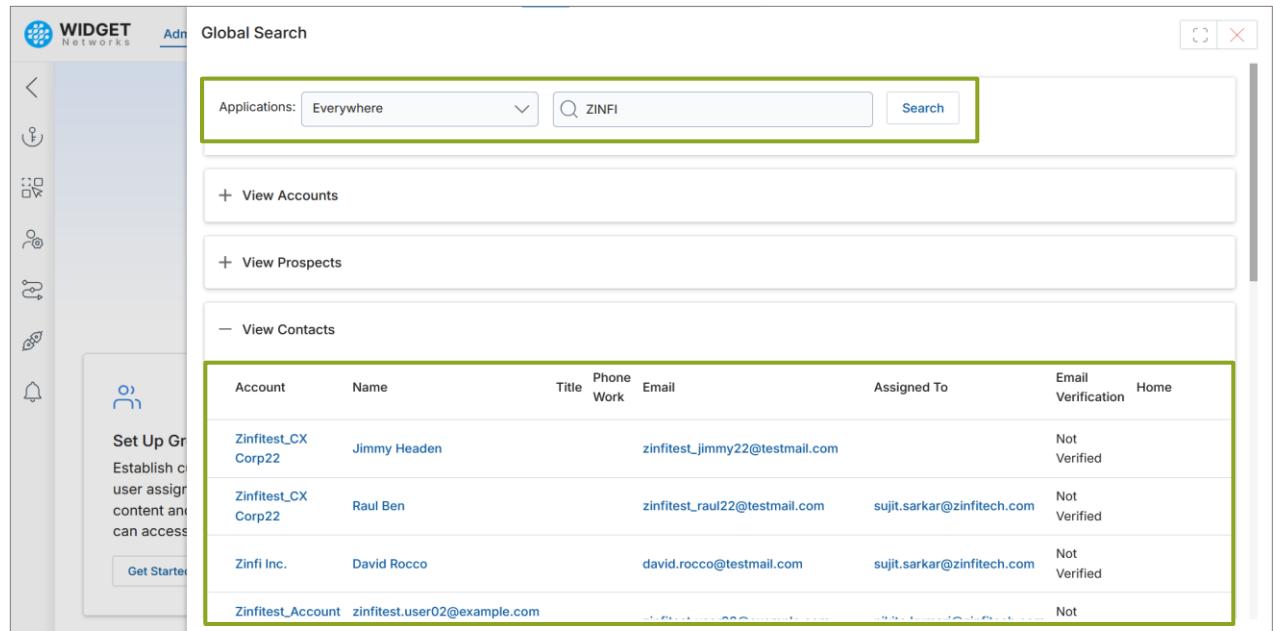
Once a User logs into the UPM portal, he can search for records associated with Applications assigned to him by using the UPM Global Search Engine. Global Search allows the User to search the entire records set associated with all UPM, eliminating the necessity to view the Application and search for the specific record(s). This feature is useful for UPM Portals with a large amount of data or content, as it helps Admin and Partner Users quickly locate the information without the need to navigate through menus or browse through different Applications manually to extract the specific Record.



- Clicking the Global Search icon will open **the Global Search Page**.
- Clicking the first drop-down menu will show the list of all the Applications associated with the Profile of the User. The User can select All or specific Application(s) from the list to search the desired Record.



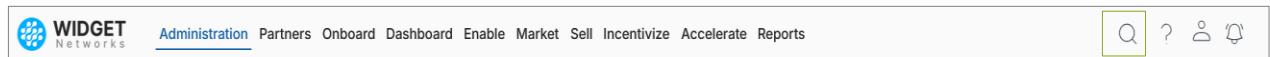
- In the below example, when the User chooses the Prospect Application from the dropdown menu and enters '**ZINFI**' as the search criterion in the second field, clicking the Search button will extract and display any Prospect records associated with the name '**ZINFI**' as shown in the image below.



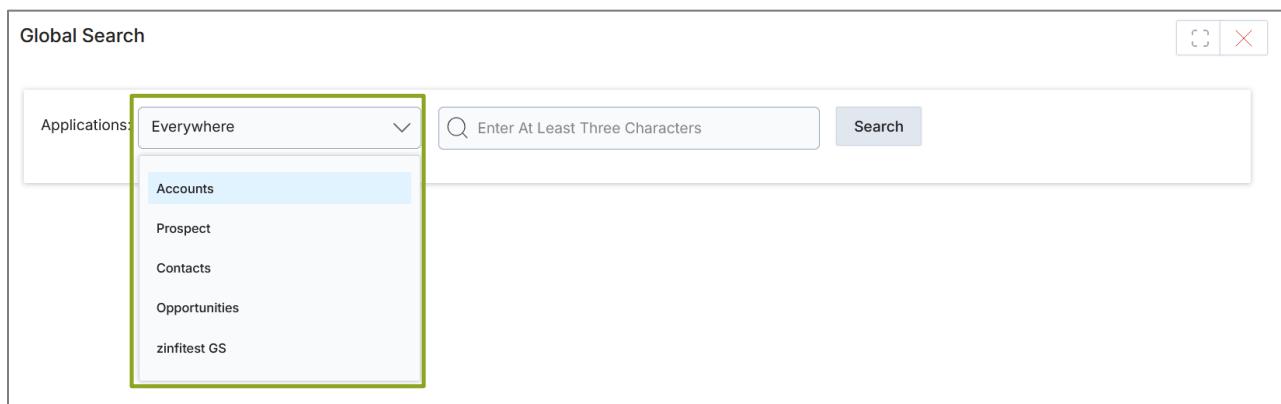
Global Search Enhancement

The Global Search Enhancement feature aims to significantly upgrade the existing search capabilities within the UPM system by introducing advanced functionalities that make searching more efficient and user-friendly. This enhancement will provide users with improved accuracy in search results, incorporating phonetic search options to account for variations in spelling and pronunciation and auto-completion features to suggest and complete search queries as users type. By leveraging these improvements, the Global Search Enhancement will enable users to find relevant information more quickly and accurately, streamlining their workflow and enhancing their overall experience within the UPM system.

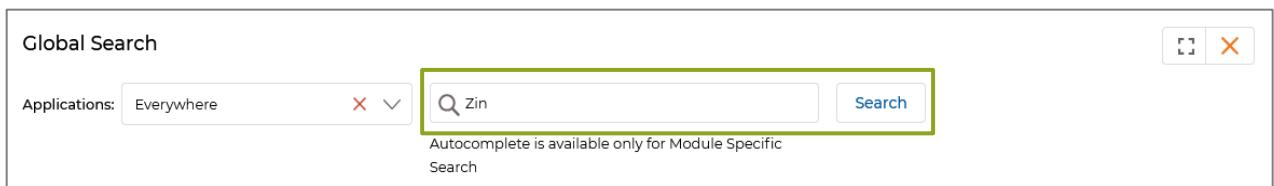
- Clicking the Global Search icon will open the **Search** page.



- Clicking the drop-down menu associated with Applications will show the list of all applications related to the User's Profile.
- The default value in the dropdown list is Everywhere. The User must select Everywhere or a specific Application(s) from the list to search for any value. Selecting Everywhere enables the User to search values across all the applications listed in the dropdown while selecting a specific application enables the user to search values associated with the selected application.



- At least three letters in the search field must be keyed to activate the **Search** button.



- In the above example, when the User chooses 'Everywhere' from the dropdown menu and enters 'Zin' as the search criterion in the second field, clicking the Search button will extract and display any records associated with the name 'Zin' across all applications as shown in the image below.

Global Search

Applications: Everywhere

Autocomplete is available only for Module Specific Search

— View Accounts

Account Name	Phone Office	Website	Custom State	Custom Country	SFID	Industry
Zinfitest-ACC-MTSIT-003		www.accmtsit003.com				
Zinfitest-ACC-MTSIT-002		www.accmtsit002.com				
Zinfitest-ACC-MTSIT-001		www.accmtsit001.com	Pennsylvania	USA		
ZINFI-TEST ACC001					001lg000008cGgPIAU	
zinfitest_jamaica					001lg000008cGklIAE	Energy
zinfitest-sacc-0002					001lg000008cBUGIA2	
ZinfiTestAcc					001lg000008cBFkIAM	
Zinfitest-SACC-001z					001lg000008cBleIAM	
zinfitest-sacc-001X					001lg000008cBMvIAM	
zinfitest_sacc-001m					001lg000008cBUIIA?	

- Individual applications can also be selected, and records related to selected applications can be extracted.
- When typing the search criterion after selecting the individual application, the search field will provide a list of possible suggestions for searchable criteria that the user can utilize.

Global Search

Applications: Accounts

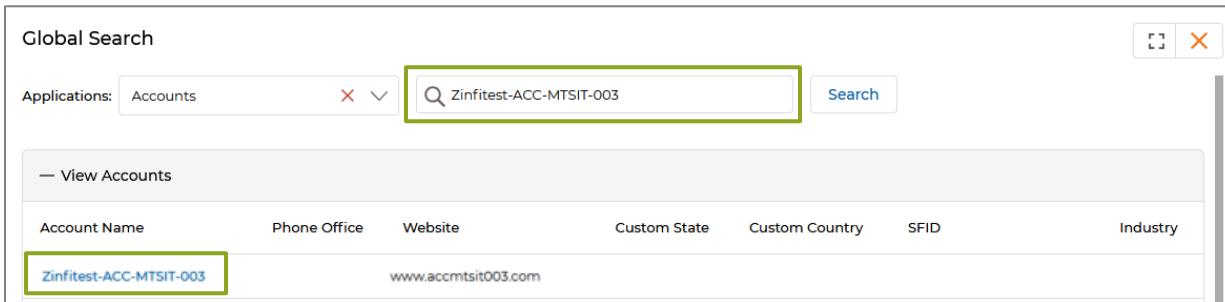
Zinfitest-ACC-MTSIT-003

Zinfitest-ACC-MTSIT-002

Zinfitest-ACC-MTSIT-001

ZINFI-TEST ACC001

- Once a suggested search criterion is utilized, the searched record with a parameterized value matching the searched text will be shortlisted.



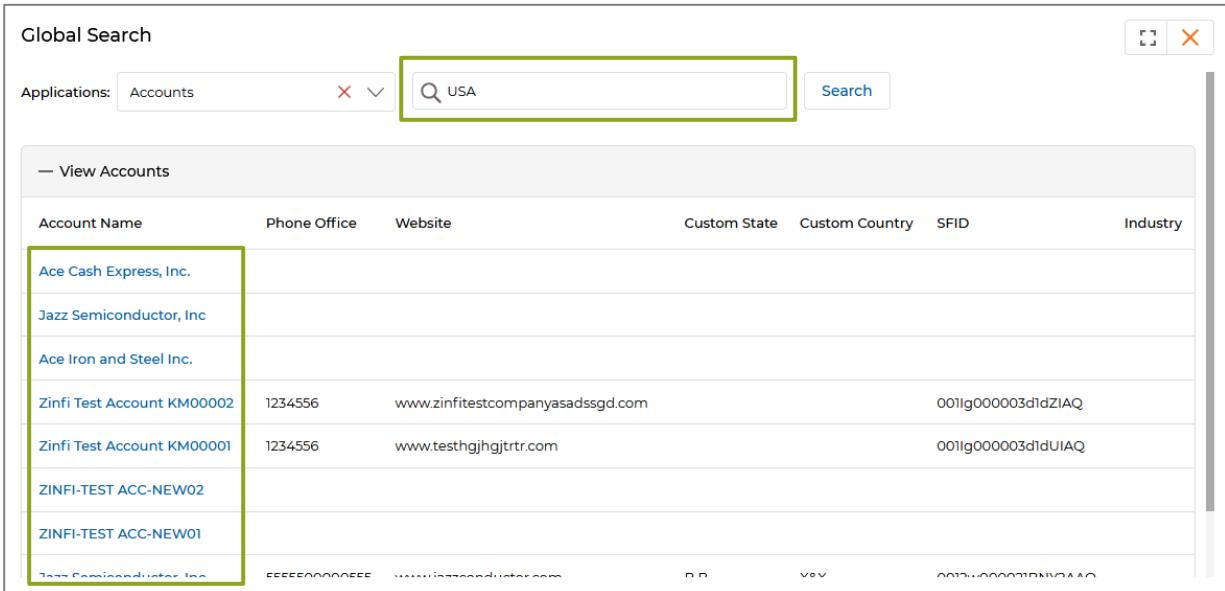
Global Search

Applications: Accounts

— View Accounts

Account Name	Phone Office	Website	Custom State	Custom Country	SFID	Industry
Zinfitest-ACC-MTSIT-003		www.accmtsit003.com				

- Fuzzy search capabilities have also been integrated into Global Search. This feature allows you to search records by any parameter values of the records. In the image below, the search text has been given as “**USA**” in the Search field. Once the Search button is hit, the list of records with parameterized values matching the searched text will be shortlisted.



Global Search

Applications: Accounts

— View Accounts

Account Name	Phone Office	Website	Custom State	Custom Country	SFID	Industry
Ace Cash Express, Inc.						
Jazz Semiconductor, Inc.						
Ace Iron and Steel Inc.						
Zinfo Test Account KM00002	1234556	www.zinfitestcompanyasadssgd.com			001lg000003d1dZIAQ	
Zinfo Test Account KM00001	1234556	www.testhgjhgjtrtr.com			001lg000003d1dUIAQ	
ZINFI-TEST ACC-NEW02						
ZINFI-TEST ACC-NEW01						

- Using the abovementioned criteria, the user can search records that contain ‘USA’. If the user goes to the details page of any record, he will find ‘USA’.

View an Account

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

— Account Information

Account Name: Ace Cash Express, Inc.	Account Type:
Phone - Corporate:	Other Phone:
Phone - Fax:	Website:
Employees (Number):	Annual Revenue:
Industry:	Ownership:
Active Account: No	Amount:
SFID:	Custom State:
Custom Country:	Communication:
ZINFO-TEST Amount:	

— Billing Address

Billing Address Street:	Billing Address City: Bangor
Billing Address Country: USA	Billing Address State:
Billing Address Zip/Postal Code:	

- Global Search functionality of field related to any application listed in Global Search can be enabled/disabled from Workflow.
- The user needs to go to the Workflow and enable or disable Global Search using the associated toggle key.
- Enabling toggle key will make the field available for Global Search while disabling the toggle key will remove the field from Global Search.

Sell > Prospects

Prospect

[Cancel](#)
[Save](#)
Development Mode

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

Edit Textbox Field

Field Label *:	Alternate Address City	Field Name *:	KEY_ALT_ADDRESS_CITY
Character Limit *:	50	Required	<input type="checkbox"/>
		Exportable	<input type="checkbox"/>
		Searchable	<input type="checkbox"/>
		Unique	<input checked="" type="checkbox"/>
		Global Search	<input checked="" type="checkbox"/>

Field-Level Management

To control data access precisely across UPM, we can allow users to view specific fields in a specific object, but then restrict the individual records they're allowed to see. Record-level management, as discussed earlier, determines which individual records users can view and edit in each object they have access to in their profile. The permissions on a record are always evaluated according to a combination of object-level, field-level, and record-level permissions.

With UPM's Workflow, field-level management allows you to restrict users' access to view and edit specific fields in a specific record of a specific Application. The UPM instance deployed at your organization would be a repository of data integrated with field-level management, restricting field access to everyone.

The fields that users see on detail and edit pages are a combination of page layouts and record-level management settings. Workflow lets us:

- Create page layouts to organize the fields on list, detail, and edit pages.
- Hide a field by omitting it from the layout.

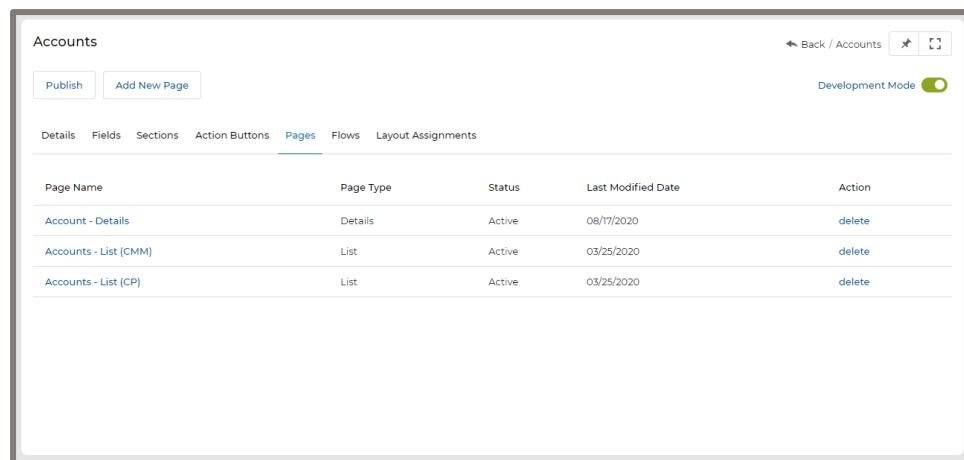
Configuring Page Layouts

Workflow Pages lets you create your page which constitutes the actions button, sections, and fields that have already been created.

Pages are generally of two types:

- **List pages** – these are the pages that show the listings of records or content (the View or Library pages)
- **Detail pages** – these are pages that hold the details of records or content (the clickthrough into details)

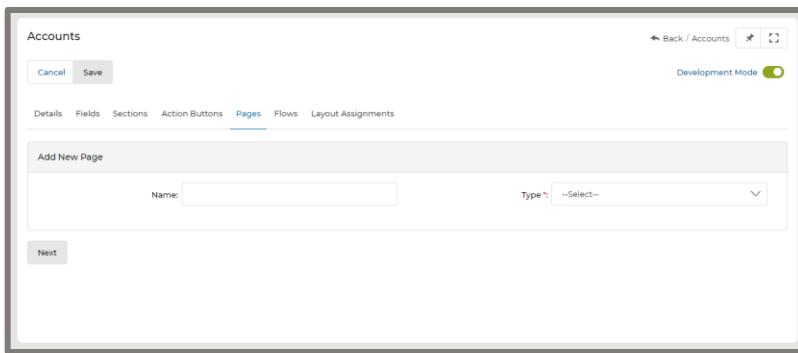
Existing pages can be viewed and edited as per the figure below:



Page Name	Page Type	Status	Last Modified Date	Action
Account - Details	Details	Active	08/17/2020	delete
Accounts - List (CMM)	List	Active	03/25/2020	delete
Accounts - List (CP)	List	Active	03/25/2020	delete

Pages can also be cloned to be used by other Applications.

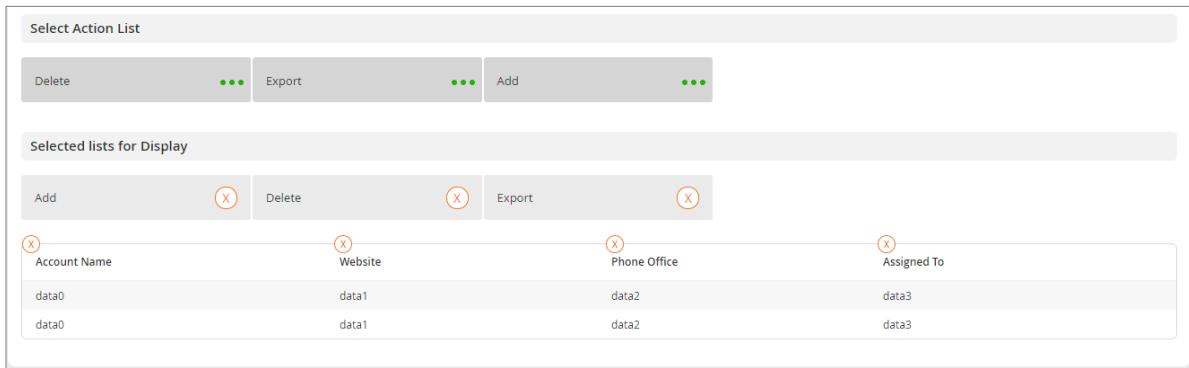
Add a NEW List Page



1. **Name:** What is the name of this page?
2. **Type:** Select *List* as the type for this page.

The following operations are carried out next:

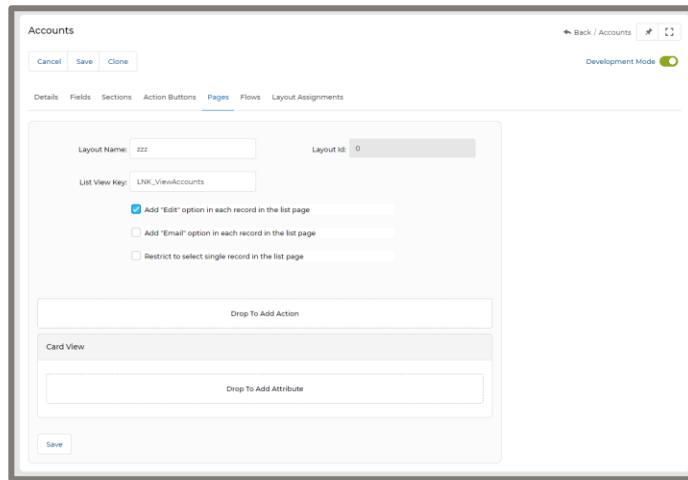
1. Select fields to display the set attribute list.
2. The edit option for each record on the list page can be enabled or disabled.
3. The selection of a single record can be restricted by enabling the restrict option.
4. The actions list can be generally set and selected to be displayed for the list page so that records can be added, deleted, or exported as per the figure below:



Add a NEW Details Page

The following operations are possible in creating a details page:

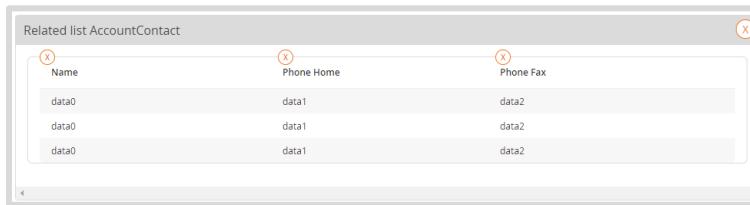
1. Add sections.
 - a. Add fields.



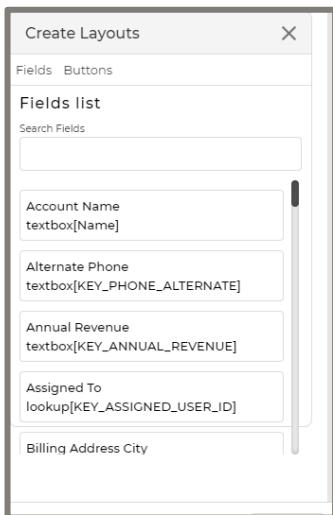
- i. Fields can be marked as read-only on the Add and Edit page.



2. Add action buttons.
3. Add a related list.
 - a. Select fields to display in the related list.
 - b. Add actions of the related list
4. Add, Edit, and Delete are the default options.
5. Can be configured to add only one record in the related list.
6. The Add, Edit, and Delete options can be hidden here.
7. The Add/ Edit page can be set to open as a pop-up rather than as a new tab.
8. The records in the related list become locked as soon as the parent record is approved, but you can provide an Add option in the approved record.



Pages layouts can be set by selecting objects from the list depicted in the figure below:



Manage File Collections

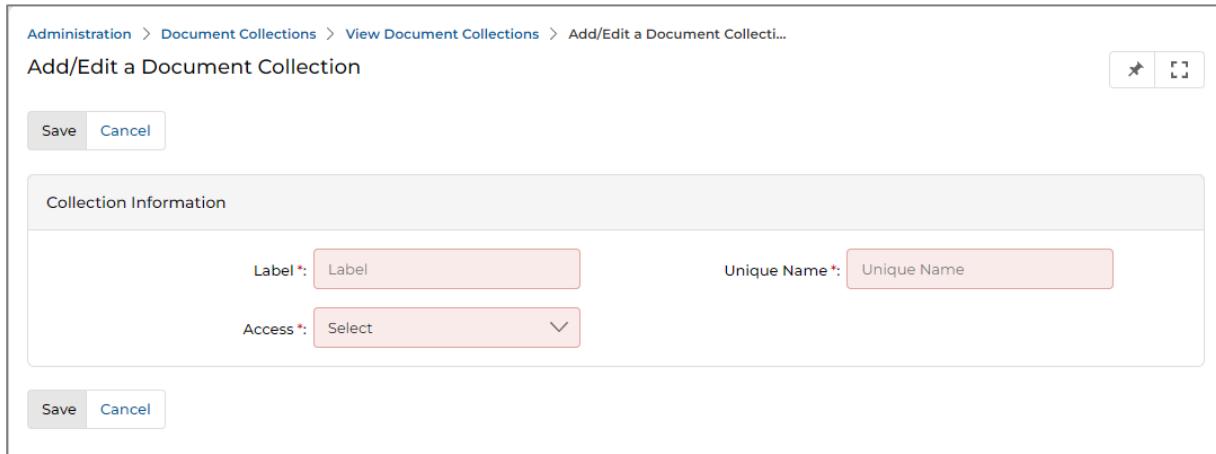
This feature provides an add-on shortcut menu “Documents Collections” to the Access Application allowing the admin to define as well as manage (Add/Edit) the specific locations/folders where associated images for documents, assets, and respective collaterals will be stored. This feature is introduced as a back-end feature and will be only utilized by the Admin with communication with ZINFI’s Engineering team.

- Click on **Access > Document Collections** from the left menu.



The screenshot shows the Zinfi Access application interface. The top navigation bar includes links for Administration, Dashboard, Partners, Onboard, Enable, Market, Sell, Incentivize, Accelerate, Reports, and a search bar. The left sidebar is titled 'Access' and lists 'Groups', 'Profiles', 'Tiers', 'Countries', 'Regions', 'Languages', 'Import Templates', 'Auto-Populate Mapping', 'Record Visibility', 'API Profiles', and 'Document Collections'. The main content area features a blue background with gears and a hand pointing at a screen, with the text 'Welcome to Portal Administration'. It also displays a message: 'You are logged in as an Admin role (Channel Marketing Manager) in the High Performance Experience (HPX)'. Below this are two orange buttons: 'Company Overview Video' and 'Portal Overview Video'. In the bottom right corner, there is a 'Helpful Tips' section with a lightbulb icon and the following text: '1. Watch the "Welcome to the Unified Channel Management Partner Portal" video found on the Introduction page, or under the "Portal Overview Video" button on'.

- Clicking the Add or the Edit button associated with any document will take you to the “Add/Edit a Document Collection” page, as shown in the image below.



Administration > Document Collections > View Document Collections > Add/Edit a Document Collecti...

Add/Edit a Document Collection

Collection Information

Label *: Label

Unique Name *: Unique Name

Access *: Select

Save Cancel

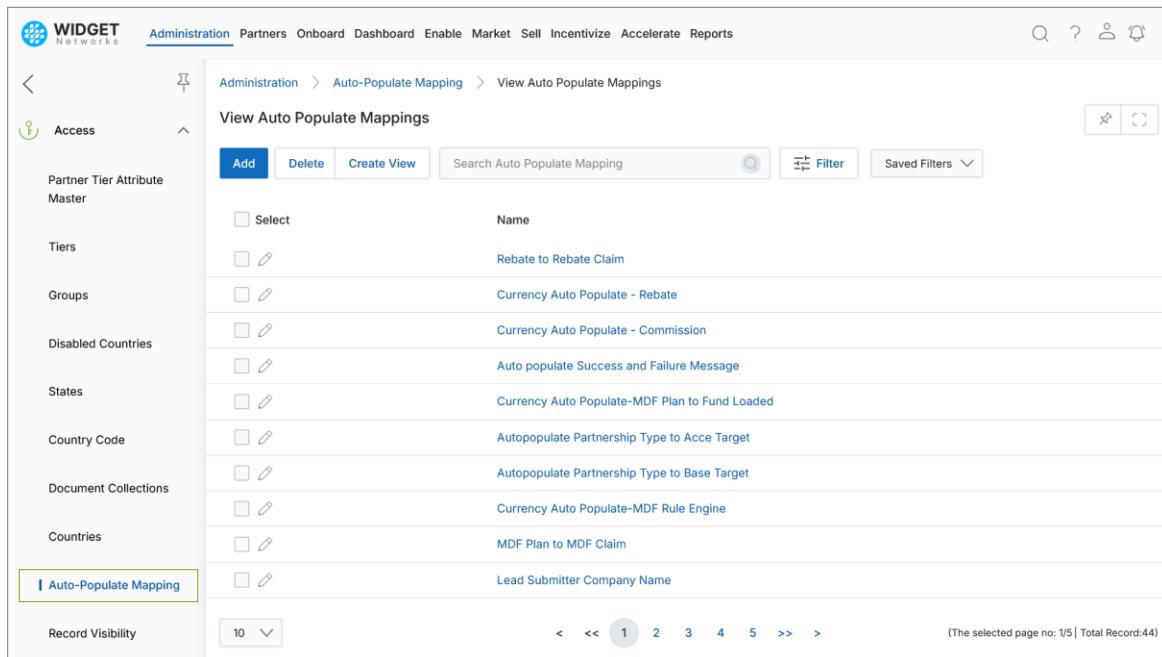
The various fields contained in the “Collection Information” section are discussed below.

- a. Label – Provide a user-friendly name for the Label.
- b. Unique Name – Reflects the name of the folder where the respective images/files will get stored when they are uploaded to the system.
- c. Access – Clicking the dropdown arrow select the Scope Resolution/Accessibility of the Folder and set it as “Public” or “Private”. Click Save to Save the Collection.

Auto Populate Mapping for Related Applications

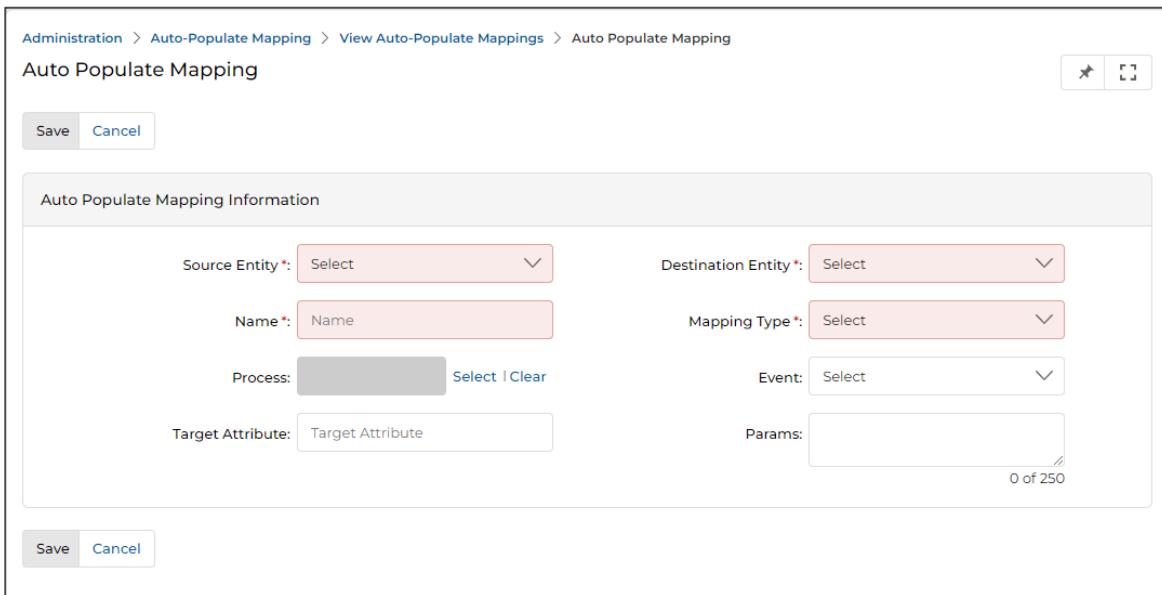
Massive update for ZINFI's related Applications comes with a specific feature allowing Admins to retain attributes seamlessly between related UPM Applications. For example, we want to retain a custom Field/Attribute of a Prospect when we are converting the Prospect to a Contact. Normally, all fields of a specific UPM Application are not retained by default, when being converted to another Application Record. With this feature, we can retain the existing field of an application record and copy it to the related UPM Application.

1. Click on **Administration** on the top menu.
2. Click on **Access > Auto Populate Mapping** from the left menu bar.



	Name	Description
<input type="checkbox"/>	Rebate to Rebate Claim	
<input type="checkbox"/>	Currency Auto Populate - Rebate	
<input type="checkbox"/>	Currency Auto Populate - Commission	
<input type="checkbox"/>	Auto populate Success and Failure Message	
<input type="checkbox"/>	Currency Auto Populate-MDF Plan to Fund Loaded	
<input type="checkbox"/>	Autopopulate Partnership Type to Acce Target	
<input type="checkbox"/>	Autopopulate Partnership Type to Base Target	
<input type="checkbox"/>	Currency Auto Populate-MDF Rule Engine	
<input type="checkbox"/>	MDF Plan to MDF Claim	
<input type="checkbox"/>	Lead Submitter Company Name	

3. To **Edit** an existing Mapping – click on the small pencil icon. To **Add** a new Mapping – click on the “Add” button at the top of the View Auto Populate Mappings page.



4. Once you are in the **Add/Edit an Auto Populate Mapping** page, check the following information:

- Auto Populate Mapping Information**
 - Source Entity** – The UPM entity/Application whose fields/values are going to get retained.

- ii. **Destination Entity** – The UPM entity/Application where the fields/values will be copied or retained.
- iii. **Name** – Name of the new Auto Populate Mapping.
- iv. **Mapping Type** – Field Mapping Type between the UPM Entities can be any one of the three types – Auto Populate – where fields are auto-copied over, Duplicate – where fields will be duplicated for the destination entity and Event – when the fields will be copied when an event occurs.
- v. **Process** – Appropriate Process can be chosen from the list of Dynamic Processes/Stored Procedures.
- vi. **Event** – It can either be On Change or Onload, based on the Field application type.
- vii. **Target Attribute** – Any Target Attribute to be associated can be provided.
- viii. **Params** – Parameters can be defined to override and preset configurations. Once you are done, click **Save**.

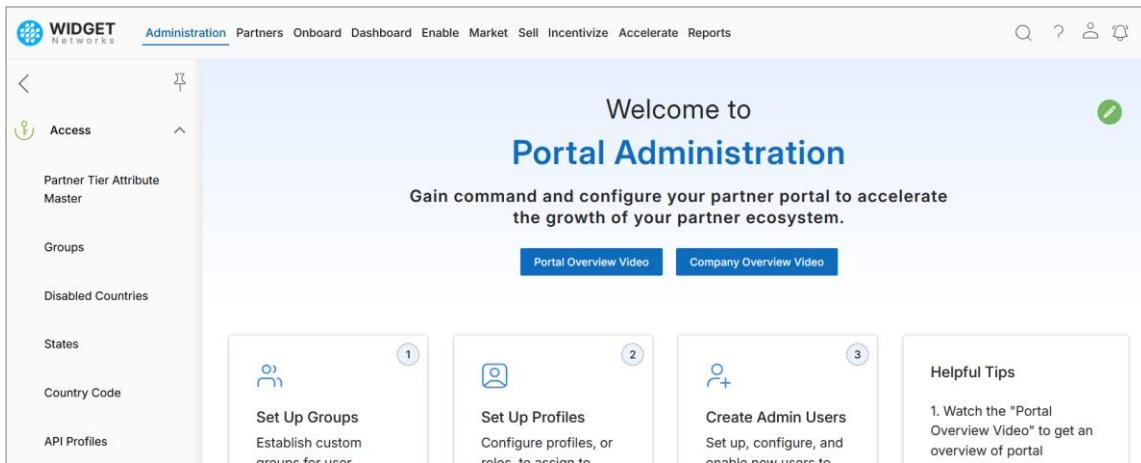
b. Auto Populate Attribute mapping

- i. The List of Mapped Attributes can be viewed and managed.

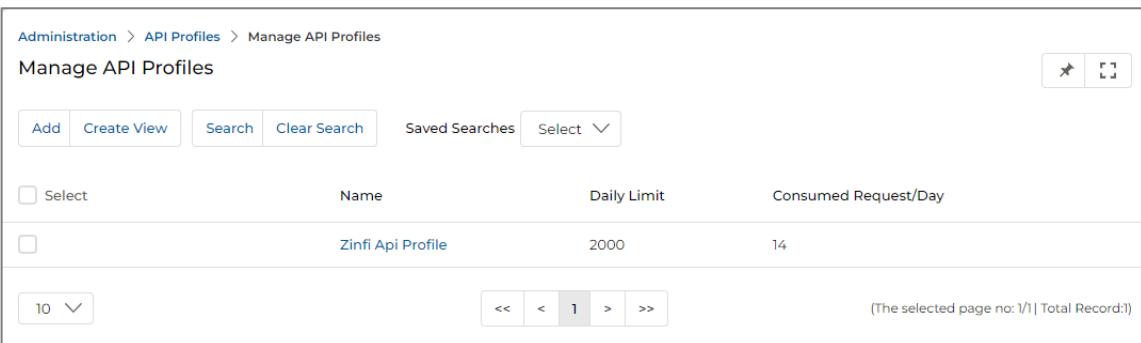
Action	Source Attribute	Destination Attribute
	PRIMARY_ADDRESS_STREET	Primary_Address2
	EMAIL1	User_Name
	FIRST_NAME	FIRST_NAME

Manage API Profiles

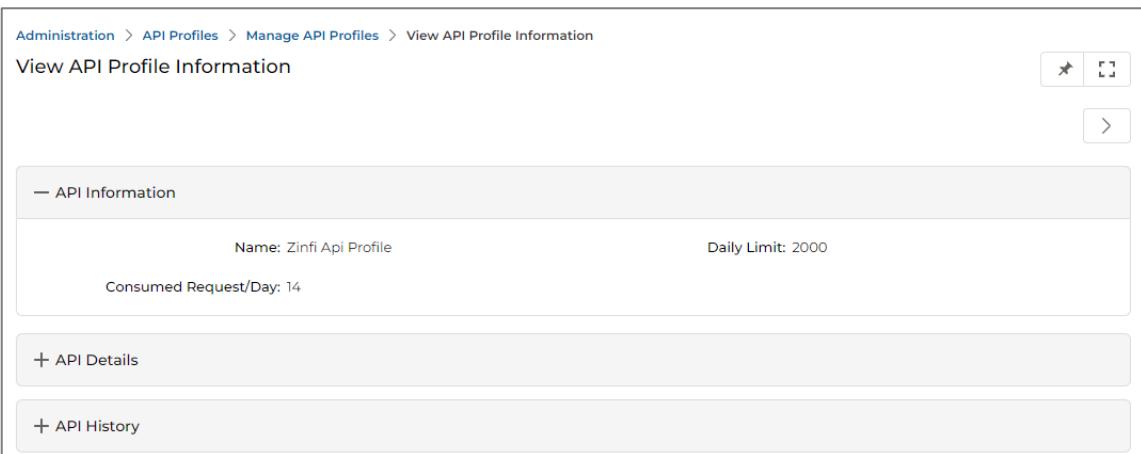
The latest upgrade features the hot rod release allowing third-party systems to access our UPM APIs to manipulate UPM records. Users provided access to API Profile are allowed to utilize the ZINFO UPM API which can be created and shared on request. Click on **Administration** on the top menu. Click on **Access > API Profiles** from the left menu.



- Clicking “API Profile” from the left menu will take you to the “Manage API Profiles” page that displays the Names of all UPM API Profiles.



- Clicking the name of any specific API Profile will take you to the “View API Profile Information” page that reflects the details of the specific API profile.



The various sections contained in this page are discussed below:

- API Information:**
 - Name – Name of the API.
 - Daily Limit – Daily API calls allowed.
 - Consumed Request/Day – Consumed API Calls/Requests for the specific day.
- API Details:** Contains the details of the APIS Listed along with their Name, Service Information, and Description, along with the respective API structures and their description.

— API Details			
Action	Name	Service information	Description
List of Module Data	Module Data list		Sample Request { "ProcessId": "A9B34876-A194-4D75-ACDF-AEB986C50862", "ProcessData": { "EntityId": "9", "totalItems": 0, "pageNo": 1, "numPages": 0, "pageSize": 10, "maxSize": 10, "orderBy": "[Modify.Date]", "orderType": "desc", "Lang": "en-US", "Logic": "", "LayoutId": "0", "globalVariable": { "campaignType": "0", "campaignTypeText": "", "campaignId": "0", "campaignText": "", "campaignStatusId": "0", "campaignStatusText": "" }, "Mode": "list", "searchInfo": { "selectedSearchId": "0", "searchType": "" }, "returnType": "list", "EntityDetailsPrevNextPageNo": 1, "selectedLayoutId": "0" } }
Save Module Data	ModuleSaveData		Sample Request { "data": { "Id": "", "EMAIL": "johnny@email.com", "KEY_TITLE": "Mr", "FirstName": "Audry", "LastName": "Crossetti", "KEY_Phone": "(619) 6274611", "KEY_PHONE_FAX": null, "PHONE_MOBILE": null, "LEAD_SOURCE": null, "Key_Campaign": { "CampaignStatus": "", "CampaignType": "", "Campaign": "", "LeadId": "" }, "STATUS": null, "COMPANY_NAME": "Paychex", "KEY_COMPANY_WEBSITE": null, "EMPLOYEE_RANGE": null, "INDUSTRY_TYPE": null, "KEY_CustomField": null, "Competitor_Name": null, "Competitor_Description": null, "Competitor_Strength": null, "Competitor_Weakness": null, "KEY_PRIMARY_ADDRESS_STREET": null, "KEY_PRIMARY_ADDRESS_STREET2": null, "KEY_PRIMARY_ADDRESS_CITY": null, "KEY_PRIMARY_ADDRESS_COUNTRY": null, "KEY_PRIMARY_ADDRESS_STATE": null, "KEY_PRIMARY_ADDRESS_POSTALCODE": null, "KEY_ALT_ADDRESS_STREET": null, "KEY_ALT_ADDRESS_STREET2": null, "KEY_ALT_ADDRESS_CITY": null, "KEY_ALT_ADDRESS_COUNTRY": null, "KEY_ALT_ADDRESS_STATE": null, "KEY_ALT_ADDRESS_POSTALCODE": null, "KEY_DESCRIPTION": null, "LEAD_SOURCE_Value": null, "STATUS_Value": null, "KEY_PRIMARY_ADDRESS_COUNTRY_Value": null, "KEY_PRIMARY_ADDRESS_STATE_Value": null, "KEY_ALT_ADDRESS_COUNTRY_Value": null, "KEY_ALT_ADDRESS_STATE_Value": null }, "entity": "9", "mode": "n" } }

- API History:** This summary provides a detailed view of the API Profiles associated with UPM users.

— Api_History				
Action	Name	IpAddress	User	Created On
Save Module Data		NA	Widget CMM	02/19/2020 6:12:08 AM
List of Module Data		150.129.179.18	Widget CMM	07/27/2018 12:21:15 PM
Save Module Data		150.129.179.18	Widget CMM	07/27/2018 12:20:20 PM
Save Module Data		150.129.179.18	Widget CMM	07/27/2018 12:20:06 PM
List of Module Data		150.129.179.18	Widget CMM	07/27/2018 12:18:56 PM

Manage Import Templates

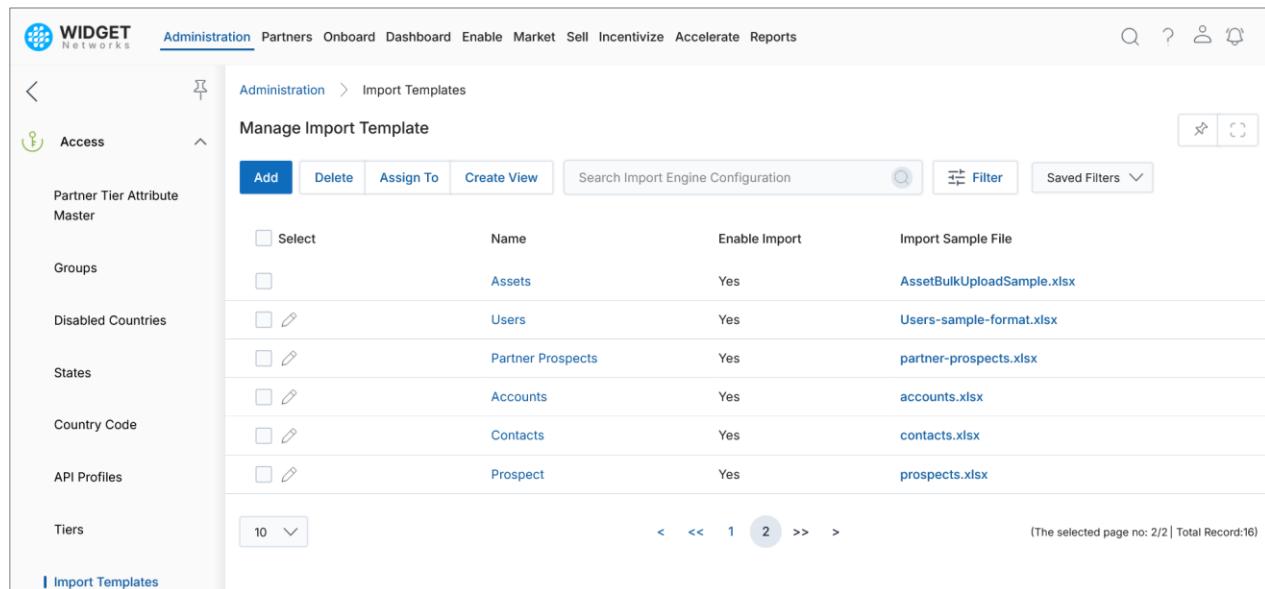
This feature is updated with the ability to upload and manage Application-specific Import Engine Templates for the processing of the UPM Import Engine. As we know, the Import Engine allows us to bulk import records of a specific Application/Object. Featuring a configurable engine, you can use it to configure the import of records in

standard global formats viz. CSV, xlsx, etc., and insert/update bulk UPM records for both standard and custom entities of UPM. The Sample Import Files with Application Parameters as Columns are utilized to feed/import records for that Application. In the below example, the Opportunities Sample Import Excel File is provided.

A	B	C	D	E	F	G	H	I	J
Opportunity Name	Sales stage	Amount	Expected Close date	Currency ISO Code	Lead Source	Account	Contact	Pricebook	Quarter
ZQ_Opp_6	1 - Prospecting	400	04/27/2021	Pound Sterling	Employee	ZQ-ACC-006	zinfo-test_user006@yopmail.com	Zinfo_test_Price book	FY20Q2
ZQ_Opp_7	5 - Needs Analysis	110	04/25/2021	Pound Sterling	Direct mail	ZQ-ACC-007	zinfo-test_user007@yopmail.com	Zinfo_test_Price book	FY20Q3
ZQ_Opp_8	10 - Closed Won	120	04/26/2021	US Dollar	Web site	ZQ-ACC-008	zinfo-test_user008@yopmail.com	Zinfo_test_Price book	FY20Q4

‘Import Templates’ allows you to configure and assign any number of Import Templates, with the desired fields (mandatory and non-mandatory) and get them associated with the “Download Sample Data” feature of the Import engine of the desired Application. This feature is an added advantage to the sales reps and partner users while importing data in bulk in the respective Application as it provides the sample/base worksheet to enter record data.

- Click on **Administration** on the top menu.
- Click on **Access > Import Templates** from the left menu bar.

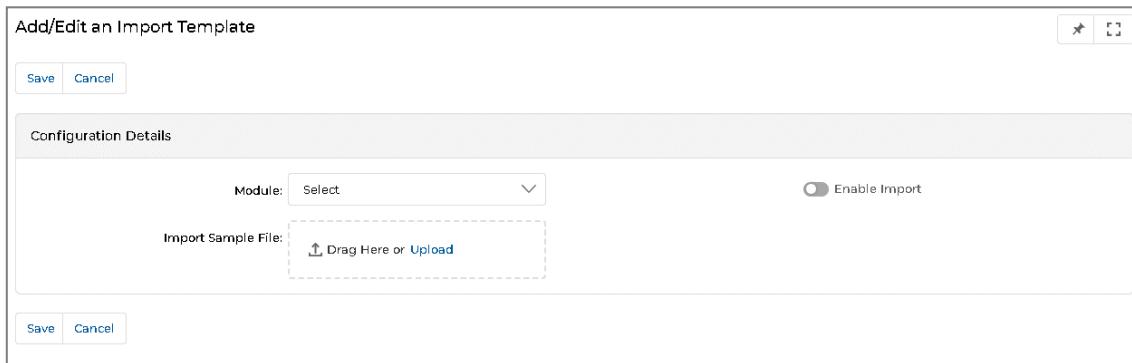


Entity	Select	Name	Enable Import	Import Sample File
Assets	<input type="checkbox"/>	Assets	Yes	AssetBulkUploadSample.xlsx
Users	<input type="checkbox"/>	Users	Yes	Users-sample-format.xlsx
Partner Prospects	<input type="checkbox"/>	Partner Prospects	Yes	partner-prospects.xlsx
Accounts	<input type="checkbox"/>	Accounts	Yes	accounts.xlsx
Contacts	<input type="checkbox"/>	Contacts	Yes	contacts.xlsx
Prospect	<input type="checkbox"/>	Prospect	Yes	prospects.xlsx

- To create a new import template, click the “Add” button, and to bring in changes to an existing one, click the small pencil icon associated with the template.

Manage Import Template			
	Name	Enable Import	Import Sample File
<input type="checkbox"/> 	Assets	Yes	AssetBulkUploadSample.xlsx
<input type="checkbox"/> 	Users	Yes	Users-sample-format.xlsx
<input type="checkbox"/> 	Partner Prospects	Yes	partner-prospects.xlsx
<input type="checkbox"/> 	Accounts	Yes	accounts.xlsx
<input type="checkbox"/> 	Contacts	Yes	contacts.xlsx
<input type="checkbox"/> 	Prospect	Yes	prospects.xlsx

- Clicking the “Add” or the “Edit” button will take you to the following page as shown in the image below.



The form is titled "Add/Edit an Import Template". It has "Save" and "Cancel" buttons at the top left. Below is a "Configuration Details" section with a "Module" dropdown set to "Select" and an "Enable Import" toggle switch. A "Import Sample File" section contains a dashed box with "Drag Here or Upload" text. At the bottom are "Save" and "Cancel" buttons.

a. Configuration Details:

- Module** – Clicking the drop-down arrow, select the “Application” for which this import template would be associated with.
- Enable Import** – Enable the toggle key to make this operative.
- Import Sample File** – Drag here or upload from your system the newly configured sample file for importing records.

- Once you are done, click on the **Save** button.
- An example of a custom-specific format is contained in the Excel sheet as shown in the image below.

1	First Name	Last Name	Email	Company	Country	
2	David	Rocco	david@testmail.com	Zinfo Inc.	USA	
3						
4						

Country-Language Association and Selection Page Management

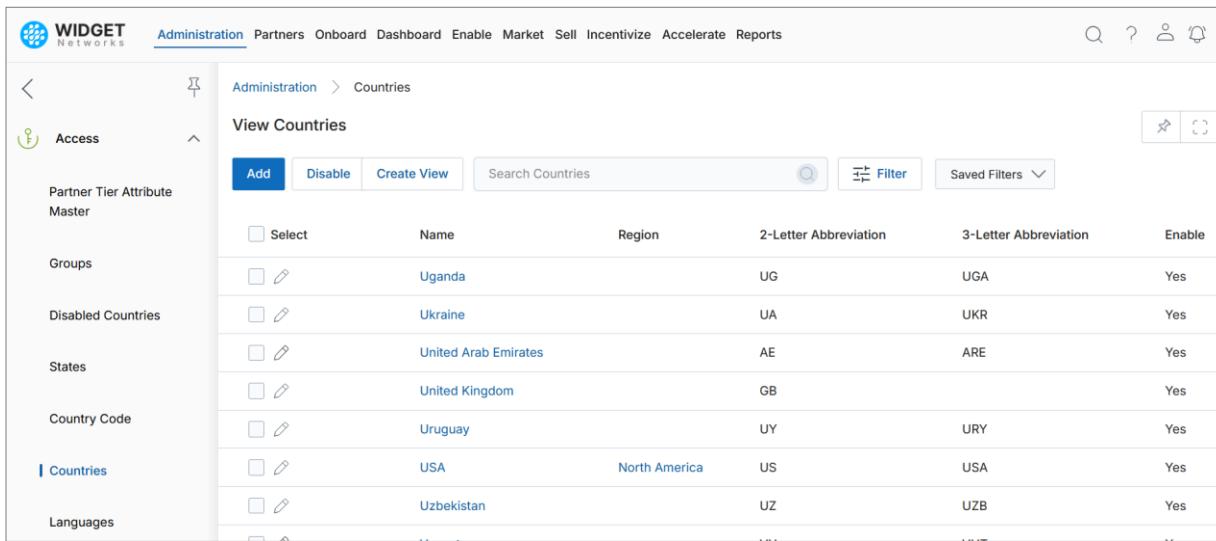
ZINFI’s Unified Channel Management (UPM) platform comes with a complete multilingual engine that allows your organization to provide a fully localized experience to users, regardless of their geographic location or the

languages they speak. The ZINFI channel management platform provides a multilingual-based UI/UX dependent on the selection of applicable Country(s) and Language(s).

‘Countries’ allows you to set up any number of countries as a segmentation method for record assignment and viewership. The UPM update features the association of Languages to a Country for the management of associated Languages and allows you to set up any number of languages as a segmentation method.

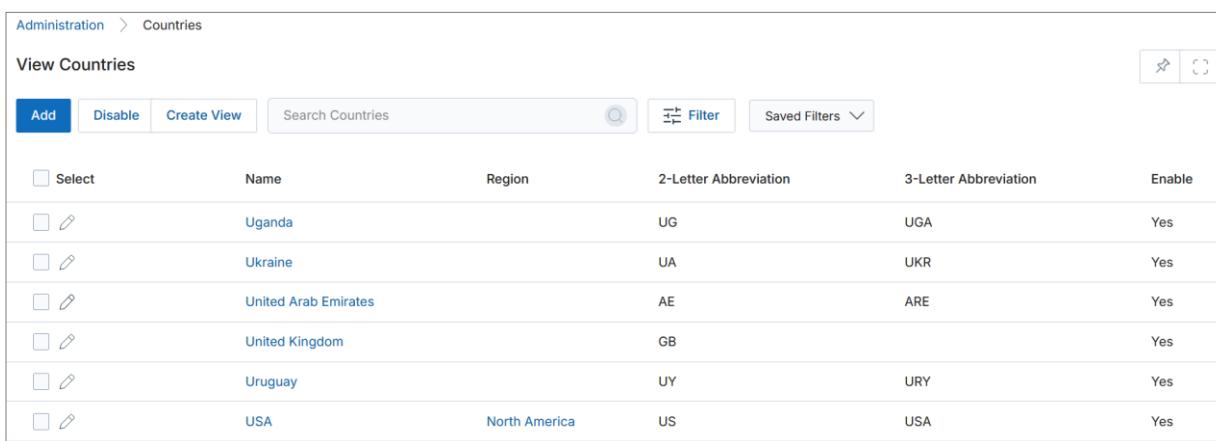
ZINFI provides 10 basic languages (associated with specific Country(s)) OOTB to support localized UI out of the box and allows the User to preset the “Country and Language” before login or from UPM Settings – to provide a localized interface translate to that language.

- Click on **Administration** on the top menu.
- Click on **Access > Countries** from the left menu bar.



Select	Name	Region	2-Letter Abbreviation	3-Letter Abbreviation	Enable
<input type="checkbox"/>	Uganda	UG	UGA	Yes	
<input type="checkbox"/>	Ukraine	UA	UKR	Yes	
<input type="checkbox"/>	United Arab Emirates	AE	ARE	Yes	
<input type="checkbox"/>	United Kingdom	GB		Yes	
<input type="checkbox"/>	Uruguay	UY	URY	Yes	
<input type="checkbox"/>	USA	North America	US	USA	Yes
<input type="checkbox"/>	Uzbekistan	UZ	UZB	Yes	

- Click on the Country Name of any Country listing to see the details page.



Select	Name	Region	2-Letter Abbreviation	3-Letter Abbreviation	Enable
<input type="checkbox"/>	Uganda	UG	UGA	Yes	
<input type="checkbox"/>	Ukraine	UA	UKR	Yes	
<input type="checkbox"/>	United Arab Emirates	AE	ARE	Yes	
<input type="checkbox"/>	United Kingdom	GB		Yes	
<input type="checkbox"/>	Uruguay	UY	URY	Yes	
<input type="checkbox"/>	USA	North America	US	USA	Yes

- Once in the details page, you will see various buttons and sections, such as:

Administration > Countries > View a Country

View a Country

[Edit](#) [Disable](#)

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

— Country Information

Country Name :	Australia	2-Letter Abbreviation :	AU
3-Letter Abbreviation :	AUS		

— Associated Region(s)

Action	Region	Country
	ASIA PACIFIC	Australia

— Associated State(s)

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

— Country Language Association

Action	Country	Language
	Australia	English

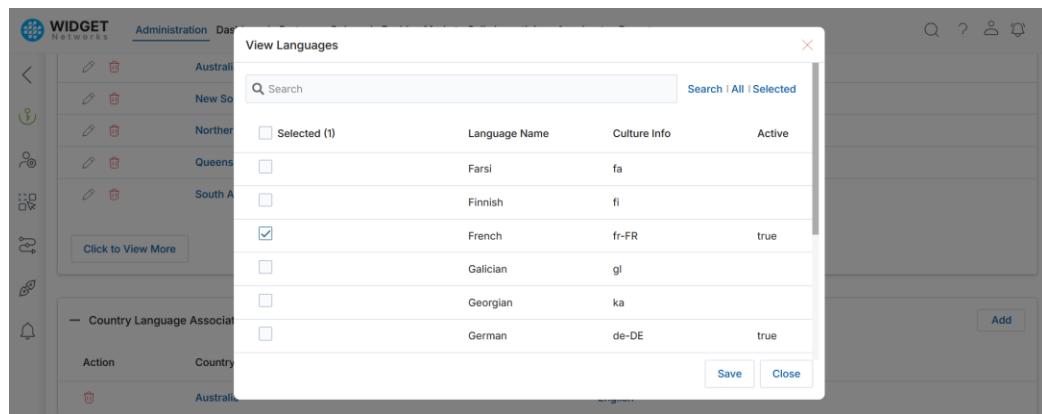
- Country Language Association:** This section allows the admin to associate specific languages to any selected country. The selected language should always be in the 'Active' status for it to be displayed to the user in the pre-login/settings page.

— Country Language Association

Action	Country	Language
	Australia	English

[Add](#)

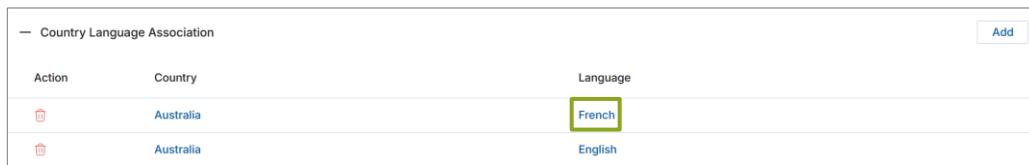
- Clicking the 'Add' button a pop-up window will appear that will allow you to select and associate the required languages to the specific country. Once the languages are selected by providing a checkmark on the boxes as shown in the image below click on the 'Save' button.



Selected (1)	Language Name	Culture Info	Active
<input type="checkbox"/>	Farsi	fa	false
<input type="checkbox"/>	Finnish	fi	false
<input checked="" type="checkbox"/>	French	fr-FR	true
<input type="checkbox"/>	Galician	gl	false
<input type="checkbox"/>	Georgian	ka	false
<input type="checkbox"/>	German	de-DE	true

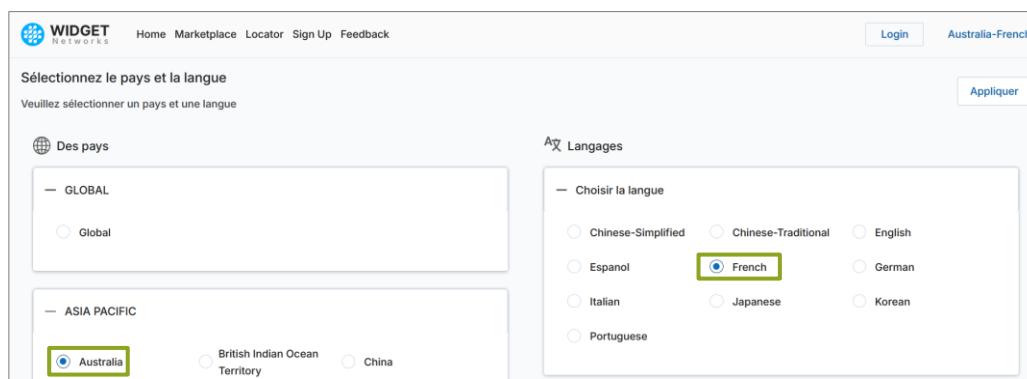
[Save](#) [Close](#)

- The newly selected languages will now be displayed in the 'Country Language Association' related list.



Country Language Association		
Action	Country	Language
	Australia	<input checked="" type="button"/> French
	Australia	<input type="button"/> English

- In the pre-login Page - when the user selects the specific country the newly selected languages will get reflected along with the existing default ones.



Sélectionnez le pays et la langue
Veuillez sélectionner un pays et une langue

Des pays

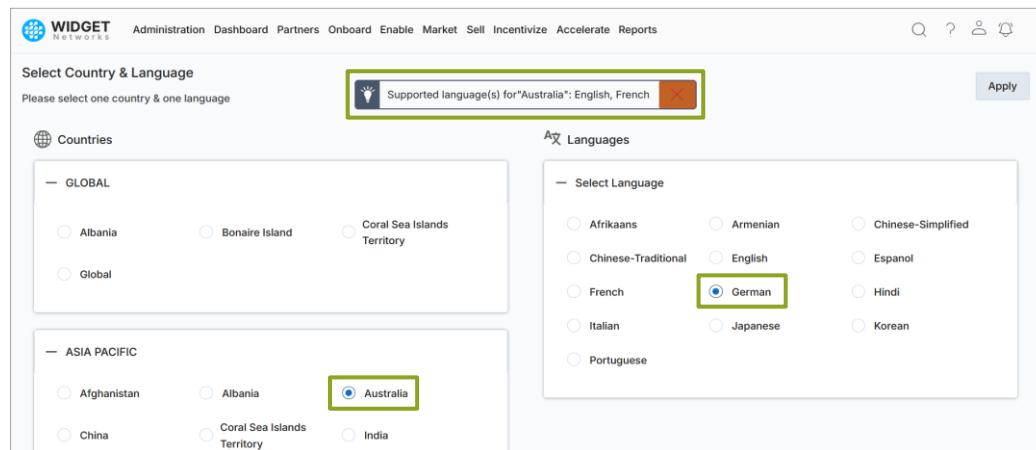
- GLOBAL
 - Global
- ASIA PACIFIC
 - Australia
 - British Indian Ocean Territory
 - China

Langages

Choisir la langue

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

- Whenever a user attempts to select a country with a language from the Country-Language page (either during login or while changing preferences post login), the system validates the selection against the configuration in Country-Language Association in Access Management.



Select Country & Language
Please select one country & one language

Countries

- GLOBAL
 - Albania
 - Bonaire Island
 - Coral Sea Islands Territory
 - Global
- ASIA PACIFIC
 - Afghanistan
 - Albania
 - Australia
 - China
 - Coral Sea Islands Territory
 - India

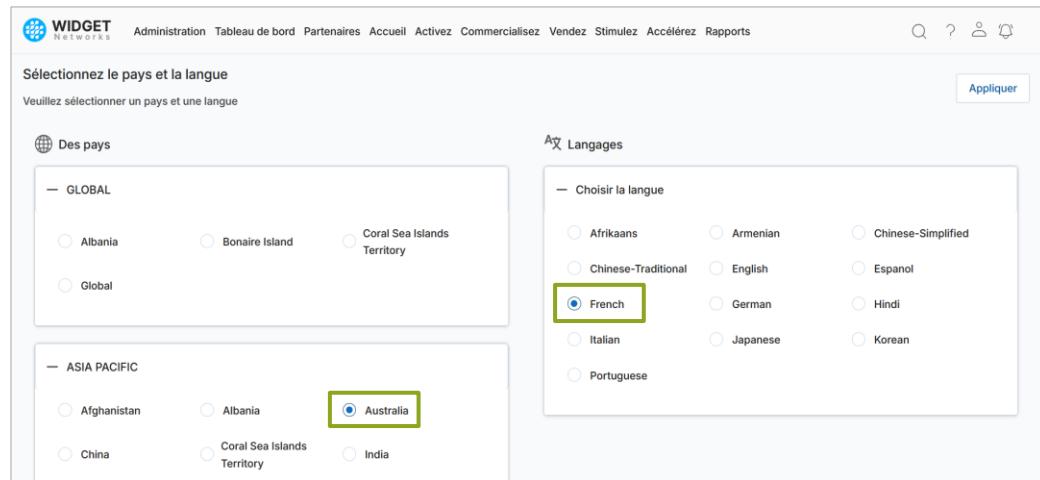
Languages

Supported language(s) for "Australia": English, French

Select Language

- Afrikaans
- Armenian
- Chinese-Simplified
- Chinese-Traditional
- English
- Espanol
- German
- Hindi
- Italian
- Japanese
- Korean
- Portuguese

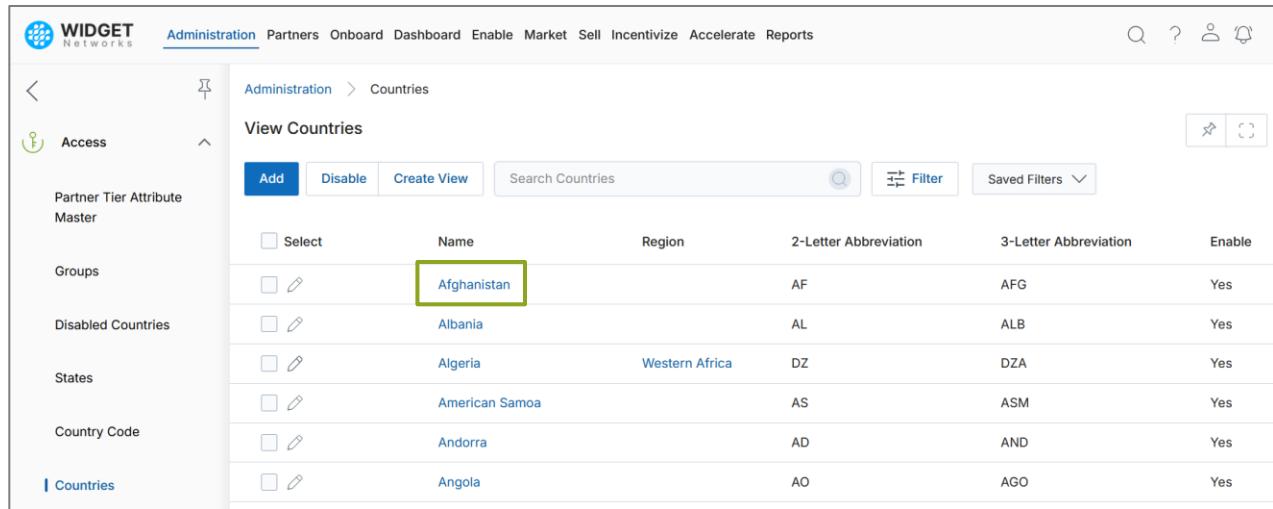
- Next, select Australia as country with French as language.
- The Apply button becomes enabled, the selection is saved successfully, and the portal UI is updated and displayed in French.



Enabling/Disabling Countries

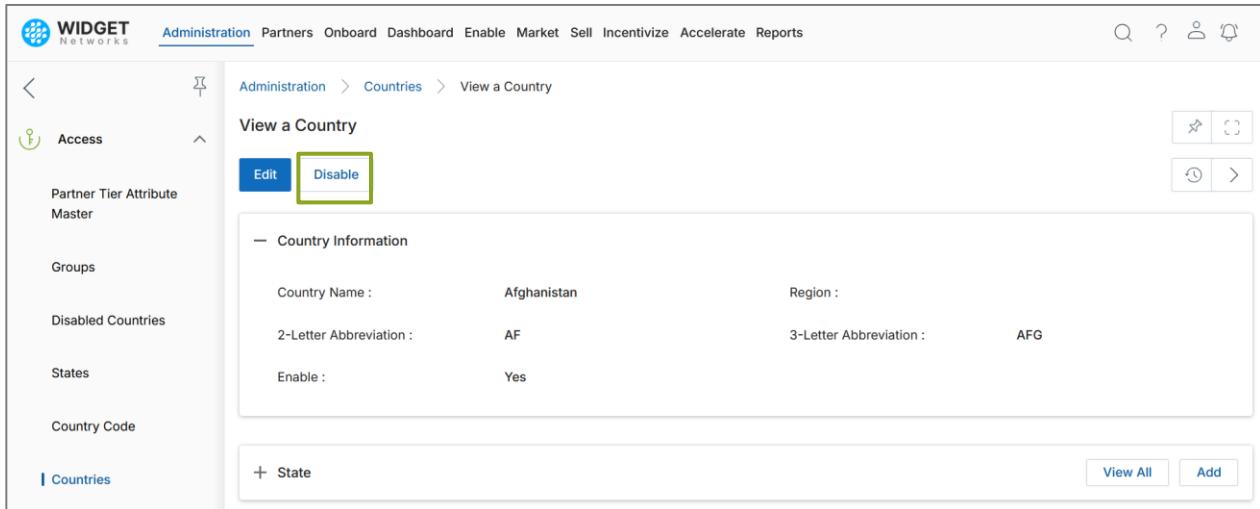
Enhancements have been introduced to the 'Countries' functionality within applications. The Country application stores all data related to countries used across the platform, including language pages, related lists, and dropdown areas, and serves as a dependent field for States. Clients often encounter issues with changed country names or the need to restrict access to certain countries. With this update, countries can now be easily managed by enabling or disabling them as required.

1. To understand this feature, navigate to **Administration > Access > Countries**. The View Countries page contains all the generated 'Countries'.



Select	Name	Region	2-Letter Abbreviation	3-Letter Abbreviation	Enable
<input type="checkbox"/>	Afghanistan		AF	AFG	Yes
<input type="checkbox"/>	Albania		AL	ALB	Yes
<input type="checkbox"/>	Algeria	Western Africa	DZ	DZA	Yes
<input type="checkbox"/>	American Samoa		AS	ASM	Yes
<input type="checkbox"/>	Andorra		AD	AND	Yes
<input type="checkbox"/>	Angola		AO	AGO	Yes

2. To disable a country, navigate to the details page of the specific country and click the "Disable" button. The country will then be removed from the "View Countries" page and added to the "View Disabled Country" list, which can be accessed by going to Administration > Access > Disabled Country.



View a Country

Country Name : Afghanistan

2-Letter Abbreviation : AF

3-Letter Abbreviation : AFG

Enable : Yes

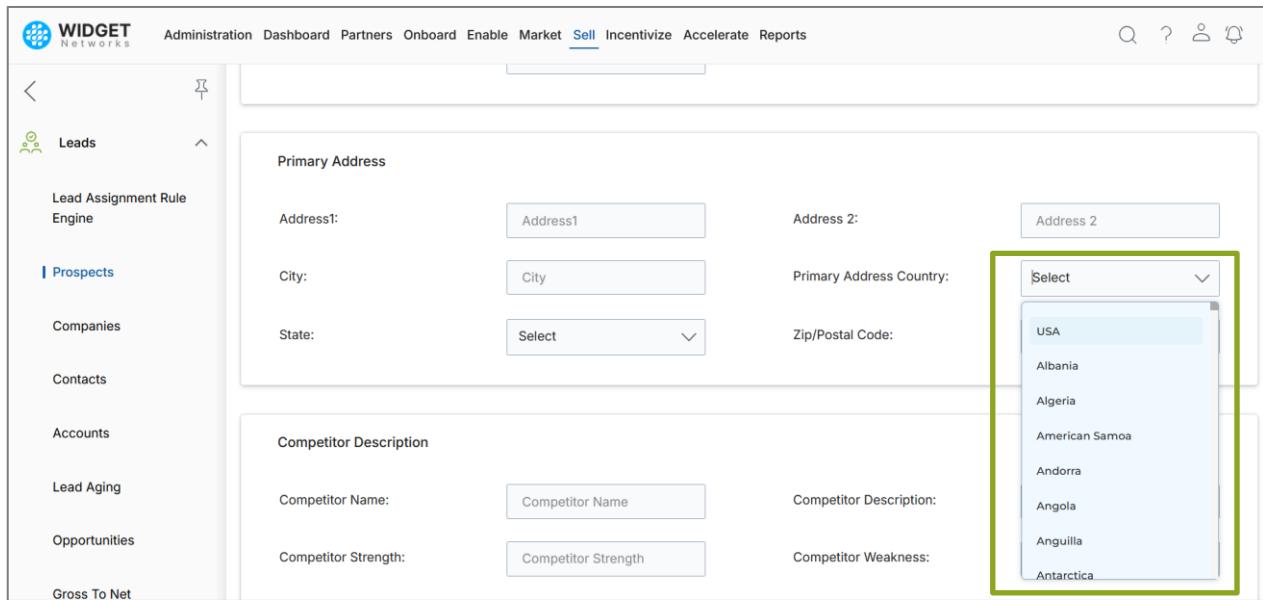
State	
View All	Add



View Disabled Countries

Select	Name	Country Id	ISO Code	Disabled
<input type="checkbox"/>	Afghanistan	2	AFG	Yes
<input type="checkbox"/>	ZinfoTest Disable Country 1	360	ZDC	Yes

3. When a country's name is disabled, it will not be displayed when creating new records. The image below demonstrates that the country name 'Afghanistan', which has been disabled, does not appear in the dropdown list for the 'Primary Address Country' field while creating a new prospect.



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

Leads Prospects Companies Contacts Accounts Lead Aging Opportunities Gross To Net

Primary Address

Address1: Address 2:

City: Primary Address Country:

State: Zip/Postal Code:

Competitor Description

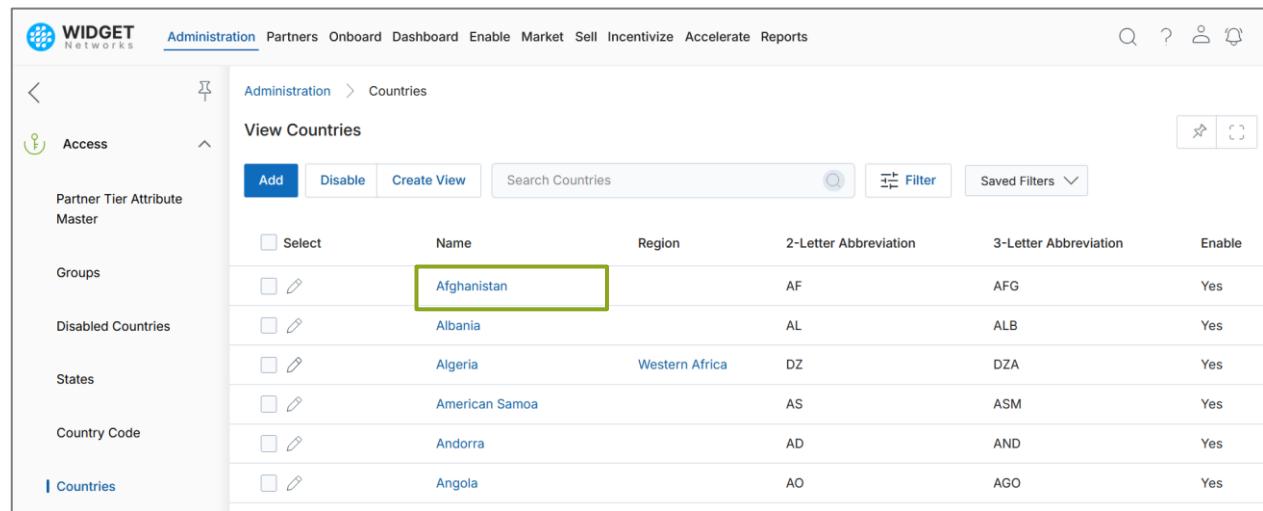
Competitor Name: Competitor Description:

Competitor Strength: Competitor Weakness:

Select

- USA
- Albania
- Algeria
- American Samoa
- Andorra
- Angola
- Anguilla
- Antarctica

4. The disabled country can be enabled by clicking the 'Enable' button. The enabled country will appear on the "View Countries" page, accessible via Administration > Access > Countries as shown in the image below.

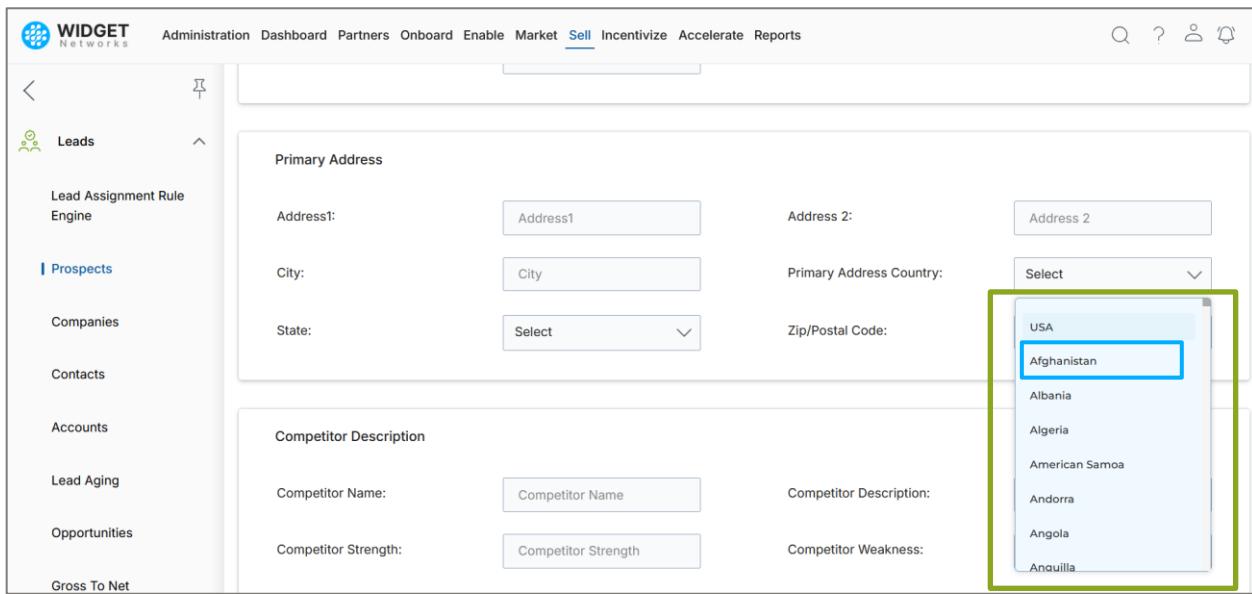


Administration > Countries

Add Disable Create View Search Countries Filter Saved Filters

Select	Name	Region	2-Letter Abbreviation	3-Letter Abbreviation	Enable
<input type="checkbox"/>	Afghanistan		AF	AFG	Yes
<input type="checkbox"/>	Albania		AL	ALB	Yes
<input type="checkbox"/>	Algeria	Western Africa	DZ	DZA	Yes
<input type="checkbox"/>	American Samoa		AS	ASM	Yes
<input type="checkbox"/>	Andorra		AD	AND	Yes
<input type="checkbox"/>	Angola		AO	AGO	Yes

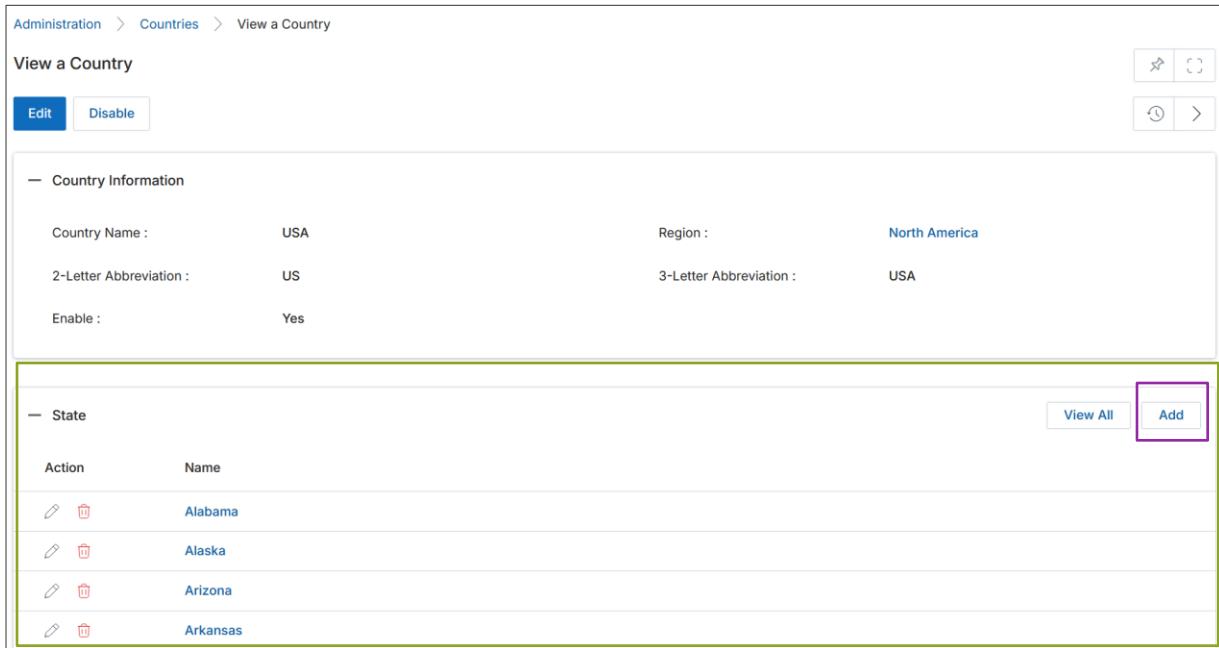
5. When a country name is enabled, it will be displayed when creating new records. The image below shows the country name 'Afghanistan', which has been enabled, appearing in the dropdown list for the 'Primary Address Country' field while creating a new prospect.



The screenshot shows the ZINFO software interface for creating a new prospect. The top navigation bar includes links for Administration, Dashboard, Partners, Onboard, Enable, Market, Sell, Incentivize, Accelerate, and Reports. The main left sidebar lists categories: Leads, Prospects (selected), Companies, Contacts, Accounts, Lead Aging, Opportunities, and Gross To Net. The Prospects section contains fields for Primary Address (Address1, City, State, Address 2, Zip/Postal Code, Primary Address Country), Competitor Description (Competitor Name, Competitor Strength, Competitor Description, Competitor Weakness), and a Competitor List section. A dropdown menu for 'Primary Address Country' is open, showing a list of countries: USA, Afghanistan, Albania, Algeria, American Samoa, Andorra, Angola, and Anquilla. The country 'Afghanistan' is highlighted with a blue border and a green rounded rectangle.

Manage States of a Country

The OEM Admin enjoys the privilege of managing the States of respective Countries. Options are now available for the Admin to Add, Edit, or Delete - States are available in the Related List on the Country's details page. Including this feature gives the Admin greater control to configure a Country with States.



Administration > Countries > View a Country

View a Country

Edit Disable

— Country Information

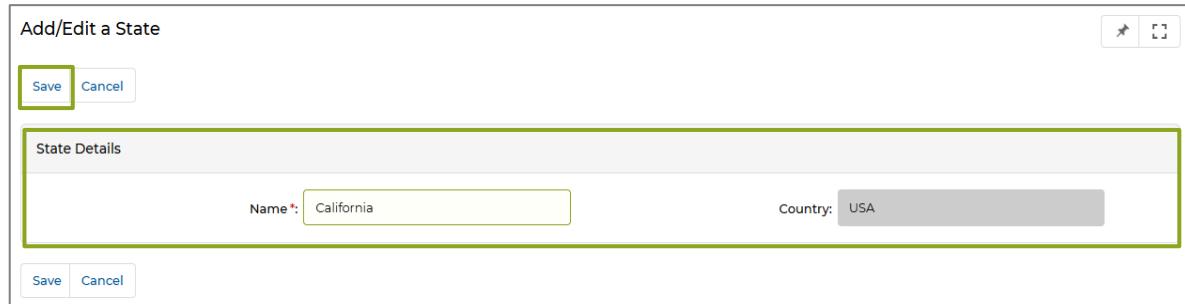
Country Name :	USA	Region :	North America
2-Letter Abbreviation :	US	3-Letter Abbreviation :	USA
Enable :	Yes		

— State

Action	Name
	Alabama
	Alaska
	Arizona
	Arkansas

View All Add

- In the UPM, the Admin traverses from Access to Countries. The Admin needs to go to the details page of the specific Country where a list of States is available in the 'State' Related List.
- Clicking the 'Add' button associated with the Related List will take the Admin to the Add/Edit a State page, where he has to provide the name of the State he wishes to add and click Save. The Admin wants to add 'California' as the new State in this example.



Add/Edit a State

Save Cancel

State Details

Name *:	California	Country:	USA
---------	------------	----------	-----

Save Cancel

- Once the details are saved, the Admin will be redirected to the View a Country page. In the 'State' Related List, we will see that 'California' has been added as the new State.



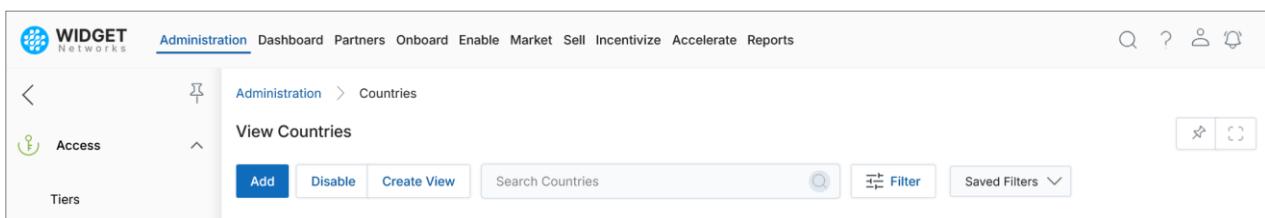
Action	Name
	Alabama
	Alaska
	Arizona
	Arkansas
	California

- By clicking the small pencil icon, the Admin can Edit any State's name. To delete a State from the list, the Admin must click the trash bin icon.

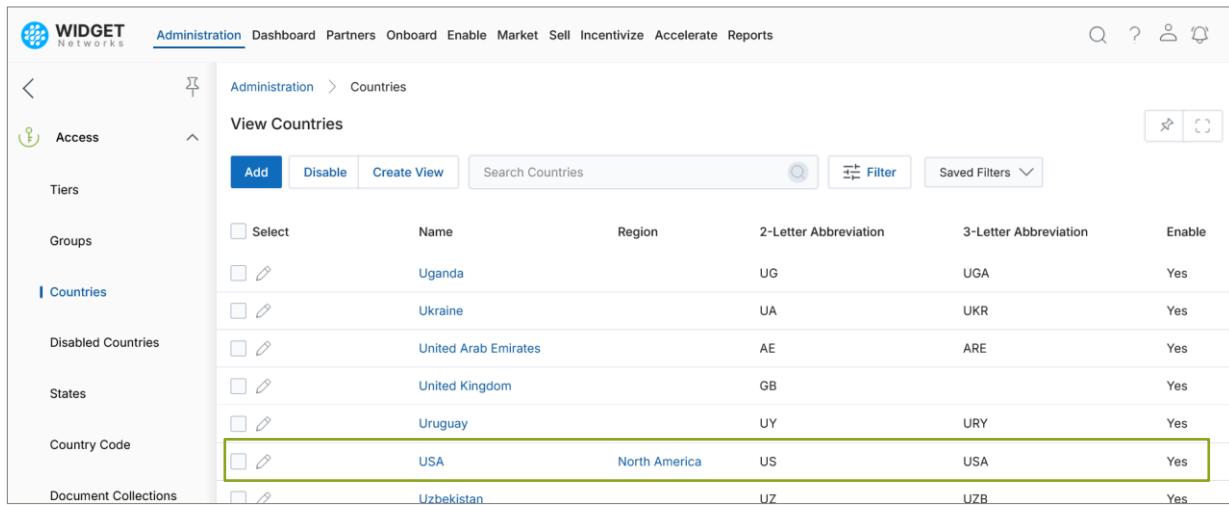
Mandatory Region Association and Abbreviation Enforcement in Country Master

As part of ongoing efforts to ensure data consistency and maintain region-based compliance across global records, the Country Master application has been enhanced with stricter validation and improved mapping integrity.

- Navigate to Administration > Access > Countries.

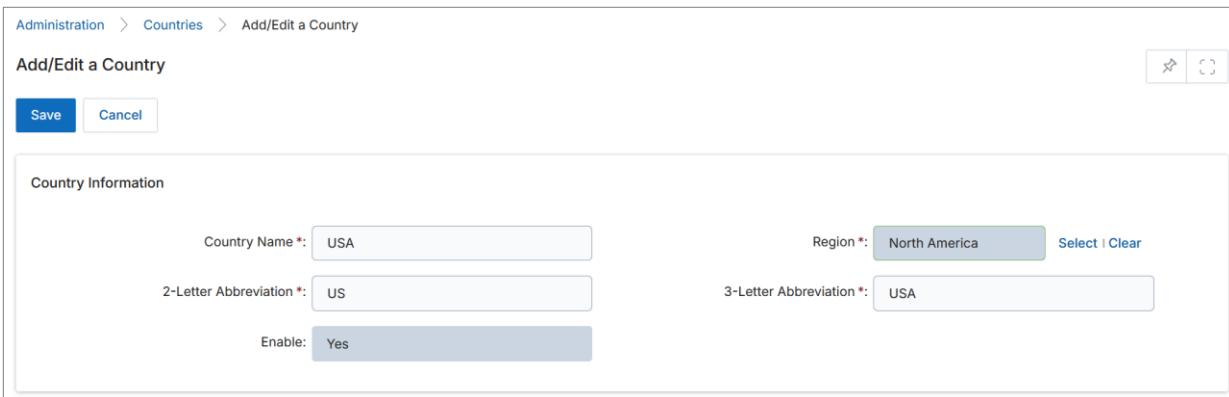


- Click Add or Edit an existing country.



Select	Name	Region	2-Letter Abbreviation	3-Letter Abbreviation	Enable
<input type="checkbox"/>	Uganda	UG	UGA	Yes	
<input type="checkbox"/>	Ukraine	UA	UKR	Yes	
<input type="checkbox"/>	United Arab Emirates	AE	ARE	Yes	
<input type="checkbox"/>	United Kingdom	GB		Yes	
<input type="checkbox"/>	Uruguay	UY	URY	Yes	
<input type="checkbox"/>	USA	North America	US	USA	Yes
<input type="checkbox"/>	Uzbekistan	UZ	UZB	Yes	

- Select Region and provide 2-Letter Abbreviation and 3-Letter Abbreviation and save the record.



Administration > Countries > Add/Edit a Country

Add/Edit a Country

Save Cancel

Country Information

Country Name *:

Region *: Select | Clear

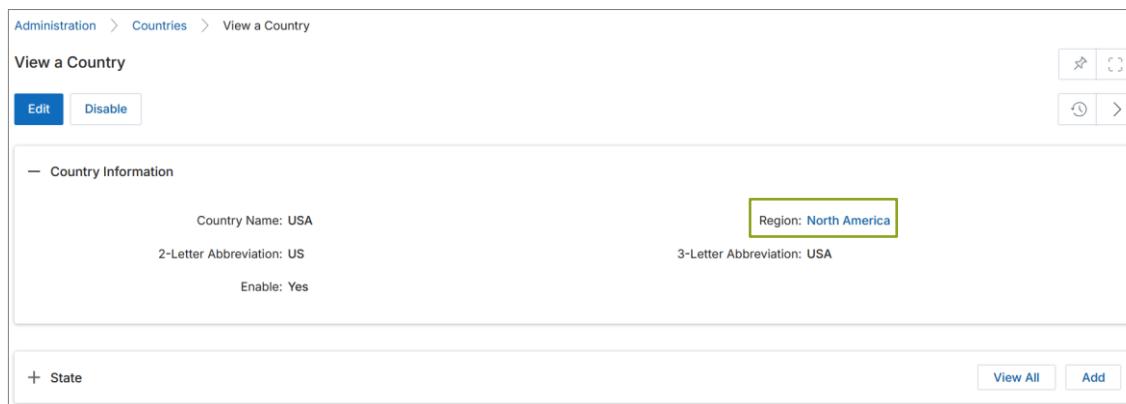
2-Letter Abbreviation *:

3-Letter Abbreviation *:

Enable:

- Mandatory Region Tagging**

- Every country added or edited must now be associated with a specific region.
- This enforces a strict one-to-one relationship, ensuring that a country cannot be left without regional classification or be linked to multiple regions unintentionally.



Administration > Countries > View a Country

View a Country

Edit Disable

— Country Information

Country Name: USA

Region: North America

2-Letter Abbreviation: US

3-Letter Abbreviation: USA

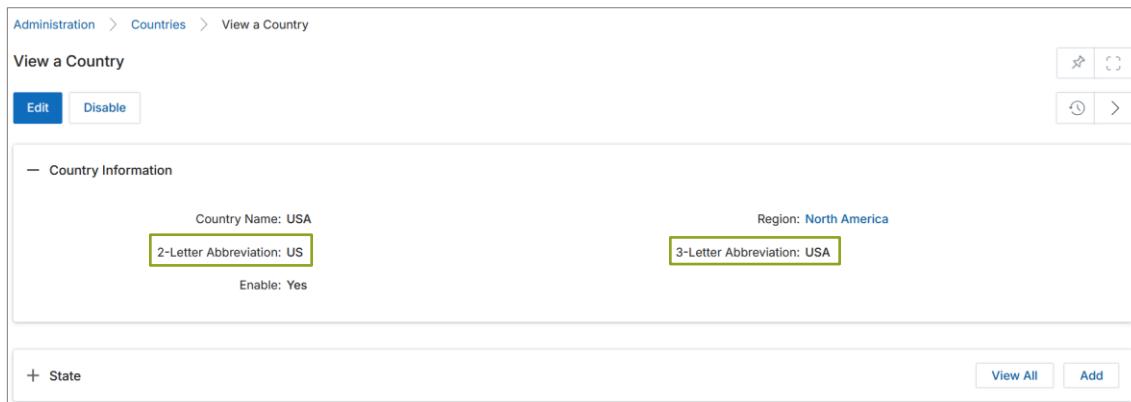
Enable: Yes

+ State

View All Add

- **Enforced Abbreviation Fields**

- The system now requires valid ISO-standard two-letter and three-letter abbreviations for every country.
- These abbreviations are critical for downstream processes, including CRM synchronization and third-party data exchanges.



Administration > Countries > View a Country

View a Country

Edit Disable

Country Information

Country Name: USA

2-Letter Abbreviation: US

Region: North America

3-Letter Abbreviation: USA

Enable: Yes

+ State

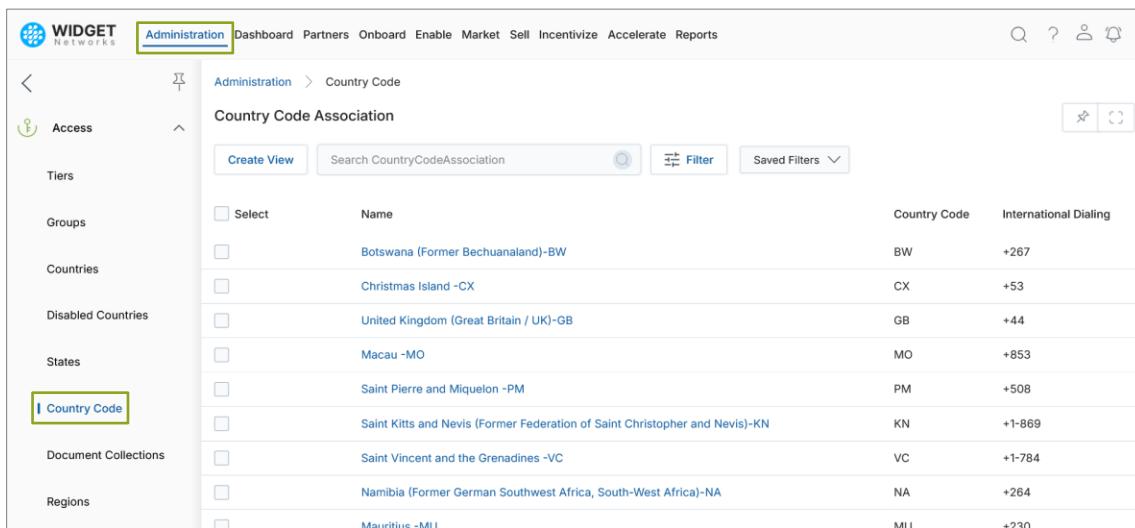
View All Add

Note: All existing country records have been updated to include valid region associations and abbreviation codes to maintain continuity and data accuracy across the platform.

Mandatory Country Code Configuration across Applications

To ensure standardization of contact records and improve international communication, full integration of country dial codes has been introduced across key applications. With this update, all phone numbers throughout the platform are now accompanied by the appropriate country codes.

- Navigate to Administration > Access > Country Code.
- The whole list of countries with Country Codes and International Dialing Codes will be visible.

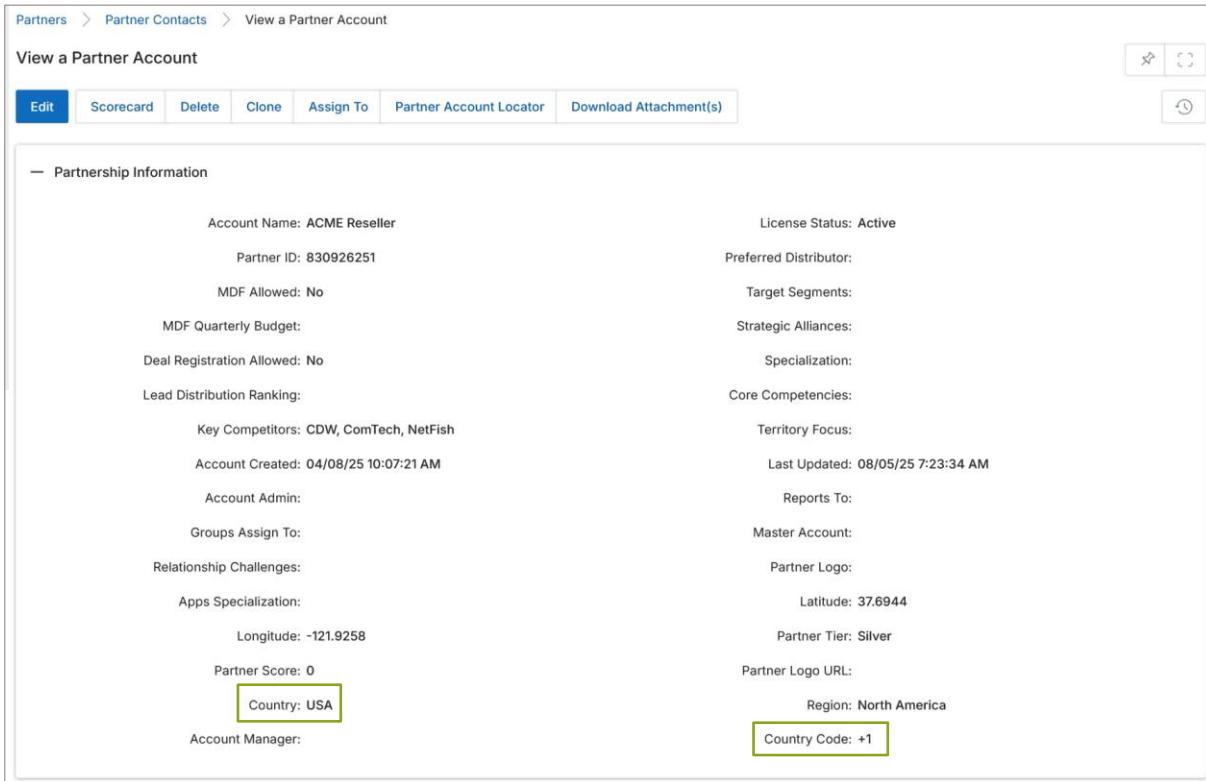


Administration > Country Code

Country Code Association

Select	Name	Country Code	International Dialing
<input type="checkbox"/>	Botswana (Former Bechuanaland)-BW	BW	+267
<input type="checkbox"/>	Christmas Island -CX	CX	+53
<input type="checkbox"/>	United Kingdom (Great Britain / UK)-GB	GB	+44
<input type="checkbox"/>	Macau -MO	MO	+853
<input type="checkbox"/>	Saint Pierre and Miquelon -PM	PM	+508
<input type="checkbox"/>	Saint Kitts and Nevis (Former Federation of Saint Christopher and Nevis)-KN	KN	+1-869
<input type="checkbox"/>	Saint Vincent and the Grenadines -VC	VC	+1-784
<input type="checkbox"/>	Namibia (Former German Southwest Africa, South-West Africa)-NA	NA	+264
<input type="checkbox"/>	Mauritius -MU	MU	+230

- A new dropdown field has been added for selecting country dial codes (e.g., +1 for USA, +91 for India).
- This dropdown appears in Partner Contacts, Contacts, Partner Accounts, Accounts, and User applications.
- Users must now explicitly choose the correct country code while entering or updating a phone number.
- This eliminates ambiguity and ensures consistent formatting of contact records.



Partners > Partner Contacts > View a Partner Account

View a Partner Account

Edit Scorecard Delete Clone Assign To Partner Account Locator Download Attachment(s)

— Partnership Information

Account Name: ACME Reseller License Status: Active

Partner ID: 830926251 Preferred Distributor:

MDF Allowed: No Target Segments:

MDF Quarterly Budget: Strategic Alliances:

Deal Registration Allowed: No Specialization:

Lead Distribution Ranking: Core Competencies:

Key Competitors: CDW, ComTech, NetFish Territory Focus:

Account Created: 04/08/25 10:07:21 AM Last Updated: 08/05/25 7:23:34 AM

Account Admin: Reports To:

Groups Assign To: Master Account:

Relationship Challenges: Partner Logo:

Apps Specialization: Latitude: 37.6944

Longitude: -121.9258 Partner Tier: Silver

Partner Score: 0 Partner Logo URL:

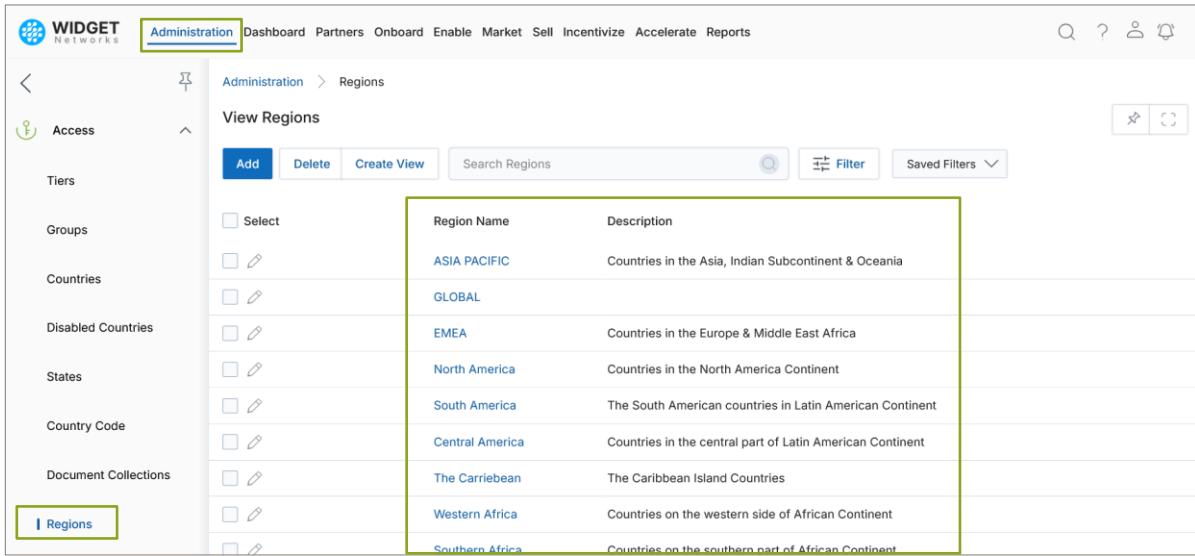
Country: USA Region: North America

Account Manager: Country Code: +1

Country-Region Mapping with Abbreviation Support

To improve transparency and ensure complete regional mapping, the Region application has been enhanced to display complete country abbreviation details alongside their mappings.

- The region listing now displays both two-letter and three-letter country abbreviation codes for each mapped country.
- Navigate to Administration > Access > Regions.
- Click the desired Region and view the associated list of Country(s) with the Region.



Region Name	Description
ASIA PACIFIC	Countries in the Asia, Indian Subcontinent & Oceania
GLOBAL	
EMEA	Countries in the Europe & Middle East Africa
North America	Countries in the North America Continent
South America	The South American countries in Latin American Continent
Central America	Countries in the central part of Latin American Continent
The Caribbean	The Caribbean Island Countries
Western Africa	Countries on the western side of African Continent
Southern Africa	Countries on the southern part of African Continent

- This gives users immediate visibility into standardized identifiers without toggling between applications.
- Administrators can easily verify if countries are correctly configured and associated within their respective regions.

Configurable Date-Time Format

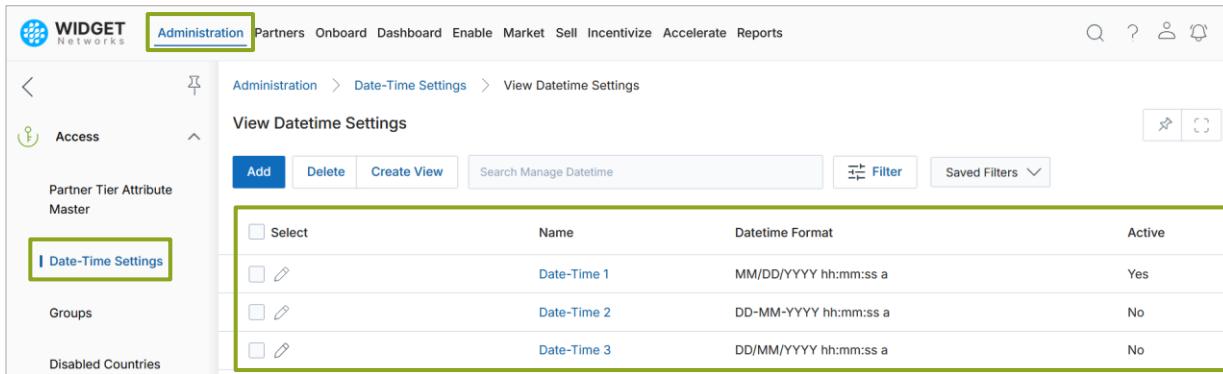
The Configurable Portal Date-Time Format feature allows portal administrators to configure the default date-time format for their portal. Once configured, this format is applied uniformly across all portal pages and components, including list pages, view pages, and add/edit pages.

Previously, the platform used a fixed MM/DD/YY format across the portal without customization options. Administrators can choose from multiple formats (e.g., DD/MM/YYYY, YYYY/MM/DD, etc.) based on their regional or organizational preference. The selected format becomes the active date-time format for that portal and automatically deactivates all other formats.

This change ensures consistency across the portal and reduces user confusion when entering, viewing, or exporting date-time data.

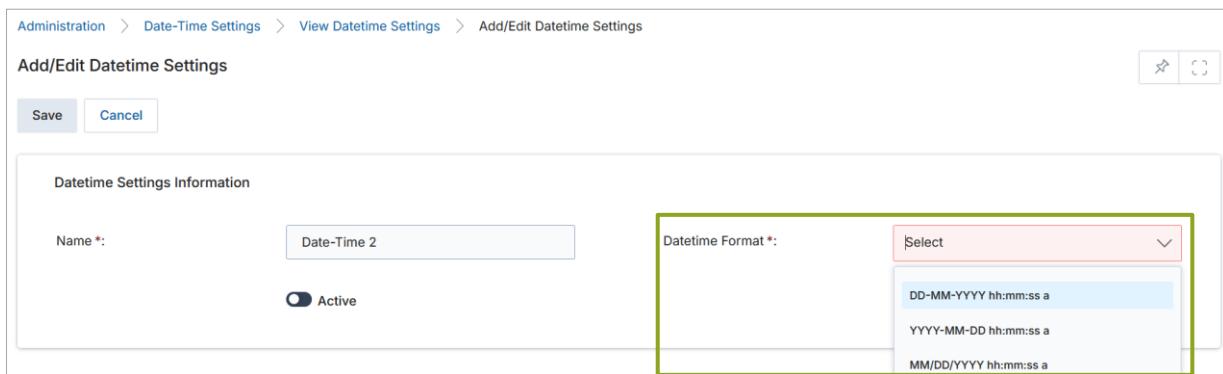
- Log in to the UPM as an administrator.

- Navigate to Administration > Access > Date-Time Settings to open the View Date-Time Settings page, which displays all active and inactive date-time formats.



	Name	Datetime Format	Active
<input type="checkbox"/>	Date-Time 1	MM/DD/YYYY hh:mm:ss a	Yes
<input type="checkbox"/>	Date-Time 2	DD-MM-YYYY hh:mm:ss a	No
<input type="checkbox"/>	Date-Time 3	DD/MM/YYYY hh:mm:ss a	No

- Open the Add/Edit Date-Time Settings page and review the available formats (e.g., DD/MM/YYYY, YYYY/MM/DD, MM/DD/YYYY) in the Date-Time Format dropdown list.



Administration > Date-Time Settings > View Datetime Settings > Add/Edit Datetime Settings

Add/Edit Datetime Settings

Save Cancel

Datetime Settings Information

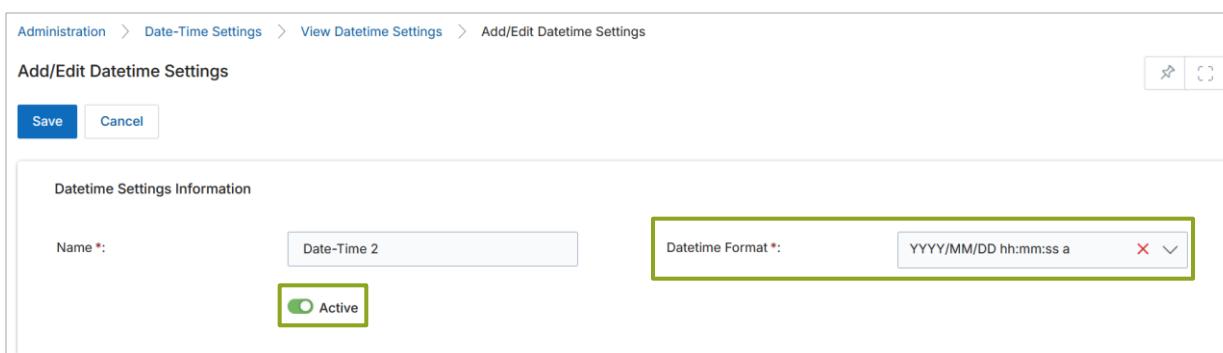
Name *: Date-Time 2

Active

Datetime Format *:

DD-MM-YYYY hh:mm:ss a
YYYY-MM-DD hh:mm:ss a
MM/DD/YYYY hh:mm:ss a

- Select the desired format and mark it as Active. Once activated, all other formats are automatically set to Inactive.



Administration > Date-Time Settings > View Datetime Settings > Add/Edit Datetime Settings

Add/Edit Datetime Settings

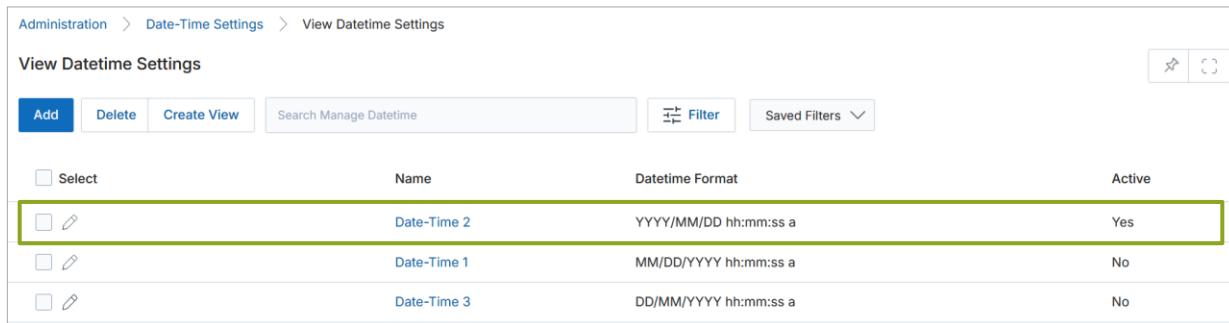
Save Cancel

Datetime Settings Information

Name *: Date-Time 2

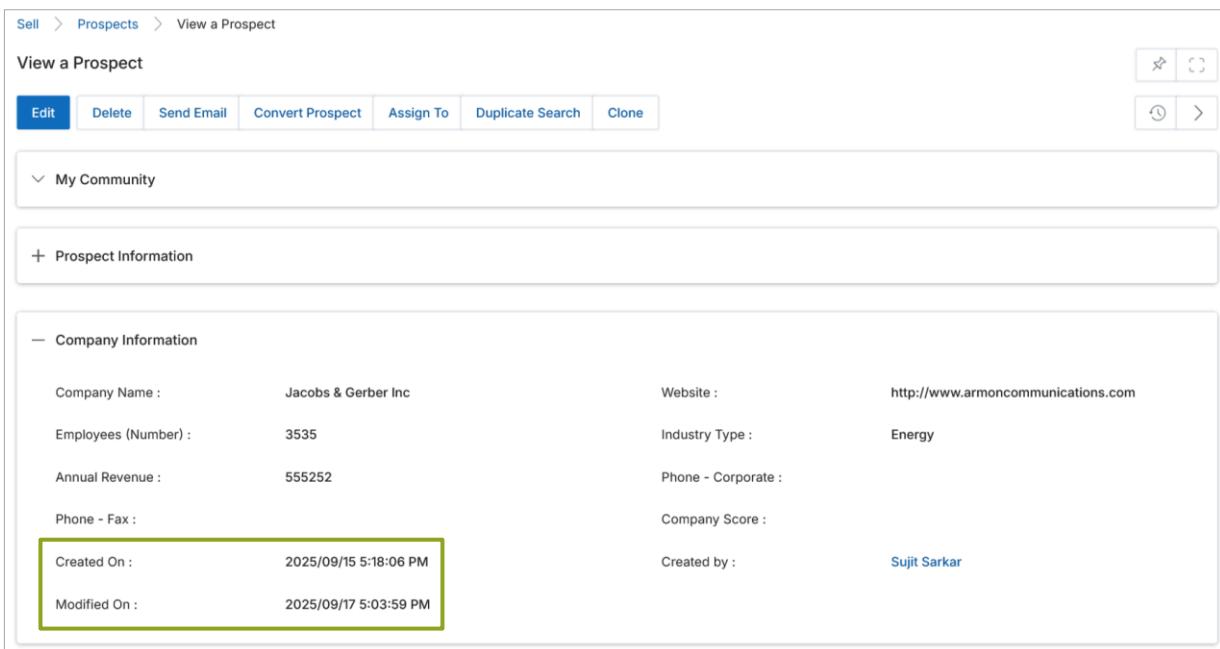
Active

Datetime Format *: YYYY/MM/DD hh:mm:ss a



Select	Name	Datetime Format	Active
<input type="checkbox"/>	Date-Time 2	YYYY/MM/DD hh:mm:ss a	Yes
<input type="checkbox"/>	Date-Time 1	MM/DD/YYYY hh:mm:ss a	No
<input type="checkbox"/>	Date-Time 3	DD/MM/YYYY hh:mm:ss a	No

- In the following example, verify the changes by navigating to the Prospect Details page, where the selected date-time format is applied consistently and displayed correctly.



Sell > Prospects > View a Prospect

View a Prospect

Edit Delete Send Email Convert Prospect Assign To Duplicate Search Clone

My Community

Prospect Information

Company Information

Company Name :	Jacobs & Gerber Inc	Website :	http://www.armoncommunications.com
Employees (Number) :	3535	Industry Type :	Energy
Annual Revenue :	555252	Phone - Corporate :	
Phone - Fax :		Company Score :	
Created On :	2025/09/15 5:18:06 PM	Created by :	Sujit Sarkar
Modified On :	2025/09/17 5:03:59 PM		

Summary of Features

The following functions are available through Access:

- Control all rights and rules that influence access control. Administrators can assign these rights and rules to users and roles.
- Make changes to user integration in business operations, such as changing the role or organizational unit.
- Change the access control for changed objects during runtime.

- Define the relationship between objects and users—for example, for organizational units, partner companies, areas, or product lines.

Note: Access initially provides users temporary full access to new objects that they create. When users save, rules-based access control for these objects is implemented and replaces the temporary full access.