

Partners Profile Management

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UPM 25.x

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Introduction

To be successful, any partner program requires several key elements: a *structured channel program*, *clear channel policies* so partners know exactly what they need to do to perform successfully and how their performance will be measured and rewarded, and *clear programs* that address both technical and non-technical aspects of the channel program.

ZINFI's UPM platform enables a unified approach to global partner management and makes achieving these objectives easier.

By deploying ZINFI's UPM platform, you can recruit, onboard, train, and manage your partners globally to drive profitable growth, and you can increase your channel ROI by having an accurate picture of what is working and what is not. The platform makes it easy for you to determine which partners are on track to become high performers and which partners need extra help. With better visibility into partner performance, your regional and field organizations can target their efforts more precisely and with better results.

Using ZINFI's UPM platform is intuitive and easy. Both vendors and partners can quickly upload lists and campaign assets to run fully integrated campaigns that are highly effective. This intuitive mode of usage not only drives higher rates of adoption of marketing tactics and tools but also ensures vendors and partners will stay engaged over the long run.

ZINFI's UPM platform is supported in multiple languages and with localized resources in various countries worldwide. This localized support drives partner usage and satisfaction and helps vendors seeking to drive partner enablement globally achieve better results.



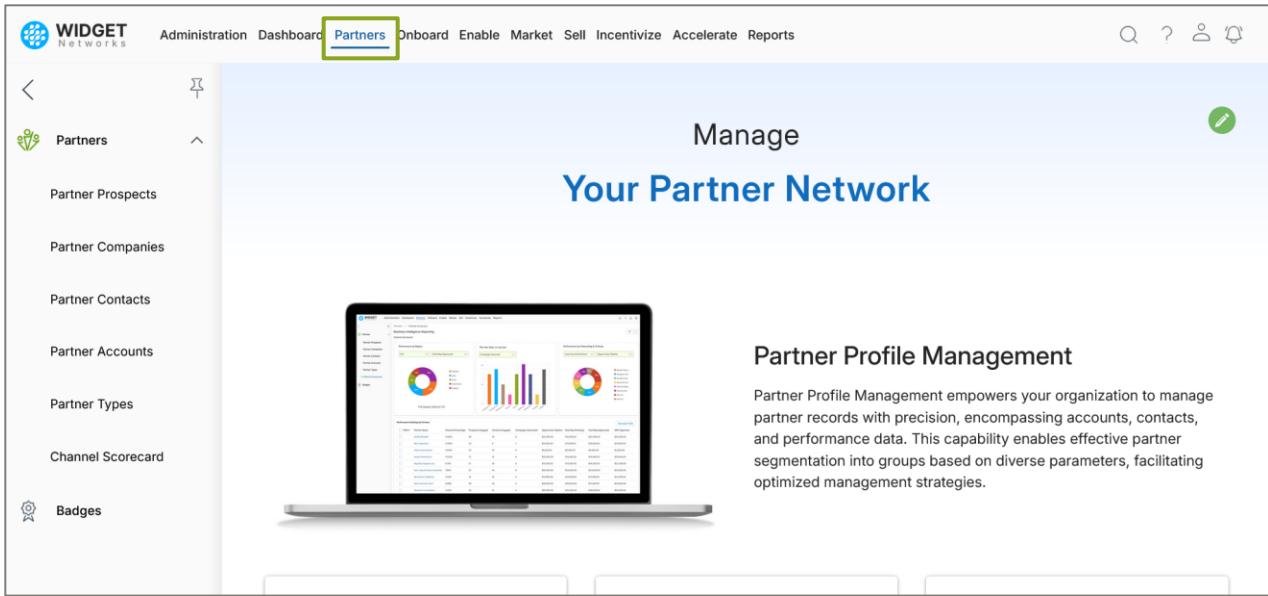
- Partner management is aligned with expertise in partner business models.
- It is focused on onboarding, developing, and growing global partners.
- It aims for the ongoing global success of the partner network across all service deployments.

ZINFI's UPM platform enables real-time information flow that enhances visibility, boosts collaboration between you and your partners, and creates a conduit between global partners and your organization, giving you full control over every element of the partner-focused sales and marketing process, including joint marketing campaigns, lead management, sales forecasting, pipeline management, order processing, and partner commissions and royalties.

Global Partner Management

UPM Partner Management

The Partners module of the UPM platform can be accessed by clicking on **Partners** in the top menu.



A list of five primary sub-modules appears on the left side of the screen: Partner Companies, Partner Prospects, Partner Contacts, Partner Accounts, and Partner Types. The Channel Scorecard is a hotlink to the Reports section displaying the Channel Dynamics in graphical format.

Partner Companies

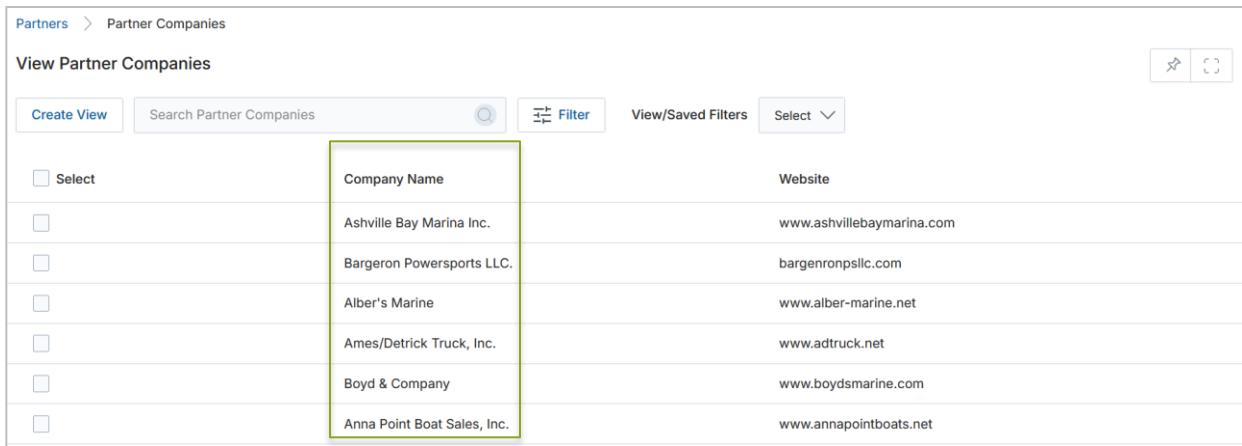
By clicking on **Partner Companies**, users can manage organization-specific details that help differentiate one partner organization from another. UPM recommends that users with administrator privileges customize these company-specific details so that all users under a specific account may be grouped with common features. The following management options are included:

Searching for Existing Partner Companies

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 dropdown.

2. Clicking on a **Company Name** in the grid takes you to its details page.



<input type="checkbox"/> Select	Company Name	Website
<input type="checkbox"/>	Ashville Bay Marina Inc.	www.ashvillebaymarina.com
<input type="checkbox"/>	Bargeron Powersports LLC.	bargenronpsllc.com
<input type="checkbox"/>	Alber's Marine	www.alber-marine.net
<input type="checkbox"/>	Ames/Detrick Truck, Inc.	www.adtruck.net
<input type="checkbox"/>	Boyd & Company	www.boydsmarine.com
<input type="checkbox"/>	Anna Point Boat Sales, Inc.	www.annapointboats.net

Partner Prospects

Potential partners—or partners qualified through marketing efforts, financial capacity, and willingness to form a partnership—can be managed with this sub-module.

Searching for Existing Partner Prospects

A list view of partner prospects is provided along with the following menu options at (1) in the figure below:

- a. **Add** – Opens a new page to add a new prospect.
- b. **Delete** – Deletes selected prospect(s) from the prospect list.
- c. **Send Email** – Creates an email distribution list of prospects you select.
- d. **Export** and **Import** – Allows users to export or import a list of prospects. A list of prospects to export can be created by selecting individual prospects, or by clicking on **Entire List** or **Current Page**.
- e. **Create View** – Allows users to create a customized page view.
- f. **Search** – This opens a new window where you can search by email ID, name, company name, country, list name, blast name, etc.
- g. **Clear Search** – Clears the current search.
- h. **Saved Searches** – Shows a list of saved searches in the search drop-down menu.

Clicking on a prospect name in the grid (2) takes you to its details page.

Partners > Partner Companies		
View Partner Companies		
Create View	Search Partner Companies <input type="text"/> 	 Filter
<input type="checkbox"/> Select	Company Name	Website
<input type="checkbox"/>	Ashville Bay Marina Inc.	www.ashvillebaymarina.com
<input type="checkbox"/>	Bargeron Powersports LLC.	bargeronpsllc.com
<input type="checkbox"/>	Alber's Marine	www.alber-marine.net
<input type="checkbox"/>	Ames/Detrick Truck, Inc.	www.adtruck.net

View Partner Prospect Details

When you click on a specific partner prospect, details of the prospect are displayed along with the following actionable items.

The menu at the top of the page (1 in the figure below) presents the following options:

- a. **Edit** – Displays details of the selected partner prospect.
- b. **Delete** – Deletes partner prospect details.
- c. **Duplicate** – Creates a duplicate of partner prospect details so they can be quickly applied to another prospect.
- d. **Send Email** – Navigates to a page where users can select email templates for use in a campaign.
- e. **Convert Prospect** – Converts a partner prospect into a contact.
- f. **Assign To** – Allocates the partner prospect to a specific user(s) or group(s).

Detailed information for the selected partner prospect is displayed at (2) in the figure below.

Options to display campaign history, tasks, notes, and assignment history for the selected partner prospect may be found at (3) at the bottom of the page.

View Partner Prospect

[Back / View Partner Prospect](#)

[Edit](#) [Delete](#) [Clone](#) [Send Email](#) [Convert Prospect](#) [Assign To](#) [Reject](#)

<
>

— Partner Information

Email: roseann.s@alber-marine.net	Title: Executive SQA
First Name: Rose Ann	Last Name: Smith
Phone: 1-837-555-3631	Fax: 1-620-347-8863
Mobile: 1-876-567-8891	Lead Source: Campaign
Status: Rejected	Score: 5

— Company Information

Company Name: Alber's Marine	Website: www.alber-marine.net
Annual Revenue: >\$90M	Industry Type: Manufacturing

— Competitor Description

Competitor Name: Justo Corp.	Competitor Description: www.jutso-corp.com
Competitor Strength: Server & Storage	Competitor Weakness: Virtualization Solutions

— Address Information

Address 1: 2777 Eu, Ave	Address 2:
City: San Diego	Country: USA
State: California	Postal Code: 94919

— Corporate Address Information

Address 1: 2777 Eu, Ave	Address 2:
City: San Diego	Country: USA
State: California	Zip/Postal Code: 94919

— Additional Information

Description: Alber's Marine is a new company that will provide high quality technical and environmental engineering services to its clients. Alber's Marine began operations on Mar 02, 2007.

+ Campaign History
Add

+ Task(s)
Add

+ Note(s)
Add

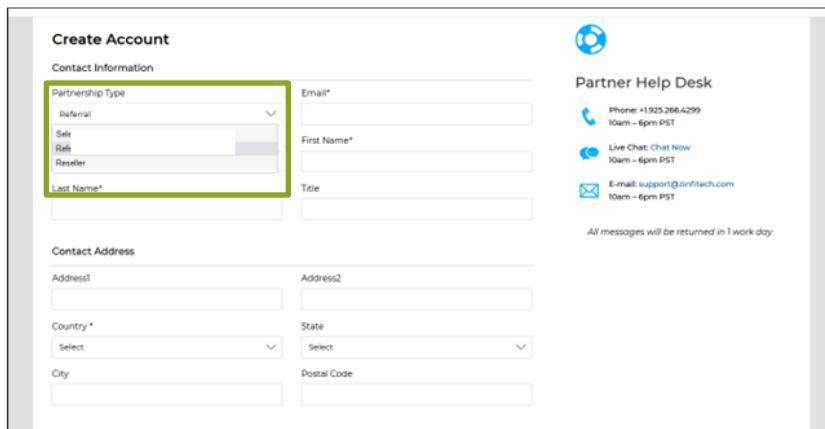
+ Prospect Assignment History

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Affiliate Partner Registration and Affiliate Partner Prospect

Upgraded Partner Management module with support for Affiliate Partners allowing organizations to manage affiliate partner profiles more quickly and effectively. Admins can easily create Affiliate Partner records including business information. Using the Affiliate Partner Profile management feature Affiliate program Managers can easily track detailed affiliate partner profile information. Affiliate Partners can also register themselves through the UPM Sign Up Form and land as an Affiliate Partner Prospect at UPM.

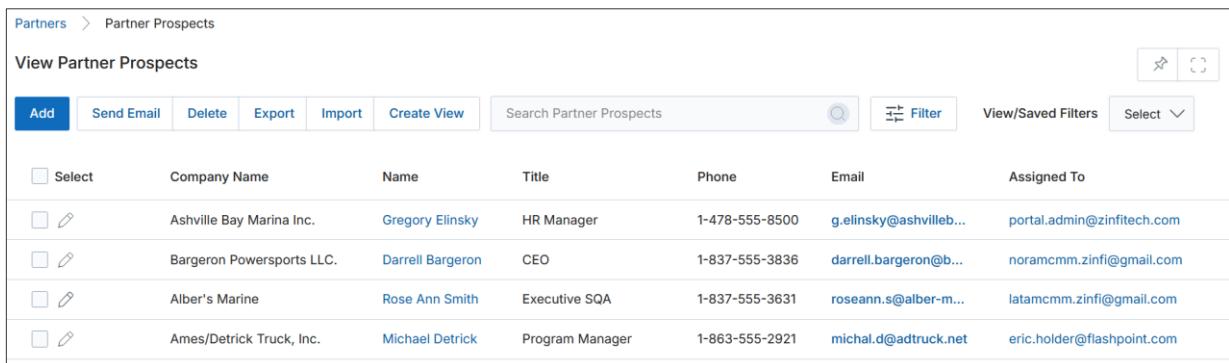
- Self-Registration of Affiliate/Referral Partner can be done on the Sign Up page of the **UPM** Portal.
- While registering, the Affiliate Partner must make sure to select '**Referral**' from the dropdown in **Partnership Type** and click **Submit** after filling in other necessary fields with data.



- Once registration is successful, the Affiliate Partner record will be visible in the **View Partner Prospects** List.

Adding an Affiliate Partner Prospect

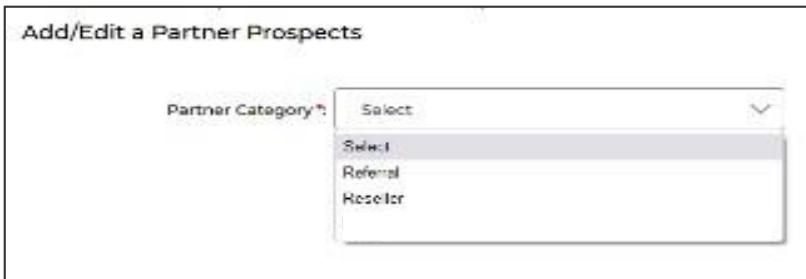
- Click on **Add** to create an Affiliate Partner Prospect.



Select	Company Name	Name	Title	Phone	Email	Assigned To
<input type="checkbox"/>	Ashville Bay Marina Inc.	Gregory Elinsky	HR Manager	1-478-555-8500	g.elinsky@ashvilleb...	portal.admin@zinfitech.com
<input type="checkbox"/>	Bargeron Powersports LLC.	Darrell Bargeron	CEO	1-837-555-3836	darrell.bargeron@b...	noramcmm.zinfo@gmail.com
<input type="checkbox"/>	Alber's Marine	Rose Ann Smith	Executive SQA	1-837-555-3631	roseann.s@alber-m...	latamcmm.zinfo@gmail.com
<input type="checkbox"/>	Ames/Detrick Truck, Inc.	Michael Detrick	Program Manager	1-863-555-2921	michael.d@adtruck.net	eric.holder@flashpoint.com

- Clicking **Add** will take the admin to an intermediary page where the admin has to choose the **Partner Category as Referral** from the options available in the dropdown.

- Similar to filling in details for a Partner prospect, the following additional fields for an Affiliate Partner Prospect will be associated:
 - **Commission Payout Milestones:**
 - **Price Book** – Associate Affiliate Partner Prospect Price Books.
 - **Referral Submission Commission** – Amount of Referral Submission Commission.
 - **Referral Acceptance Commission** – Amount of Referral Acceptance Commission.
 - **Referral Rejected Commission** – Amount of Referral Commissions Rejected.
- It is to be noted that the **Commission Payout Milestones** section won't be available if the user initially chooses **Reseller** as **Partner Category**.



The Affiliate Partner Prospect is converted to a Contact and Account and finally, an Affiliate Partner User is created.

Partner Contacts

A partner prospect or potential partner is an organization that matches the OEM's ideal partner profile but has not yet expressed a definite interest in becoming a partner. A partner contact is a person you can contact to connect with the partner prospect through an opted-in phone number or email address. The Partner Contacts sub-module provides everything you need to know about contact on a single page, including contact info, communication history, and related tasks and notes. Every interaction with contact is tracked and updated in real-time.

Search for Existing Partner Contacts

A list of partner contacts is provided along with the following options at (1) in the figure below:

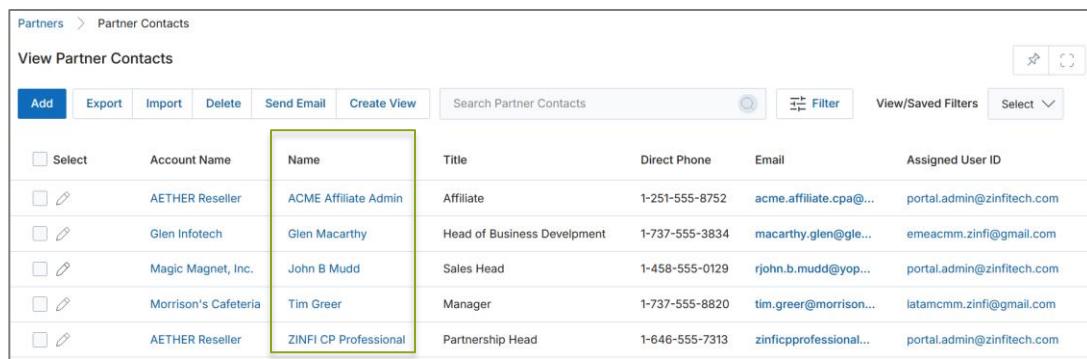
- a. **Add** – Opens a new page to add a new partner contact.
- b. **Delete** – Deletes selected contacts(s) from the partner contact list.
- c. **Send Email** – Navigates to a page where users can choose an email distribution list to add selected partner contacts to.
- d. **Export** – Allows users to export a list of contacts by selecting one of these options from the drop-down menu: **Entire List**, **Current Page**, or **Selected Records**. After selecting the desired option, click on **Export**.
- e. **Create View** – Allows users to create a new customized page view.

- f. **Search** – This opens a new window where you can search by email ID, contact name, company name, country, list name, blast name, etc.
- g. **Clear Search** – Clears the current search.

Clicking on a contact name in the list takes you to the contact's details page and clicking on the contact's company takes you to the company's details page.

View Partner Contact Details

When you click on a specific contact, the details for that contact are displayed along with the following actionable items.



Account Name	Name	Title	Direct Phone	Email	Assigned User ID
AETHER Reseller	ACME Affiliate Admin	Affiliate	1-251-555-8752	acme.affiliate.cpa@...	portal.admin@zinfitech.com
Glen Infotech	Glen Macarthy	Head of Business Development	1-737-555-3834	macarthy.glen@gle...	emeacmm.zinfo@gmail.com
Magic Magnet, Inc.	John B Mudd	Sales Head	1-458-555-0129	rjohn.b.mudd@yop...	portal.admin@zinfitech.com
Morrison's Cafeteria	Tim Greer	Manager	1-737-555-8820	tim.greer@morrison...	latamcmm.zinfo@gmail.com
AETHER Reseller	ZINFO CP Professional	Partnership Head	1-646-555-7313	zinficpprofessional...	portal.admin@zinfitech.com

- a. **Edit** – Opens contact details in edit mode.
- b. **Delete** – Deletes the specific contact.
- c. **Clone** –Duplicates contact details and opens in editable mode.
- d. **Send Mail** – Sends an email to the contact. (More details related to sending email can be found in the Emails module of the UPM platform.)
- e. **Assign To** – Allocates a contact to specific user(s) or group(s).

Detailed information for the selected partner contact is provided below.

Options to display notes, tasks, campaign history, contacts assignment history, users, and help desk history for the selected partner contact may be found at the bottom of the page.

Edit
Delete
Clone
Send Email
Assign To

— Partner Contact Information

First Name: Tim	Last Name: Greer
Email: tim.greer@morrisons.com	Title: Manager
Contact Type: Active	User Type: CP
Address 1: 210 Sports Center	State: Georgia
Address 2: 1444 Sam Nunn Blv	City: Savannah
Country: USA	Zip/Postal Code: 23711
Direct Phone: 1-737-555-8820	Mobile Phone: 1-766-477-4898
Contact Source: Campaign	Score:

— Account Information

Account Name: Morrison's Cafeteria	Country: USA
State: Georgia	City: Savannah
Address 1: 210 Sports Center	Address 2: 1444 Sam Nunn Blv
Zip/Postal Code: 23711	

Description: Ayer's Sports Center is a new company that will provide high quality technical and environmental engineering services to its clients. Ayer's Sports Center began operations on Mar 02, 2007.

+ Notes Add

+ Tasks Add

+ Campaign History Add

+ Contacts Assignment History Add

+ User Record Add

+ Help Desk Add

Partner Accounts

Partner contacts are associated with accounts (company records). There is a many-to-one relationship between contacts and accounts, wherein multiple contacts may be associated with a single account. The Partner Accounts sub-module has the following features:

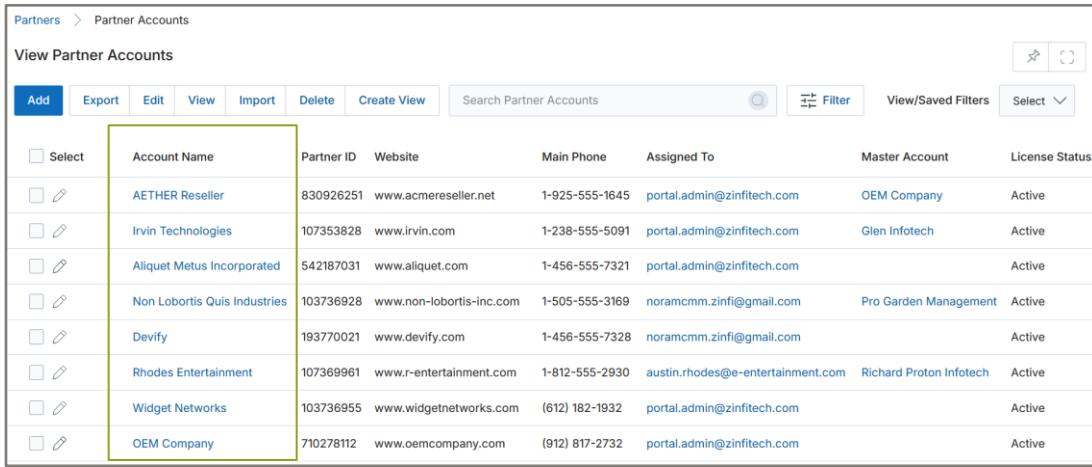
Searching for Existing Partner Accounts

A list of partner accounts is provided along with the following options in the figure below:

- a. **Add** – Opens a new page to add a new partner account.
- b. **Delete** – Deletes selected account(s) from the account list.
- c. **Export** – Allows you to export selected records as needed.

- d. **Create View** – Allows you to create a customized view.
- e. **Search** – Opens a new pop-up window where you can enter search criteria to find desired records.
- f. **Clear Search** – Clears the existing search.
- g. **Saved Searches** – Shows a list of saved searches in the search drop-down menu. 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 menu.

Clicking on an account name in the list takes you to its details page.



Select	Account Name	Partner ID	Website	Main Phone	Assigned To	Master Account	License Status
<input type="checkbox"/>	AETHER Reseller	830926251	www.acmereseller.net	1-925-555-1645	portal.admin@zinfitech.com	OEM Company	Active
<input type="checkbox"/>	Irvin Technologies	107353828	www.irvin.com	1-238-555-5091	portal.admin@zinfitech.com	Glen Infotech	Active
<input type="checkbox"/>	Aliquet Metus Incorporated	542187031	www.aliquet.com	1-456-555-7321	portal.admin@zinfitech.com		Active
<input type="checkbox"/>	Non Lobortis Quis Industries	103736928	www.non-lobortis-inc.com	1-505-555-3169	noramcmm.zinfo@gmail.com	Pro Garden Management	Active
<input type="checkbox"/>	Devify	193770021	www.devify.com	1-456-555-7328	noramcmm.zinfo@gmail.com		Active
<input type="checkbox"/>	Rhodes Entertainment	107369961	www.r-entertainment.com	1-812-555-2930	austin.rhodes@e-entertainment.com	Richard Proton Infotech	Active
<input type="checkbox"/>	Widget Networks	103736955	www.widgetnetworks.com	(612) 182-1932	portal.admin@zinfitech.com		Active
<input type="checkbox"/>	OEM Company	710278112	www.oemcompany.com	(912) 817-2732	portal.admin@zinfitech.com		Active

View Partner Account Details

The top menu provides the following options:

- a. **Edit** – Opens the account in edit mode.
- b. **Delete** – Deletes selected account(s).
- c. **Clone** – Duplicate account information and open it in editable mode.
- d. **Assign To** – Allocates the account to specific user(s) or group(s). When a Partner Account gets assigned to a **specific user** all the associated “Contacts” along with their related “User Records” get transferred to the respective user’s “Partner Accounts” list.
- e. **Submit for Approval** – Click to process the Partner Account Approval Workflow.
- f. **Scorecard** – Reflects the scores of the specific Partner Account under various heads

Partners > Partner Accounts > View a Partner Account

View a Partner Account

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

Partnership information

Account Name: Big Data Support	License Status: Active
Partner ID: F539G	Preferred Distributor: Perfect Support
MDF Allowed: No	Target Segments:
MDF Quarterly Budget: 2000	Strategic Alliances:
Deal Registration Allowed: Yes	Specialization: SLED
Lead Distribution Ranking: 2	Core Competencies: Data
Key Competitors: Target Data	Territory Focus: NORAM
Account Created: 05/14/24 6:02:41 AM	Last Updated: 08/02/24 12:21:47 PM
Account Admin:	Region: GLOBAL
Reports To:	Groups Assign To:
Master Account: Big Data Support	Partner Tier: test
Relationship Challenges:	Partner Logo:  PartnerLogo2.png
Apps Specialization: Test1, Test2	Partner Logo URL: https://mtsitzinfo.net/conc... Edit
Latitude:	Longitude:

[+ Company Information](#)

[+ Partner Locator Overview Page](#)

[+ Accounts Assignment History](#)

[+ Partner Type](#) [Add](#)

[+ Solutions Offered](#) [Add](#)

[+ Business Plans](#)

[+ Support Desk Ticket\(s\)](#) [Add](#)

[+ Projects](#) [Add](#)

[+ Rewards Points Earned](#)

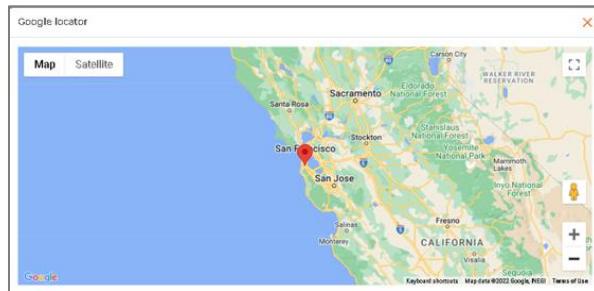
[+ MDF Plans](#)

[+ License Management History](#)

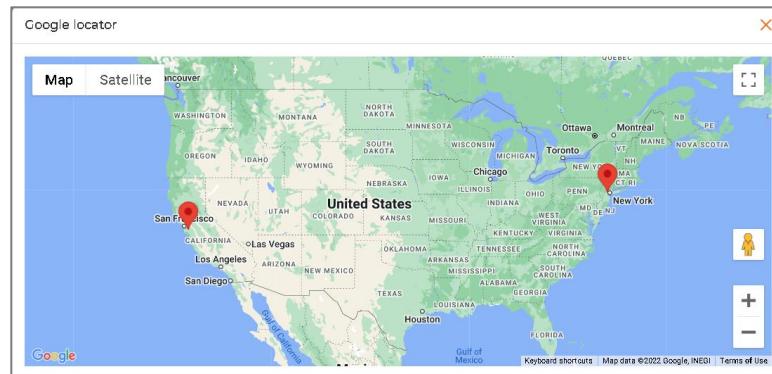
[+ Partner Contacts](#) [View All](#) [Add](#)

[+ Signee](#) [Add](#) [Sort Order](#)

- g. **Partner Account Locator** – This button allows you to locate the Partner Account on Google Maps based on the Address Location of the Partners saved. Here two situations may arise as discussed below.
- h. **Master Partner Account with NULL Associated Child Partner Accounts:** The location of the Master Partner Account will only be displayed on the Google Map as shown below.



1. **Master Partner Account with Associated Child Partner Accounts:** A master Account (considered a Parent Account) can be tagged to multiple Partner Accounts (considered as child accounts). Getting into a Master Account and a subsequent click on the Partner Account Locator button will display the Google map with all the child Partner Accounts tagged to it as shown in the image below.



Detailed information for the selected account is provided along with the Company background information and the assignment history for the account.

Options to display partner contacts, partner type, solutions offered, business plans, help desk ticketing information, projects, rewards, and market development funds (MDF) are also provided.

- i. **Partner Tier** – When the **Partner Score** is updated, the system checks the tier rules and updates the **Partner Tier** if needed. If the new **Partner Score** falls into a different tier range, the system automatically changes the **Partner Tier** and shows the updated **Partner Tier Name**. This ensures that the Partner always has the right tier based on their latest score.

Partner Tier: Titanium	Partner Score: 6
------------------------	------------------

- j. **Signee**: The "Signee" related list enables Administrators to assign signatories to a specific Partner Account, defining the signing sequence (order) as needed. Partner Administrators can select signatories and configure their order.

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

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



The screenshot shows a modal dialog titled "Contract Signees" with the following fields:

- Signee Information** section:
 - Partner Account: zinfitest_aia
 - Signatory Type: Select (dropdown menu)
 - SortOrder: [System Generated]
 - Users: Select (dropdown menu)
- Buttons: Save and Cancel

- 1. **Signatory Type (mandatory)** – This shows whether the signatory belongs to the Admin or Partner group. The available options are Admin and Partner.



The screenshot shows a dropdown menu for "Signatory Type" with the following options:

- Admin (selected)
- Partner

2. Users (mandatory) – Based on the selected signatory type, users tagged with the specific account will be displayed, allowing the user to choose a particular user.

View Users	
Name	Email Address
Nikita Kumari	nikita.kumari@zinfo.com
sdss dsfe	defef@dsdsd.com
Zinfo test Partner	zinfo test partner@yopmail.com
ZINFO TEST02/12	ZINFO TEST02/12@yopmail.com
Simon 1 Partner	simon.partner1@yopmail.com
Simon CPA	simoncpa@yopmail.com
Demo User	demo.user@yopmail.com

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

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

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

Partners > Partner Accounts > View a Partner Account > Sort Order List

Sort Order List

[Save](#) [Cancel](#)

Roni Zinfo partner
zinfo test clara
Zinfo test Partner

[Save](#) [Cancel](#)

Partners > Partner Accounts > View a Partner Account > Sort Order List

Sort Order List

[Save](#) [Cancel](#)

Zinfo test Partner
Roni Zinfo partner
zinfo test clara

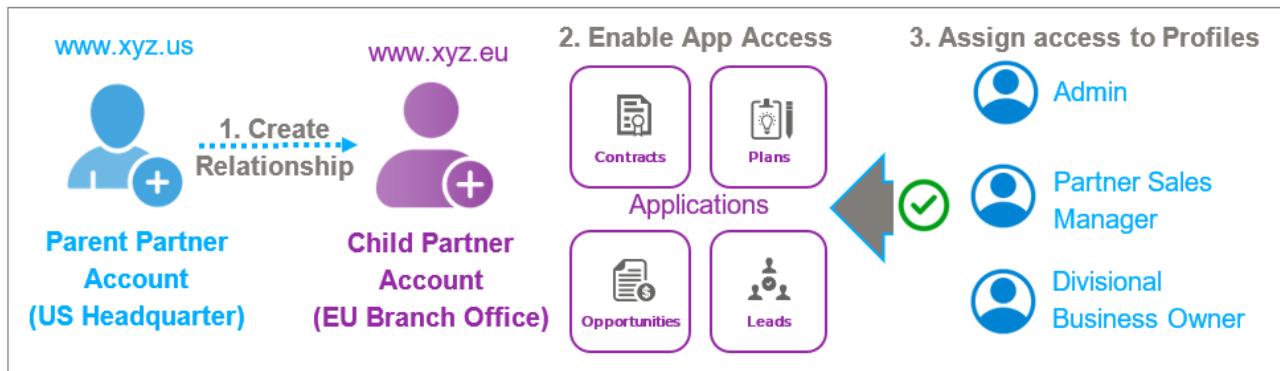
[Save](#) [Cancel](#)

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

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

Master/Parent-Child Partner Accounts

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



- All Account Names are listed with the Master Account (Parent Account, if any) on the List Page.
- To update the Master/Parent Account of a Child Partner Account, click on the Child Partner Account – Child Account1, to access its details page.

Partners > Partner Accounts							
View Partner Accounts							
Add		Edit	Import	Create View	Child	Filter	Saved Filters
<input type="checkbox"/>	Select	Account Name		Partner ID	License Status	Last Updated	Modified On
<input type="checkbox"/>		Zinfitest Child 2			Active	08/13/25 7:27:28...	2025/08/13 12:57:28 PM
<input type="checkbox"/>		zinfitest_grchild1			Active	08/13/25 7:27:08...	2025/08/13 12:57:08 PM
<input type="checkbox"/>		Zinfitest Child 1			Active	08/13/25 7:26:24...	2025/08/13 12:56:24 PM
<input type="checkbox"/>		Child Account2			Active	06/21/25 7:49:18...	2025/06/21 1:19:18 PM
<input type="checkbox"/>		ZinfitestChildAccount1stJan2025to28thFeb2025			Active	02/18/25 11:01:33...	2025/02/18 4:31:33 PM
<input type="checkbox"/>		Child Account1			Active	02/13/25 7:37:25...	2025/02/13 1:07:25 PM

Partners > Partner Accounts > View a Partner Account

View a Partner Account

Edit Delete Clone Assign To Partner Account Locator Scorecard

— Partnership Information

Account Name: Child Account1	License Status: Active
Partner ID:	Preferred Distributor:
MDF Allowed: No	Target Segments:
MDF Quarterly Budget:	Strategic Alliances:
Deal Registration Allowed: No	Specialization:
Lead Distribution Ranking:	Core Competencies:
Key Competitors:	Territory Focus:
Account Created: 12/26/24 2:13:00 PM	Last Updated: 02/13/25 7:37:25 AM
Account Admin:	Region: GLOBAL
Reports To:	Groups Assign To:
Master Account: Master Account1	Relationship Challenges:
Partner Logo:  CRM-Logo2.png	Apps Specialization:
Latitude:	Longitude:
Partner Tier: None	Partner Score:

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

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

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



The screenshot shows the Widget Networks Administration interface. The top navigation bar includes links for Market, Partners, Onboard, Sell, Incentivize, Dashboard, Enable, Reports, and Accelerate. On the far right are icons for search, help, user profile, and notifications. A left sidebar with a 'Tiers' section is partially visible. The main content area is titled 'Administration > Record Visibility' and 'View Record Visibilities'. It features a table with columns: 'Select', 'Module Name', 'Default Access', 'User Hierarchy Enabled', 'Enable Account Hierarchy Visibility', 'Persona Account Hierarchy for Profile', and 'Persona User Hierarchy for Profile'. A row for 'Sales Prospects' is selected, highlighted with a green border. The 'Sales Prospects' row contains the values: 'Courses' (Module Name), 'No' (Default Access), 'No' (User Hierarchy Enabled), 'Yes' (Enable Account Hierarchy Visibility), and 'Partner Admin, Partner' (Persona Account Hierarchy for Profile). The 'Sales Prospects' row is also highlighted with a green border.

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

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

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

Add/Edit a Record Visibility

Save Cancel

Record Visibility Information

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

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

WIDGET Networks

Welcome Market Onboard Sell Incentivize Enable Reports Accelerate

Sell > Prospects

View Prospects

Add Delete Export Import Send Email Create View Search Clear Search Saved Searches Select

Company Name Name Title Email Phone Lead Score Survey Sent Favorite

Demo Sales Account 2 Demo Lead 2 Demo Lead 2 Demolead2@yopmail... No

Demo Sales Account 1 Demo Lead 1 Demo Lead 1 DemoLead@yopmail... No

ZinfiTTestCompanyRebecca ZinfiTTest Rebecca ZinfiTTestRebecca202... No

ZinfiTTestCPCreated20.33 ZinfiTTestCP Created20.33 ZinfiTTestCPCreated2... No

ZinfiTTestCPACreated20.31 ZinfiTTestCPA Created20.31 ZinfiTTestCPACreated... No

ZinfiTTestCPCreated20.21 ZinfiTTestCP Created20.21 ZinfiTTestCPCreated2... No

ZinfiTTestCPACreated20.19 ZinfiTTestCPA Created20.19 ZinfiTTestCPACreated... No

ZinfiTTestCPCreated20.09 ZinfiTTestCP Created20.09 ZinfiTTestCPCreated2... No

ZinfiTTestCPACreated20.08 ZinfiTTestCPA Created20.08 ZinfiTTestCPACreated... No

ZinfiTTestMasterProspect ZinfiTTest Master Prospect ZinfiTTestMasterPros... No

ZinfiTTestRaul2024 ZinfiTTest Raul ZinfiTTestRaul2024@y... No

ZinfiTTestDaul2024 ZinfiTTest Daul ZinfiTTestDaul2024@y... No

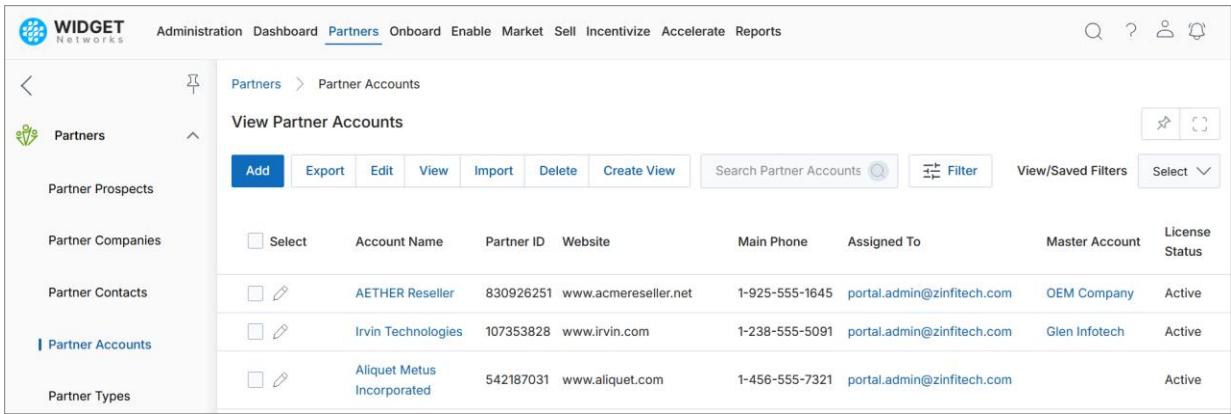
Parent/Master Prospects (highlighted with a purple box)

Child Prospects (highlighted with a green box)

Partner Logo URL auto-generate

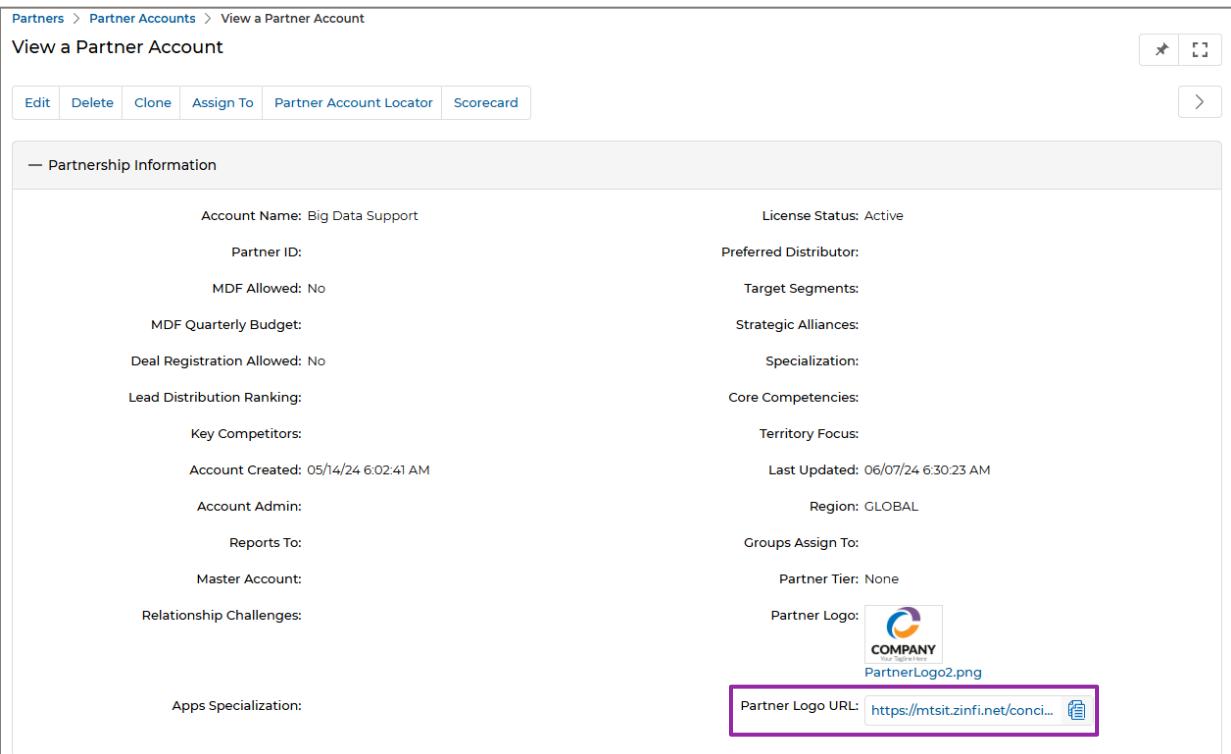
Implementing the Partner Logo feature in the Release lets you share your brand assets seamlessly across the web. With this cutting-edge tool, cumbersome Partner Logo downloads and complicated sharing processes are gone. With the Universal Resource Locator of the Logo, you can easily integrate it into your third-party platforms, viz. Salesforce (SFDC) or host it on the Internet with no-access restrictions.

1. After logging into the UPM System as an Admin user, we click **Partners > Partners > Partner Accounts** to reach the **View Partner Accounts** page, which lists all the Partner Accounts.



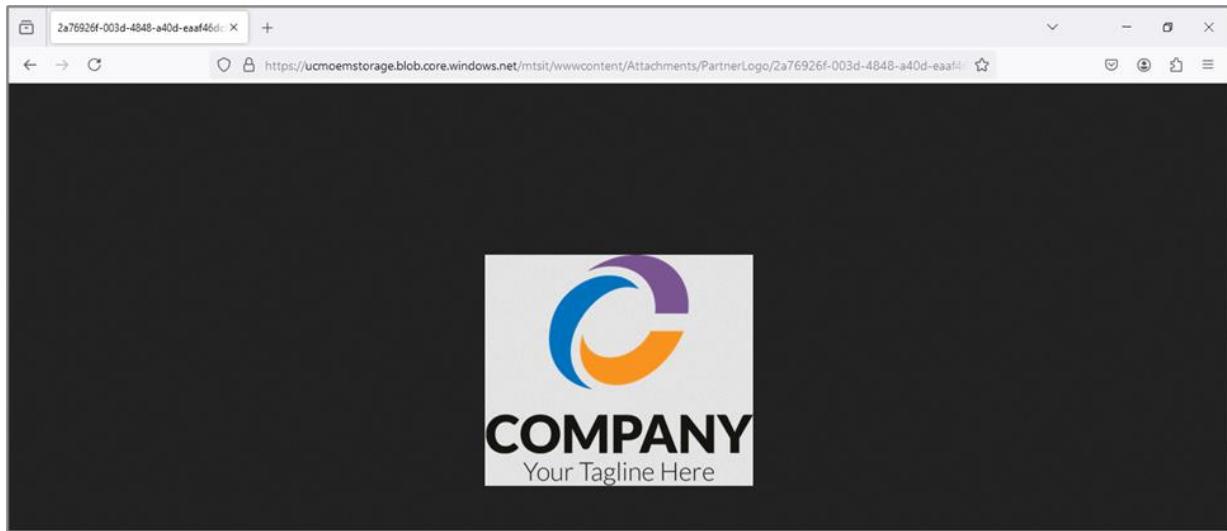
	Select	Account Name	Partner ID	Website	Main Phone	Assigned To	Master Account	License Status
<input type="checkbox"/>		AETHER Reseller	830926251	www.acmereseller.net	1-925-555-1645	portal.admin@zinfitech.com	OEM Company	Active
<input type="checkbox"/>		Irvin Technologies	107353828	www.irvin.com	1-238-555-5091	portal.admin@zinfitech.com	Glen Infotech	Active
<input type="checkbox"/>		Aliquet Metus Incorporated	542187031	www.aliquet.com	1-456-555-7321	portal.admin@zinfitech.com		Active

2. Once we click any Account Name and navigate to the Partner Account details page, we'll find the **Partner Logo URL** auto-generated, ready to be used and shared.



Account Name: Big Data Support	License Status: Active
Partner ID:	Preferred Distributor:
MDF Allowed: No	Target Segments:
MDF Quarterly Budget:	Strategic Alliances:
Deal Registration Allowed: No	Specialization:
Lead Distribution Ranking:	Core Competencies:
Key Competitors:	Territory Focus:
Account Created: 05/14/24 6:02:41 AM	Last Updated: 06/07/24 6:30:23 AM
Account Admin:	Region: GLOBAL
Reports To:	Groups Assign To:
Master Account:	Partner Tier: None
Relationship Challenges:	Partner Logo:
Apps Specialization:	Partner Logo URL: https://mtsit.zinf.net/conci...

3. Clicking the link will instantly download the Partner Logo (as configured in the browser). The link can also be accessed and opened without needing to log into the UPM Portal.



4. This URL can be easily copied for sharing.

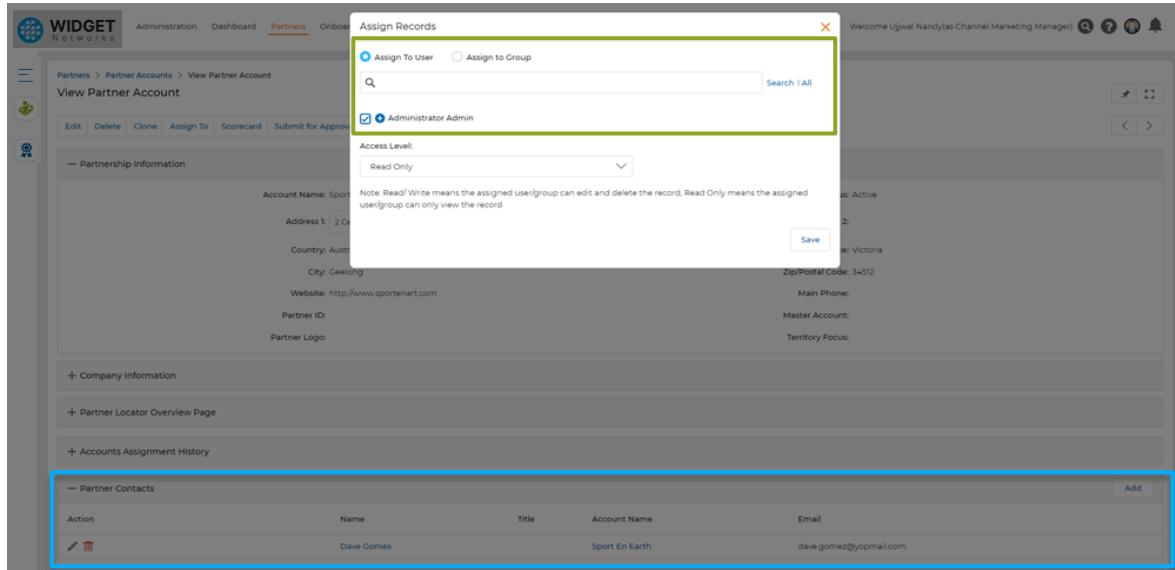


5. The URL can be seamlessly integrated with platforms like Salesforce (SFDC) or accessed to end-users who don't have UPM Portal access.

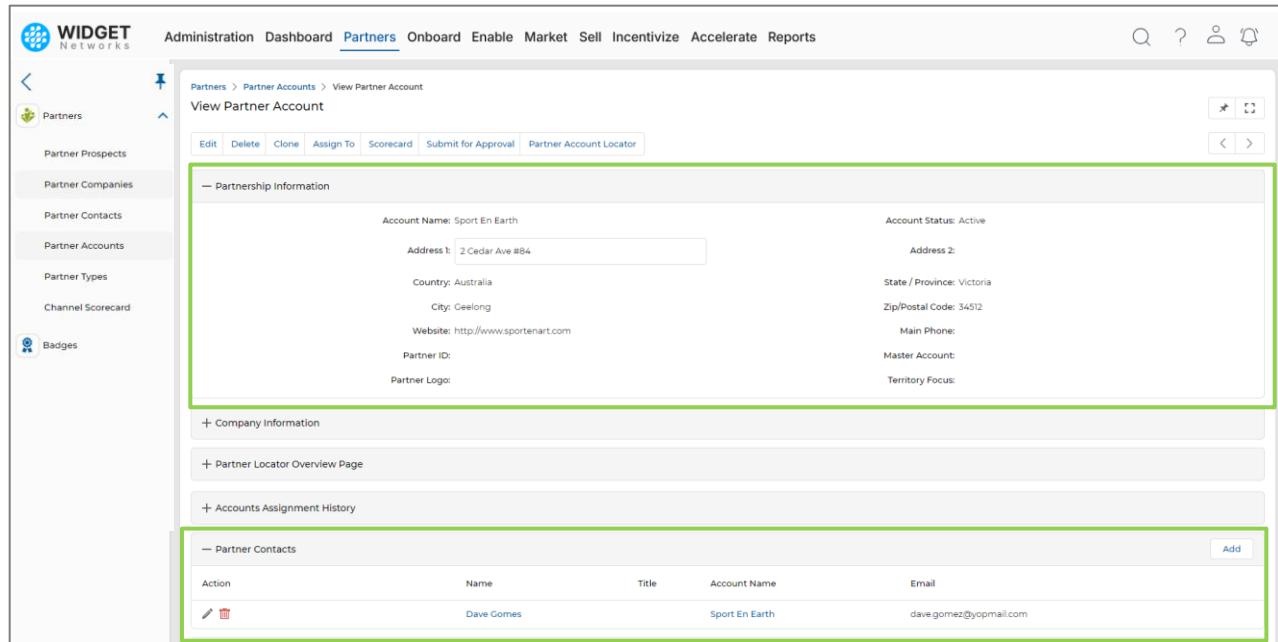
Auto-assignment of related Partner Contacts and Users on Assignment of Partner Account to User

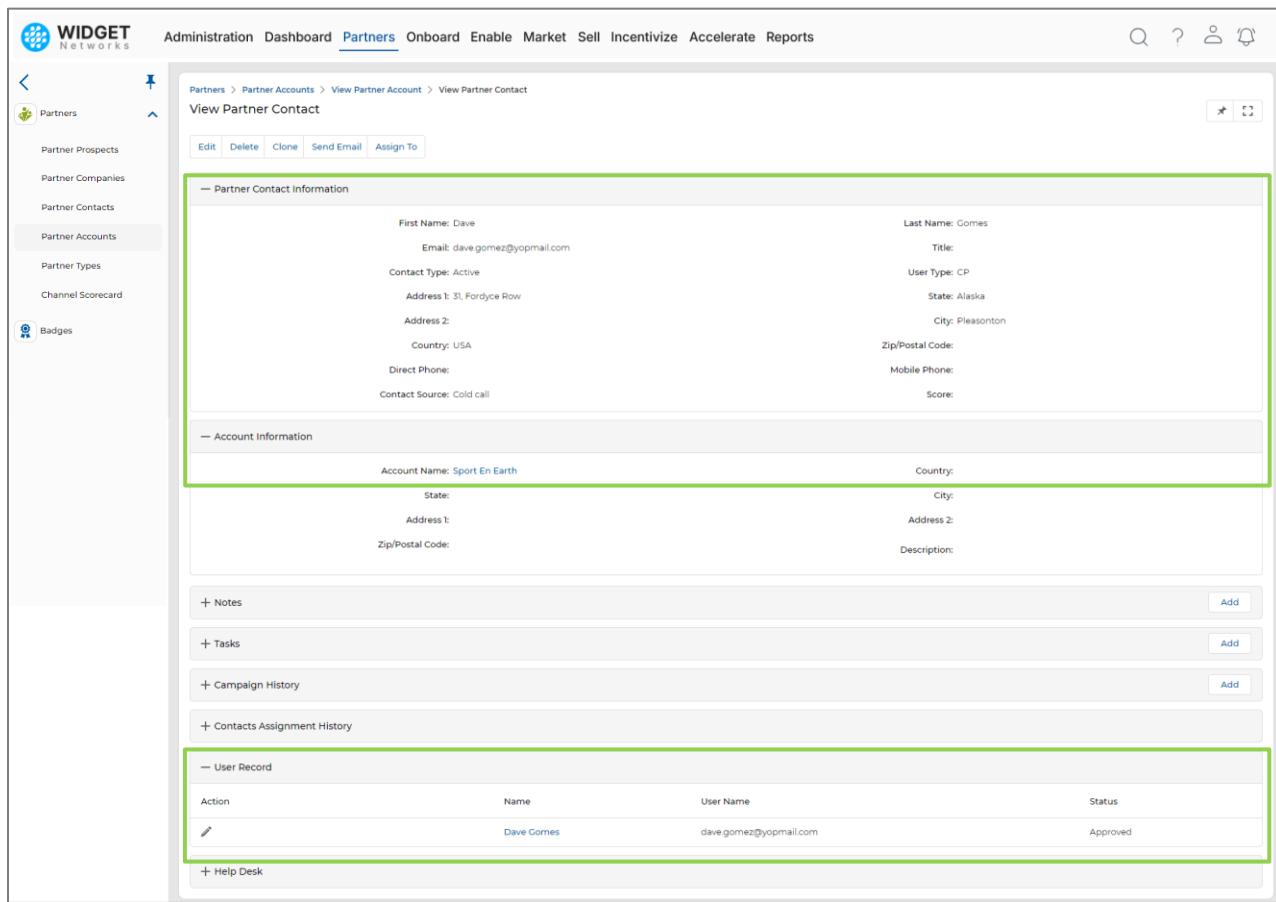
When a Partner Account gets assigned to a specific user all the associated “Contacts” along with their related “User Records” get transferred to the respective user’s “Partner Accounts” list.

We will utilize the **Partner Accounts** Module to assign a specific Partner Account to a User. Once assigned the Partner Contacts and Users mapped to the Partner Account get auto-assigned to that specific user.



In the above example, we have assigned the Partner Account - Sport En Earth with a Partner Contact – Dave Gomes, and a resultant Channel Partner User to the User – **User-Administrator Admin**. Post assignment, the Partner Contact – Dave Gomes and Channel Partner User will be auto-assigned to Administrator Admin.





The screenshot shows the ZINFO platform interface for managing Partner Accounts. The top navigation bar includes links for Administration, Dashboard, Partners, Onboard, Enable, Market, Sell, Incentivize, Accelerate, and Reports. The Partners tab is currently selected. The left sidebar has a tree structure with 'Partners' expanded, showing 'Partner Prospects', 'Partner Companies', 'Partner Contacts', 'Partner Accounts' (which is selected and highlighted in grey), 'Partner Types', 'Channel Scorecard', and 'Badges'. The main content area is titled 'View Partner Contact' and shows a contact record for 'Dave Gomez'. The contact information includes: First Name: Dave, Last Name: Gomez, Email: dave.gomez@yopmail.com, Title: (empty), User Type: CP, Address 1: 31, Fordyce Row, Address 2: (empty), City: Pleasanton, Country: USA, Zip/Postal Code: (empty), Mobile Phone: (empty), and Score: (empty). Below this is an 'Account Information' section with fields for Account Name: Sport En Earth, State: (empty), City: (empty), Address 1: (empty), Address 2: (empty), Zip/Postal Code: (empty), and Description: (empty). There are also sections for Notes, Tasks, Campaign History, and Contacts Assignment History, each with an 'Add' button. The 'User Record' section shows a table with columns for Action, Name, User Name, and Status. One row is listed: Action: (pencil icon), Name: Dave Gomez, User Name: dave.gomez@yopmail.com, and Status: Approved. At the bottom is a '+ Help Desk' button.

Deactivating a Partner Account

If you want to make an account inactive (which will essentially lock out all users at that Account from the portal), then change the status of that account in the **Account Status** field from *Active* to *Inactive*. This does not delete the Account, Contacts, or Users – it only renders the account inactive and blocks login access.

Please note: If an account has been inactivated, then all contacts (users) associated with the account will have no access to the portal.

User(s) Status and Access to UPM dependent on Account Status

On updating a Partner Account Status to Inactive will automatically lock out all users associated with that Account from the portal, and the Status of the associated Users mapped with the Partner Contacts will become Pending. This does not delete the Account, Contacts, or Users – it only renders the account including the associated Partner Contact – Users as Inactive/Pending and blocks login access.

- If we change the **Account Status** of any **Partner Account** from **Active** to **Inactive**, then the **Status** of associated **Users** mapped with **Partner Contacts** will become **Pending**.

- In the images below we find that the **Status** of the **Partner Account** is **Active** and the corresponding **Status** of associated **User** mapped with the respective **Partner Contact** is **Approved**.

Partners > Partner Accounts > View Partner Account

View Partner Account

[Edit](#) [Delete](#) [Clone](#) [Assign To](#) [Scorecard](#) [Submit for Approval](#)

[<](#) [>](#)

— Partnership Information

Account Name: Zinfitest-Affiliate-ACC-014B	Account Status: Active
Address 1: California	Address 2:
Country: USA	State / Province: California
City: California	Zip/Postal Code: 880099
Website: www.abcd.com	Main Phone:
Partner ID:	Master Account:
Partner Logo:	Territory Focus:

+ Company Information

+ Partner Locator Overview Page

+ Accounts Assignment History

— Partner Contacts

[Add](#)

Action	Name	Title	Account Name	Email
 	zinfitest affiliate014b		Zinfitest-Affiliate-ACC-014B	zinfitest_affiliate014b@yopmail.com

Partners > Partner Accounts > View Partner Account > View Partner Contact > View User

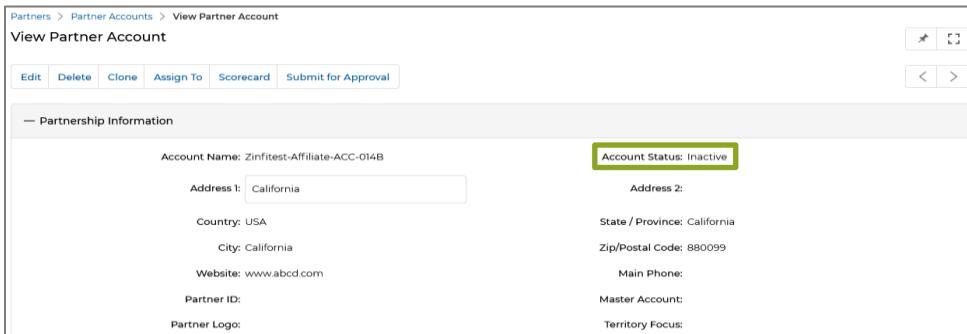
View User

[Edit](#) [Delete](#) [Assign To](#) [Request Impersonation](#) [Impersonate](#) [Permanent Delete](#) [Change Username](#)

— User Information

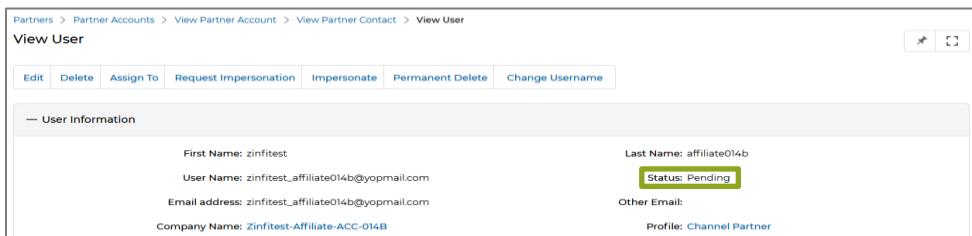
First Name: zinfitest	Last Name: affiliate014b
User Name: zinfitest_affiliate014b@yopmail.com	Status: Approved
Email address: zinfitest_affiliate014b@yopmail.com	Other Email:
Company Name: Zinfitest-Affiliate-ACC-014B	Profile: Channel Partner
Title:	Direct Phone:
Mobile:	Department:
Other:	Fax:
Main Phone:	

- Now, when we update the **Account Status** of Partner Account from **Active** to **Inactive** in the **Add/Edit a Partner Account** page.



The screenshot shows the 'View Partner Account' page. At the top, there are buttons for Edit, Delete, Clone, Assign To, Scorecard, and Submit for Approval. Below this is a section titled 'Partnership Information' containing fields for Account Name, Address 1, Address 2, Country, State / Province, Zip/Postal Code, Main Phone, Partner ID, Website, Partner Logo, Master Account, and Territory Focus. The 'Account Status' field is highlighted with a green box and contains the value 'inactive'.

- We find that the **Status** of the corresponding **User** mapped with the respective **Partner Contact** has been updated to **Pending**.



The screenshot shows the 'View User' page. At the top, there are buttons for Edit, Delete, Assign To, Request Impersonation, Impersonate, Permanent Delete, and Change Username. Below this is a section titled 'User Information' containing fields for First Name, Last Name, User Name, Email address, Company Name, and Profile. The 'Status' field is highlighted with a green box and contains the value 'Pending'.

- If we create a new **User Record** mapped with a **Partner Contact** while its **Partner Account** is **Inactive**, then the **Status** of the **User** will be displayed as **Pending**.
- Now, if we update the **Account Status** of the **Partner Account** to **Active**, the **Status** of the **User(s)** mapped with respective **Partner Contact(s)** will remain as **Pending** and we've to change the Status of the User to Approved manually.

Partner Types

Based on your business processes and organizational policy, you can configure partner types effectively using the following tools:

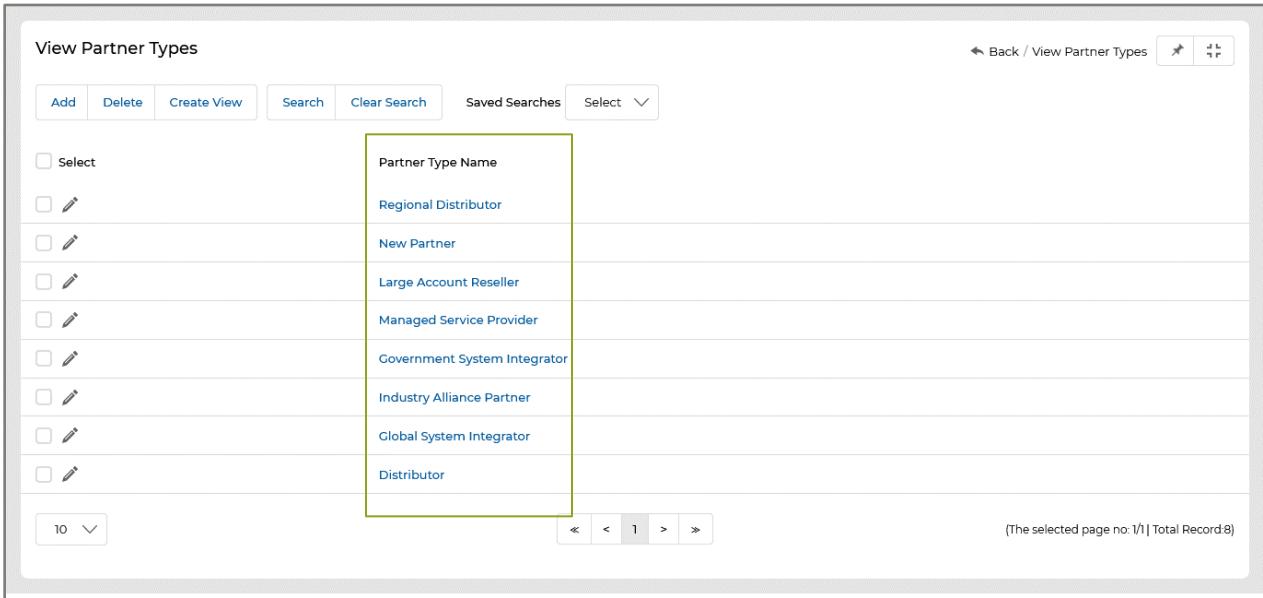
Searching for Existing Partner Types

A list of partner types is provided along with the following options at (1) in the figure below:

- Add** – Opens a page to add a new partner type.
- Delete** – Deletes selected row items.
- Create View** – Allows you to create a customized view.
- Search** – Opens a new pop-up window where you can enter search criteria to find desired records.
- Clear Search** – Clears the current search.
- Saved Searches** – Shows a list of saved searches in the search drop-down menu. When selected, two more options are shown:

- i. **Edit** – Provides an option to update the selected search name.
- ii. **Delete** – Deletes the selected search name from the search drop-down.

Click on a partner type name (2) to navigate to its details page, where you can edit or delete partner types.



The selected page no: 1/1 | Total Record: 8

Partner Badge Management

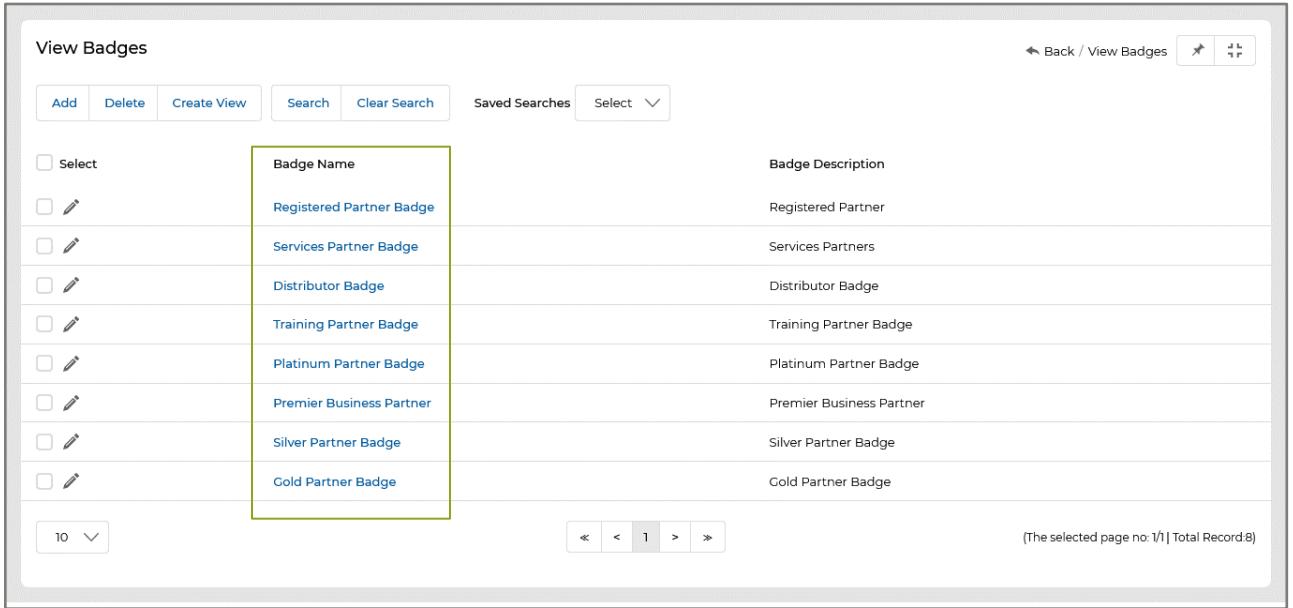
After a partner prospect finally becomes your partner, it can qualify for partner badges. Partners can earn partner badges by demonstrating enhanced skill and expertise, meeting specified requirements, delivering company agency and client revenue growth, and sustaining and growing their client base. Partners can display badges on their website, on other online properties, and hard copy marketing and sales assets.

Search for Existing Badges

A list of badges is provided along with the following options at (1) in the figure below:

- a. **Add** – Opens a page to add a new badge.
- b. **Delete** – Deletes selected badges.
- c. **Create View** – Allows you to create a customized view.
- d. **Search** – Opens a new pop-up window where you can enter search criteria to find desired records.
- e. **Clear Search** – Clears the current search.
- f. **Saved Searches** – Shows a list of saved searches in the search drop-down menu. 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.

Click on the badge name (2) to navigate to its details page, where you can edit or delete badges.

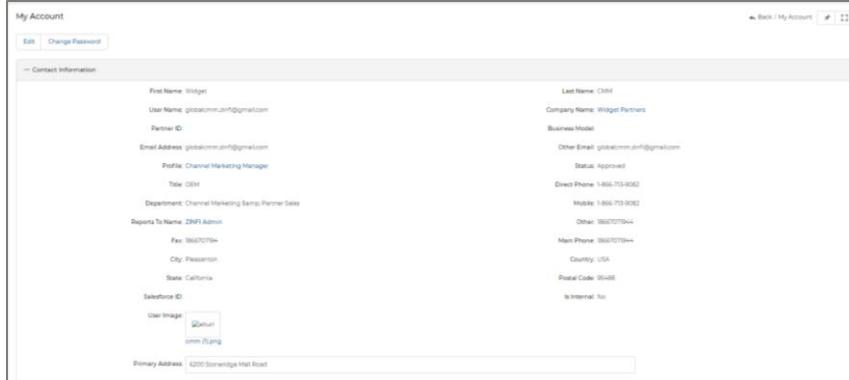


Partner & CPA Logo Management

If you have a business requirement where you have to upload Business Partner Images/logos to the account in the UPM UI for the partner instance and display the same when the business partner logs in to UPM and operates throughout the platform, UPM provides this Partner and CPA (Channel partner Admin) Logo management feature where CPA can upload their brand logo which would be viewable to all the partners under that CPA role.

This is a feature where CPA can upload their brand logo which would be viewable to all the partners under that CPA role. To achieve this please follow the steps mentioned below:

1. Click on the dropdown menu at the top right-hand corner.
2. Click on **My Account**.
3. Click on **Edit** to open the **My Account** details in edit mode to modify.



4. Click on the red cross icon to omit the existing logo.

5. Click on **Browse** to upload the new logo.
6. Click on **Save** to update changes.

Back / View Account  
Save
Cancel

Contact Information

First Name * :	Widget	Last Name * :	CMM
User Name * :	globalcmm.zinfo@gmail.com	Company Name * :	Widget Partners
Partner ID:	Partner ID	Business Model:	<input type="button" value="▼"/>
Email Address * :	globalcmm.zinfo@gmail.com	Other Email:	globalcmm.zinfo@gmail.com
Profile:	Channel Marketing Manager	Status:	Approved
Title:	OEM	Direct Phone:	1-866-713-9082
Department:	Channel Marketing & Partner Sales	Mobile:	1-866-713-9082
Reports To Name * :	ZINFO Admin	Select Clear	Other:
Fax:	1866707194	Main Phone:	18667071944
City:	Pleasanton	Country:	<input type="button" value="USA"/>
State:	<input type="button" value="▼"/>	Postal Code:	95488
Salesforce ID:	Salesforce ID	<input type="checkbox"/> Is Internal	
User Image:	<input style="border: 1px solid #ccc; padding: 2px 5px; margin-right: 5px;" type="button" value="Upload"/> <input style="border: 1px solid #ccc; padding: 2px 5px;" type="button" value="Browse"/> <div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">  cmm (1).png  </div>		

Primary Address:

6200 Stoneridge Mall Road

Primary Address2:

Suite # 300

User Settings

Time Zone:	<input type="button" value="GMT-06:00 Central Time (US & Canada)"/>
------------	---

Marketing Settings

<input checked="" type="checkbox"/> Auto Dialer Access	<input checked="" type="checkbox"/> Receive Lead Alert
<input type="checkbox"/> Multi Factor Authentication Enabled	

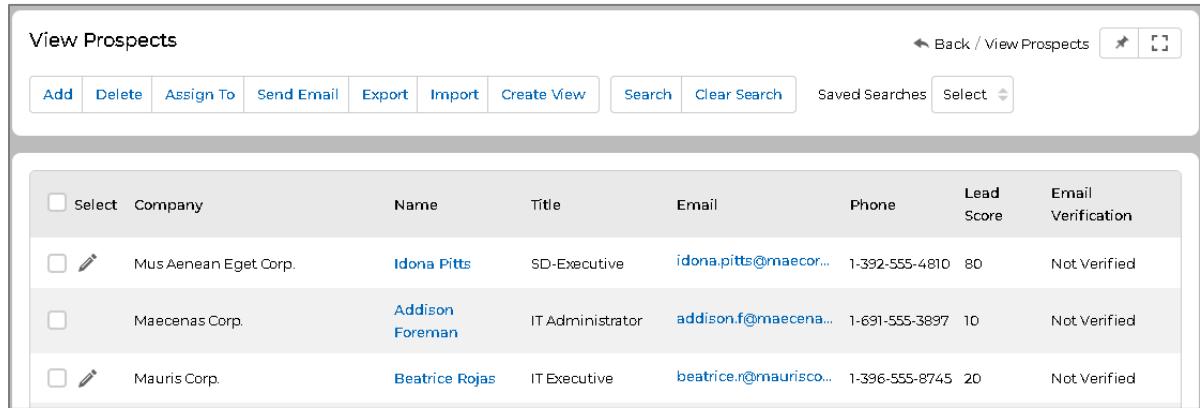
Portal Settings

Portal Id:	<input type="text" value="170420191200_99"/>
------------	--

Save
Cancel

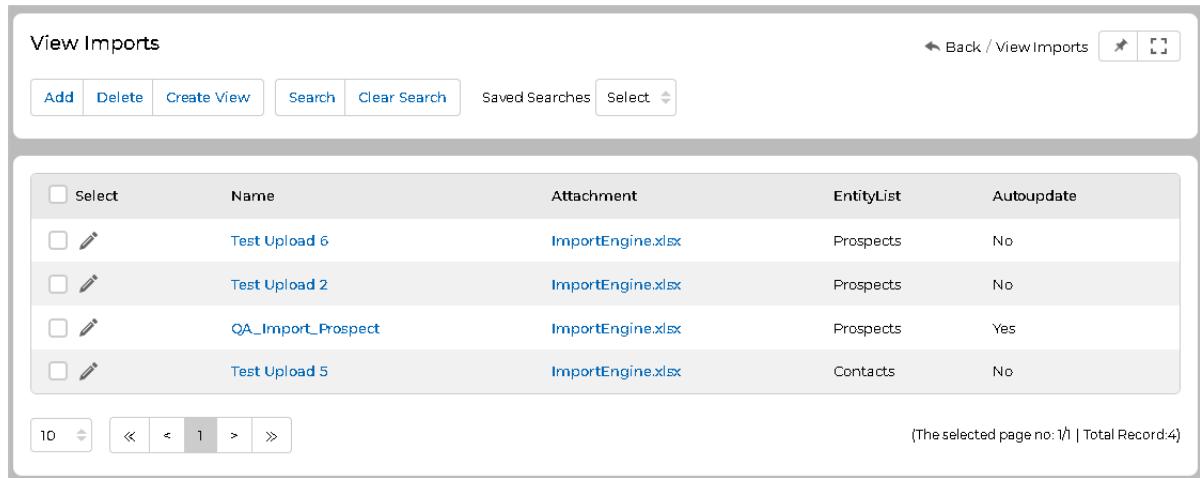
Importing and Uploading Partner Prospects, Contacts, Accounts and Companies

1. Click on the “Import” button in the List View



Select	Company	Name	Title	Email	Phone	Lead Score	Email Verification
<input type="checkbox"/>	Mus Aenean Eget Corp.	Idona Pitts	SD-Executive	idona.pitts@maecor...	1-392-555-4810	80	Not Verified
<input type="checkbox"/>	Maecenas Corp.	Addison Foreman	IT Administrator	addison.f@maecena...	1-691-555-3897	10	Not Verified
<input type="checkbox"/>	Mauris Corp.	Beatrice Rojas	IT Executive	beatrice.r@maurisco...	1-396-555-8745	20	Not Verified

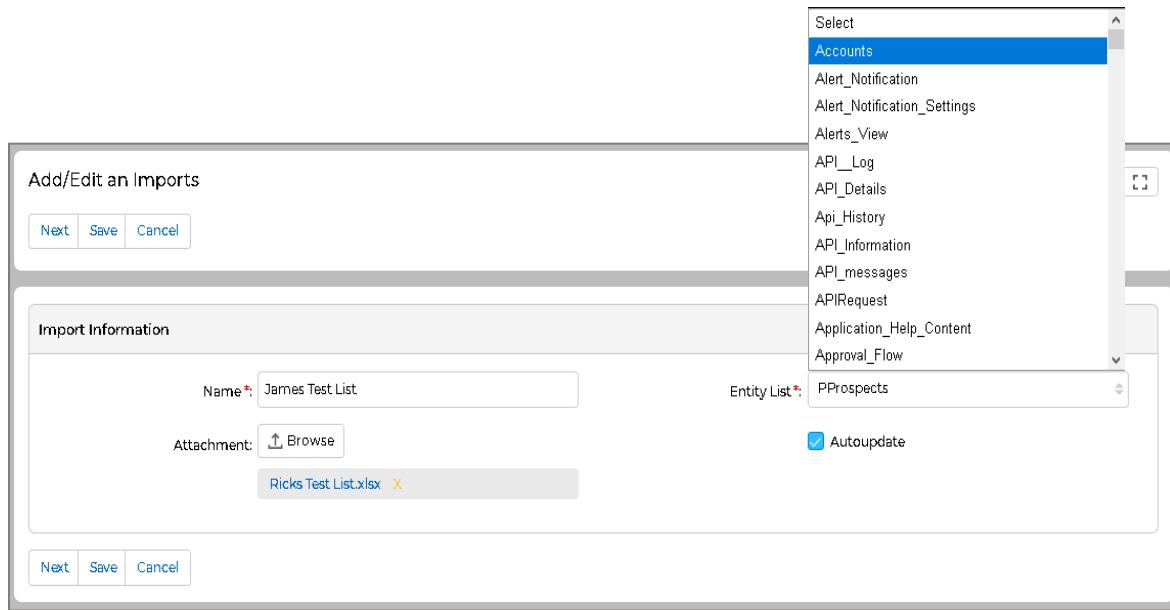
2. Click **Add** to configure the Import Type.



Select	Name	Attachment	EntityList	Autoupdate
<input type="checkbox"/>	Test Upload 6	ImportEngine.xlsx	Prospects	No
<input type="checkbox"/>	Test Upload 2	ImportEngine.xlsx	Prospects	No
<input type="checkbox"/>	QA_Import_Prospect	ImportEngine.xlsx	Prospects	Yes
<input type="checkbox"/>	Test Upload 5	ImportEngine.xlsx	Contacts	No

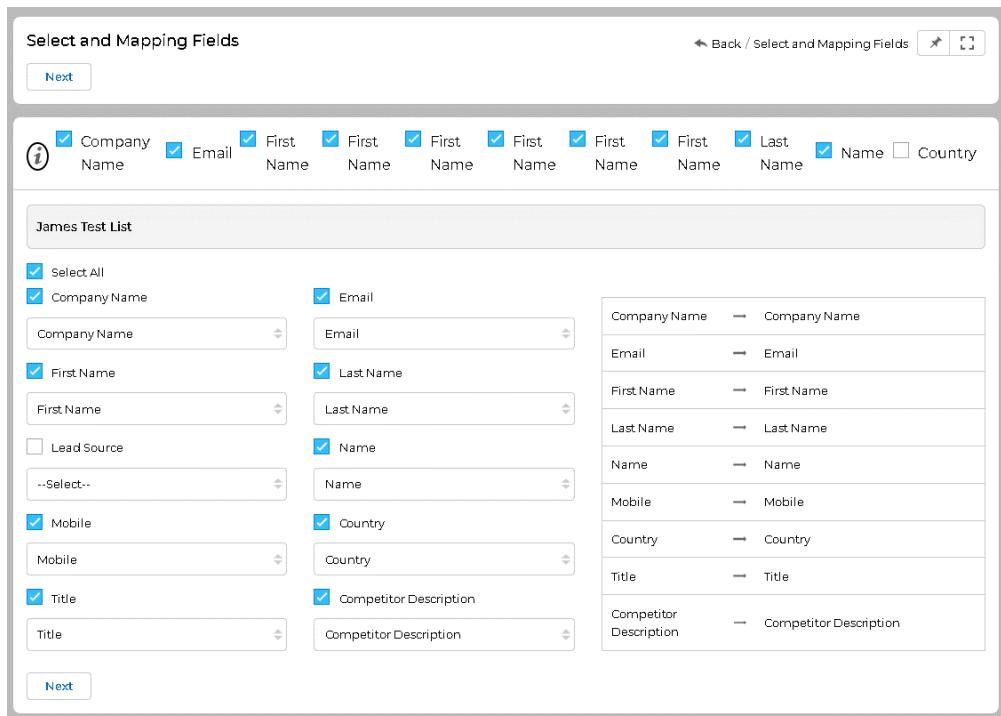
10 < < < 1 > >> [The selected page no: 1/1 | Total Record: 4]

3. Provide the following details to configure the Import setup.
 - a. Name: This is the Import Type name.
 - b. Entity List: Select one of the existing entities where you want to import/append records.
 - c. Attachment: Browse and upload the file (CSV/Excel) containing the records to be imported/updated.
 - d. Autoupdate: Check this option to automatically update existing records (if present)
 - e. Next: Click **Next** to configure the field mapping.



4. The next step is to map the fields:

a. In this window, the headers in the Excel are mapped with the header rows in the entity database. The labels next to each checkbox are the names of the header fields in the Excel and the corresponding entity fields to map in the database appears in the dropdown. You need to choose the proper database field in the dropdown to map both properly. *You can review the mapping configuration on the right side of the window.*

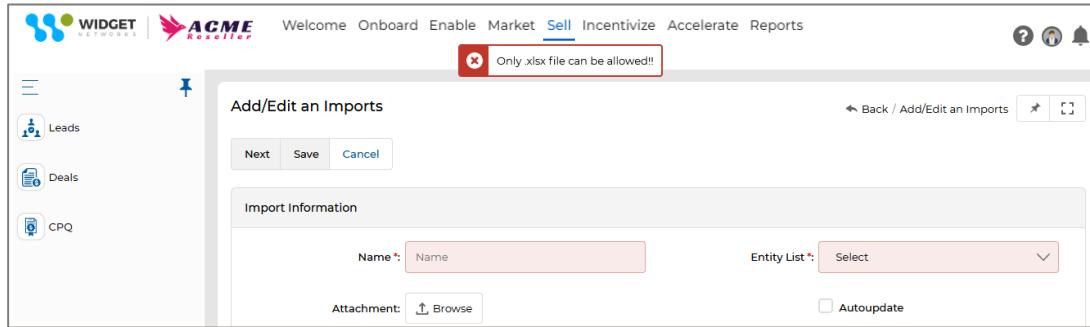


James Test List	Entity Field
<input checked="" type="checkbox"/> Select All	<input checked="" type="checkbox"/> Company Name
<input checked="" type="checkbox"/> Company Name	<input checked="" type="checkbox"/> Email
<input checked="" type="checkbox"/> First Name	<input checked="" type="checkbox"/> First Name
<input type="checkbox"/> Lead Source	<input checked="" type="checkbox"/> First Name
<input type="checkbox"/> ..Select..	<input checked="" type="checkbox"/> Last Name
<input checked="" type="checkbox"/> Mobile	<input checked="" type="checkbox"/> Name
<input type="checkbox"/> Mobile	<input checked="" type="checkbox"/> Country
<input checked="" type="checkbox"/> Title	<input checked="" type="checkbox"/> Competitor Description
<input type="checkbox"/> Title	<input checked="" type="checkbox"/> Competitor Description

b. After you are done, click **Next** to continue.

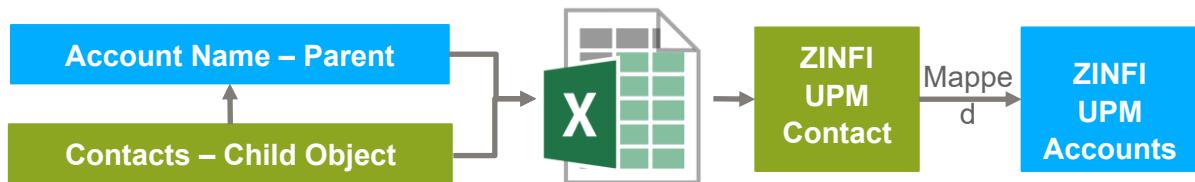
5. Alert Message for Upload of unsupported File Format at import Engine:

The Import Engine is further updated to assist the User, with an appropriate alert message, if an unsupported file format is utilized for upload of records to ZINFI UPM. On trying to upload a file, other than xls, xlsx, etc. the following alert message is automatically displayed at the Import Engine.



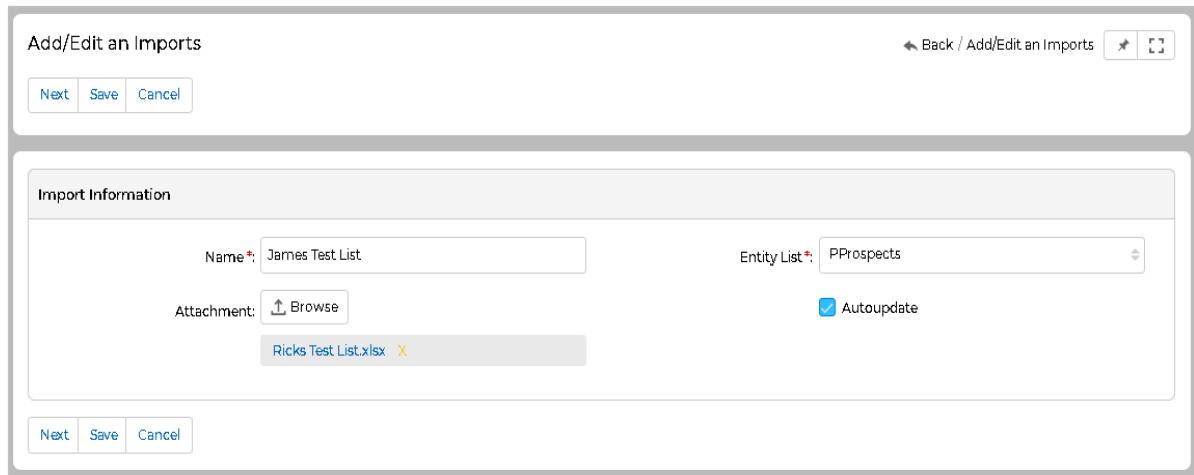
Parent-Child Field/Attribute Relation Configuration in Import Engine

This latest feature can upload dependent Fields (of respective Parent Module) through the UPM Import Engine for all UPM module records. This tool allows you to bulk import records of a Module/Object with the option to upload add-on dependent Fields. Account Name for Contacts, through the same upload file, for all modules. Featuring a configurable engine, you can use it to configure the import of records in standard global formats viz. CSV, xls, etc. and insert/update bulk UPM records containing Field references for both standard and custom entities of UPM.



Edit an existing Import Configuration

1. To edit an existing import configuration, click the Edit (pencil) icon.
2. Click the links in the **Attachment** column to download the imported file containing records.



Add/Edit an Imports

Import Information

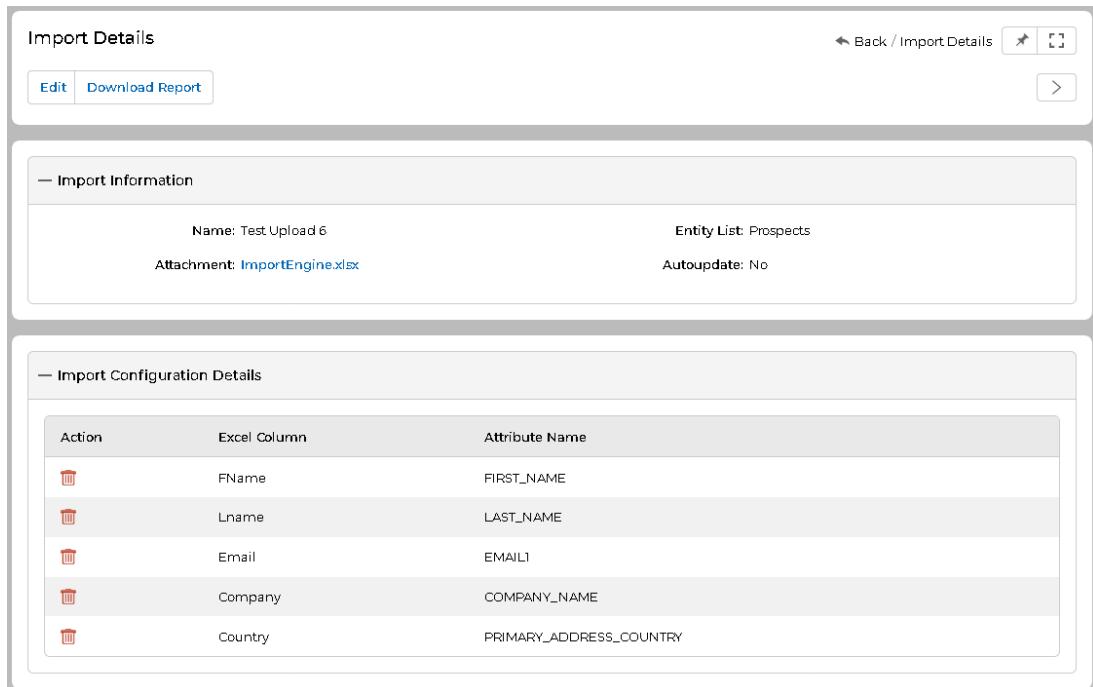
Name*: James Test List Entity List*: PProspects

Attachment: [Browse](#) Autoupdate

Ricks Test List.xlsx X

Next Save Cancel

3. Click the link in the **Name** column, to go to the “Import Details” Window.
 - a. Import Information: This section shows the Configuration details.
 - b. Import Configuration Details: This section shows the Field Mapping details.
 - c. Download Report: Click **Download Report** to view the Import Summary Report.



Import Details

Import Information

Name: Test Upload 6 Entity List: Prospects

Attachment: [ImportEngine.xlsx](#) Autoupdate: No

Import Configuration Details

Action	Excel Column	Attribute Name
	FName	FIRST_NAME
	Lname	LAST_NAME
	Email	EMAIL1
	Company	COMPANY_NAME
	Country	PRIMARY_ADDRESS_COUNTRY