Partners Profile Management

Ext.prd.007.10 | 08.14.2025

UPM 25.x

ZINFI Confidential & Proprietary
Shared Under NDA

Contents

Introduction

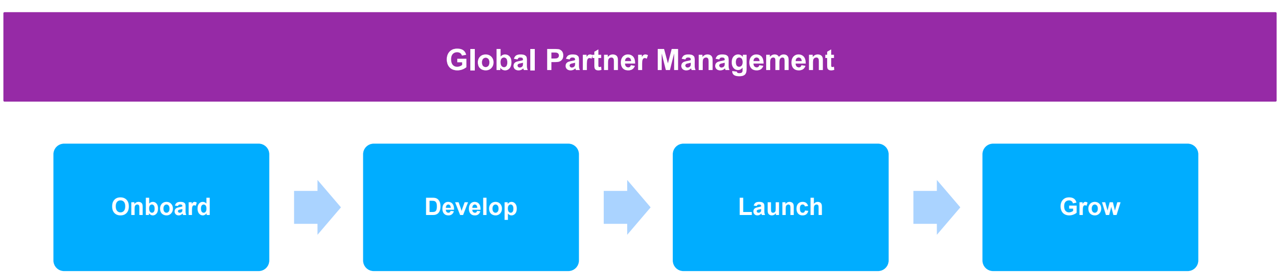
To be successful, any partner program requires several key elements: a *structured channel program, clear channel policies* so partners know exactly what they need to do to perform successfully and how their performance will be measured and rewarded, and *clear programs* that address both technical and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



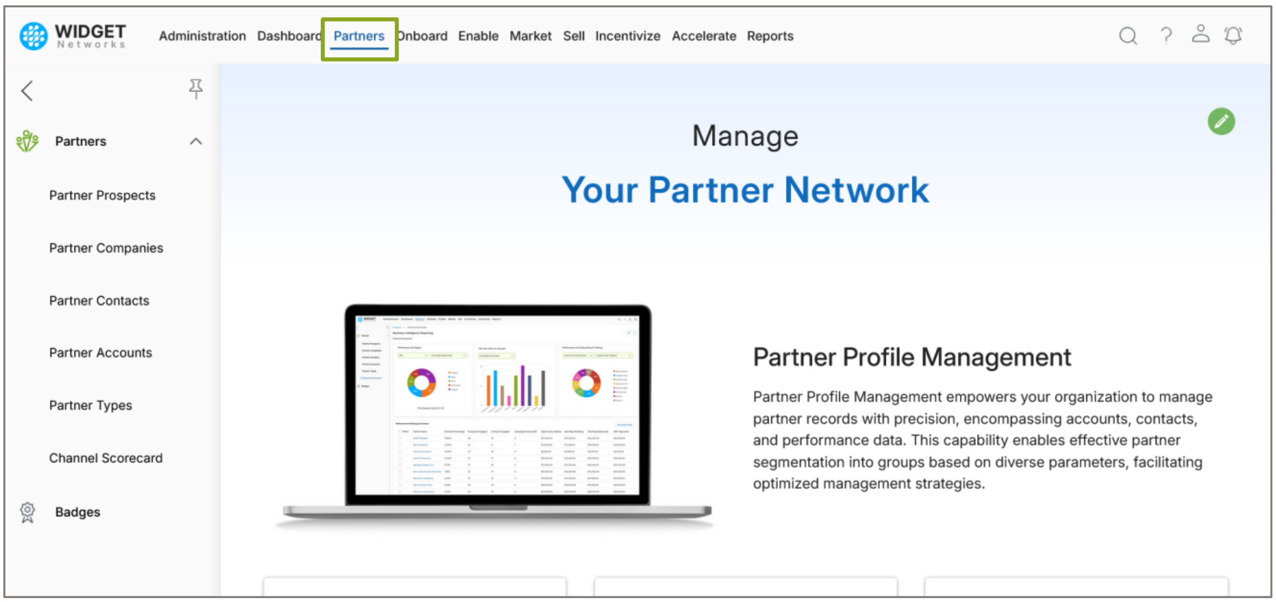
- Partner management is aligned with expertise in partner business models.
- It is focused on onboarding, developing, and growing global partners.
- It aims for the ongoing global success of the partner network across all service deployments.

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

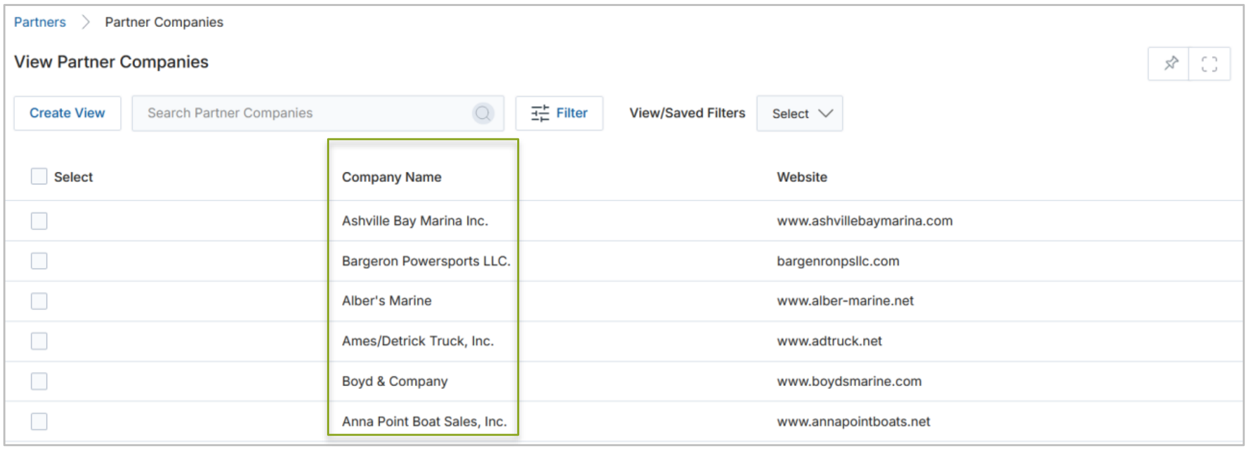
By clicking on **Partner Companies**, users can manage organization-specific details that help differentiate one partner organization from another. UPM recommends that users with administrator privileges customize these company-specific details so that all users under a specific account may be grouped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



Partner Prospects

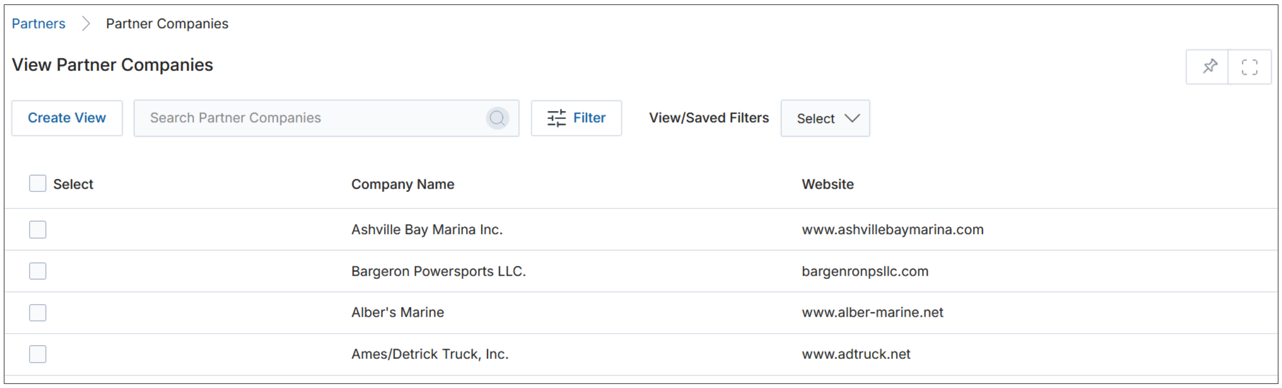
Potential partners—or partners qualified through marketing efforts, financial capacity, and willingness to form a partnership—can be managed with this sub-module.

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.



View Partner Prospect Details

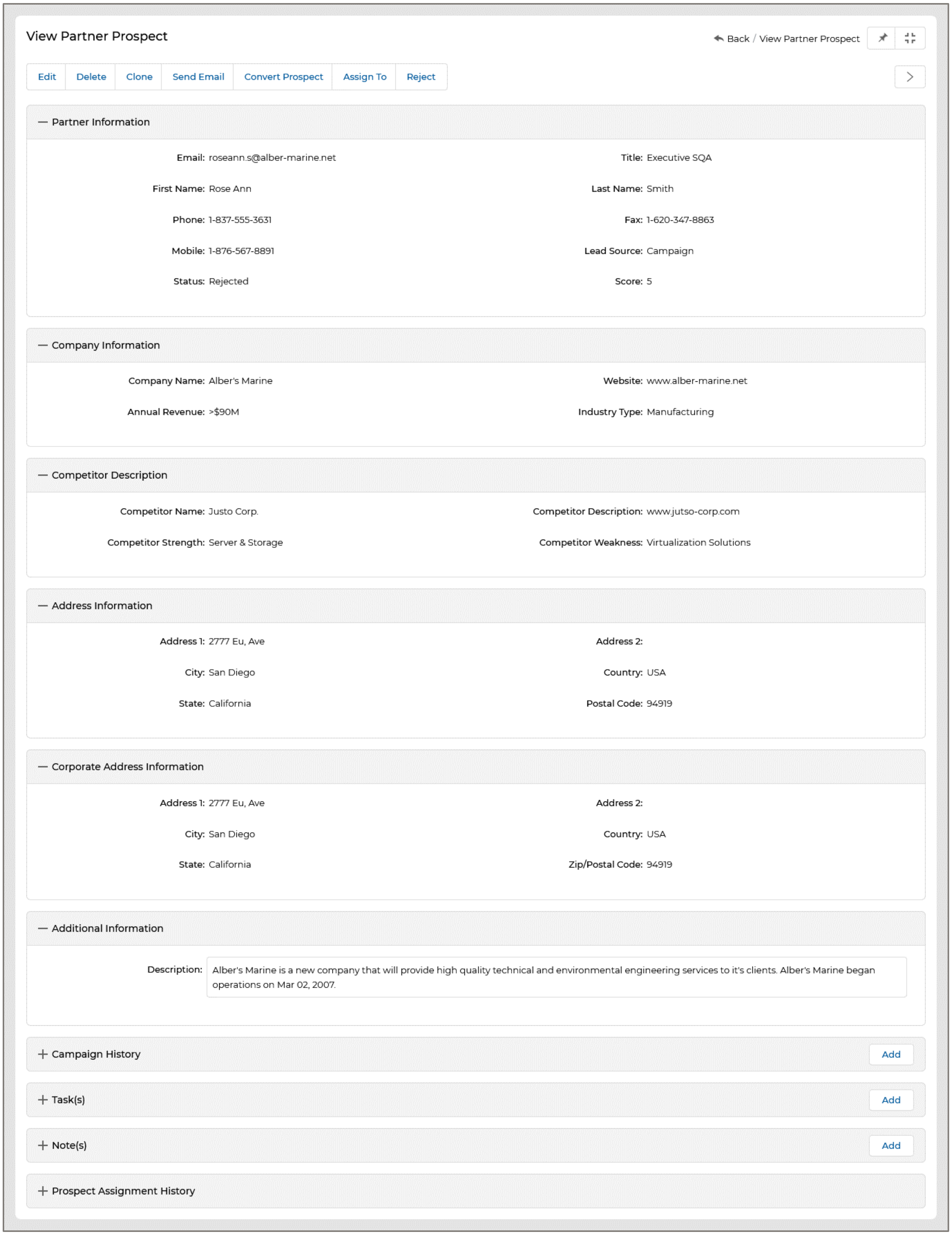
When you click on a specific partner prospect, details of the prospect are displayed along with the following actionable items.

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 it's clients. Alber's Marine began operations on Mar 02, 2007.

+ Campaign History — Add

+ Task(s) — Add

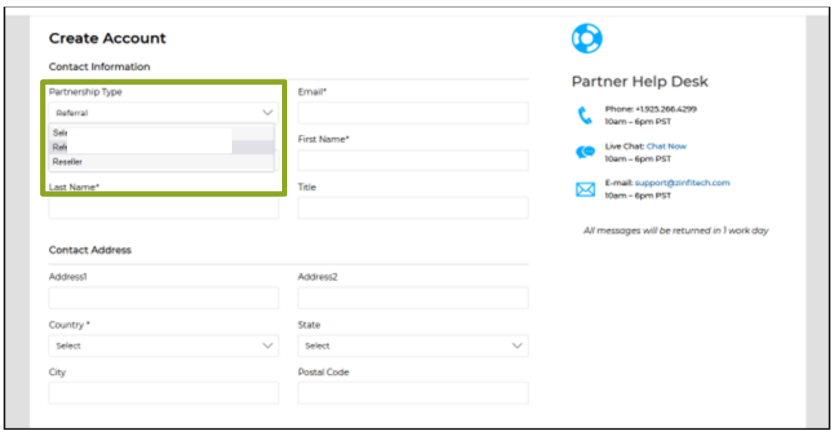
+ Note(s) — Add

+ Prospect Assignment History

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.

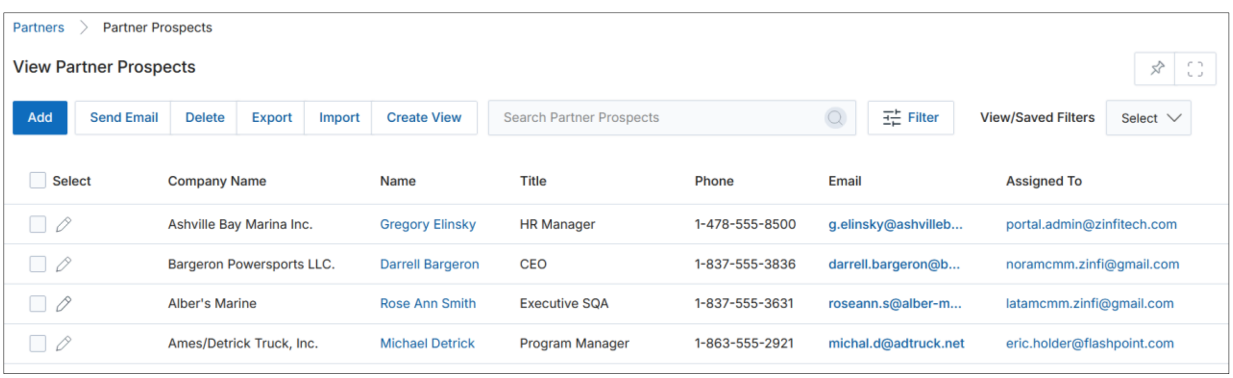
- Self-Registration of Affiliate/Referral Partner can be done on the Sign Up page of the **UPM** Portal.
- While registering, the Affiliate Partner must make sure to select '**Referral**' from the dropdown in **Partnership Type** and click **Submit** after filling in other necessary fields with data.



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

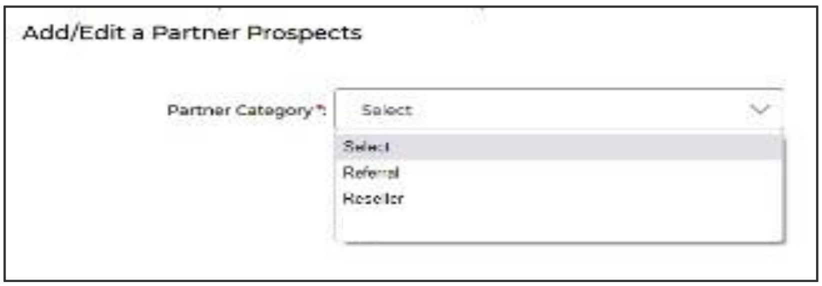
Adding an Affiliate Partner Prospect

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



- 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:

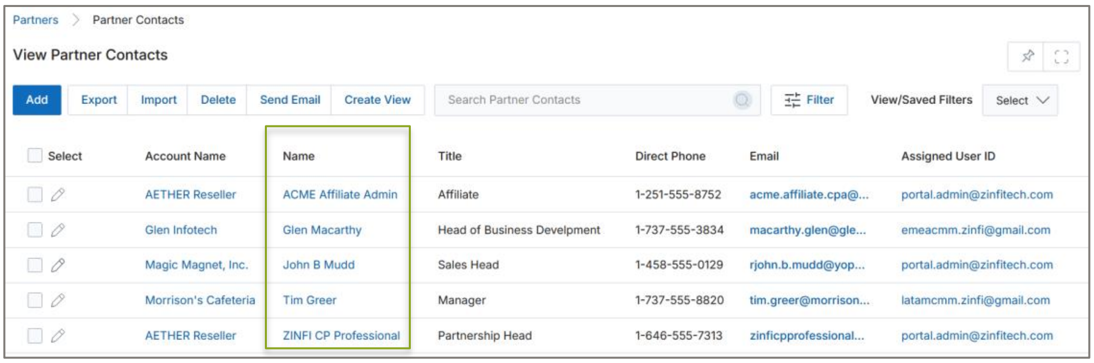
a. **Add** – Opens a new page to add a new partner contact.
b. **Delete** – Deletes selected contacts(s) from the partner contact list.
c. **Send Email** – Navigates to a page where users can choose an email distribution list to add selected partner contacts to.
d. **Export** – Allows users to export 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

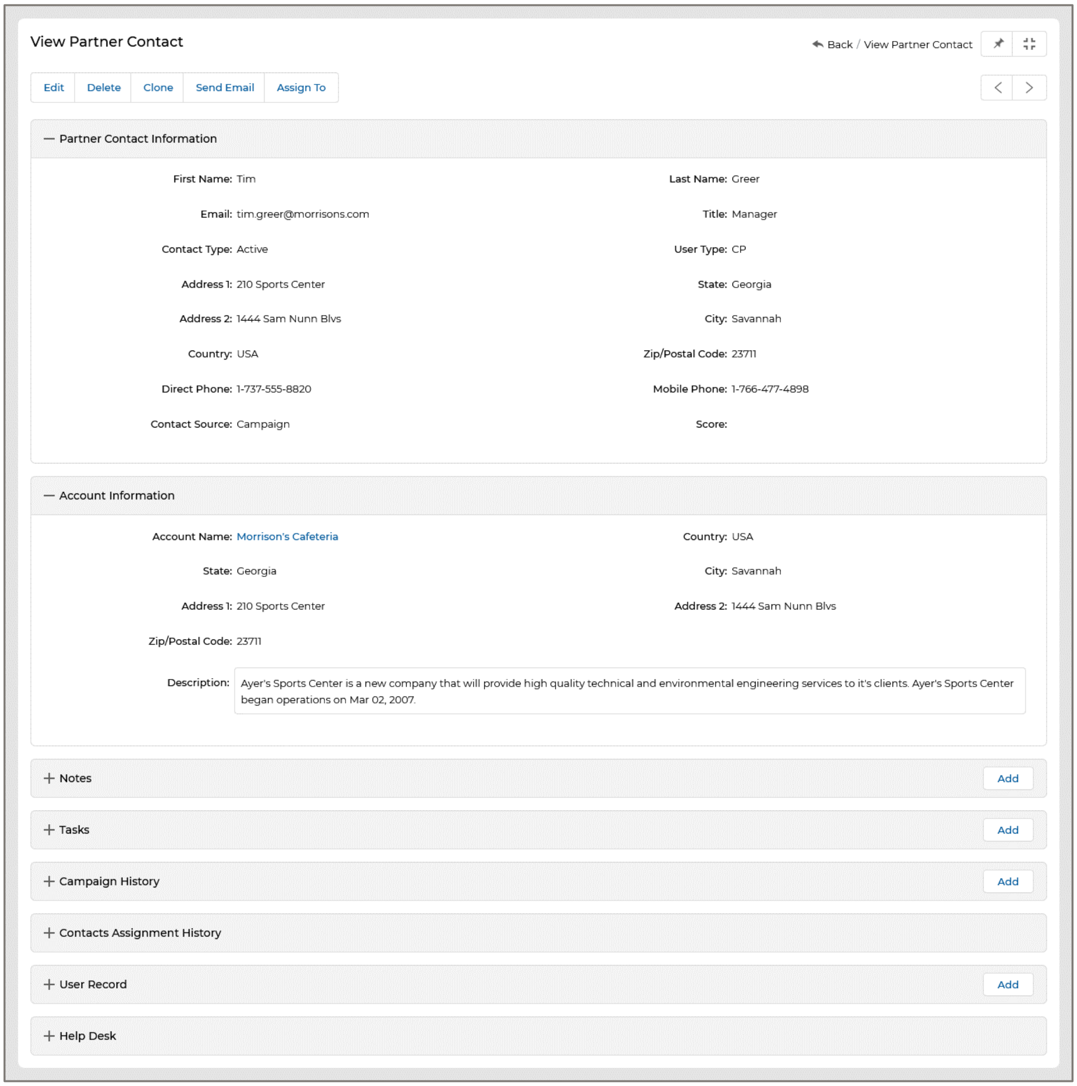
When you click on a specific contact, the details for that contact are displayed along with the following actionable items.



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.



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:

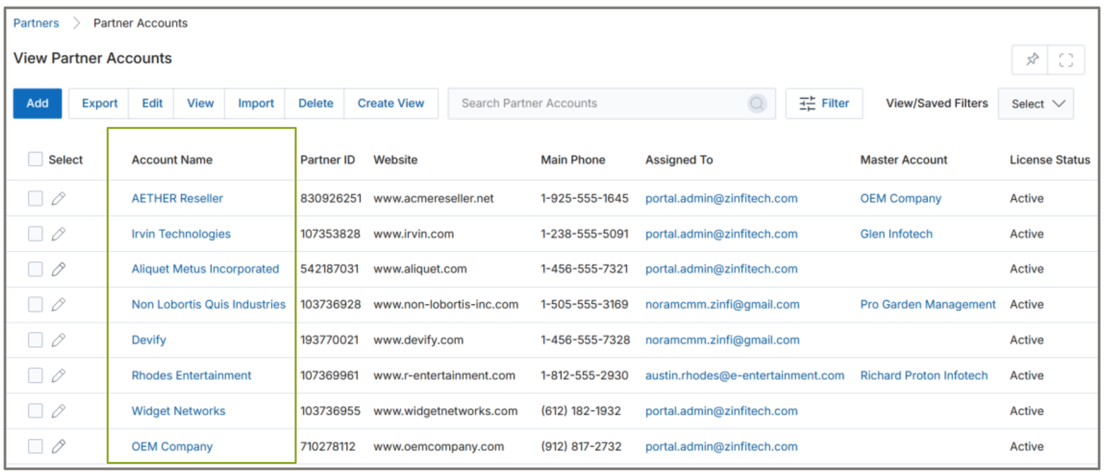
Searching for Existing Partner Accounts

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.



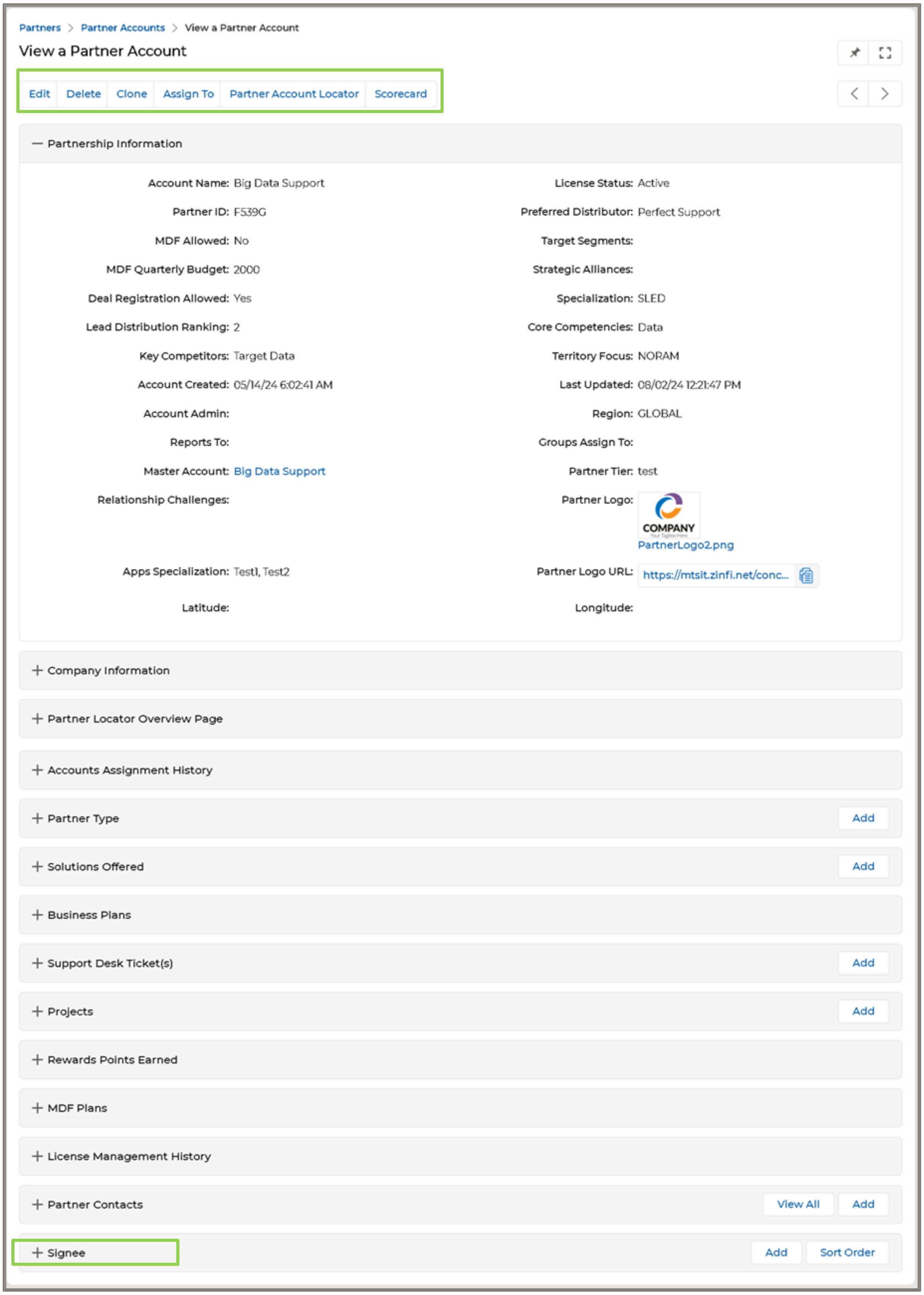
Select	Account Name	Partner ID	Website	Main Phone	Assigned To	Master Account	License Status
	AETHER Reseller	830926251	www.acmereseller.net	1-925-555-1645	portal.admin@zinfitech.com	OEM Company	Active
	Irvin Technologies	107353828	www.irvin.com	1-238-555-5091	portal.admin@zinfitech.com	Glen Infotech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

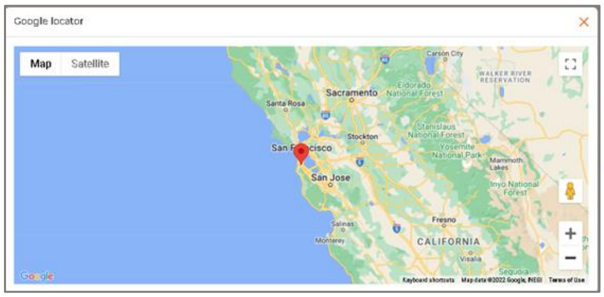
a. **Edit** – Opens the account in edit mode.
b. **Delete** – Deletes selected account(s).
c. **Clone** – Duplicate account information and open it in editable mode.
d. **Assign To** – Allocates the account to specific user(s) or group(s). When a Partner Account gets assigned to a **specific user** all 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

.

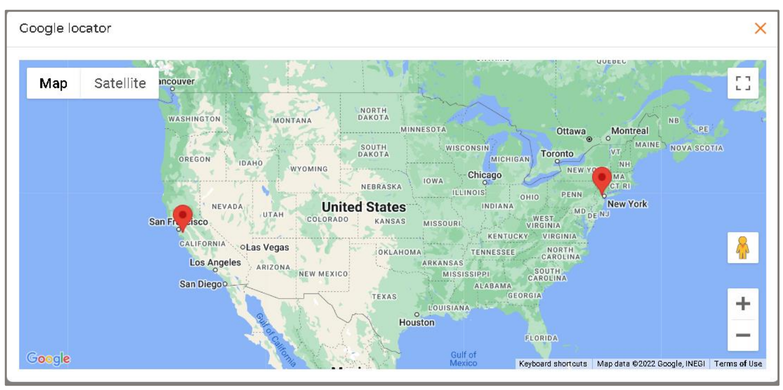

Partners > Partner Accounts > View a Partner Account
View a Partner Account
Edit
Delete
Clone
Assign To
Partner Account Locator
Scorecard
Partnership Information
Account Name: Big Data Support
Partner ID: F539G
MDF Allowed: No
MDF Quarterly Budget: 2000
Deal Registration Allowed: Yes
Lead Distribution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

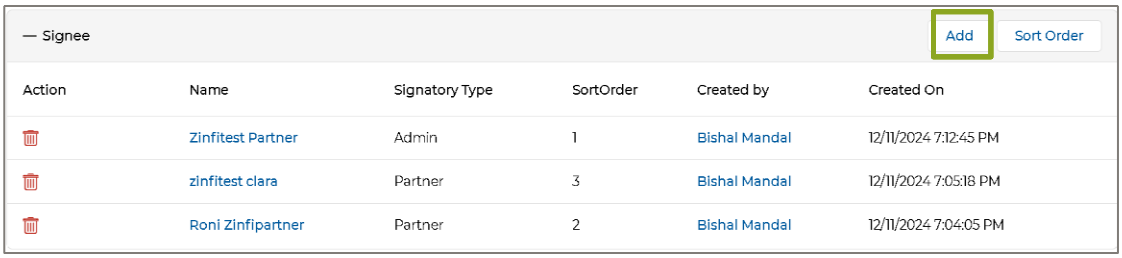


Detailed information for the selected account is provided along with the Company background information and the assignment history for the account.

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.

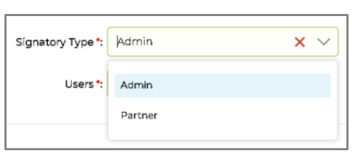
i. **Partner Tier** – When the **Partner Score** is updated, the system checks the tier rules and updates the **Partner Tier** if needed. If the new **Partner Score** falls into a different tier range, the system automatically changes the **Partner Tier** and shows the updated **Partner Tier Name**.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

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.

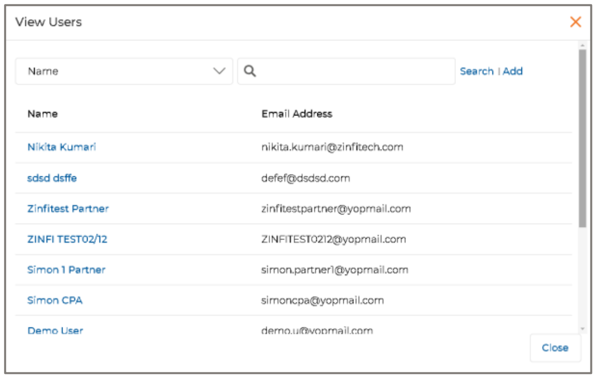


i. Clicking the Add button redirects you to the Contract Signees page, where you can designate signatories from either the Partner or Admin sides.

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

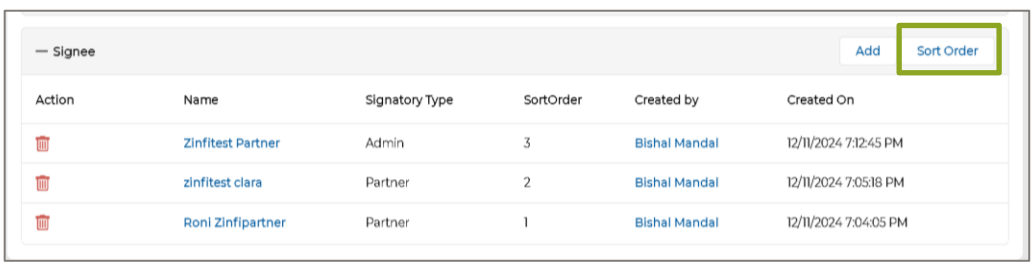


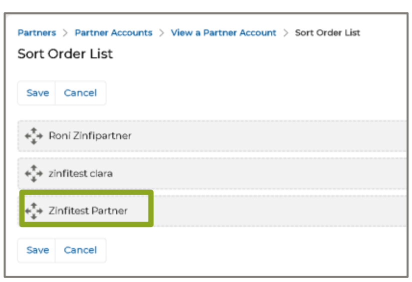
2. Users (mandatory) – Based on the selected signatory type, users tagged with the specific account will be displayed, allowing the user to choose a particular user.

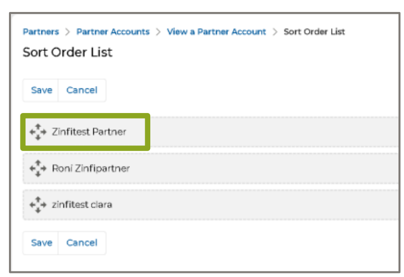


ii. Based on business requirements, you can add multiple signees from the Admin and Partner sides for all contractual agreements associated with this Partner Account.

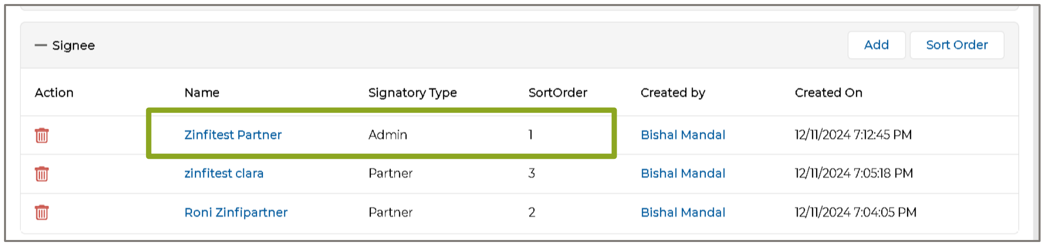
iii. For any contractual agreement, a specific signing sequence can be configured. The **Sort Order** functionality allows you to arrange this sequence. When signatories are added to the Signees list by the Admin, the sequence is automatically assigned based on the order in which they are saved. However,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







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

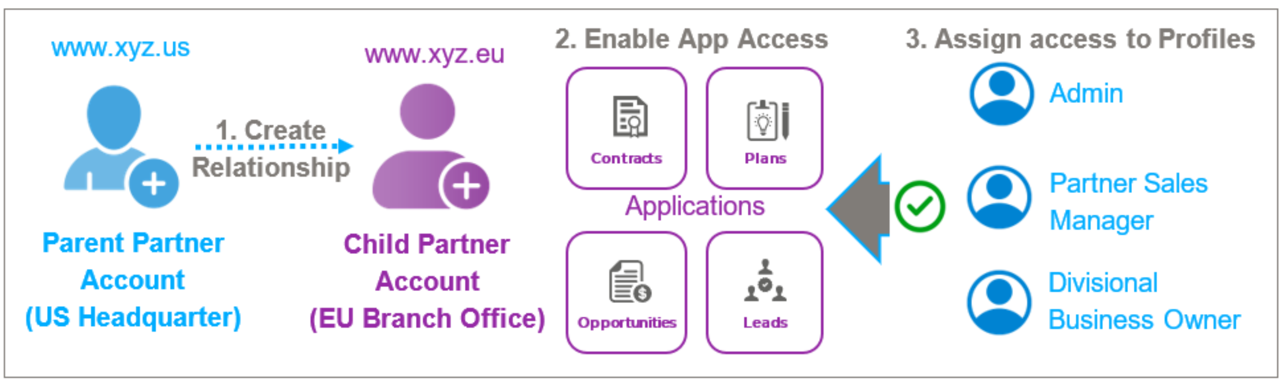


— Signee Add Sort Order

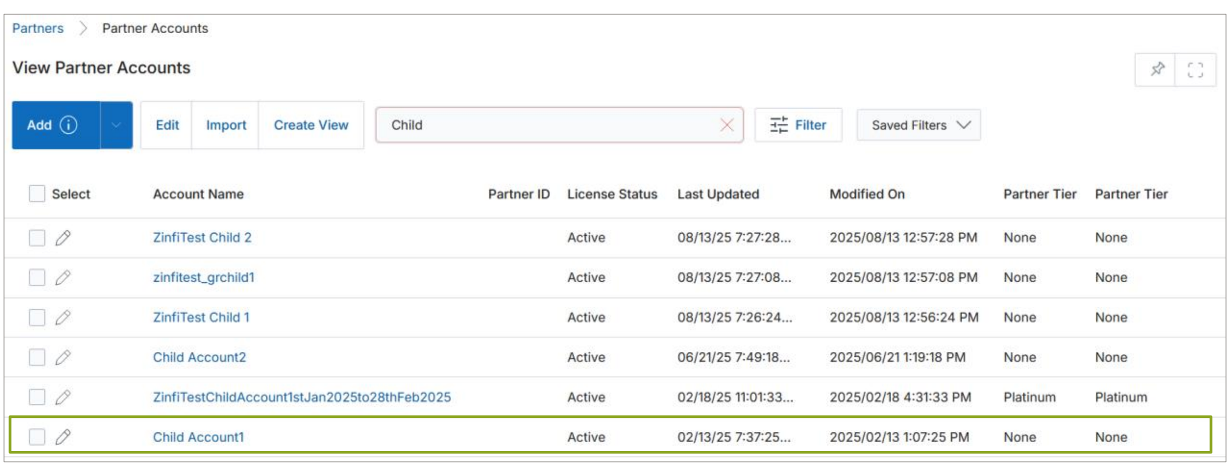
Action	Name	Signatory Type	SortOrder	Created by	Created On
	Zinfitest Partner	Admin	1	Bishal Mandal	12/11/2024 7:12:45 PM
	zinfitest clara	Partner	3	Bishal Mandal	12/11/2024 7:05:18 PM
	Roni Zinfipartner	Partner	2	Bishal Mandal	12/11/2024 7:04:05 PM

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.

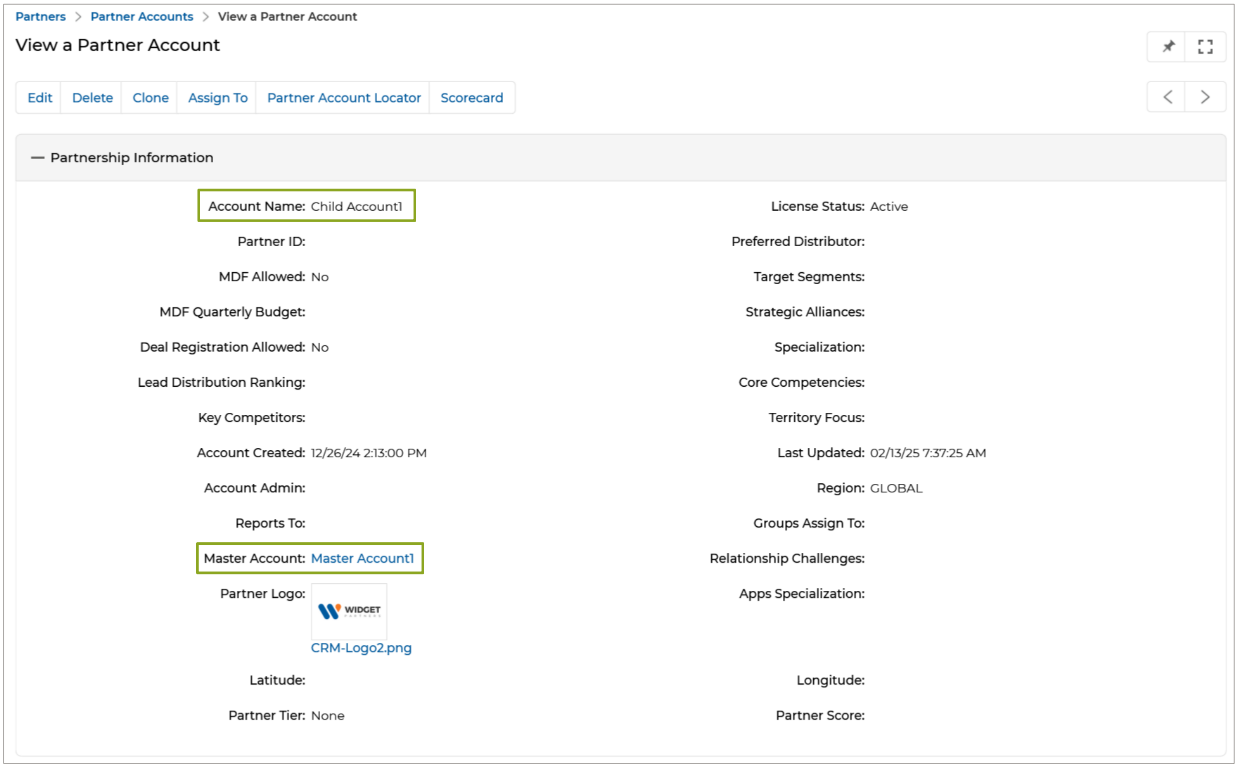


Partners > Partner Accounts

View Partner Accounts

Add | Edit | Import | Create View | Child | Filter | Saved Filters

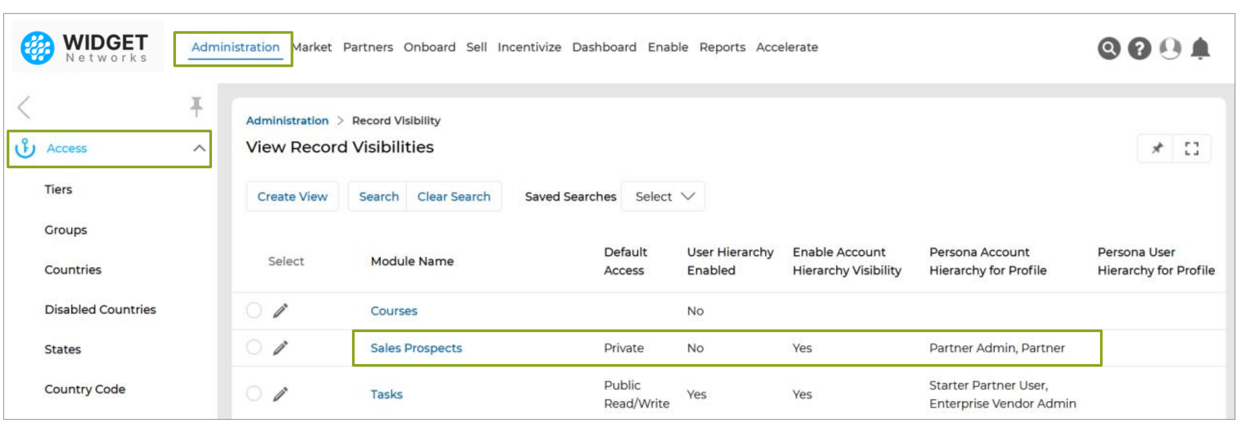
Select	Account Name	Partner ID	License Status	Last Updated	Modified On	Partner Tier	Partner Tier
	ZinfiTest Child 2		Active	08/13/25 7:27:28...	2025/08/13 12:57:28 PM	None	None
	zinfitest_grchild1		Active	08/13/25 7:27:08...	2025/08/13 12:57:08 PM	None	None
	ZinfiTest Child 1		Active	08/13/25 7:26:24...	2025/08/13 12:56:24 PM	None	None
	Child Account2		Active	06/21/25 7:49:18...	2025/06/21 1:19:18 PM	None	None
	ZinfiTestChildAccount1stJan2025to28thFeb2025		Active	02/18/25 11:01:33...	2025/02/18 4:31:33 PM	Platinum	Platinum
	Child Account1		Active	02/13/25 7:37:25...	2025/02/13 1:07:25 PM	None	None



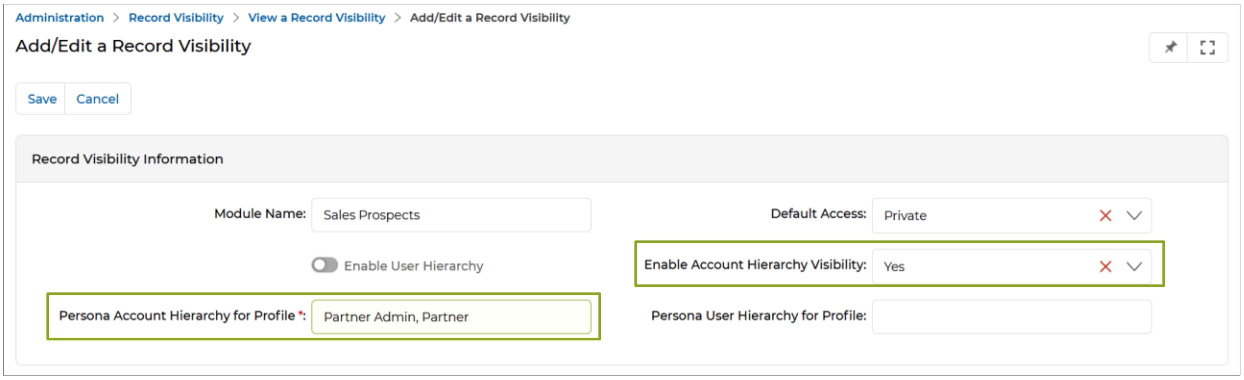
- The associated Master/Partner Account for the selected Child Partner Account is displayed and click **Edit** to change the Master/Parent Account if required.

  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.

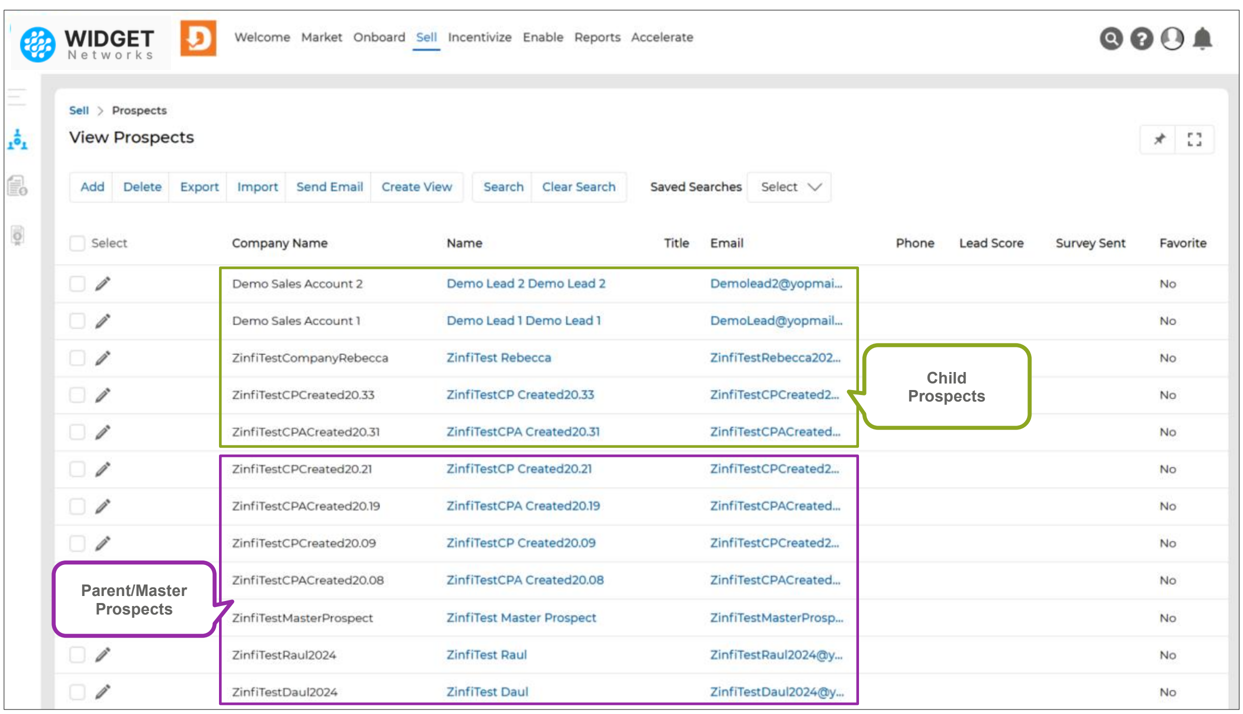


- To configure the Record Visibility of any application, navigate to Administration > Access Management > Record Visibility. The image below shows the Record Visibility configured for the Sales Prospects.



- ○ **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.

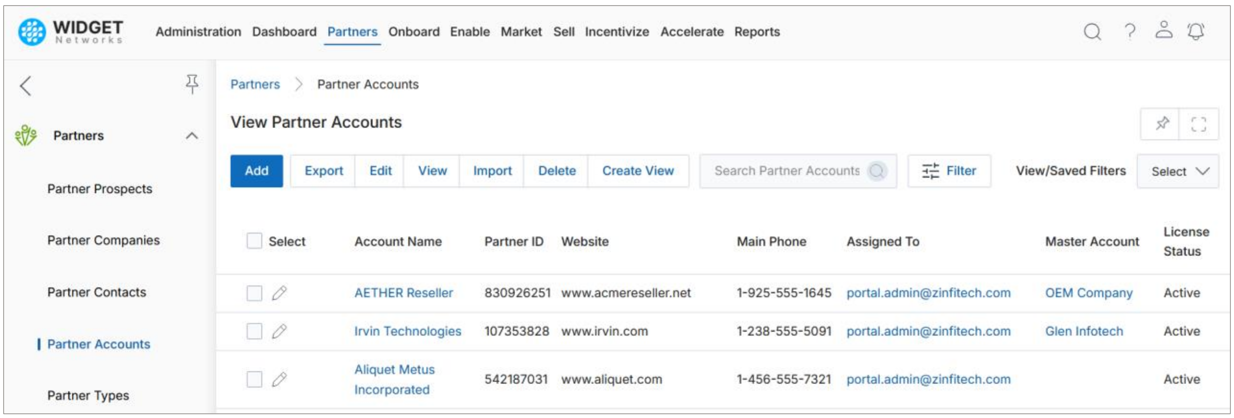
- Once configured, click Save to save the Visibility Settings for the specific Application—Sales Prospects. Similar steps must be followed for other Applications.
- The User associated with **Master Account1**, logs into UPM. The User can now view records of the **Partner Child Account (Child Account1)** along with his/her own records.



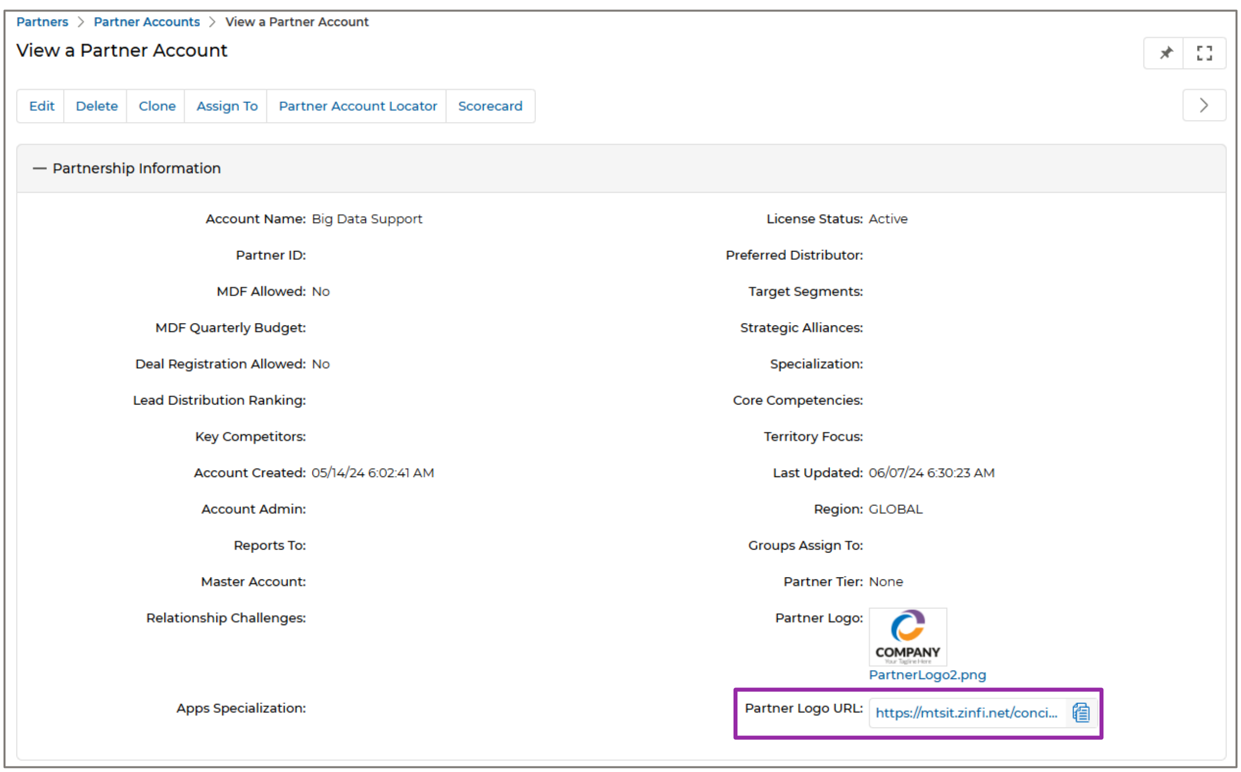
Partner Logo URL auto-generate

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.

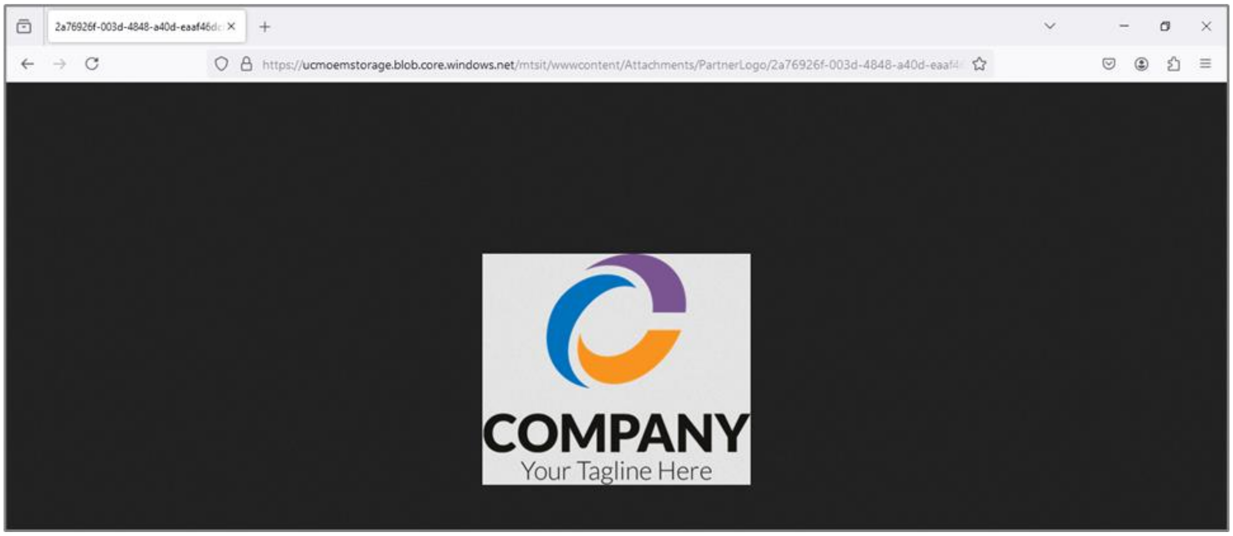
1. After logging into the UPM System as an Admin user, we click **Partners** > **Partners** > **Partner Accounts** to reach the **View Partner Accounts** page, which lists all the Partner Accounts.



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.



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.



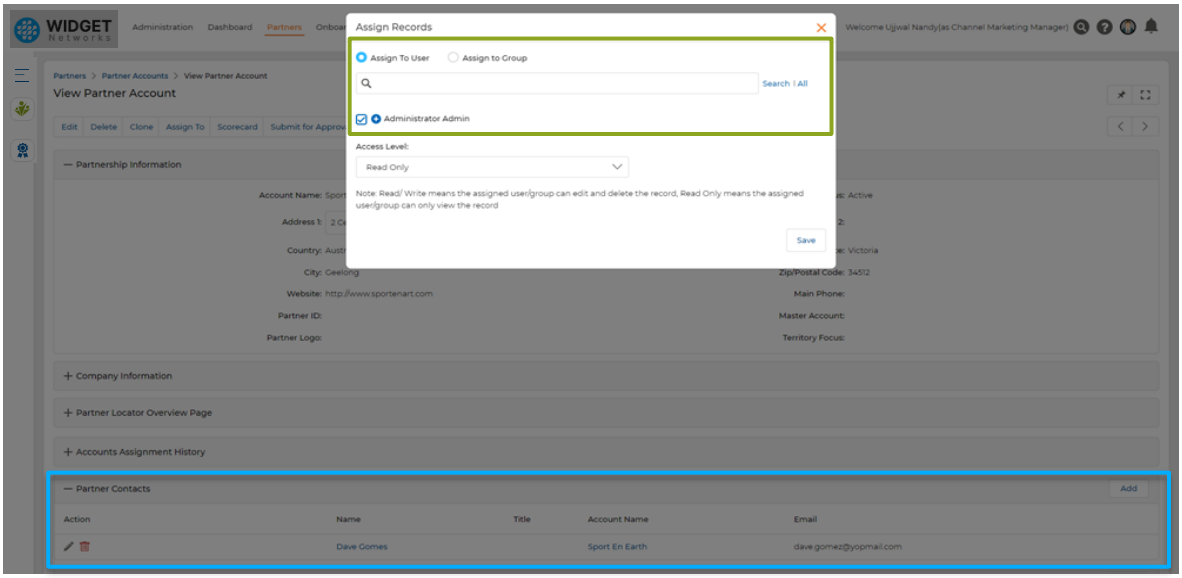
4. This URL can be easily copied for sharing.

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

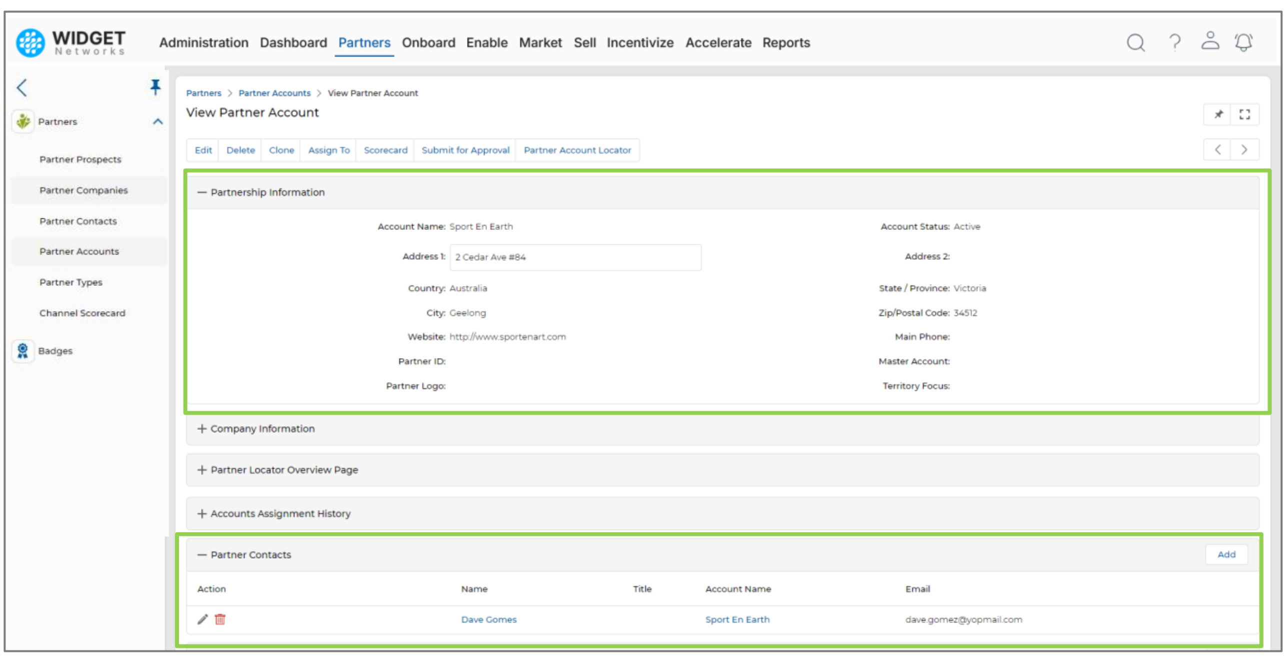
Auto-assignment of related Partner Contacts and Users on Assignment of Partner Account to User

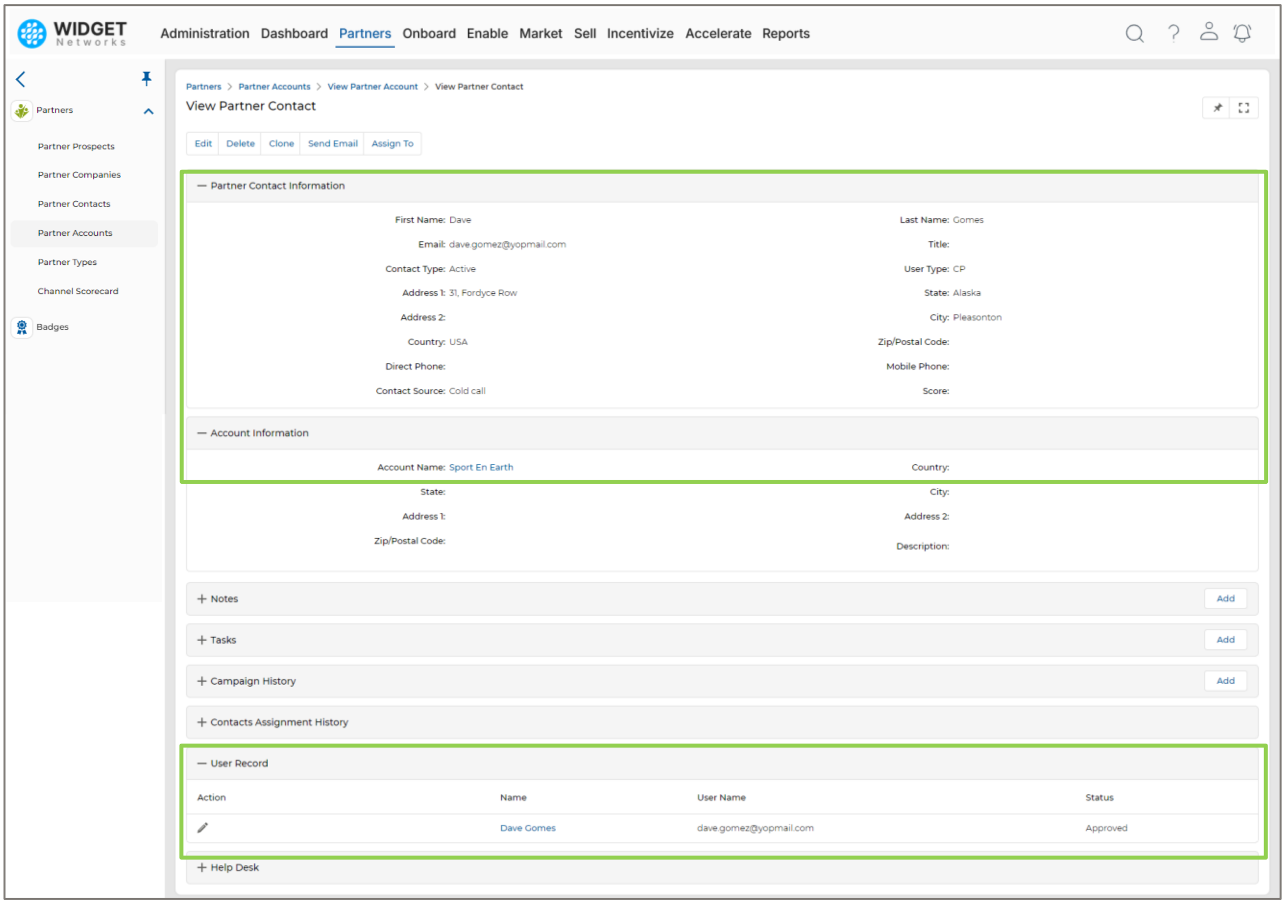
When a Partner Account gets assigned to a specific user all the associated “Contacts” along with their related “User Records” get transferred to the respective user’s “Partner Accounts” list.

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.





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.

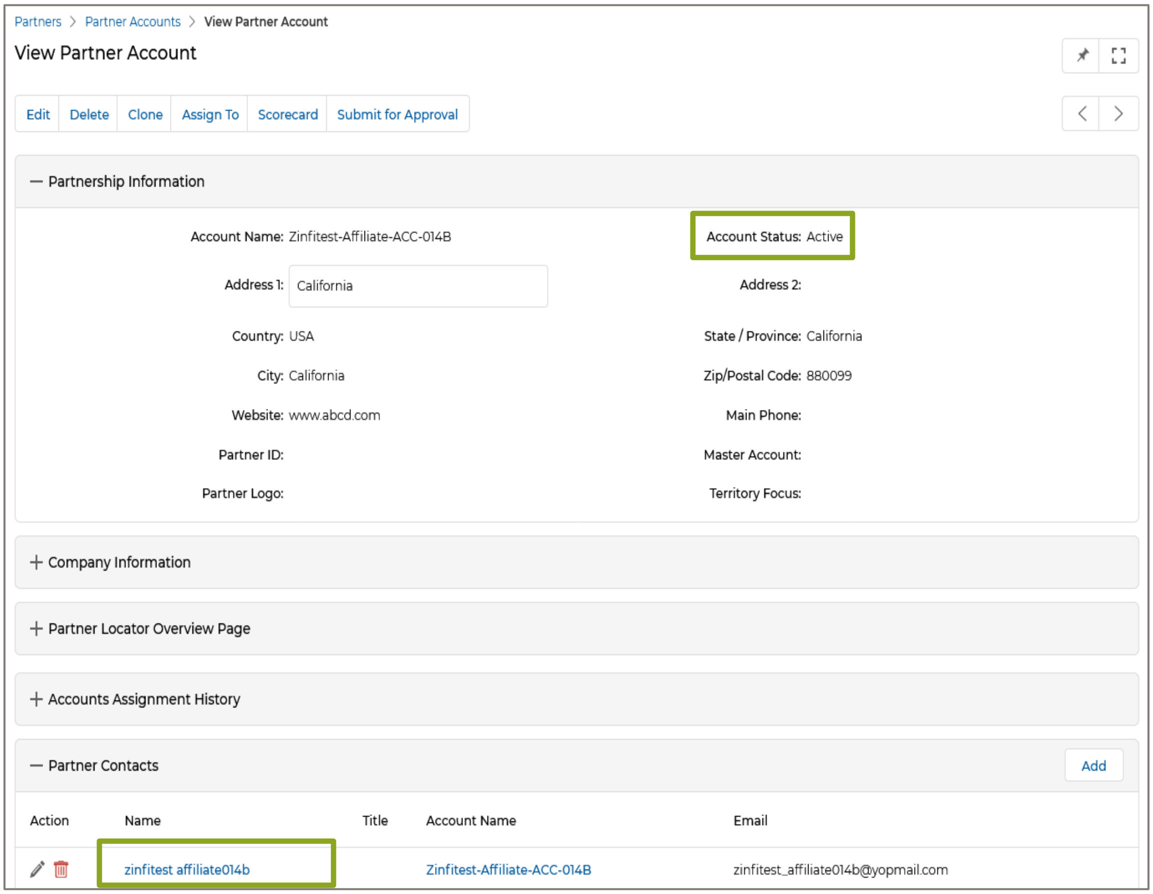
Please note: If an account has been inactivated, then all contacts (users) associated with the account will have no access to the portal.

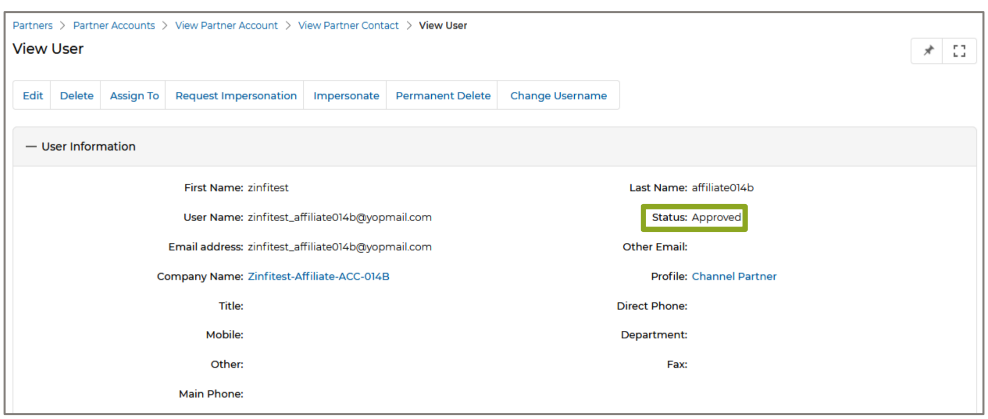
User(s) Status and Access to UPM dependent on Account Status

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**.

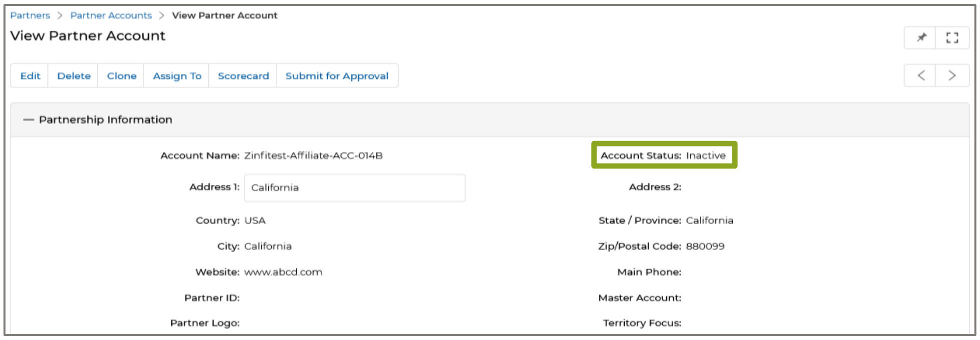
- In the images below we find that the **Status** of the **Partner Account** is **Active** and the corresponding **Status** of associated **User** mapped with the respective **Partner Contact** is **Approved**.



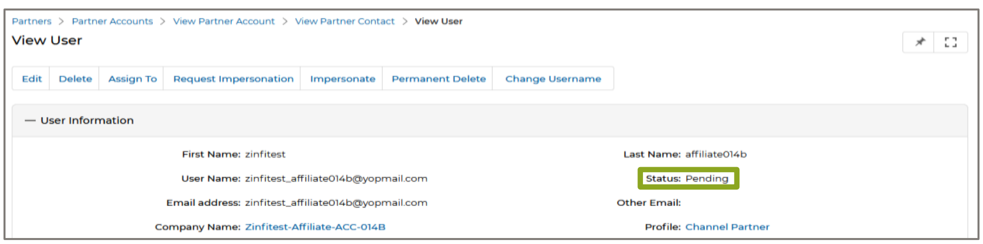


 |

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



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

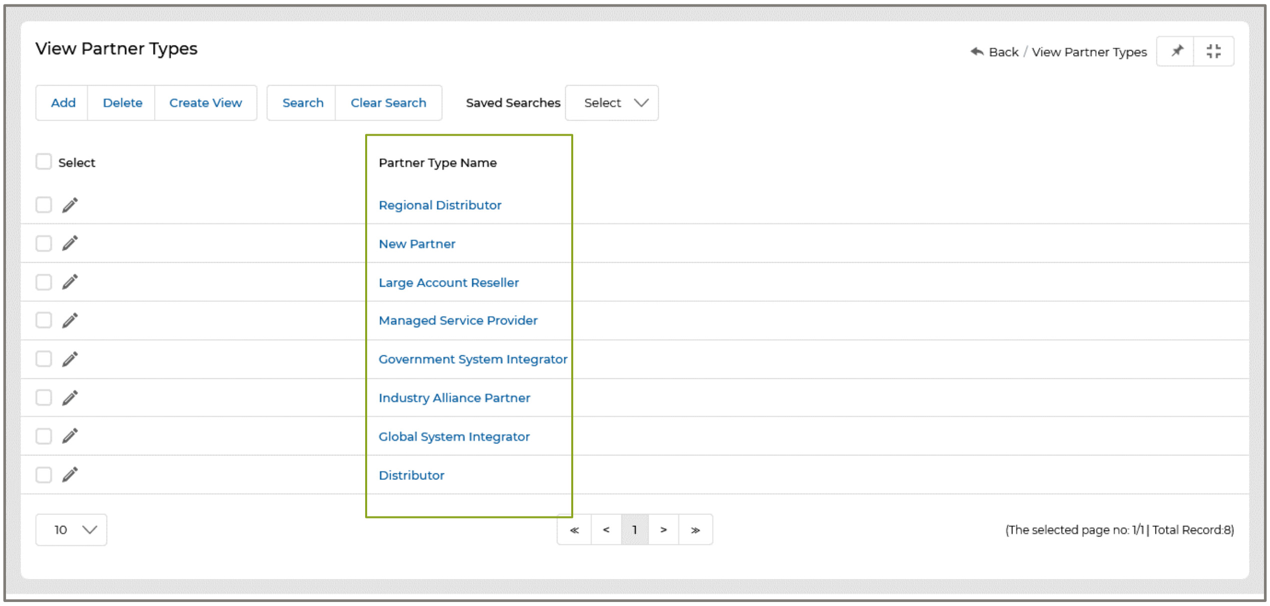
Searching for Existing Partner Types

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

a. **Add** – Opens a page to add a new partner type.
b. **Delete** – Deletes selected row items.
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 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.



Partner Badge Management

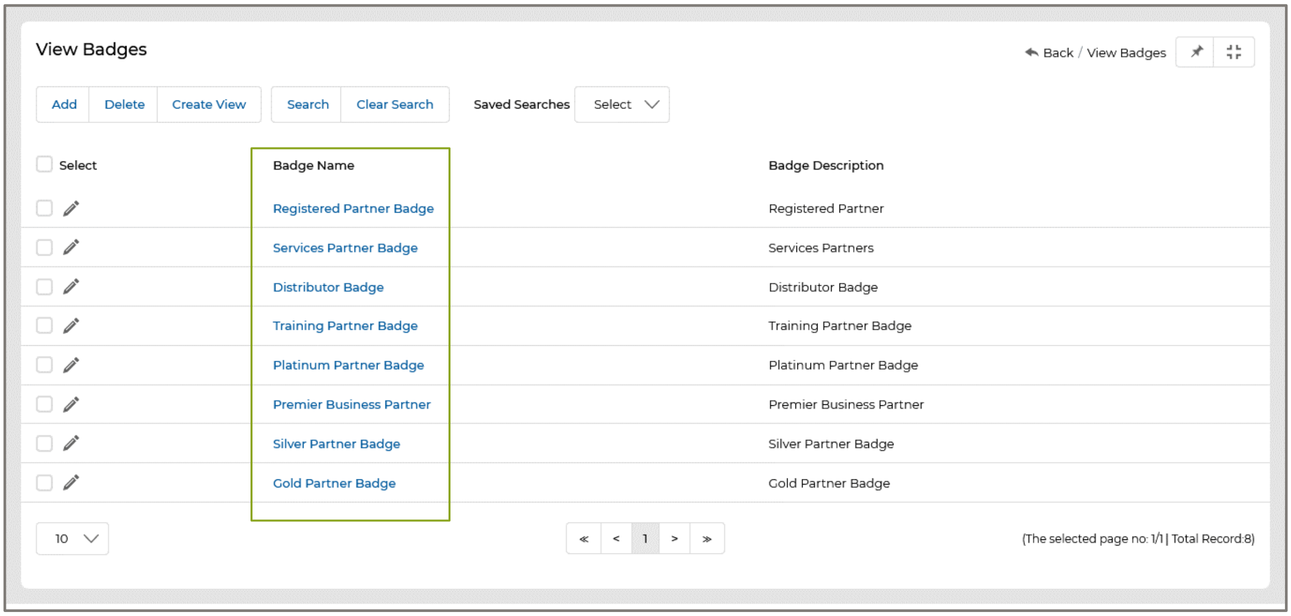
After a partner prospect finally becomes your partner, it can qualify for partner badges. Partners can earn partner badges by demonstrating enhanced skill and expertise, meeting specified requirements, delivering company agency and client revenue growth, and sustaining and growing their client base. 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.

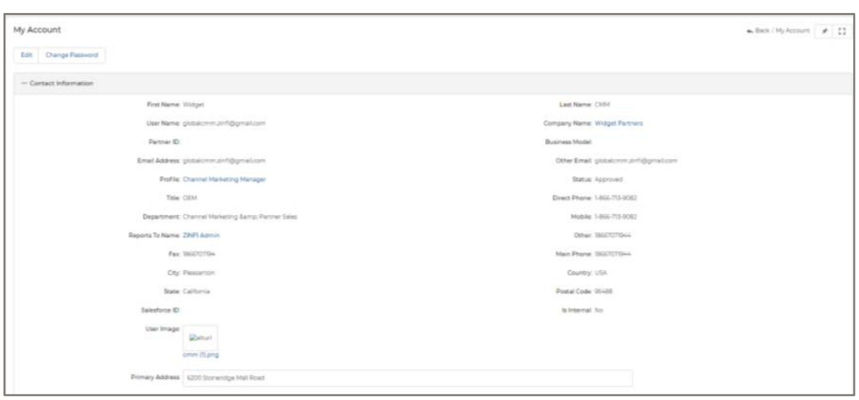


Partner & CPA Logo Management

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.

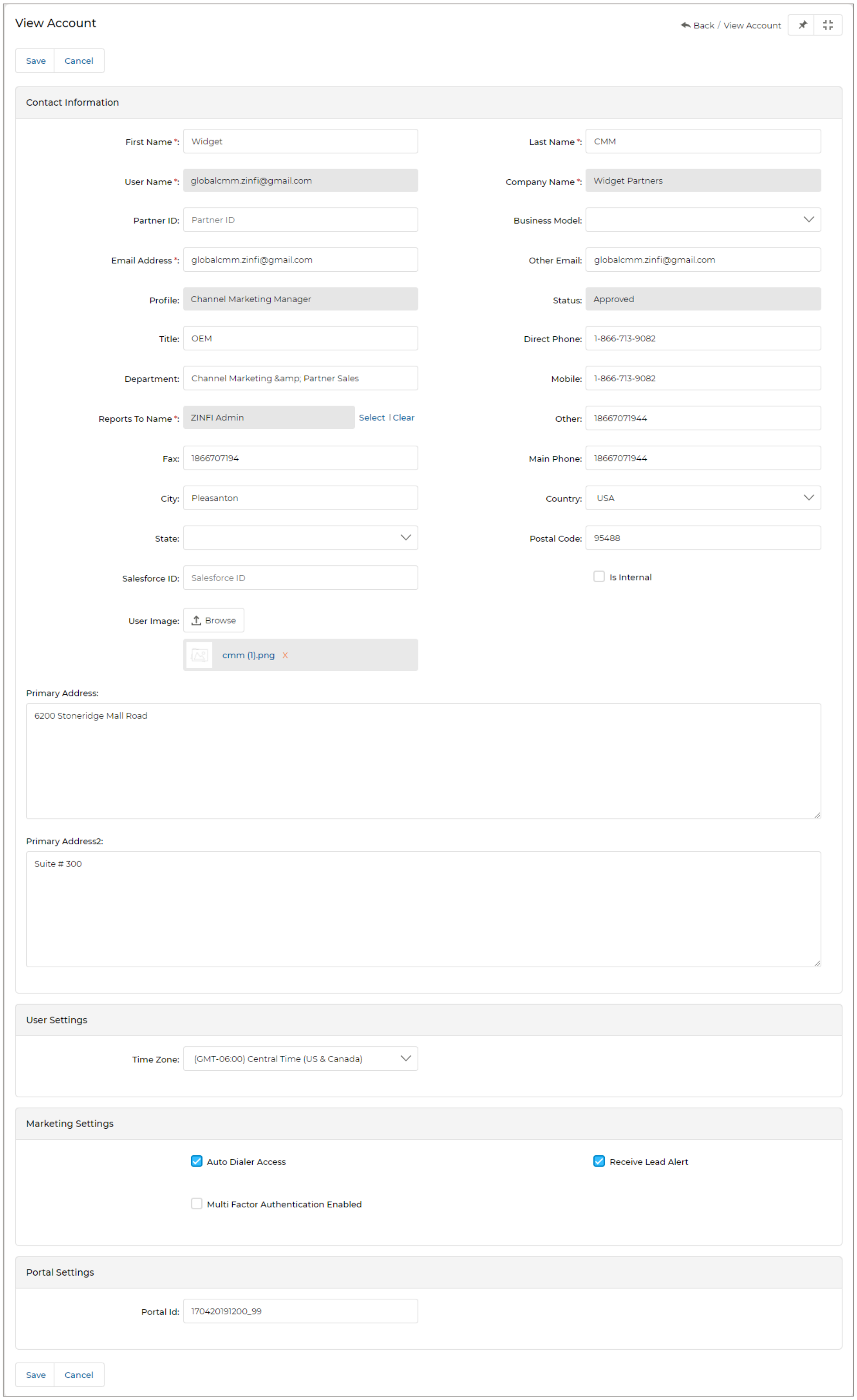
This is a feature where CPA can upload their brand logo which would be viewable to all the partners under that CPA role. To achieve this please follow the steps mentioned below:

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.



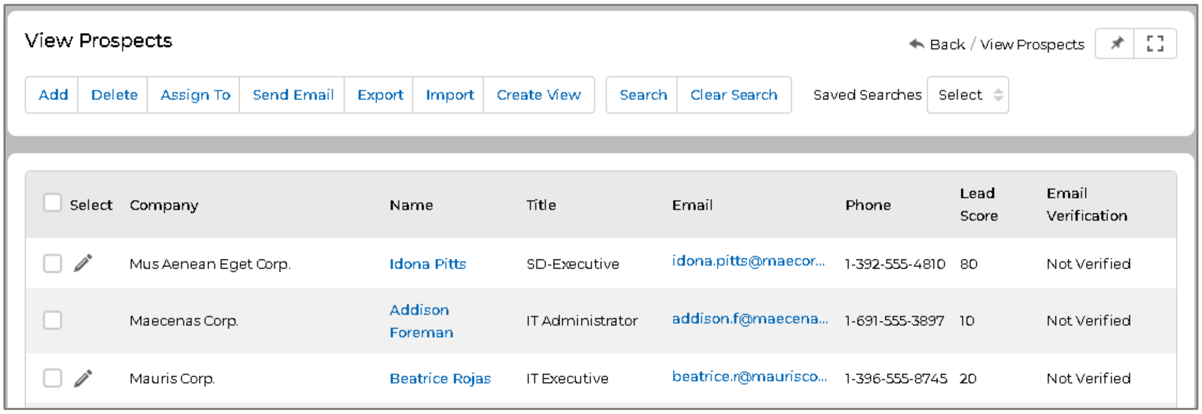
4. Click on the red cross icon to omit the existing logo.

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

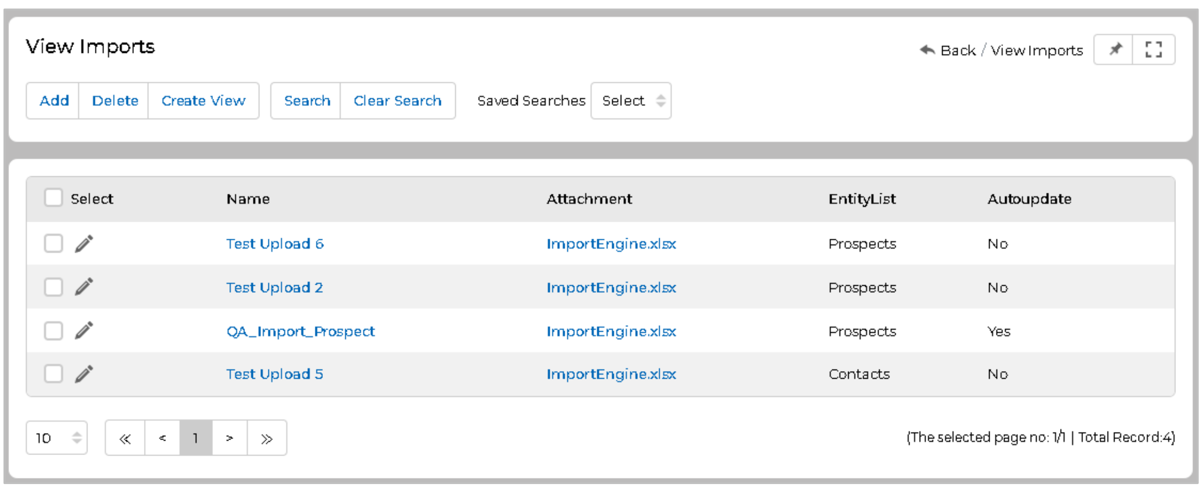


Importing and Uploading Partner Prospects, Contacts, Accounts and Companies

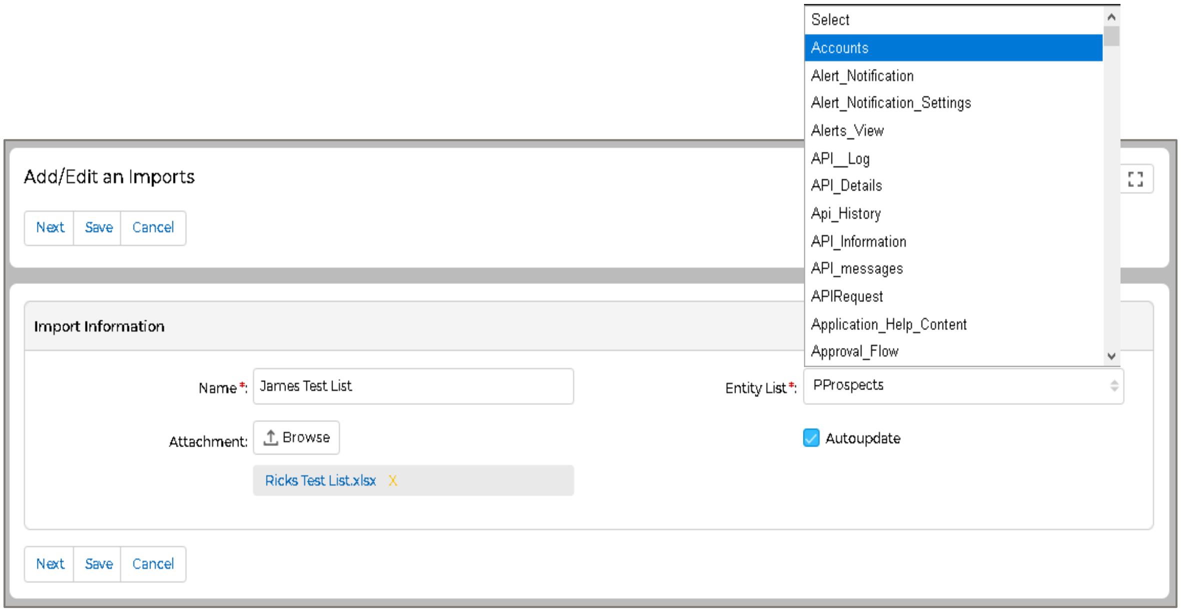
1. Click on the “Import” button in the List View



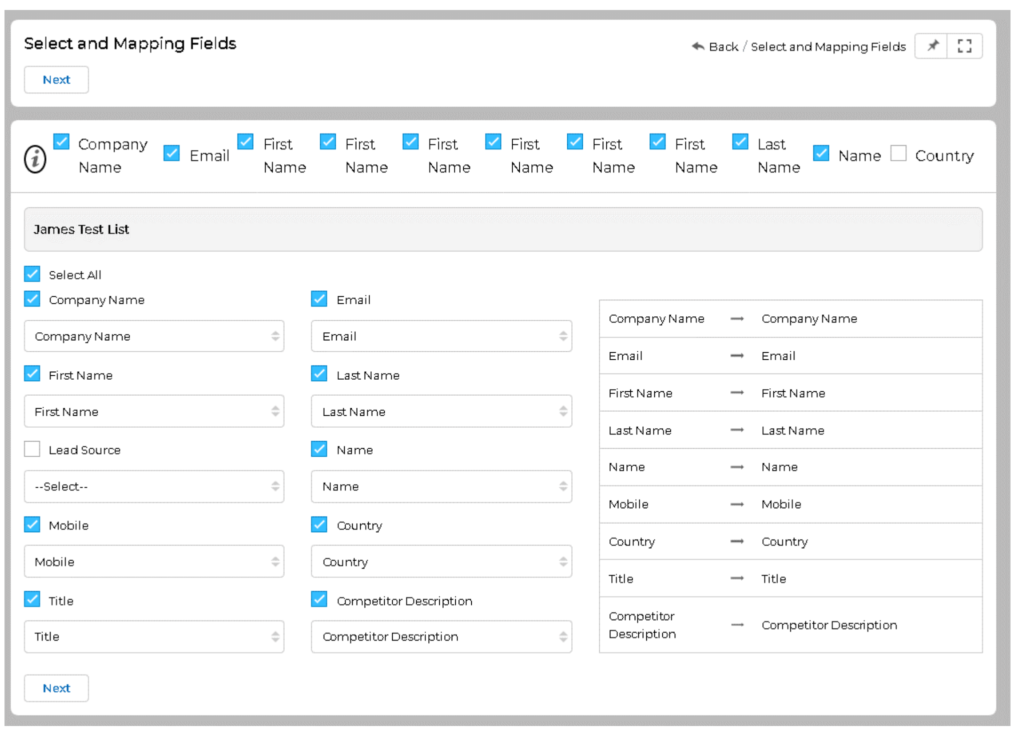
2. Click **Add** to configure the Import Type.



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.



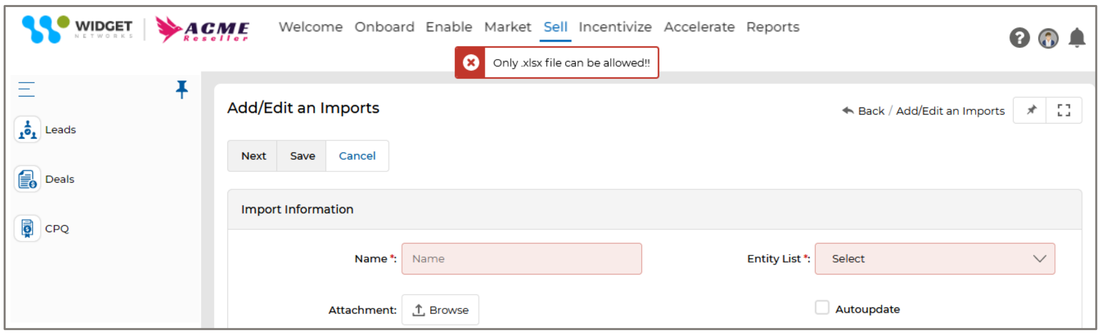
4. The next step is to map the fields:
    a. In this window, the headers in the Excel are mapped with the header rows in the entity database. The labels next to each checkbox are the names of the header fields in the Excel and the corresponding entity fields to map in the database appears in the drop-down. 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.*



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

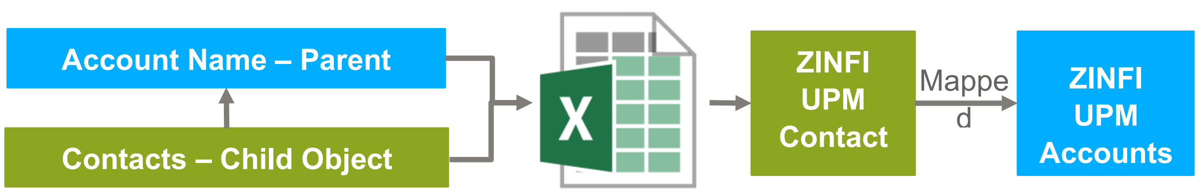
5. **Alert Message for Upload of unsupported File Format at import Engine:**

   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.



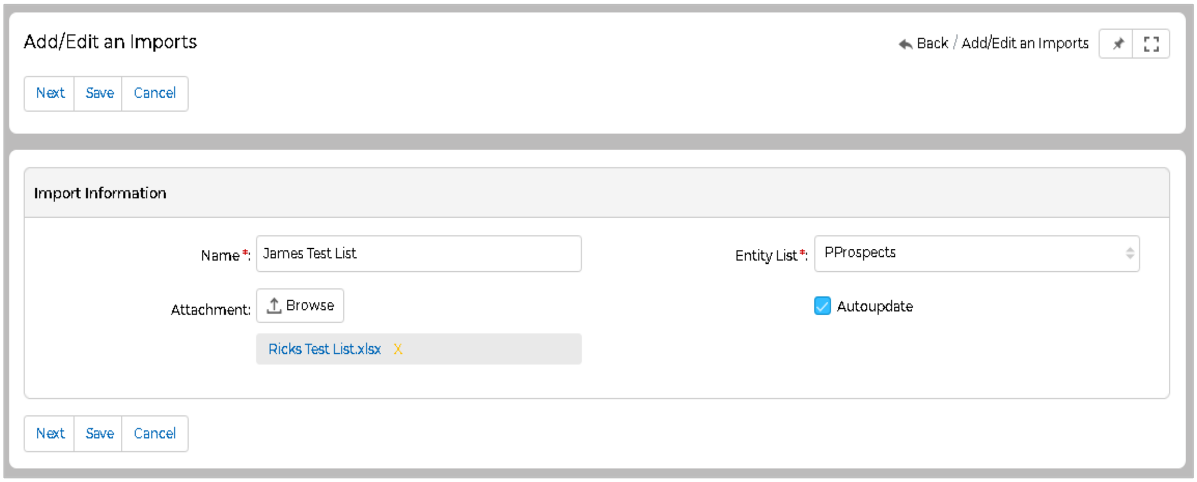
Parent-Child Field/Attribute Relation Configuration in Import Engine

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.



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.