

# Users & Group Management

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UPM 25.X

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# Introduction

For the purposes of this document, anyone who logs in to ZINFI's UPM platform is a UPM user. Users, such as sales reps, channel marketing managers, channel partners and administrators who need access to the channel's records are all stakeholders in the channel environment managed by UPM.

Every user of the UPM platform is entrusted with a user account. The user account identifies the user, and the account settings determine which features and records the user can access. Each user account contains at least the following information:

- Username
- Email address
- User's first and last name
- Profile

## User Types

### Administrators

Administrators are users who can access the entire system. At every organization there must be at least one administrator who can access all the data and features in the UPM account (organizational instance). Administrators are typically key personnel at the highest levels in the organization's hierarchy.

### Standard Users

Standard users are users who can access data according to their defined permissions (profiles) and roles in the organization and as set up by the administrator. Standard users typically include individuals like sales reps and marketing managers.

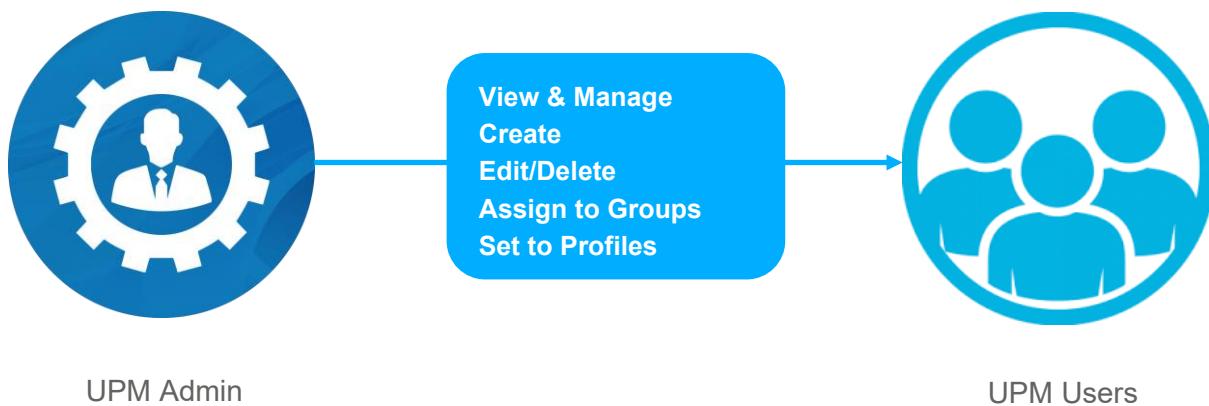


Figure 1: UPM User Management

# User Management

Managing the complexities of security administration is a serious and growing concern for all enterprises, especially those open to channel e-commerce within large networks. User management is an important security tool for these organizations. User-based access control is the foundation for managing the required functionality and authentication for a security system.

UPM provides the following set of user management features that allow administrators to control user access to the organization's records along with the facility of sending the 'Forgot Password Email' to the Email of the user (provided in the Email address field) and not to the Email contained in the Username parameter. The updated feature also provides a back-end configuration which tracks the IP of the user requesting forgot password and password update - a security add-on for audit and tracking capabilities.

## Accessing Administration

1. Click on **Administration** on the top menu.
2. Once you land on the admin page you get the following options to setup your portal:

The screenshot shows the 'Welcome to Portal Administration' page. At the top, it says 'Welcome to Portal Administration' and 'Gain command and configure your partner portal to accelerate the growth of your partner ecosystem.' Below this are two video buttons: 'Portal Overview Video' and 'Company Overview Video'. To the right is a green edit icon.

The main content area has six numbered cards:

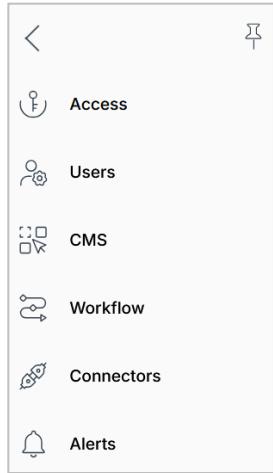
- 1. Set Up Groups**: Establish custom groups for user assignment, defining the content and data each user can access. Buttons: 'Get Started' and 'Need Help?'
- 2. Set Up Profiles**: Configure profiles, or roles, to assign to users, controlling their access to tools and functionalities. Buttons: 'Get Started' and 'Need Help?'
- 3. Create Admin Users**: Set up, configure, and enable new users to assist with the portal's setup and ongoing management. Buttons: 'Get Started' and 'Need Help?'
- 4. Branding Your Portal**: Incorporate your logo, color palette, and branding themes to customize the portal's visual identity. Buttons: 'Get Started' and 'Need Help?'
- 5. Customize Your Pages**: Develop and manage web pages within your partner portal using user-friendly CMS tools. Buttons: 'Get Started' and 'Need Help?'
- 6. Customize Your Menus**: Strategically feature relevant applications and tools within appropriate menus across portal zones. Buttons: 'Get Started' and 'Need Help?'

**Helpful Tips** sidebar:

1. Watch the "Portal Overview Video" to get an overview of portal navigation and capabilities.
2. For additional help or guidance on all applications, tools, click on the question mark icon in the upper right of your header area to get access to the ZINFI UPM Knowledge Center.

Icons in the sidebar include a magnifying glass, a question mark, a user profile, and a gear. Below the sidebar is a screenshot of the ZINFI portal interface with a 'Hello. How can we help you?' message.

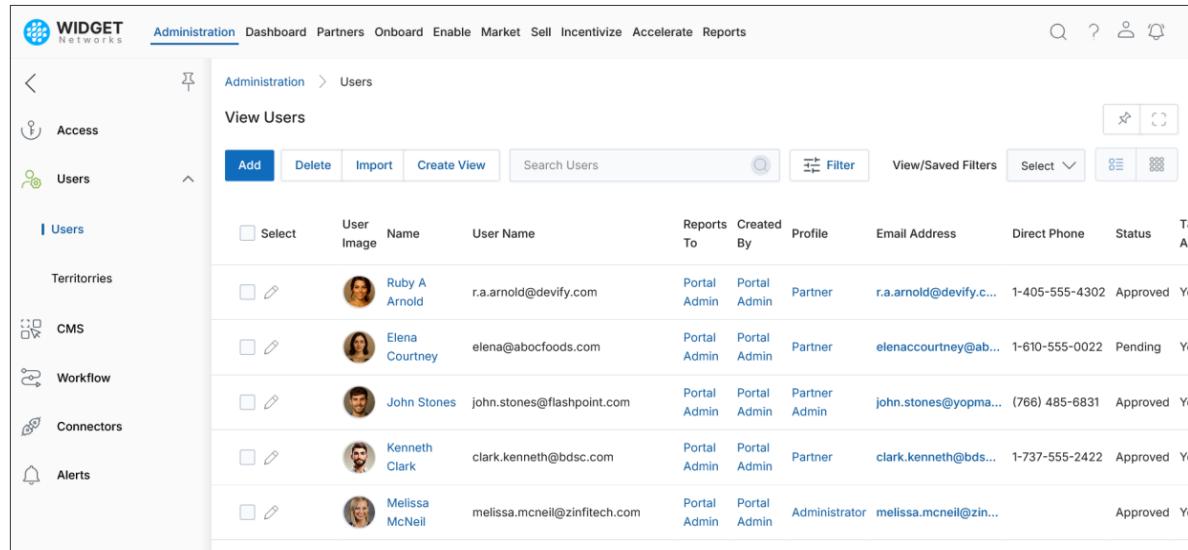
- a. **Setup Groups** – Create your custom set of groups, to assign to users to drive what content and data they will see within the accessible modules.
- b. **Setup Profiles** – Configure profiles (roles) to apply to all your users that will drive what tools and functionality they have access to.
- c. **Set Up Countries & Regions** – Add/update country and their respective region configurations you need for your partners.
- d. **Set Up Languages & Currencies** – Add/update language and their associative currency configurations needed to localize your portal.
- e. **Creating New Users** – Set-up, configure, segment and enable new users to the system, both admin and partner views.
- f. **Branding Your Portal** – Add your logo, color palette and branding themes to the portal to apply your company style. The visibility of the logo of Partner can be restricted from backend.
- g. **Customize Your Portal Pages** – Build and manage the web pages of portal, with easy-to-use CMS tools to apply your designs.
- h. **Customize Your Terminology** – Manage the terminology you use in all your form and tool labeling, to match the lingo of your business or industry.
- i. **Customize Your Menus** – Make sure you feature the right module and tool in the right menus across your various portal zones and areas.
- j. **Set Up Partner Tiers** – Configure your partner tiers to drive certification, learning and capability-access as your partners move up.
- k. **Set Up Sales Territories** – Build your sales territories to assign to your partners and admin users to segment assignments and processes.
- l. **Connect to External Systems** – Connect your sub-systems that you need to integrate with to import or sync data and content.
- On the left-hand side menu, you will find the following modules (with all submodule tools) to setup your portal:
  - a) Access
  - b) Users
  - c) CMS
  - d) Workflow
  - e) Connectors
  - f) Alerts



## Manage Users

### View Users

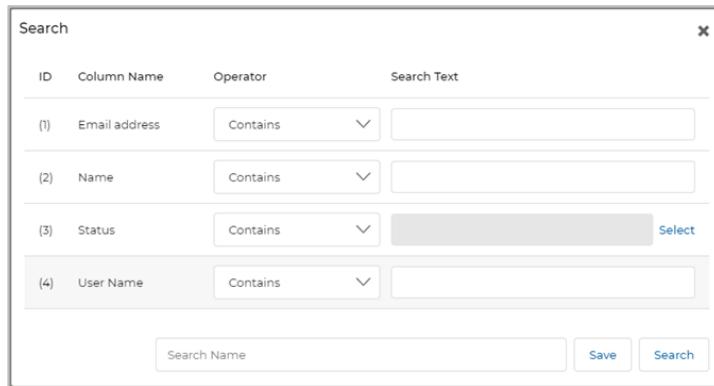
1. Click on the **column header** to sort the list in alphabetical order.



Select	User Image	Name	User Name	Reports To	Created By	Profile	Email Address	Direct Phone	Status	Territories
<input type="checkbox"/>		Ruby A. Arnold	r.a.arnold@devify.com	Portal Admin	Portal Admin	Partner	r.a.arnold@devify.c...	1-405-555-4302	Approved	Yes
<input type="checkbox"/>		Elena Courtney	elena@abocfoods.com	Portal Admin	Portal Admin	Partner	elenaccourtney@ab...	1-610-555-0022	Pending	Yes
<input type="checkbox"/>		John Stones	john.stones@flashpoint.com	Portal Admin	Portal Admin	Partner Admin	john.stones@yopma...	(766) 485-6831	Approved	Yes
<input type="checkbox"/>		Kenneth Clark	clark.kenneth@bdsc.com	Portal Admin	Portal Admin	Partner	clark.kenneth@bds...	1-737-555-2422	Approved	Yes
<input type="checkbox"/>		Melissa McNeil	melissa.mcneil@zinfitech.com	Portal Admin	Portal Admin	Administrator	melissa.mcneil@zin...		Approved	Yes

2. Click on the **Name** of the User to go into its detailed view.
3. Click on:
  - Add** to add a new user.
  - Select** the users and click on delete to delete the users.
  - Click on **Search** to look for a user.

4. You may search by several criteria, including email address, name, status, and username.



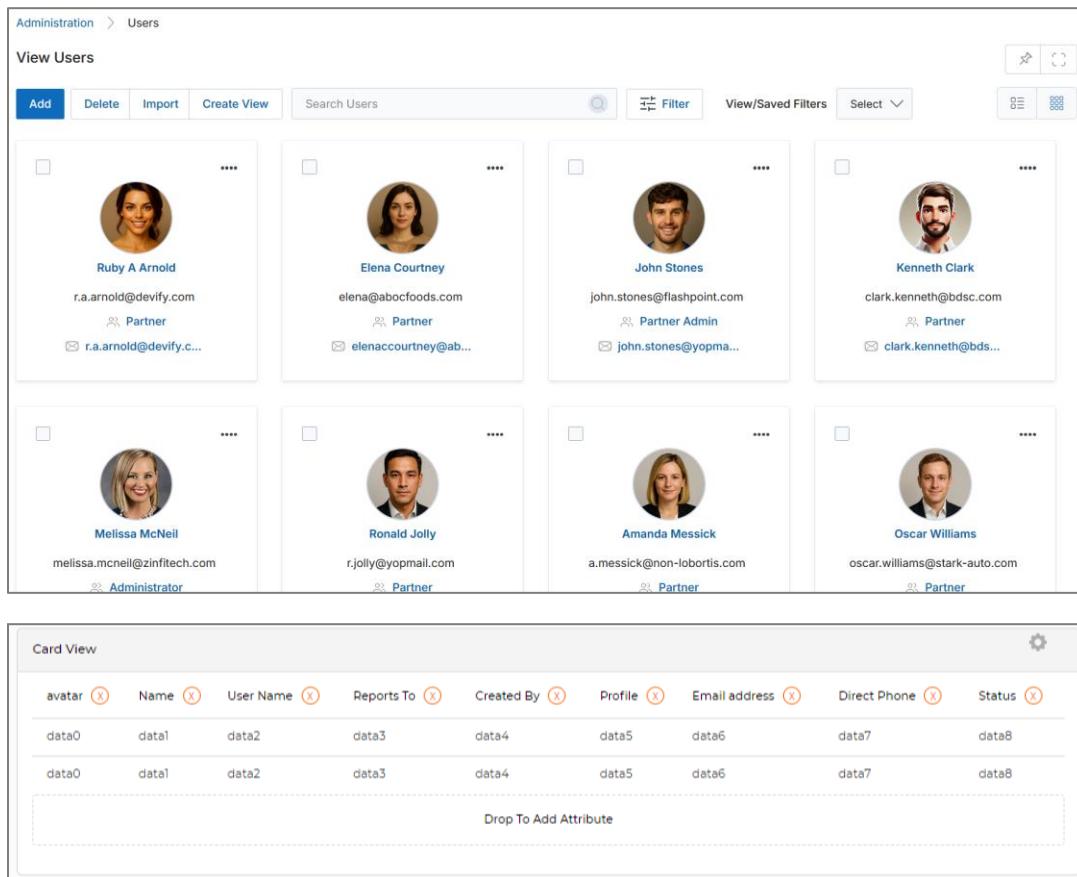
The search dialog box contains the following fields:

ID	Column Name	Operator	Search Text
(1)	Email address	Contains	<input type="text"/>
(2)	Name	Contains	<input type="text"/>
(3)	Status	Contains	<input type="text"/> <a href="#">Select</a>
(4)	User Name	Contains	<input type="text"/>

Buttons at the bottom: [Search Name](#), [Save](#), [Search](#).

5. You may also save the search if you want.

6. The Users with their primary information can be viewed in Thumb View/Card View formats. The user information that are to be displayed in the Card View can be effectively managed via FlexiFlow which allows you to select the user attributes. If none of the attributes are selected, the Card View of Users cannot be accessed via the UPM platform.



**View Users**

Users listed:

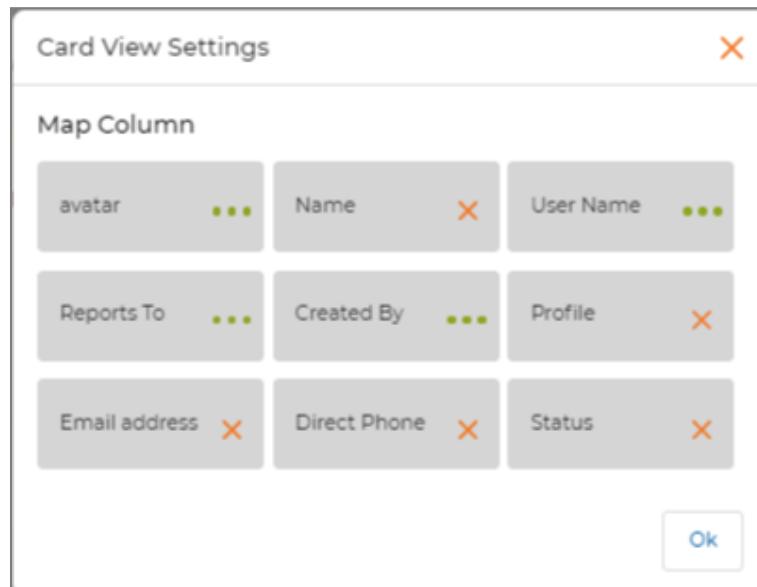
- Ruby A Arnold (Partner, r.arnold@devify.com)
- Elena Courtney (Partner, elena@abocfoods.com)
- John Stones (Partner Admin, john.stones@flashpoint.com)
- Kenneth Clark (Partner, clark.kenneth@bdsc.com)
- Melissa McNeil (Administrator, melissa.mcneil@zinfitech.com)
- Ronald Jolly (Partner, r.jolly@yopmail.com)
- Amanda Messick (Partner, a.messick@non-lorbitis.com)
- Oscar Williams (Partner, oscar.williams@stark-auto.com)

**Card View**

Attributes mapped to columns:

avatar	Name	User Name	Reports To	Created By	Profile	Email address	Direct Phone	Status
data0	data1	data2	data3	data4	data5	data6	data7	data8
data0	data1	data2	data3	data4	data5	data6	data7	data8

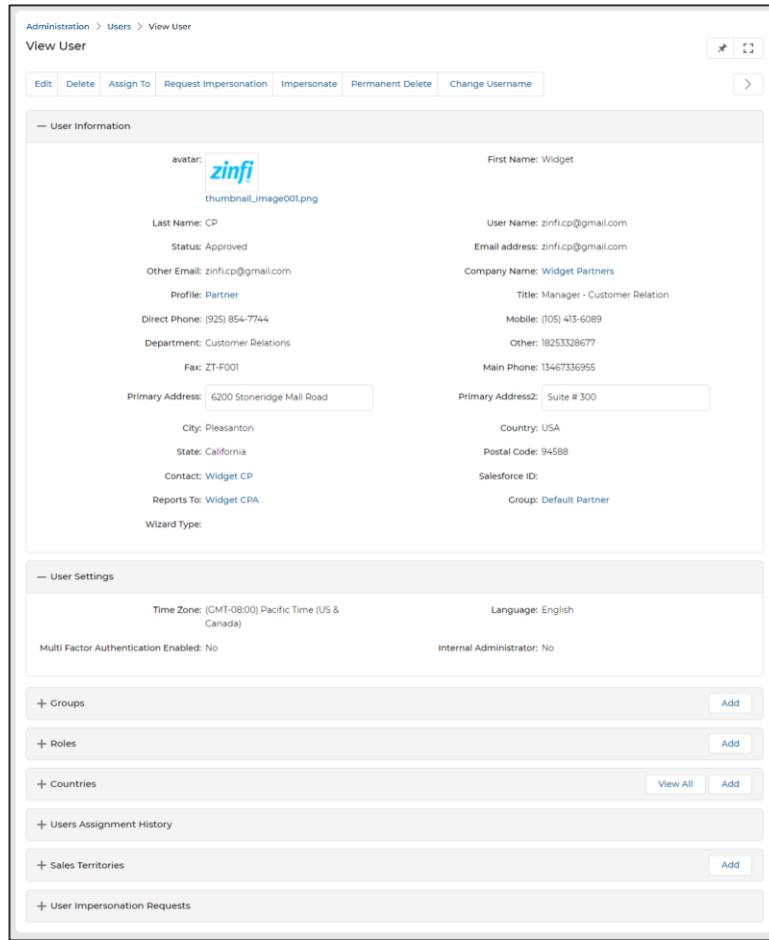
Drop To Add Attribute



## View User Record Details

1. On the View User page, click on **Edit** or **Delete** to make updates or delete a user. You can also click on:
  - a. **Assign To**, to assign the selected user to another user(s)/group(s).
  - b. **Request Impersonation**, to request the user to impersonate his/her login info as yours to use the application. The chosen user will receive an email requesting that he/she log in to the application and go to My Account to approve the request.
  - c. **Impersonate**, to activate the feature if the user approves the impersonation request.
  - d. **Change Username**, to bring changes to the username.
2. The User Information section displays details about the user, including the avatar (profile image) first and last name, username, email address, company name and more.
3. The User Settings section displays the time zone and language associated with the user, as well as other information.

4. Other sections on the View User page show groups, roles, countries, assignment history, sales territories and a history of impersonation requests associated with the user.



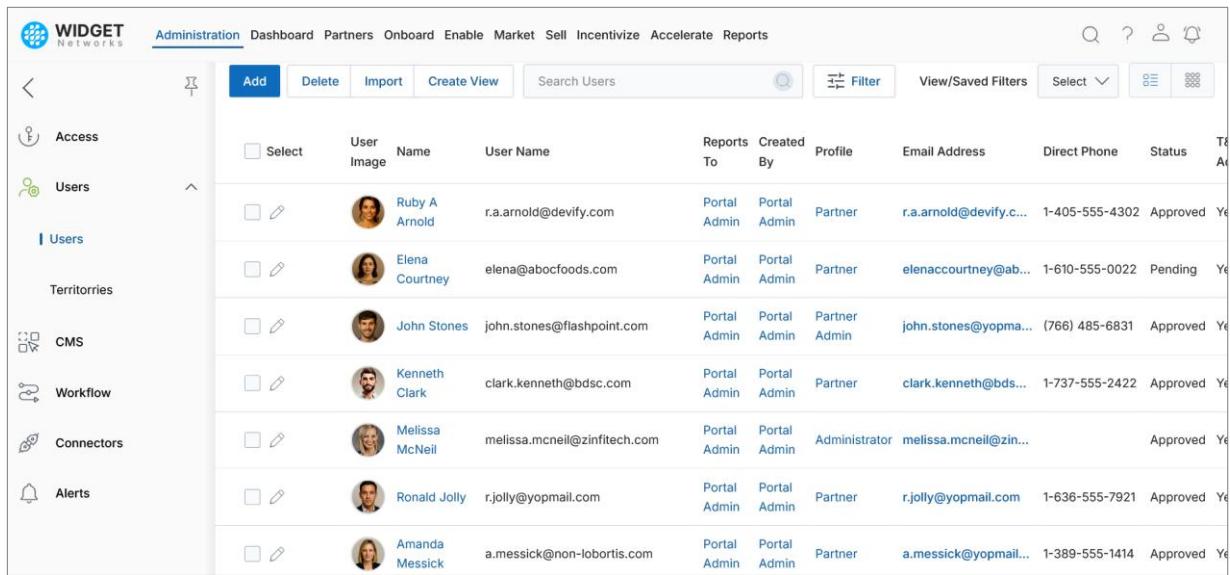
The screenshot shows the 'View User' page in the ZINFI Administration interface. The top navigation bar includes 'Administration > Users > View User' and 'View User' buttons. Below the navigation is a toolbar with 'Edit', 'Delete', 'Assign To', 'Request Impersonation', 'Impersonate', 'Permanent Delete', and 'Change Username' buttons. The main content is divided into sections:

- User Information:** Displays the user's first name (Widget), last name (CP), status (Approved), email (zinfo.cp@gmail.com), and company (Widget Partners). It also shows the user's title (Manager - Customer Relation), mobile number (105) 43-6089, and fax (10253328677). Address details include 6200 Stoneridge Mall Road, Suite # 300, Pleasanton, California, USA, postal code 94588.
- User Settings:** Shows the time zone (PST), language (English), and multi-factor authentication status (Enabled: No). It also indicates the user is not an internal administrator.
- Groups:** A list of groups associated with the user, with an 'Add' button.
- Roles:** A list of roles associated with the user, with an 'Add' button.
- Countries:** A list of countries associated with the user, with 'View All' and 'Add' buttons.
- Assignment History:** A list of users assigned to this user, with 'View All' and 'Add' buttons.
- Sales Territories:** A list of sales territories associated with the user, with an 'Add' button.
- User Impersonation Requests:** A list of impersonation requests associated with the user.

## Add/Edit a User

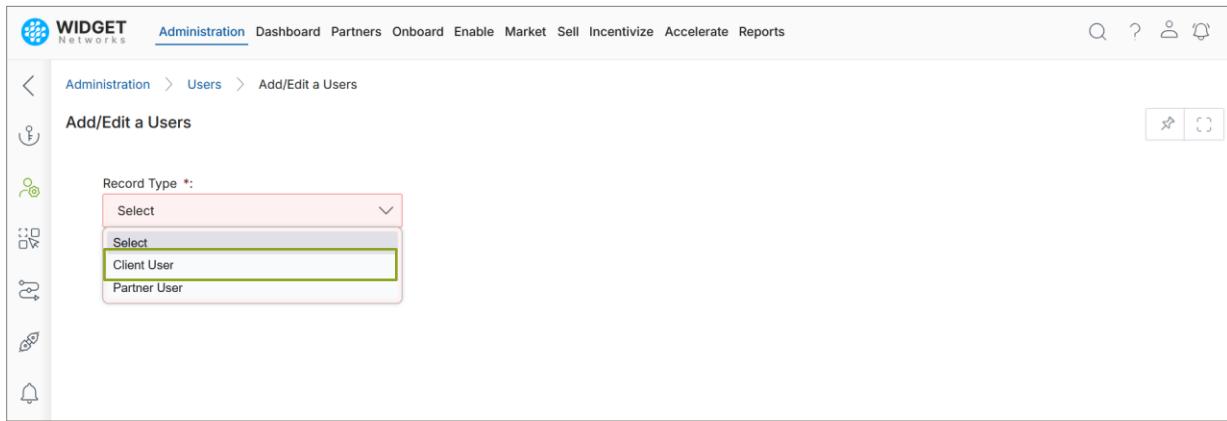
### Add a New Client (Admin) User

1. ZINFI UPM provides an added advantage to the Client (Admin) to create his/her own set of users directly in the portal without having to create a Partner Contact (and the associated Partner Account record) at the initial stage. These type of user records, created directly by the admin will not get listed in Partner Contacts (and associated Partner Account) records.
2. To create a user of this type you need to get into the '**Users**' listing page. Click the **Add** button here as shown in the image below.



<input type="checkbox"/> Select	User Image	User Name	Reports To	Created By	Profile	Email Address	Direct Phone	Status	Territories
<input type="checkbox"/>		Ruby A Arnold	r.a.arnold@devify.com	Portal Admin	Portal Admin	Partner	r.a.arnold@devify.c...	1-405-555-4302	Approved Yes
<input type="checkbox"/>		Elena Courtney	elenabocfoods.com	Portal Admin	Portal Admin	Partner	elenaccourtney@ab...	1-610-555-0022	Pending Yes
<input type="checkbox"/>		John Stones	john.stones@flashpoint.com	Portal Admin	Portal Admin	Partner Admin	john.stones@yopma...	(766) 485-6831	Approved Yes
<input type="checkbox"/>		Kenneth Clark	clark.kenneth@bdsc.com	Portal Admin	Portal Admin	Partner	clark.kenneth@bds...	1-737-555-2422	Approved Yes
<input type="checkbox"/>		Melissa McNeil	melissa.mcneil@zinfitech.com	Portal Admin	Portal Admin	Administrator	melissa.mcneil@zin...		Approved Yes
<input type="checkbox"/>		Ronald Jolly	r.jolly@yopmail.com	Portal Admin	Portal Admin	Partner	r.jolly@yopmail.com	1-636-555-7921	Approved Yes
<input type="checkbox"/>		Amanda Messick	a.messick@non-lobortis.com	Portal Admin	Portal Admin	Partner	a.messick@yopmail...	1-389-555-1414	Approved Yes

3. Clicking the Add button will take you to the following page, where clicking the dropdown arrow you need to select the “User Type”. Here you need to select “Client User” as shown in the image below.



Administration > Users > Add/Edit a Users

Add/Edit a Users

Record Type \*:

Select

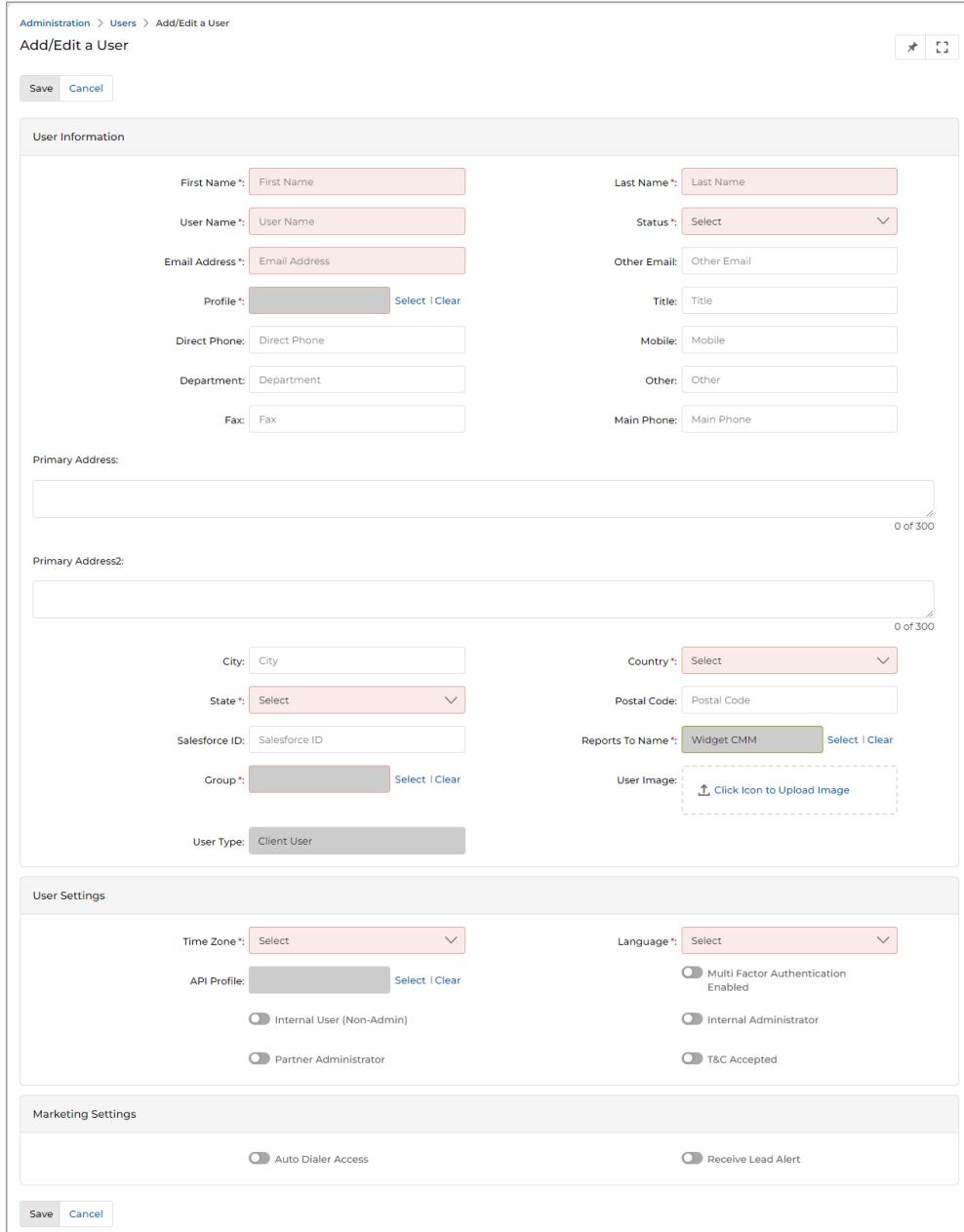
Select

Client User

Partner User

4. Selecting “Client User” will take you to the following “Add/Edit a User” page as shown in the image below.

User Type is auto selected as Client User and mandatory selection of associated Partner Contact (associated with a Partner Account) is not needed, and the field Contact is not visible as with the case when creating a Partner User Record.



Administration > Users > Add/Edit a User

Add/Edit a User

User Information

First Name\*:

Last Name\*:

User Name\*:

Status\*:

Email Address\*:

Other Email:

Profile:

Title:

Direct Phone:

Mobile:

Department:

Other:

Fax:

Main Phone:

Primary Address:

Primary Address2:

City:

Country\*:

State\*:

Postal Code:

Salesforce ID:

Reports To Name\*:

Group:

User Image:

User Type:

User Settings

Time Zone\*:

Language\*:

API Profile:

Internal User (Non-Admin)

Multi Factor Authentication Enabled

Internal Administrator

Partner Administrator

T&C Accepted

Marketing Settings

Auto Dialer Access

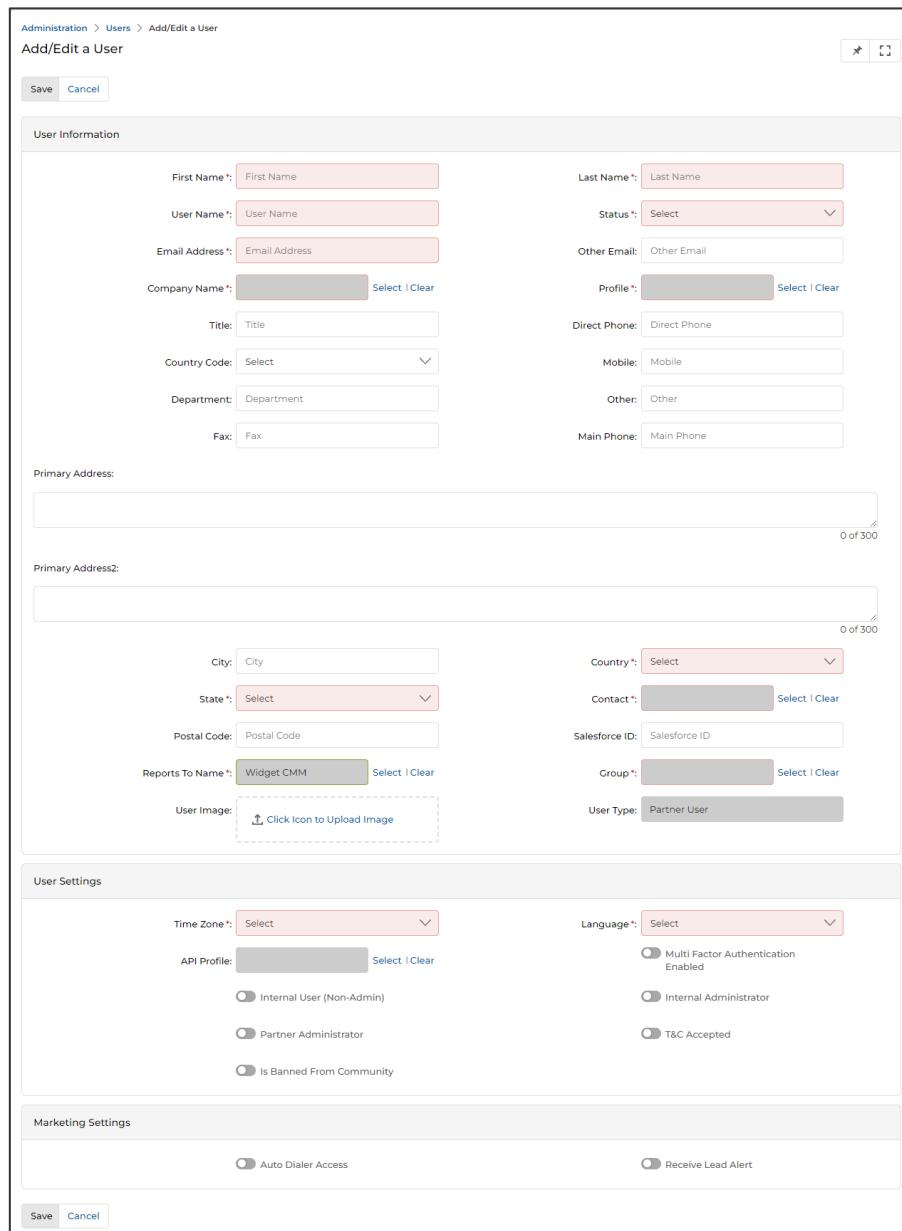
Receive Lead Alert

Save Cancel

## Add a New Partner User

1. First you must create a **Partner Contact** record, so please see the "Partner Profiles Management (Admin) guidebook for how to do that.

2. Once you have created the **Partner Contact** record, you can click the **Add** button in the User(s) related list at the bottom of their Partner Contact record details page – or you can come here to User Management and click on the **Add** button at the top of the View Users page.
3. If you clicked over from the **Partner Contact** record related list, the information of that partner will already be auto populated.
4. If you choose to create the User record by clicking on the **Add** button at the top of the **View Users** page, and subsequently selecting '**Partner User**' you will be taken to the **Add/Edit a User** page as shown in the image below where you need to enter the required data.



Administration > Users > Add/Edit a User

Add/Edit a User

Save Cancel

User Information

First Name\*: First Name

Last Name\*: Last Name

User Name\*: User Name

Status\*: Select

Email Address\*: Email Address

Other Email: Other Email

Company Name\*: Company Name Select | Clear

Profile\*: Profile Select | Clear

Title: Title

Direct Phone: Direct Phone

Country Code: Select

Mobile: Mobile

Department: Department

Other: Other

Fax: Fax

Main Phone: Main Phone

Primary Address:

Primary Address2:

City: City

Country\*: Select

State\*: Select

Contact\*: Contact Select | Clear

Postal Code: Postal Code

Salesforce ID: Salesforce ID

Reports To Name\*: Reports To Name Select | Clear

Group\*: Group Select | Clear

User Image: Click Icon to Upload Image

User Type: Partner User

User Settings

Time Zone\*: Select

Language\*: Select

API Profile: API Profile Select | Clear

Internal User (Non-Admin)

Multi Factor Authentication Enabled

Partner Administrator

Internal Administrator

Is Banned From Community

T&C Accepted

Auto Dialer Access

Receive Lead Alert

Marketing Settings

Save Cancel

5. Maintaining logical hierachal order of the organization in the UPM portal as configured by the admin, a **User** is only allowed to report to his **seniors/superiors** by the system. Who the **User** will report to can be found from the '**Select**' link found beside **Reports To Name** field clicking which will open a pop-up window where names of User's **seniors/superiors** are listed. The pop-up window, which is also known as **Hierachal Users Tab** neither displays names of **User's subordinates** nor his own **name**. It only displays the names of **User's seniors/superiors**. The appropriate name should be selected from this list. However, when a new user is created this field gets auto populated by default with the name of the user who is creating this record and can be updated.

**Note:** Users registering via the sign-up page are created with an inactive or pending status if their associated Partner Account is inactive. Users will receive a registration confirmation email but cannot access the platform or reset their password until the Partner Account is activated. Admins can still manually create users with active status from inactive accounts, but these users will remain restricted from logging in until the account is active.

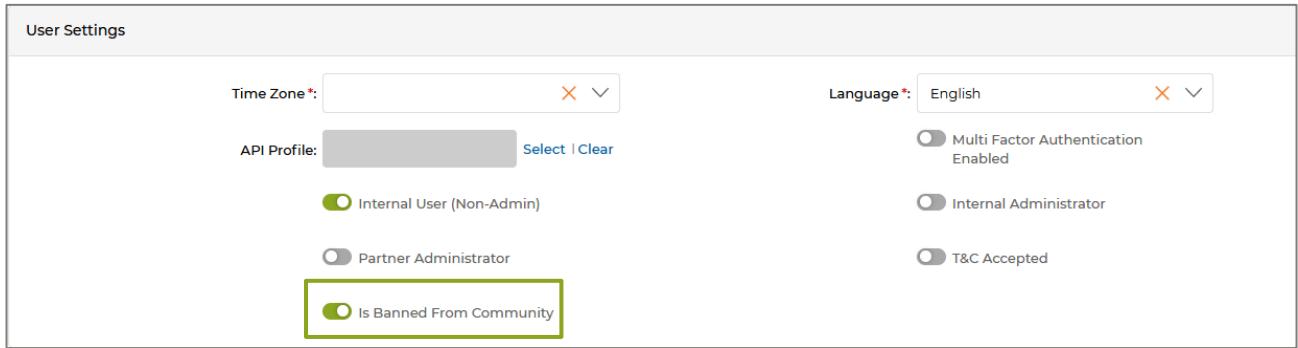
### Auto Group Assignment based on Attributes

The Auto Group Assignment based on Attributes feature enhances operational efficiency by automating group assignments using Group Attributes such as 'Country' and 'Partner Tier', reducing manual effort and ensuring accuracy. This feature dynamically updates group associations in real-time as user attributes change, maintaining consistency and scalability. Administrators can configure and customize group attributes as needed by navigating to Administration > Access > Groups, creating new groups, and defining attribute conditions. For more details, please refer to the **Group Attributes** section under Add/Edit a Group in the 'Access Management - CMM' guidebook.

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

## Banning User from Accessing Community Module

This feature enables the Admin to impose a ban on User from entering Community Module. Revoking the ban will enable the User to get access of the Community Module. Invoking/revoking ban will trigger notification via email to the User.



The screenshot shows the 'User Settings' section of a user profile. It includes fields for Time Zone, Language, API Profile, and several checkboxes for user roles and status. The 'Is Banned From Community' checkbox is highlighted with a green border, indicating it is selected.

## Archival of Primary Countries associated to User

The enhanced feature of the Country related list for the User, features an archive of the Countries associated to the User. The **Country** related list displays the list of Primary Country associated to the user, throughout the Users lifecycle. If the current **Primary Country** is updated to a new Country from **Add/Edit a User** page, the record of the new **Primary Country** will be visible in the **Countries** section along with that of previous **Primary Country(s)**. The occurrence of the Primary Country is unique and appears only once in the Country related list, even though it may have been updated multiple times.

This Country related list that shows what **Countries** that are associated with a specific user, for a User to view content assigned to these countries. In the image below, we update the **Primary Country** to '**Sweden**', and Save the User. Once the **Primary Country** is changed to '**Sweden**', the name of it, automatically gets updated in the list in the **Countries** section in **View User** page.

Administration > Users > View User

**View User**

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

**User Information**

avatar: 	First Name: Widget
thumbnail_image001.png	
Last Name: CP	User Name: zinfi.cp@gmail.com
Status: Approved	Email address: zinfi.cp@gmail.com
Other Email: zinfi.cp@gmail.com	Company Name: Widget Partners
Profile: Partner	Title: Manager - Customer Relation
Direct Phone: (925) 854-7744	Mobile: (105) 413-6089
Department: Customer Relations	Other: 18253328677
Fax: ZT-F001	Main Phone: 13467336955
Primary Address: 6200 Stoneridge Mall Road	Primary Address2: Suite # 300
City: Pleasanton	Country: USA
State: California	Postal Code: 94588

**Countries**

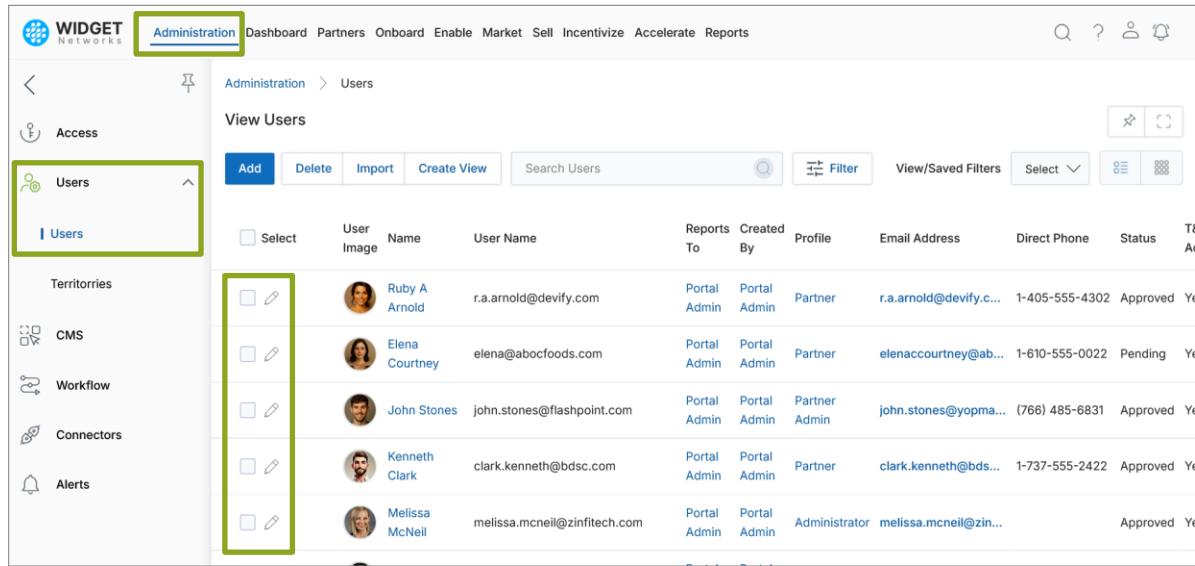
Action	CountryID
	Sweden
	China
	Indonesia
	Vietnam
	Japan

[Click to View More](#)

## Legacy Login

Disabling the newly introduced Legacy Login feature ensures the User will be only allowed to utilize SSO (Single Sign-On) to get access to the portal. Enabling the feature allows the User to utilize the Legacy Login of the UPM Portal and access/login the Portal using the login credentials (mailed/generated via ZINFI UPM). A convenient toggle key has been introduced to enable/disable Legacy Login.

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



The screenshot shows the Zinfi Administration interface. The top navigation bar includes 'Administration', 'Dashboard', 'Partners', 'Onboard', 'Enable', 'Market', 'Sell', 'Incentivize', 'Accelerate', and 'Reports'. The left sidebar under 'Access' has a 'Users' section highlighted with a green box. The main content area is titled 'View Users' and shows a table of users. The table columns include 'Select', 'User Image', 'Name', 'User Name', 'Reports To', 'Created By', 'Profile', 'Email Address', 'Direct Phone', 'Status', and 'Actions'. Five user rows are listed, each with an edit icon (pencil icon inside a box) next to the 'User Image' column, also highlighted with a green box. The users are: Ruby A Arnold, Elena Courtney, John Stones, Kenneth Clark, and Melissa McNeil.

Select	User Image	Name	User Name	Reports To	Created By	Profile	Email Address	Direct Phone	Status	Actions
		Ruby A Arnold	r.a.arnold@devify.com	Portal Admin	Portal Admin	Partner	r.a.arnold@devify.c...	1-405-555-4302	Approved	
		Elena Courtney	elenacourtney@ab... cfoods.com	Portal Admin	Portal Admin	Partner	elenacourtney@ab... cfoods.com	1-610-555-0022	Pending	
		John Stones	john.stones@flashpoint.com	Portal Admin	Portal Admin	Partner Admin	john.stones@yopma... com	(766) 485-6831	Approved	
		Kenneth Clark	clark.kenneth@bdsc.com	Portal Admin	Portal Admin	Partner	clark.kenneth@bds... com	1-737-555-2422	Approved	
		Melissa McNeil	melissa.mcneil@zinfi... tech.com	Portal Admin	Portal Admin	Administrator	melissa.mcneil@zin...		Approved	

- Click on the **Edit** button on the **View Users** (as shown above image) page to edit an existing User Account.
- Once you are on the **Add/Edit a User** page, disable/enable the **Legacy Login** toggle key in the User Settings section.

Administration > Users > View a User > Add/Edit a User

### Add/Edit a User

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

#### User Information

First Name *:	Simon	Last Name *:	Das
User Name *:	simon.das@zinfi.com	Status *:	Approved <a href="#">X</a> <a href="#">▼</a>
Email Address *:	simon.das@zinfi.com	Other Email:	portal.admin@zinfi.com
Company Name *:	Abc2355 <a href="#">Select</a> <a href="#">Clear</a>	Profile *:	Super Admin <a href="#">Select</a> <a href="#">Clear</a>
Title:	Title	Direct Phone:	Direct Phone
Country Code:	Select <a href="#">▼</a>	Mobile:	Mobile
Department:	Department	Other:	Other
Fax:	Fax	Main Phone:	Main Phone
Primary Address:		Primary Address2:	
<input style="width: 100%; height: 30px; border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;" type="text" value="City"/>		<input style="width: 100%; height: 30px; border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;" type="text" value="Country *: USA"/>	
<input style="width: 100%; height: 30px; border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;" type="text" value="State *: California"/>		<input style="width: 100%; height: 30px; border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;" type="text" value="Postal Code"/>	
<input style="width: 100%; height: 30px; border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;" type="text" value="Contact *: Simon Das"/>		<input style="width: 100%; height: 30px; border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;" type="text" value="Salesforce ID"/>	
<input style="width: 100%; height: 30px; border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;" type="text" value="Reports To *: Portal Admin"/>		<input style="width: 100%; height: 30px; border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;" type="text" value="Wizard Type: Select"/>	
<input style="width: 100%; height: 30px; border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;" type="text" value="Group *:"/>		<input #"="" type="text" value="User Image: &lt;a href="/> Click Icon to Upload Image" style="width: 100%; height: 30px; border: 1px dashed #ccc; padding: 5px; margin-bottom: 5px;"/>	
<input style="width: 100%; height: 30px; border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;" type="text" value="User Type: User Type"/>		<input style="width: 100%; height: 30px; border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;" type="text" value="API Profile: Zinfi Api Profile"/>	
<input style="width: 100%; height: 30px; border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;" type="text" value="Business Model: Select"/>			

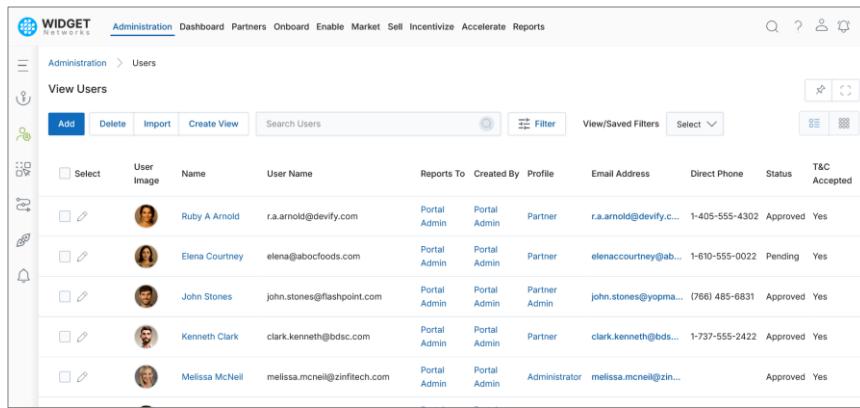
#### User Settings

Time Zone *:	(GMT+08:00) Kuala Lumpur, ... <a href="#">X</a> <a href="#">▼</a>	Language *:	English <a href="#">X</a> <a href="#">▼</a>
<input type="checkbox"/> Multi Factor Authentication Enabled	<input checked="" type="checkbox"/> Internal Administrator		
<input type="checkbox"/> T&C Accepted	<input type="checkbox"/> Internal User (Non-Admin)		
<input type="checkbox"/> Is User Profile Locked?	Failed Login Count: <input type="text" value="Failed Login Count"/>		
Forgot Password Count: <input type="text" value="Forgot Password Count"/>	Created by: <input type="text" value="Portal Admin"/>		
Modified by: <input type="text" value="Portal Admin"/>	<input checked="" type="checkbox"/> Legacy Login		

**Note:** Disabling the toggle key - the User will be only allowed to utilize SSO (Single Sign-On) to get access to the portal.

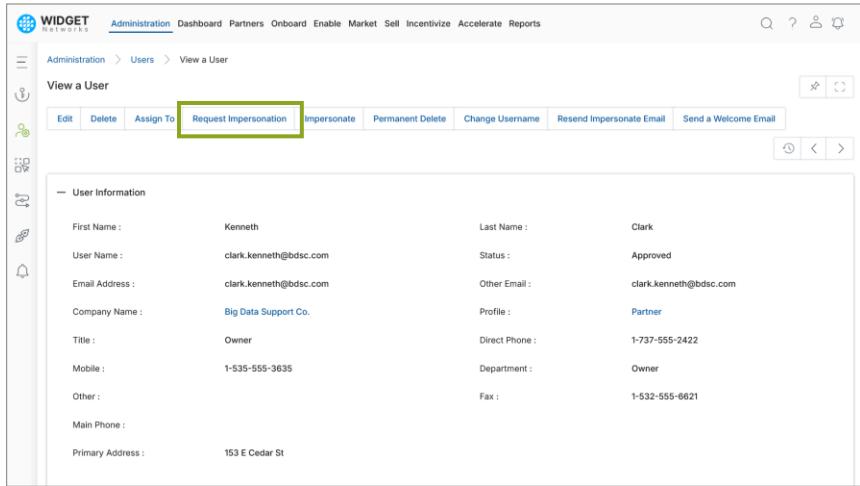
## Impersonating a Partner User

1. Log in using the Admin credentials and open the User listing page. Then click on a **name** to view its details.

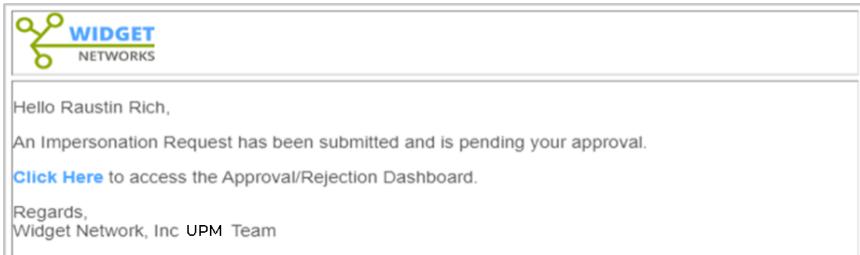


Select	User Image	Name	User Name	Reports To	Created By	Profile	Email Address	Direct Phone	Status	T&C Accepted
<input type="checkbox"/>		Ruby A Arnold	r.a.arnold@devify.com	Portal Admin	Portal Admin	Partner	r.a.arnold@devify.c...	1-405-555-4302	Approved	Yes
<input type="checkbox"/>		Elena Courtney	elenacourtney@ab...	Portal Admin	Portal Admin	Partner	elenacourtney@ab...	1-810-555-0022	Pending	Yes
<input type="checkbox"/>		John Stones	john.stones@flashpoint.com	Portal Admin	Portal Admin	Partner	john.stones@yopma...	(766) 485-6831	Approved	Yes
<input type="checkbox"/>		Kenneth Clark	clark.kenneth@bdsc.com	Portal Admin	Portal Admin	Partner	clark.kenneth@bds...	1-737-555-2422	Approved	Yes
<input type="checkbox"/>		Melissa McNeil	melissa.mcneil@zin...	Portal Admin	Portal Admin	Administrator	melissa.mcneil@zin...		Approved	Yes

2. Click on the **Request Impersonation** button. An email will go to the partner asking for approval as shown below.



Edit	Delete	Assign To	Request Impersonation	Impersonate	Permanent Delete	Change Username	Resend Impersonate Email	Send a Welcome Email																																				
<p>— User Information</p> <table> <tbody> <tr> <td>First Name :</td> <td>Kenneth</td> <td>Last Name :</td> <td>Clark</td> </tr> <tr> <td>User Name :</td> <td>clark.kenneth@bdsc.com</td> <td>Status :</td> <td>Approved</td> </tr> <tr> <td>Email Address :</td> <td>clark.kenneth@bdsc.com</td> <td>Other Email :</td> <td>clark.kenneth@bdsc.com</td> </tr> <tr> <td>Company Name :</td> <td>Big Data Support Co.</td> <td>Profile :</td> <td>Partner</td> </tr> <tr> <td>Title :</td> <td>Owner</td> <td>Direct Phone :</td> <td>1-737-555-2422</td> </tr> <tr> <td>Mobile :</td> <td>1-532-555-3635</td> <td>Department :</td> <td>Owner</td> </tr> <tr> <td>Other :</td> <td></td> <td>Fax :</td> <td>1-532-555-6621</td> </tr> <tr> <td>Main Phone :</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Primary Address :</td> <td>153 E Cedar St</td> <td></td> <td></td> </tr> </tbody> </table>									First Name :	Kenneth	Last Name :	Clark	User Name :	clark.kenneth@bdsc.com	Status :	Approved	Email Address :	clark.kenneth@bdsc.com	Other Email :	clark.kenneth@bdsc.com	Company Name :	Big Data Support Co.	Profile :	Partner	Title :	Owner	Direct Phone :	1-737-555-2422	Mobile :	1-532-555-3635	Department :	Owner	Other :		Fax :	1-532-555-6621	Main Phone :				Primary Address :	153 E Cedar St		
First Name :	Kenneth	Last Name :	Clark																																									
User Name :	clark.kenneth@bdsc.com	Status :	Approved																																									
Email Address :	clark.kenneth@bdsc.com	Other Email :	clark.kenneth@bdsc.com																																									
Company Name :	Big Data Support Co.	Profile :	Partner																																									
Title :	Owner	Direct Phone :	1-737-555-2422																																									
Mobile :	1-532-555-3635	Department :	Owner																																									
Other :		Fax :	1-532-555-6621																																									
Main Phone :																																												
Primary Address :	153 E Cedar St																																											



Hello Raustin Rich,

An Impersonation Request has been submitted and is pending your approval.

[Click Here](#) to access the Approval/Rejection Dashboard.

Regards,  
Widget Network, Inc UPM Team

3. To begin the approval/rejection process, the partner user selects **Click Here** in the email received and logs in using his/her credentials. The partner is automatically redirected to the Impersonation Requests section in the My Account menu.
4. On the User Impersonation Requests page, the partner user clicks on the **name** of the admin requester to view the details page of this request.

View User Impersonation Requests

Back / View User Impersonation Requests  

Search Clear Search Saved Searches Select 

Select	Name	Impersonate Requested By User	Access_Duration_In_Days_	Access_Expiration_Date	Status
<input type="checkbox"/>	4 IMR-0004	Global CMM	30		Pending Approval

10 First Previous 1 Next Last (The selected page no: 1/1 | Total Record:1)

5. The partner user clicks on either **Approve** or **Reject**. If **Reject** is selected, the requester will not be allowed to impersonate the user and use the account.

View User Impersonation Request

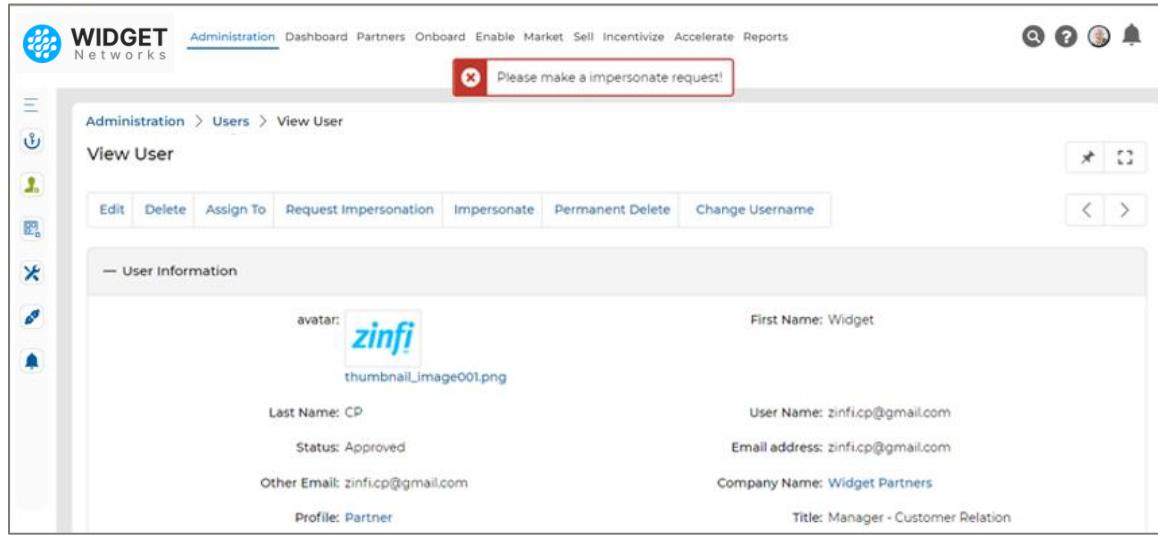
User Impersonation Details

Name IMR-0004	Impersonate Requested By User Global CMM
Access Duration (In Days) 30	Access Expiration Date
Status Pending Approval	

— Approval History

Step	Submitter	Approver	Actual Approver	Status	Comments	Action Taken Date	Action
Partner Approval	Global CMM	Raustin Rich		Active			  5

6. NOTE: Before the partner approves or rejects action on request, if the admin clicks on the **Impersonate** button for this user, the Admin will see the following notification message.



Administration > Users > View User

View User

— User Information

First Name: Widget

Last Name: CP

Status: Approved

Other Email: zinfo.cp@gmail.com

Profile: Partner

First Name: Widget

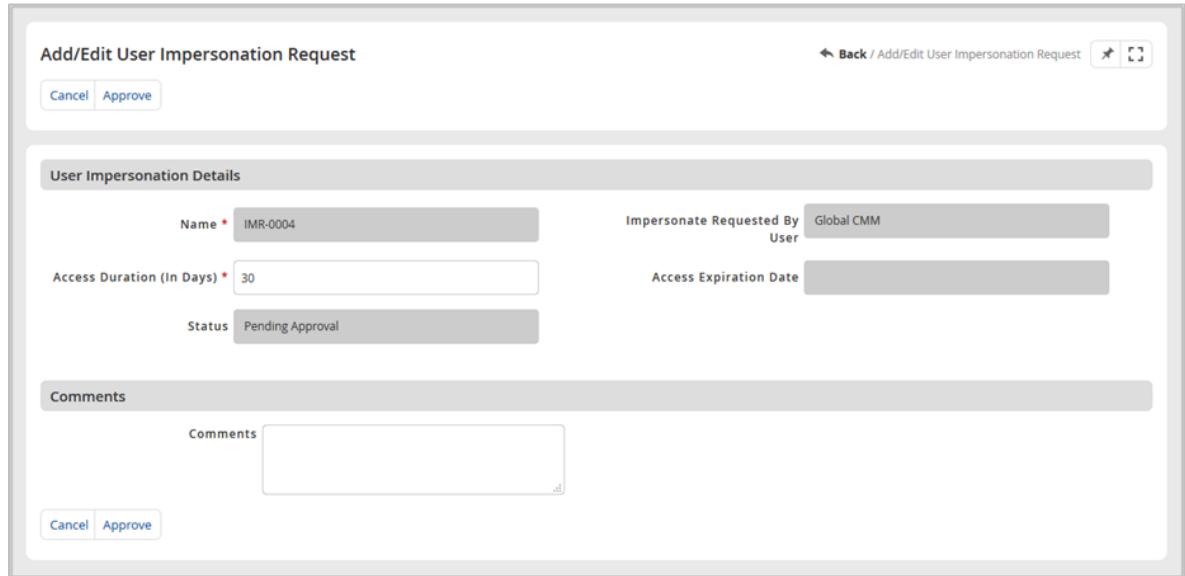
User Name: zinfo.cp@gmail.com

Email address: zinfo.cp@gmail.com

Company Name: Widget Partners

Title: Manager - Customer Relation

7. If 'Approve' is selected, a page will open in edit mode and the partner can edit the field for access duration to set the number of days permission is granted for and provide comments if necessary. The access expiration date will be automatically calculated based on the number of days selected. When done, the partner user clicks on **Approve**.



Add/Edit User Impersonation Request

User Impersonation Details

Name \* IMR-0004

Impersonate Requested By Global CMM User

Access Duration (In Days) \* 30

Access Expiration Date

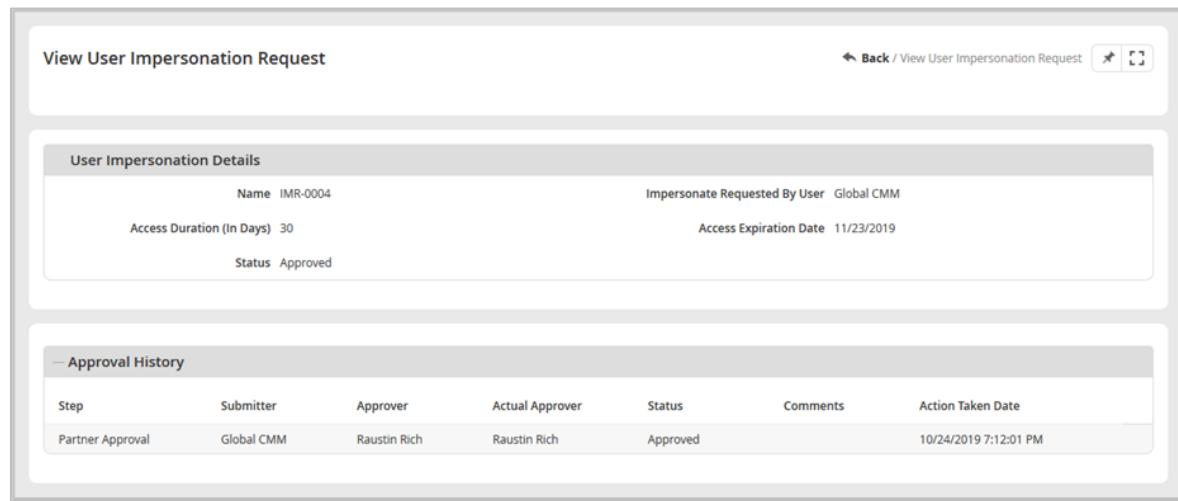
Status Pending Approval

Comments

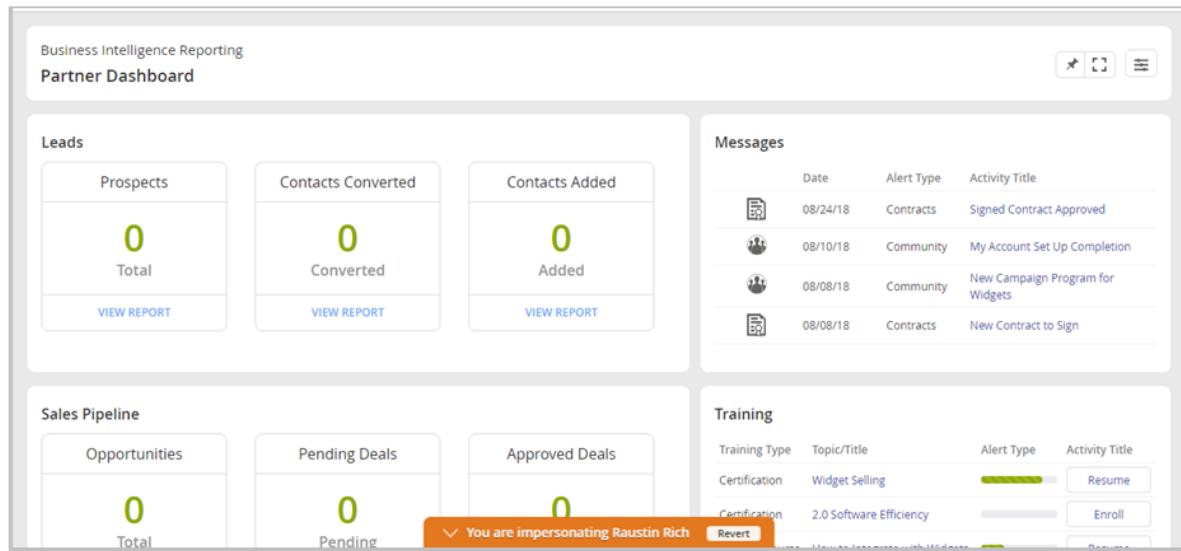
Comments

Cancel Approve

8. After the partner approves, the screen will look something like the one shown below.



9. You can now go back into the portal to the partner user's record and click the **Impersonate** button. You will see the following impersonation screen.

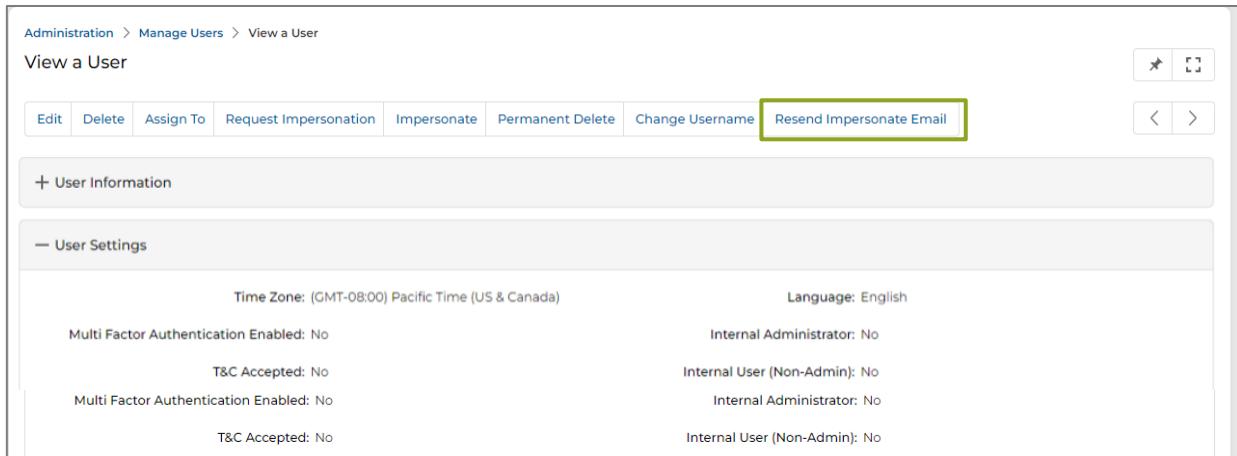


10. Click on **Revert** to stop the impersonation and cease being this partner. *Please note: Selecting **Revert** will not permanently end impersonation; it will simply log you out as this partner. Access to the impersonation function will remain active until the designated expiration date.*

 ✓ You are impersonating Raustin Rich **Revert**

## Resend Impersonate Request Email

A request email for impersonation can be resent only if the previous 'Impersonation Request' is Pending and the Approver has not yet taken action. Clicking 'Resend Impersonate Email' will resend the Request Impersonation Email to the same user.



Administration > Manage Users > View a User

View a User

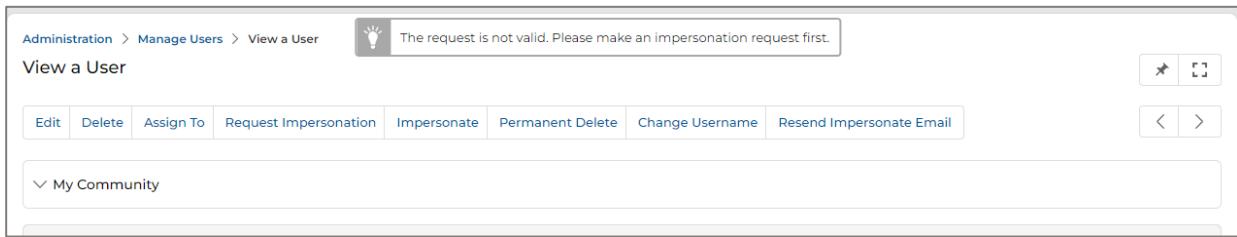
Edit Delete Assign To Request Impersonation Impersonate Permanent Delete Change Username **Resend Impersonate Email**

+ User Information

— User Settings

Time Zone: (GMT-08:00) Pacific Time (US & Canada)	Language: English
Multi Factor Authentication Enabled: No	Internal Administrator: No
T&C Accepted: No	Internal User (Non-Admin): No
Multi Factor Authentication Enabled: No	Internal Administrator: No
T&C Accepted: No	Internal User (Non-Admin): No

If the 'Resend Impersonate Email' button is clicked without initially sending the Request Mail for impersonation, an error message will appear, indicating that the Impersonation request has not been initiated.



Administration > Manage Users > View a User

The request is not valid. Please make an impersonation request first.

View a User

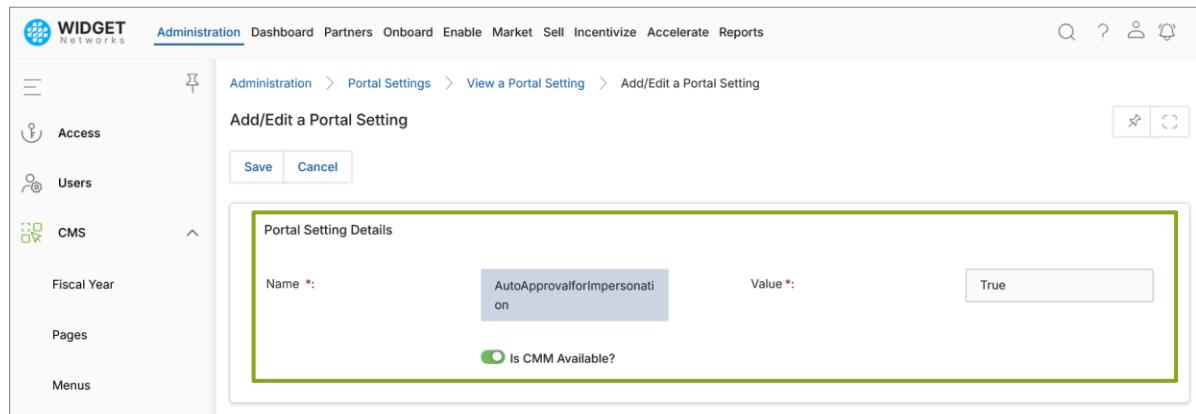
Edit Delete Assign To Request Impersonation Impersonate Permanent Delete Change Username **Resend Impersonate Email**

▼ My Community

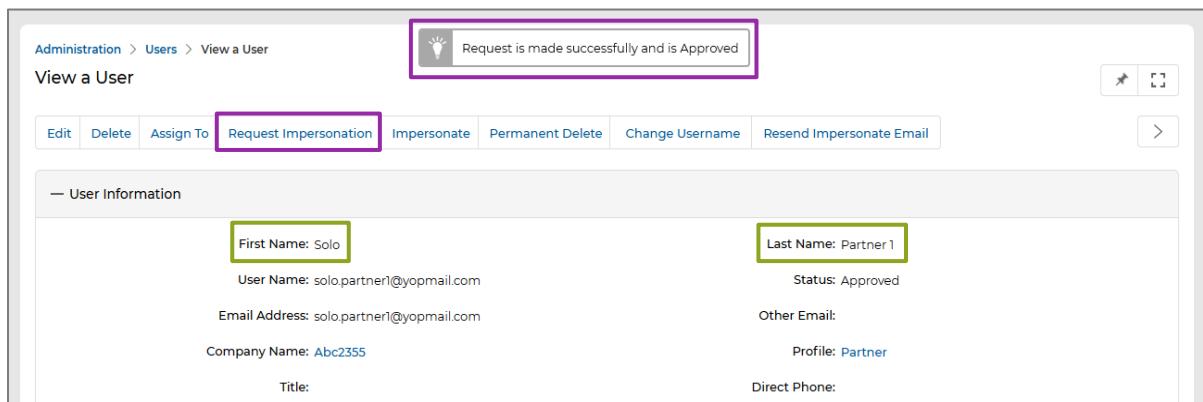
## Enable/Disable Approval Flow for Impersonations

“User Impersonation” is a convenient UPM User Management functionality – allowing users to impersonate another User to cover up his duties during the User’s unavailability. The latest upgrade Auto Approves Impersonation Request once such a Request is submitted.

- Once in the Portal Settings of the CMS application, the Auto Approval for Impersonation Request feature is enabled, the Admin User doesn’t need to wait for approval of his Impersonation Request to be granted by the requested Partner. Any request for the Impersonation of a Partner Account will be auto approved.



- Using this feature randomly is discouraged as it might jeopardize the security of the concerned OEM and require written consent from the OEM and the legal department of ZINFI.
- In the User details page, the Admin User needs to click the Request Impersonation button.



- Once the Request Impersonation button is clicked, a message will appear indicating that the request for impersonation of this particular Partner User has been successfully made and automatically approved (as shown in the image below).
- Now, if the User scrolls down below, he will see a User Impersonation related list that contains the summary of Partner User Impersonation requests for this Partner User made by the Admin User and their status. It is to be noted that the Access Duration to the Partner User Account will be for 30 days. Once that duration is over, the Admin User must submit an Impersonation Request again.

Administration > Users > View a User

**View a User**

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

**User Information**

First Name: Solo	Last Name: Partner 1
User Name: solo.partner1@yopmail.com	Status: Approved
Email Address: solo.partner1@yopmail.com	Other Email:
Company Name: Abc235	Profile: Partner
Title:	Direct Phone:
Country Code: +91	Mobile: 8777452922
Department:	Other:
Fax:	Main Phone:
Primary Address:	Primary Address2:
City: California City	Country: USA
State: California	Postal Code:
Contact: Solo Partner 1	Salesforce ID:
Reports To: Solo Joardar	Wizard Type:
Group: Partner (mandatory partner group)	User Image:
User Type: Partner User	API Profile:
Business Model:	

[+ User Settings](#)

[+ Groups](#) [Add](#)

[+ Roles](#) [Add](#)

[+ Countries](#) [Add](#)

[+ Users Assignment History](#)

[+ Sales Territories](#) [Add](#)

**User Impersonation Requests**

Name	Impersonate Requested By User	Impersonated User	Access Duration (In Days)	Status
IMR-0049	Arijit Roy	Solo Partner 1	30	Approved

- The Admin User now clicks the Impersonate button which lets him impersonate the Partner User account.

Administration > Users > View a User

View a User

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

— User Information

First Name: Solo	Last Name: Partner 1
User Name: solo.partner1@yopmail.com	Status: Approved
Email Address: solo.partner1@yopmail.com	Other Email:
Company Name: Abc2355	Profile: Partner

WIDGET Networks | Partner Logo Welcome Onboard Enable Market Sell Incentivize Accelerate Reports

Welcome

Welcome to the **ZINFI Inc. Partner Program!**

Our Partner Portal provides you with training, marketing materials, sales tools and everything you need to grow your pipeline.

How It Works? Watch the Video

WELCOME SOLO PARTNER 1 (as Partner)

My Account Global-English About UPM Logout

**Message from ZINFI Inc. Team**

Today, ZINFI Inc. is one of the largest pure-play channel partners. You are impersonating Solo Partner 1

Revert

Compliance & Governance

- If in the Portal Settings of the CMS application, Auto Approval for Impersonation Request feature is disabled, the Admin User will need to wait for approval of his Impersonation Request to be granted by the requested Partner.

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

Add/Edit a Portal Setting

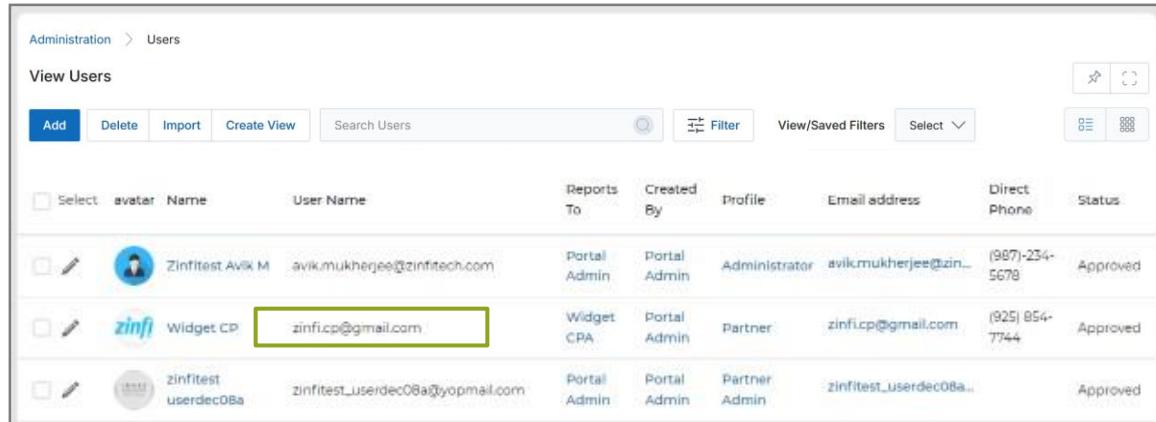
Save Cancel

Portal Setting Details

Name*: AutoApprovalforImpersonation	Value*: false
<input checked="" type="checkbox"/> Is CMM Available?	

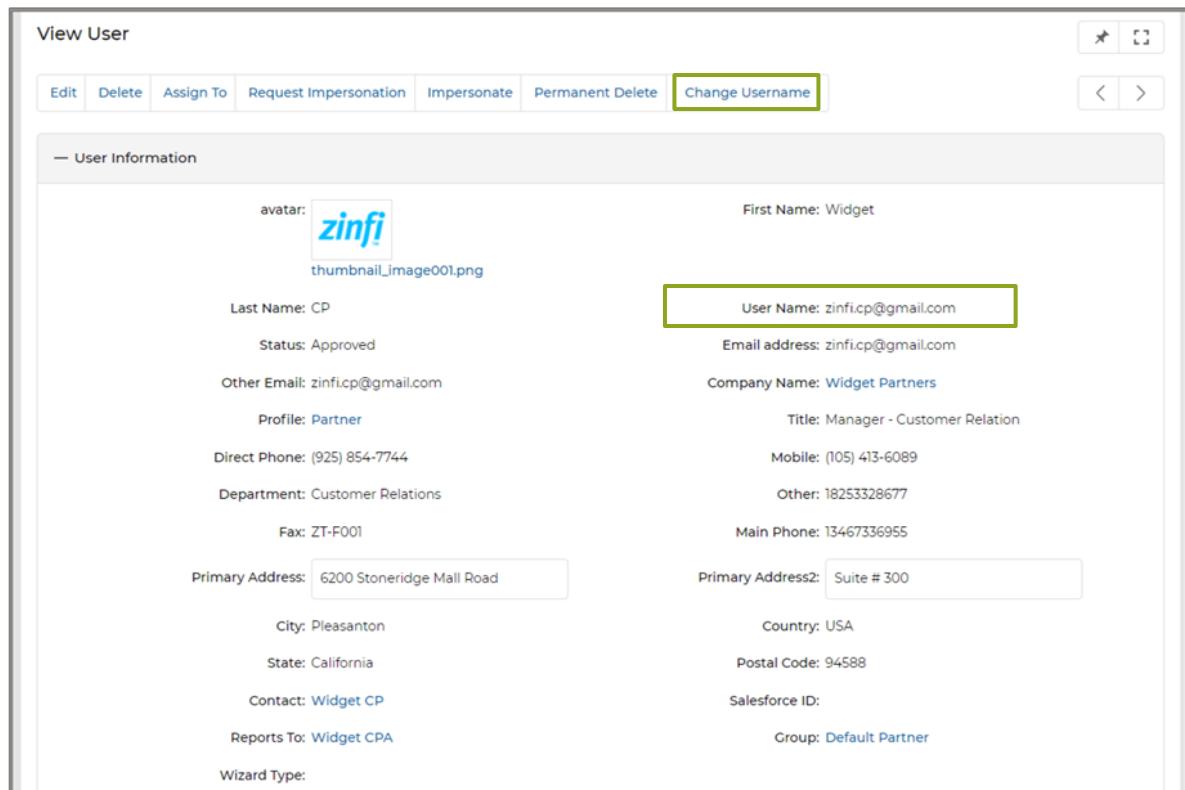
## Changing the Username

1. To change the Username, traverse to Administration > Users - 'View Users' page displaying the list of all the Users.



Select	Avatar	Name	User Name	Reports To	Created By	Profile	Email address	Direct Phone	Status
<input type="checkbox"/>		Zinfi test Avik M	avik.mukherjee@zinfi.com	Portal Admin	Portal Admin	Administrator	avik.mukherjee@zin...	(987)-234-5678	Approved
<input type="checkbox"/>		Widget CP	zinficp@gmail.com	Widget CPA	Portal Admin	Partner	zinficp@gmail.com	(925) 854-7744	Approved
<input type="checkbox"/>		zinfitest userdec08a@yopmail.com	zinfitest_userdec08a@yopmail.com	Portal Admin	Portal Admin	Partner Admin	zinfitest_userdec08a...		Approved

2. Clicking the name of any specific user will take you to the **View User** page, that contains the User Name details of the specific user.



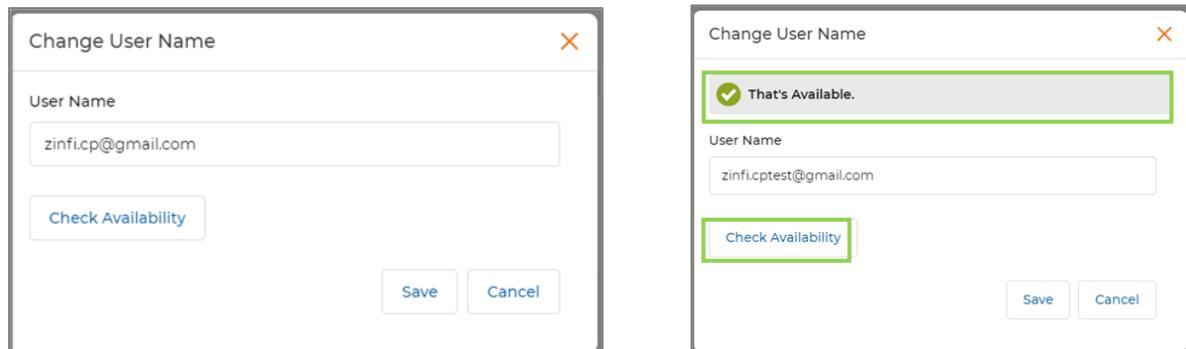
**View User**

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

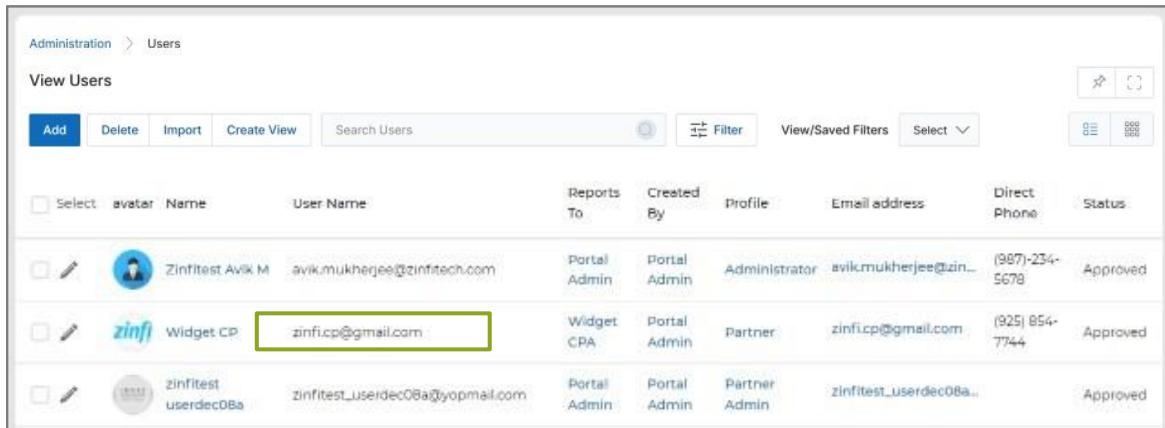
**User Information**

avatar:	First Name: Widget
Last Name: CP	User Name: zinficp@gmail.com
Status: Approved	Email address: zinficp@gmail.com
Other Email: zinficp@gmail.com	Company Name: Widget Partners
Profile: Partner	Title: Manager - Customer Relation
Direct Phone: (925) 854-7744	Mobile: (105) 413-6089
Department: Customer Relations	Other: 18253328677
Fax: ZT-F001	Main Phone: 13467336955
Primary Address: 6200 Stoneridge Mall Road	Primary Address2: Suite # 300
City: Pleasanton	Country: USA
State: California	Postal Code: 94588
Contact: Widget CP	Salesforce ID:
Reports To: Widget CPA	Group: Default Partner
Wizard Type:	

3. When the **Change Username** button is clicked, a pop up comes up which enables you to change the 'Username'. Provide the User Name to update and check the availability of the user name in the system by clicking - **Check Availability** button. If available, click Save to proceed updating the User Name.



4. Changes will be reflected in the 'View Users' page as shown below.



Select	Avatar	Name	User Name	Reports To	Created By	Profile	Email address	Direct Phone	Status
<input type="checkbox"/>		Zinfitest Avik M	avik.mukherjee@zinfitech.com	Portal Admin	Portal Admin	Administrator	avik.mukherjee@zinf...	(987)-234-5678	Approved
<input type="checkbox"/>		Widget CP	<b>zinfo.cp@gmail.com</b>	Widget CPA	Portal Admin	Partner	zinfo.cp@gmail.com	(925) 854-7744	Approved
<input type="checkbox"/>		Zinfitest userdec0Ba	zinfitest_userdec0Ba@yopmail.com	Portal Admin	Portal Admin	Partner	zinfitest_userdec0Ba...		Approved

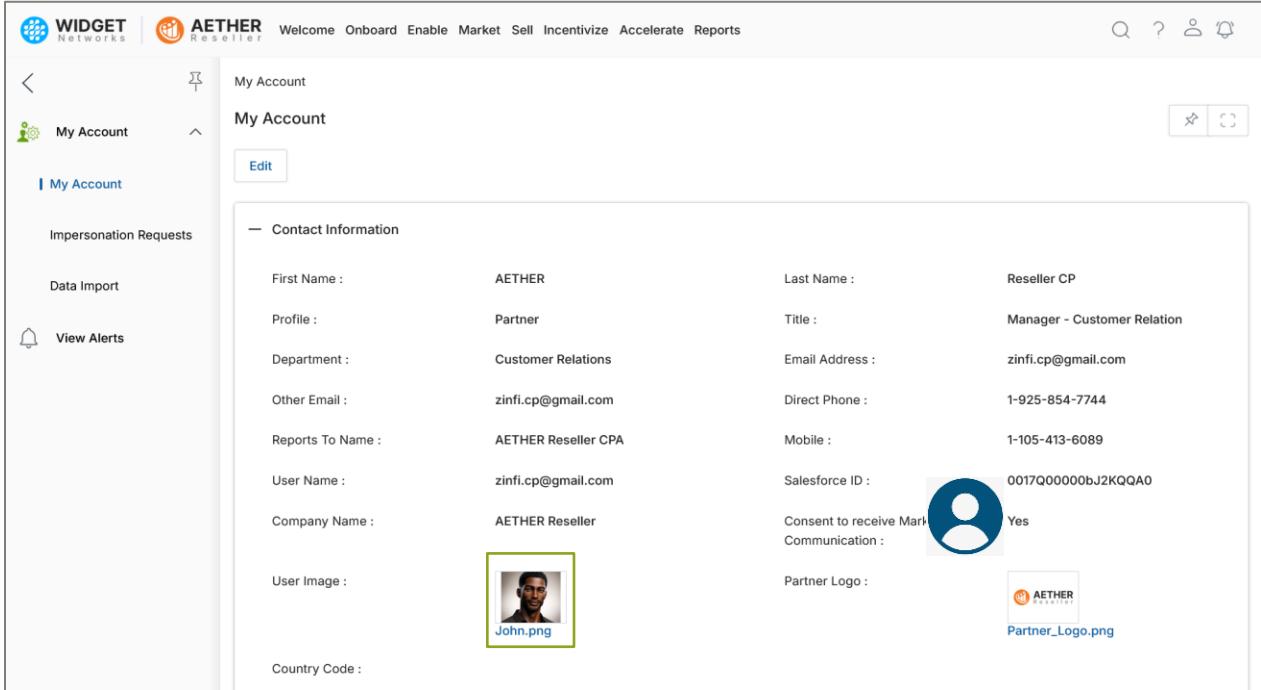
**Note:** Users can also use email addresses with a “+” symbol (like [john.dyne+expwar@yopmail.com](mailto:john.dyne+expwar@yopmail.com)) as their username without encountering any errors.

## Dynamic Avatar – User Image Update

UPM's My Account - module enables users to upload personalized avatar images for their respective profiles. Utilizing this option provides the user, to browse his system and upload his image as per his choice.

- The user needs to delete the existing image listed at the "User Image" field in the Contact information section.
- The user needs to click 'Browse' and Click Upload to set the image of his choice.
- Once the image is uploaded and saved, it will get reflected in the 'My Account' Profile section

as well as in the 'User Image' field as shown below.



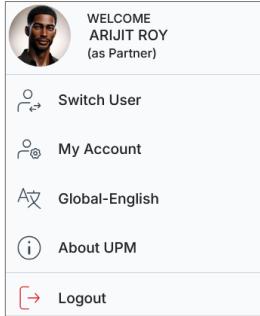
The screenshot shows the 'My Account' edit page. The 'Edit' button is highlighted. The 'Contact Information' section contains the following data:

Field	Value	Field	Value
First Name :	AETHER	Last Name :	Reseller CP
Profile :	Partner	Title :	Manager - Customer Relation
Department :	Customer Relations	Email Address :	zinfi.cp@gmail.com
Other Email :	zinfi.cp@gmail.com	Direct Phone :	1-925-854-7744
Reports To Name :	AETHER Reseller CPA	Mobile :	1-105-413-6089
User Name :	zinfi.cp@gmail.com	Salesforce ID :	0017Q00000bJ2KQQAO
Company Name :	AETHER Reseller	Consent to receive Marketing Communication :	Yes
User Image :		Partner Logo :	
Country Code :			

UPM profiles were initially associated with "blank" picture profile view on the top right corner with the User's Name next to it. The latest offering of UPM allows OOB feature to edit/update and display portal users profile pictures in the form of the "Avatar" icon.

## Top Right Menu Management

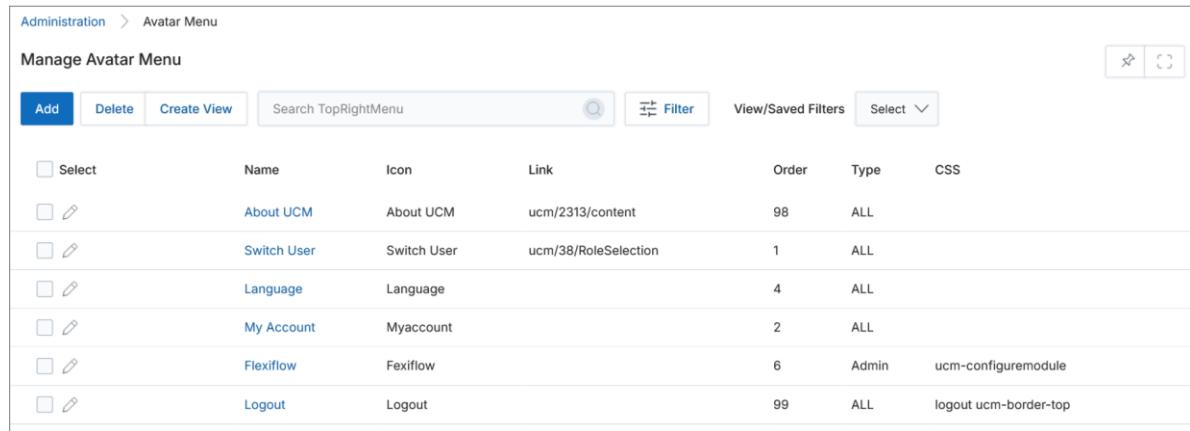
The latest update provides the User to select fast track options at the My Account settings, which are available by clicking on the Avatar Image/Profile Image. The availability and the order of the options viz. Switch user, My Account, FlexiFlow, etc. can be easily managed by the respective user.



The menu options are:

- Switch User
- My Account
- Global-English
- About UPM
- Logout

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



Select	Name	Icon	Link	Order	Type	CSS
<input type="checkbox"/>	About UCM	About UCM	ucm/2313/content	98	ALL	
<input type="checkbox"/>	Switch User	Switch User	ucm/38/RoleSelection	1	ALL	
<input type="checkbox"/>	Language	Language		4	ALL	
<input type="checkbox"/>	My Account	Myaccount		2	ALL	
<input type="checkbox"/>	Flexiflow	Flexiflow		6	Admin	ucm-configuremodule
<input type="checkbox"/>	Logout	Logout		99	ALL	logout ucm-border-top

- Menu Link can be easily added, updated and deleted from the Top Right Menu management module.
- By clicking Add/Edit, the following parameters for the specific Menu option can be configured:
  - Name – Name of the Menu option.
  - Link – On clicking the Menu option, which UPM URL to redirect.
  - Type – The Menu option would be applicable for Partner, Admin or All.
  - Icon – Choose Icon for the Menu Option.
  - CSS – CSS preset for the Menu option.
  - Order – Set the order of the Menu Option in the List of Options.

## SMS Integration for Forgot Password Flow

### Feature Description

Users are provided with the option to reset their User password for UPM by utilizing the Forgot Password Option available at the Login Screen of UPM and providing the Registered Email ID as a validator. Users are now provided with add-on feature where the OTP/Verification Code to authenticate the user for the Reset Password process is sent to the Registered Mobile Phone Number (saved at UPM for the User record) of the User along with the standard Registered Email Address Field of Users.

### Resetting of Password

- i. *Forgot Password?* This problem has a quick fix solution. Password can be reset by following a few easy steps with the help of Email and SMS.
- ii. In the following example, we will see how to reset password of UPM of the User visible in the image below.

Administration > Users > View User

**View User**

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

**User Information**

First Name: Andrew	Last Name: Saymonds
User Name: zest@yopmail.com	Status: Approved
Email address: andrew_saymonds@yopmail.com	Other Email:
Company Name: Zest Inc.	Profile: Partner
Title:	Direct Phone:
Mobile: 9874964797	Other:
Main Phone: 9874964797	Fax:
Department:	Joining Date:
Primary Address:	

- iii. In the image above, the User's **Name**, **User Name**, **Email address**, and **Contact Number** are visible.
- iv. The User reaches the **Login** screen and enters the login credentials. We assume that the User has forgotten the password because the User Name was correct. He clicks **Forgot Password** link.

**WIDGET Networks**

**Forgot Password?**

Please provide your username to receive the verification code via your registered email address or mobile number.

Your Username

Enter Captcha



[Send Code](#)

[← Back to Login](#)

Powered by **ZINFO Unified Partner Management™**

- v. The reset password page now displays a simple, intuitive CAPTCHA image that contains alphanumeric characters for the user to enter.
- vi. A refresh icon allows users to generate a new CAPTCHA image if the current one is difficult to read.



- vii. Once the user successfully enters the CAPTCHA and submits their request, the standard password reset flow continues without any additional steps.

**WIDGET Networks**

**Forgot Password?**

Please provide your username to receive the verification code via your registered email address or mobile number.

arijit.roy@yopmail.com

jRjBV

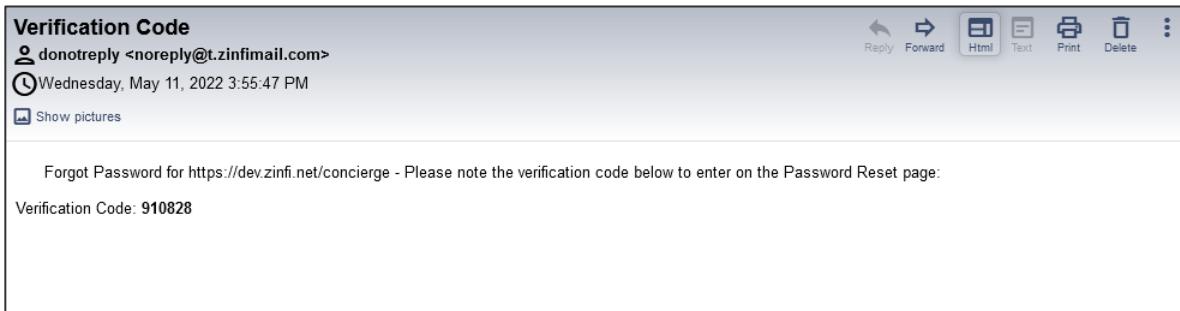
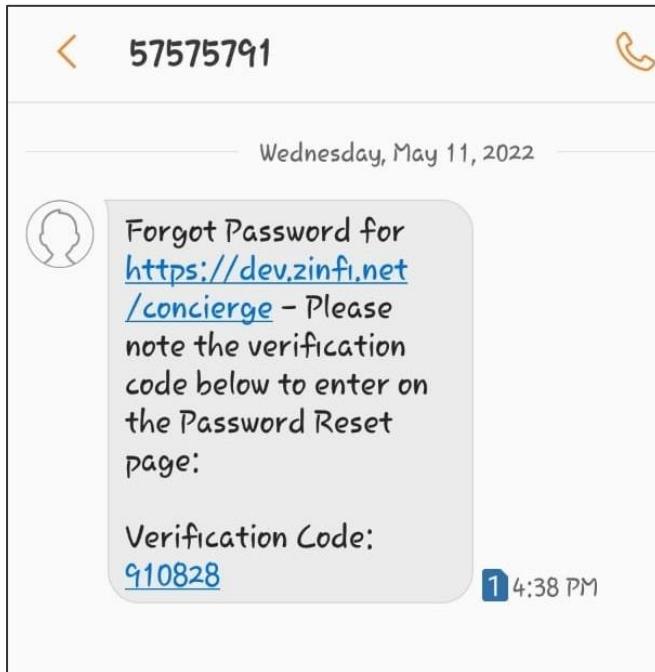


**Send Code**

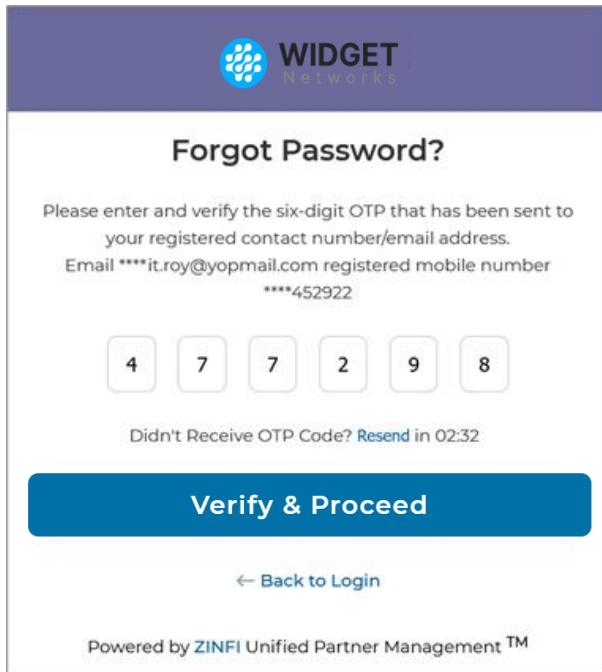
[← Back to Login](#)

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viii. The User receives the same 6-digit **Verification Code** in his registered mobile number. The Code is also sent to the Registered Email ID.

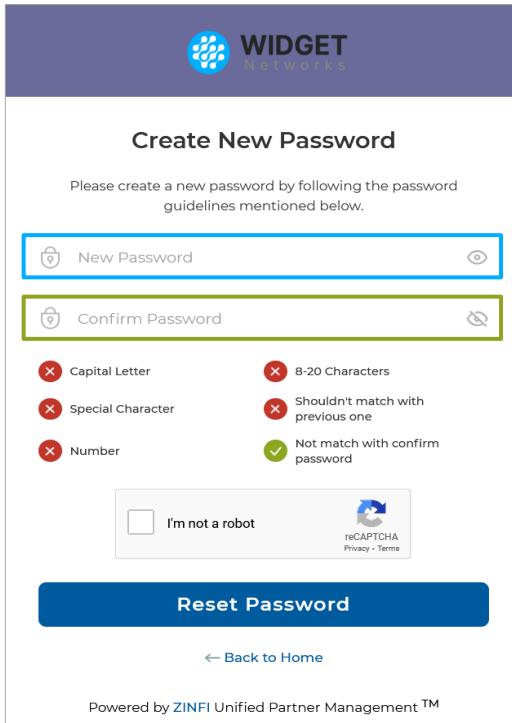


ix. The User is re-directed to the Code Input page. On this page, the User enters the 6-digit **Verification Code** which he/she has received in his/her **Email** address and registered mobile number through SMS, simultaneously.



The screenshot shows a 'Forgot Password?' screen. At the top, there is a logo for 'WIDGET Networks' with a blue circular icon. Below the logo, the text 'Forgot Password?' is displayed in bold. A message instructs the user to enter a six-digit OTP sent to their registered contact number/email address. It shows an example email '\*\*\*\*it.roy@yopmail.com' and mobile number '\*\*\*\*452922'. Below this, there is a row of six input fields containing the digits '4', '7', '7', '2', '9', and '8'. A link 'Didn't Receive OTP Code? Resend in 02:32' is provided. A large blue button labeled 'Verify & Proceed' is centered. Below the button, a link '← Back to Login' is visible. At the bottom, a note says 'Powered by ZINFI Unified Partner Management TM'.

- x. Once the User enters the 6-digit code and presses the **Verify & Proceed** button, he/she is directed to the “**Create New Password**” screen.
- xi. Two fields are available on this screen - “**New Password**” and “**Confirm Password**”. The user enters the desired new password into the “**New Password**” field (highlighted in blue). Then, the



The screenshot shows a 'Create New Password' screen. At the top, there is a logo for 'WIDGET Networks' with a blue circular icon. Below the logo, the text 'Create New Password' is displayed in bold. A message asks the user to create a new password following guidelines. Two input fields are present: 'New Password' (highlighted in blue) and 'Confirm Password' (highlighted in green). Below these fields are several validation rules: 'Capital Letter' (red X), 'Special Character' (red X), 'Number' (red X), '8-20 Characters' (red X), 'Shouldn't match with previous one' (red X), and 'Not match with confirm password' (green checkmark). A reCAPTCHA box with the text 'I'm not a robot' and a reCAPTCHA logo is shown. A large blue button labeled 'Reset Password' is at the bottom. Below the button, a link '← Back to Home' is visible. At the bottom, a note says 'Powered by ZINFI Unified Partner Management TM'.

user re-enters the same password into the "**Confirm Password**" field (highlighted in purple) to verify it matches the first entry.

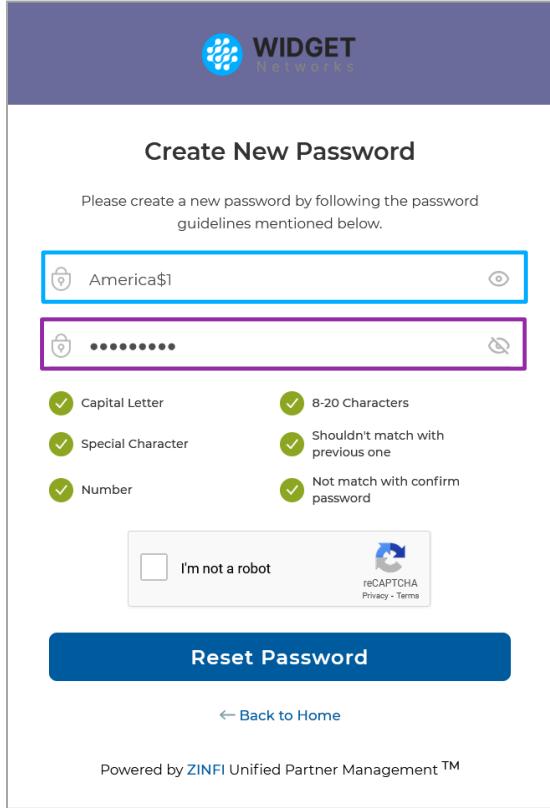
xii. **Minimum Password Complexity Requirement** - The user has to adhere to the criteria mentioned on the screen while creating the new password. Password criteria include requirements designed to enhance security and protect against unauthorized access. Meeting each parameter of the criterion will be confirmed by displaying a green tick beside each criterion. Once all the criteria are adhered to, the user will be able to reset the new password.

- Capital Letter: The password must include at least one uppercase letter (A-Z).
- Special Character: The password must include at least one special character (e.g., @, #, \$, %).
- Number: The password must include at least one numeric digit (0-9).
- 8-20 Characters: The password length must be between 8 and 20 characters.
- Shouldn't Match with Previous One: The new password must be different from the previously used password.
- Not Match with Confirm Password: The password must exactly match the confirm password field.

xiii. **Password Visibility Toggle** - A toggle (Eye icon) is present next to the password field to switch between hiding and showing the password. Using this feature the user can confirm the accuracy of their password while typing, reducing the chance of input errors by clicking the "Eye" icon.

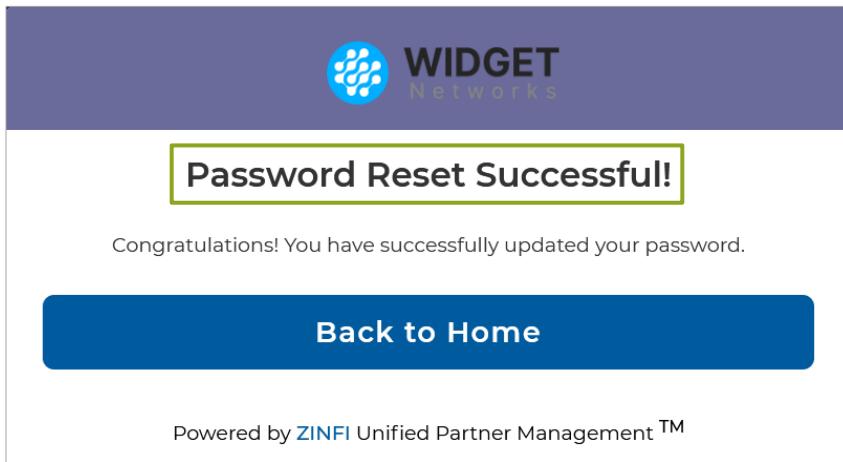
- "Eye Open" Icon: Indicates that the password is visible when the icon is clicked or toggled. When the user clicks the "Eye" icon toggle, the password must revert to its obscured state.
- If the password is visible and the user does not interact with the page for 30 seconds, the system should automatically revert the password field to the obscured state for security purposes.
- "Eye Closed" Icon: Indicates that the password is hidden (default configuration) and the entered password is obscured with dots.

**Note: The Password Visibility Toggle feature is also available on the "Log In" page of the UPM.**



The image shows the 'Create New Password' page for Widget Networks. At the top, the Widget Networks logo is displayed. Below it, the heading 'Create New Password' is centered. A sub-instruction below the heading reads: 'Please create a new password by following the password guidelines mentioned below.' Two password input fields are shown: the first contains 'America\$1' and the second contains '\*\*\*\*\*'. Below these fields is a list of six password complexity requirements, each with a green checkmark and a corresponding icon: 'Capital Letter' (green circle with white checkmark), 'Special Character' (green circle with white checkmark), 'Number' (green circle with white checkmark), '8-20 Characters' (green circle with white checkmark), 'Shouldn't match with previous one' (green circle with white checkmark), and 'Not match with confirm password' (green circle with white checkmark). A 'reCAPTCHA' box is present, containing the text 'I'm not a robot' and a reCAPTCHA logo. A large blue 'Reset Password' button is at the bottom. Below the button is a link to 'Back to Home'. At the very bottom, it says 'Powered by ZINFI Unified Partner Management™'.

xiv. After meeting the **Minimum Password Complexity** requirements, the user clicks the "Reset Password" button to submit the request, and a confirmatory message will be shown like the one visible in the image below.

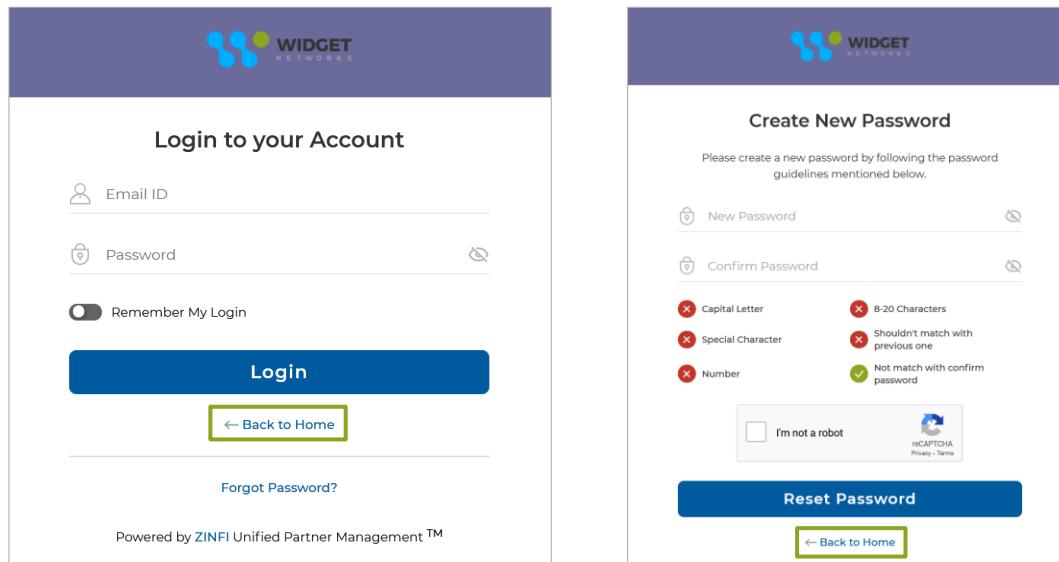


xv. **Back to Home** – At any point during the 'Forgot Password' process, users can return to the homepage by clicking the 'Back to Home' link. This link, available on the password reset page, allows users to exit the reset process without saving their inputs and navigate directly to the UPM homepage. It provides a convenient option for users who choose to discontinue the password reset and explore other sections or features of the UPM.

xvi. Clicking the “**Back to Home**” button takes him/her to the Home page of the UPM.

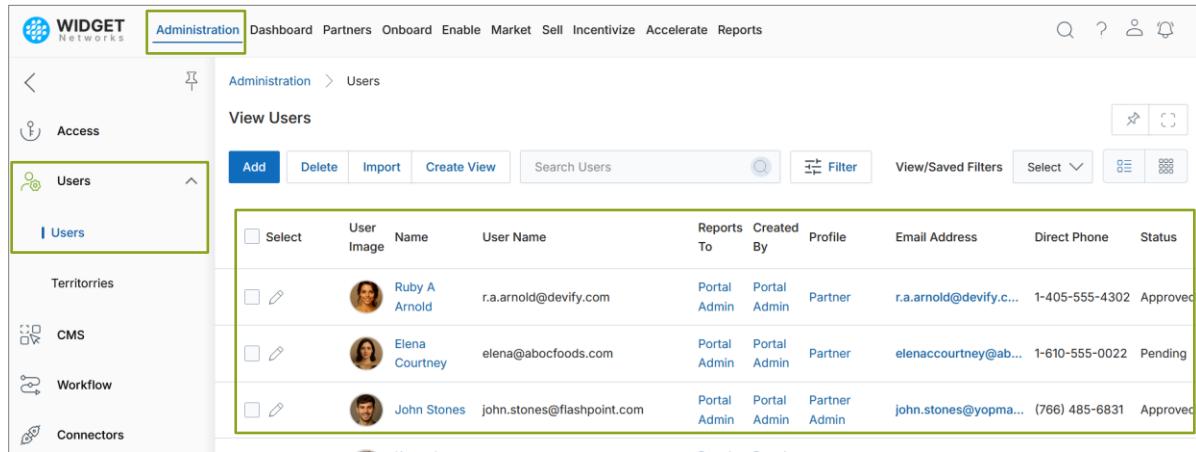
## Login and Password Change Tracking

With the release of this feature, the Admin will be able to track a record of recent login attempts, and password reset requests made by the user. This tracking history is useful for security purposes, as it allows administrators to track account activity and identify any suspicious or unauthorized access attempts. Maintaining a Login/Forgot Password Log can contribute to enhanced security, improved user experience, and regulatory compliance for organizations.



The image displays two screenshots of the ZINFO Unified Partner Management (UPM) interface. The left screenshot shows the 'Login to your Account' page, featuring fields for Email ID and Password, a 'Remember My Login' checkbox, and a 'Login' button. Below the login form is a 'Back to Home' button with a green border. The right screenshot shows the 'Create New Password' page, which includes fields for 'New Password' and 'Confirm Password'. It also features a list of password guidelines with red 'X' marks for 'Capital Letter', 'Special Character', and 'Number', and a green checkmark for '8-20 Characters', 'Shouldn't match with previous one', and 'Not match with confirm password'. Below these fields is a reCAPTCHA checkbox labeled 'I'm not a robot'. At the bottom of the page are 'Reset Password' and 'Back to Home' buttons.

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



Select	User Image	Name	User Name	Reports To	Created By	Profile	Email Address	Direct Phone	Status
<input type="checkbox"/>		Ruby A Arnold	r.a.arnold@devify.com	Portal Admin	Portal Admin	Partner	r.a.arnold@devify.c...	1-405-555-4302	Approved
<input type="checkbox"/>		Elena Courtney	elena@abocfoods.com	Portal Admin	Portal Admin	Partner	elenaccourtney@ab...	1-610-555-0022	Pending
<input type="checkbox"/>		John Stones	john.stones@flashpoint.com	Portal Admin	Portal Admin	Partner	john.stones@yopma...	(766) 485-6831	Approved

- Click on the name of any User, which will take you to the details page of the User.
- Once you are on View a User page, go to the bottom of the page where you'll find **Login/Forgot Password History** related list.

Administration > Users > View a User

**View a User**

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

**User Information**

First Name:	Simon	Last Name:	Das
User Name:	simon.das@zinfitech.com	Status:	Approved
Email Address:	simon.das@zinfitech.com	Other Email:	portal.admin@zinfitech.com
Company Name:	Abc2355	Profile:	Super Admin
Title:	Direct Phone:		
Country Code:	Mobile:		
Department:	Other:		
Fax:	Main Phone:		
Primary Address:	Primary Address2:		
City:	Country: USA		
State:	Postal Code:		
Contact:	Salesforce ID:		
Reports To:	Wizard Type:		
Group:	User Image:		
User Type:	API Profile: <a href="#">Zinfo Api Profile</a>		
Business Model:			

**User Settings**

Time Zone: (GMT+08:00) Kuala Lumpur, Singapore	Language: English
Multi Factor Authentication Enabled: No	Internal Administrator: Yes
T&C Accepted:	Internal User (Non-Admin): No
Is User Profile Locked?:	Failed Login Count:
Forgot Password Count:	Created by: <a href="#">Portal Admin</a>
Modified by: <a href="#">Portal Admin</a>	Legacy Login:

[+ Groups](#) [Add](#)  
[+ Roles](#) [Add](#)  
[+ Countries](#) [Add](#)  
[+ Users Assignment History](#)  
[+ Sales Territories](#) [Add](#)  
[+ User Impersonation Requests](#)  
[+ Demo Roles](#) [Add](#)  
**+ Login/Forgot Password History** [View All](#)

- Click open the **Login/Forgot Password History** related list. It will show a list of records.

— Login/Forgot Password History		
Log Type	Login/Forgot Pwd Status	Created On
Forgot Password	Success	04/25/2024 2:40:03 PM
Login	Failure	04/25/2024 2:39:53 PM
Login	Failure	04/25/2024 2:39:49 PM

- We decipher from the above image that the user tried to log in twice to the portal but failed.

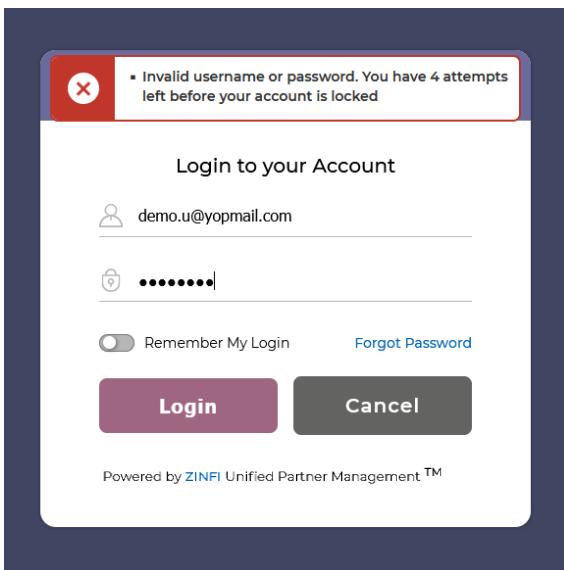
**\*Note:** Similarly, if the user unsuccessfully attempts to log in 5 times in a row, the account will get locked, and the entire history will be captured in the Login/Forgot Password History related list.

## Wrong Password Limit Check and Auto Account Unlock After Lock

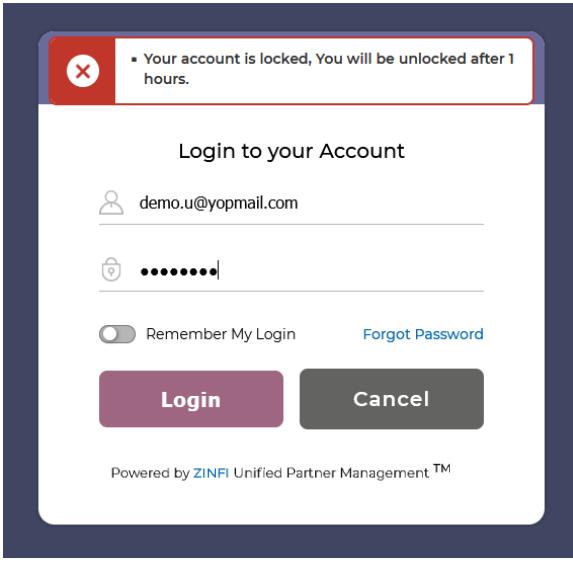
The key benefits of the account lockout feature include enhanced security and improved user management. By locking the account after five consecutive failed login attempts, the system effectively mitigates the risk of brute force attacks and unauthorized access attempts, safeguarding user data and system integrity. The real-time feedback, showing the number of remaining attempts before the lockout, helps users avoid accidental account lockout and provides clear guidance on how many attempts they have left.

Automatic resetting of failed attempts upon successful login and the 24-hour-based automatic unlock mechanism ensure a balanced approach to security and user convenience, reducing the need for administrative intervention while maintaining robust protection against unauthorized access.

- Once the user makes his first attempt to log in to the UPM using the wrong password, a message will appear stating that he has four attempts pending before the account gets locked.



- The message is not editable by Admin.
- The number of failed login attempts will automatically reset once the user successfully logs in.
- If a user enters the wrong password 5 times, their account will be default locked for 24 hours. After the 24-hour default period, the user account automatically unlocks, and the user can log in again using the correct credentials.

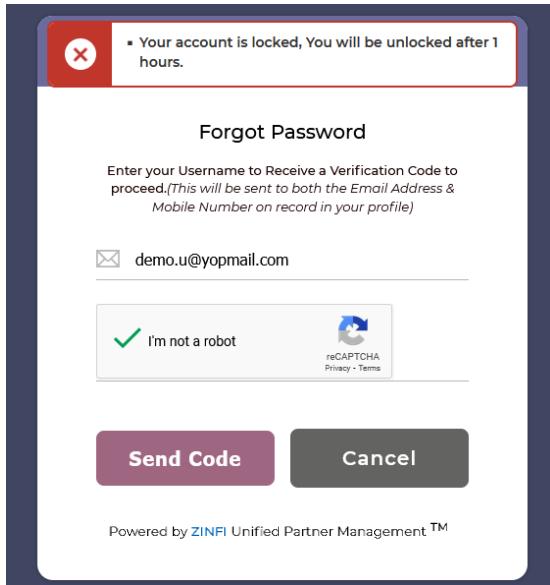


The image shows a 'Login to your Account' page. At the top, a red banner displays a warning: 'Your account is locked, You will be unlocked after 1 hours.' Below the banner, there are fields for 'Email' (demo.u@yopmail.com) and 'Password' (represented by a series of dots). There is a 'Remember My Login' checkbox, a 'Forgot Password' link, and two buttons: 'Login' (purple) and 'Cancel' (gray). At the bottom, it says 'Powered by ZINFI Unified Partner Management™'.

**Note: The lockout duration can be configured from the backend.**

**For example, the image below shows that the account has been locked for only 1 hour instead of the default 24 hours.**

- The “Account-Locked” message will be displayed on both the Forgot Password and Login pages.

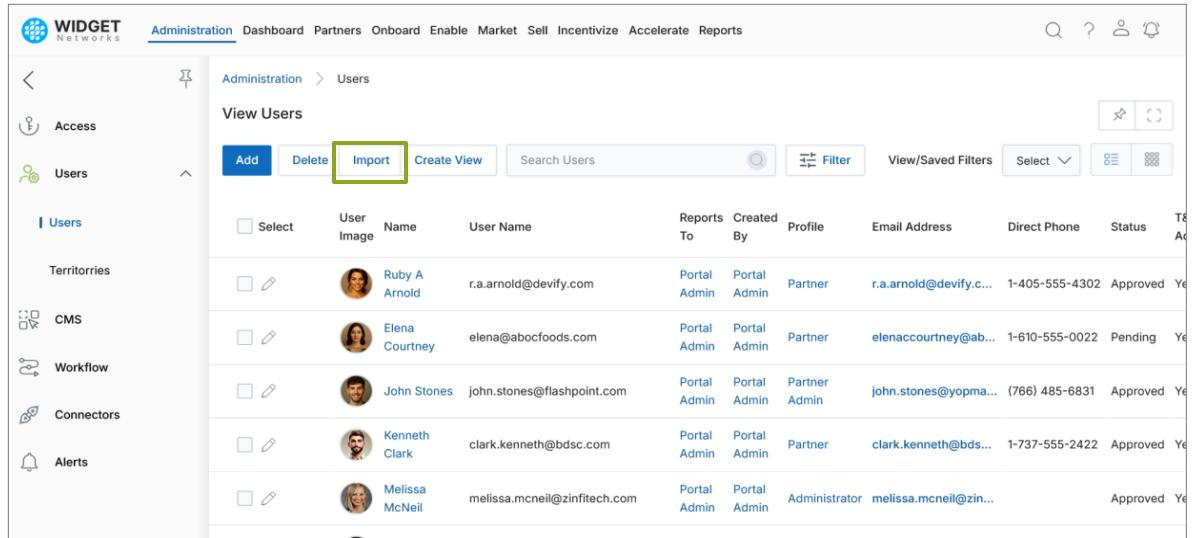


The image shows a 'Forgot Password' page. At the top, a red banner displays a warning: 'Your account is locked, You will be unlocked after 1 hours.' Below the banner, there is a text field for 'Email' (demo.u@yopmail.com). There is a 'reCAPTCHA' checkbox labeled 'I'm not a robot' and a 'Send Code' button. At the bottom, it says 'Powered by ZINFI Unified Partner Management™'.

## Import Engine Integration for User Records

The Import engine lets users create an import instance by assigning a name and selecting the Entity for which user records needs to be imported. The Auto Update feature is provided to update existing user records. Post upload of the user records file in legacy (xlsx) format, the user can easily map the fields of the respective Entity to the column headers in the legacy file and we are all set to import bulk user records with a single click.

1. In situations when you want to add or edit **User** records in bulk you need to click the “**Import**” button in the View Users List View.



The screenshot shows the ZINFO platform's 'View Users' list view. The top navigation bar includes links for Administration, Dashboard, Partners, Onboard, Enable, Market, Sell, Incentivize, Accelerate, Reports, and a search bar. The left sidebar has a 'Users' section selected, showing sub-options for Users, Territories, CMS, Workflow, Connectors, and Alerts. The main content area is titled 'View Users' and shows a table of user records. The table columns include: Select, User Image, Name, User Name, Reports To, Created By, Profile, Email Address, Direct Phone, Status, and Type. The 'Import' button in the top navigation bar is highlighted with a yellow box. The table data is as follows:

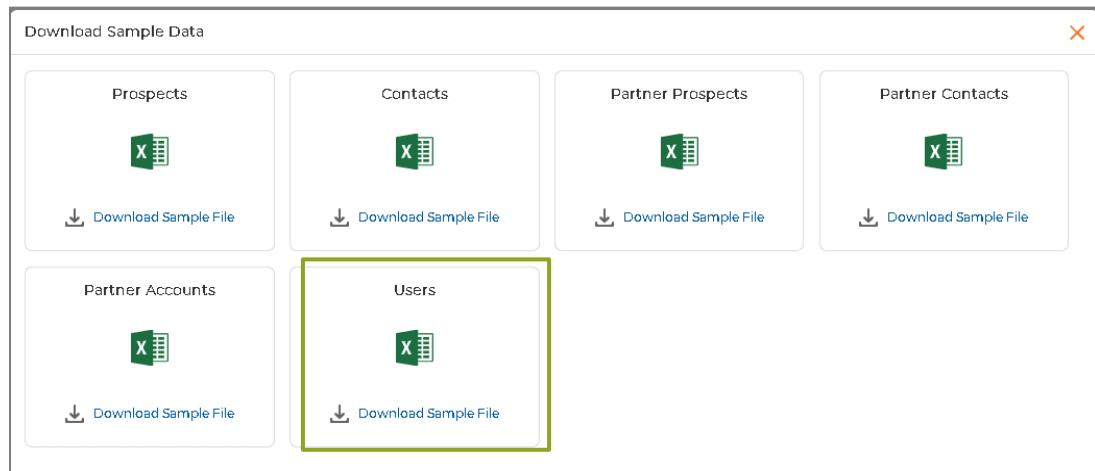
Select	User Image	Name	User Name	Reports To	Created By	Profile	Email Address	Direct Phone	Status	Type
<input type="checkbox"/>		Ruby A Arnold	r.a.arnold@devify.com	Portal Admin	Portal Admin	Partner	r.a.arnold@devify.c...	1-405-555-4302	Approved	Yes
<input type="checkbox"/>		Elena Courtney	elenacourtney@abocfoods.com	Portal Admin	Portal Admin	Partner	elenacourtney@ab...	1-610-555-0022	Pending	Yes
<input type="checkbox"/>		John Stones	john.stones@flashpoint.com	Portal Admin	Portal Admin	Partner Admin	john.stones@yopma...	(766) 485-6831	Approved	Yes
<input type="checkbox"/>		Kenneth Clark	clark.kenneth@bdsc.com	Portal Admin	Portal Admin	Partner	clark.kenneth@bds...	1-737-555-2422	Approved	Yes
<input type="checkbox"/>		Melissa McNeil	melissa.mcneil@zinfi.com	Portal Admin	Portal Admin	Administrator	melissa.mcneil@zin...		Approved	Yes

2. Clicking the “Import” button will take you to this page that displays Record sets imported earlier.

### Buttons:

- a. **Add:** This allows you to import a list of Users from the standard pre-formatted Users Sample Data excel sheet.
- b. **Delete:** Allows you to remove the attachment of the set of records imported earlier. The records though won't be removed from the system.

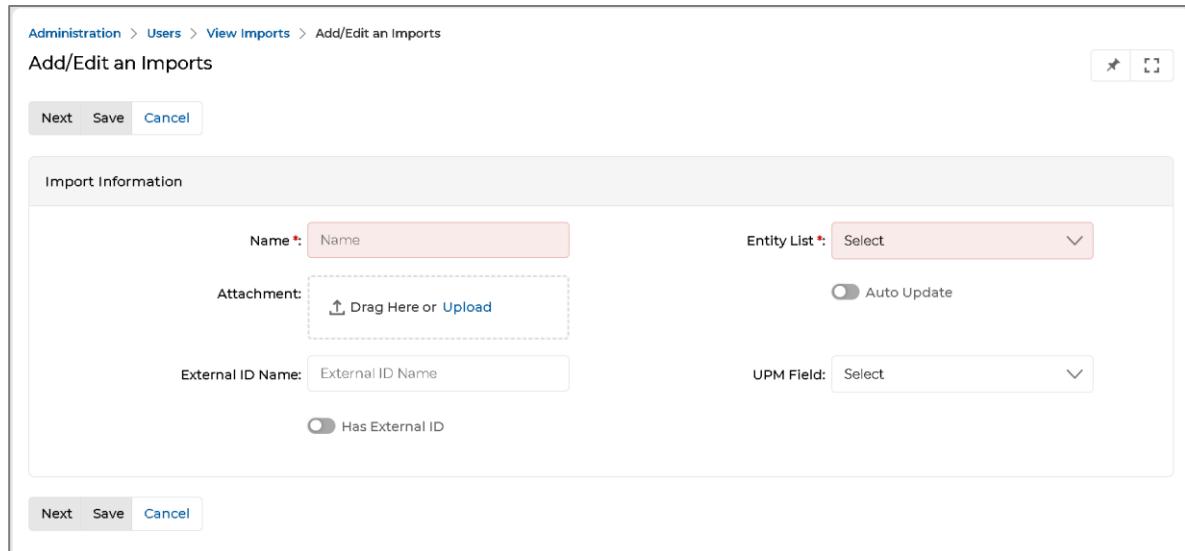
c. **Download Sample Data:** Clicking here will take you to a pop-up window featuring the downloadable sample excel sheets, associated with various record types. So, for this example you should proceed to download the “**Users**” sample excel and use that to fill your data.



3. We fill in the User records in the sample worksheet template as provided in the image below. The Column Headings in Red are mandatory fields.

D	E	F	G	H	I	J	K	L	M
Email address	Other Email	Contact	Status	Company Name	Profile	Secondary Profiles	Reports To	Title	Direct Phone
1 pixel@zinfitech.com		pixel@zinfitech.com	Approved	Zinfo Test ABC Ltd.	Channel Marketing Manager	Lab Partner	widgercmm@zinfitech.com	Sales Rep	
2 amit.gupta@zinfitech.com		amit.gupta@zinfitech.com	Approved	Zinfo Test XYZ Ltd.	Channel Marketing Manager	Profile 2	widgercmm@zinfitech.com	Marketing Manager	254152633
3 amrita.pal@zinfitech.com		amrita.pal@zinfitech.com	Approved	Zinfo Test ABC Ltd.	Channel Marketing Manager	Lab Partner	widgercmm@zinfitech.com	Techncial Consultant	268952485
4									
5									

4. Clicking the **Add** button will take you to the following page where you need to provide the following details to configure the Import setup.



Administration > Users > View Imports > Add/Edit an Imports

Add/Edit an Imports

Import Information

Name\*:

Entity List\*:

Attachment:

External ID Name:

UPM Field:

Has External ID

Next Save Cancel

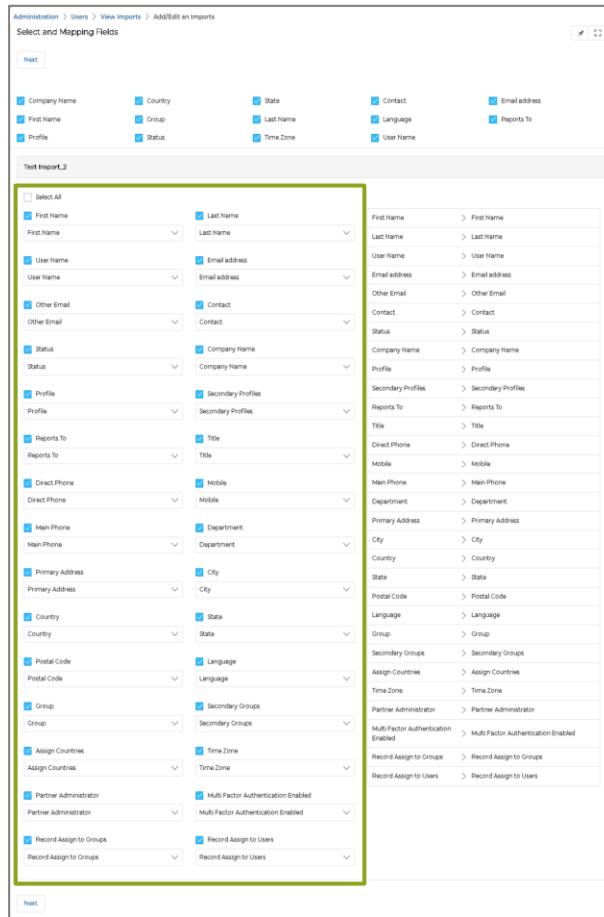
a. **Name** - Name of this upload/import instance.

b. **Entity List** – Clicking the drop-down arrow you need to select the module for which you want to import (upload) records. For this example, select “**Users**”.

- c. **Attachment** - Browse, attach and upload the excel sample sheet that you have filled out.
- d. **Auto update** - Checkbox to specify the system whether to update and overwrite a certain field. *When uploading and creating NEW records, leave this unchecked.*
- e. **External ID Name:** *(to be used only if you check off the “Autoupdate” checkbox above, and the “Has External ID” checkbox below)* This refers to the external (custom) field to be utilized for identification for the record set to be updated.
- f. **UPM Field:** The field to be utilized to Auto Update existing records
- g. **Has External ID:** Check this box off if you are utilizing an External ID Name.
- h. Next: Click **Next** to configure the field mapping.

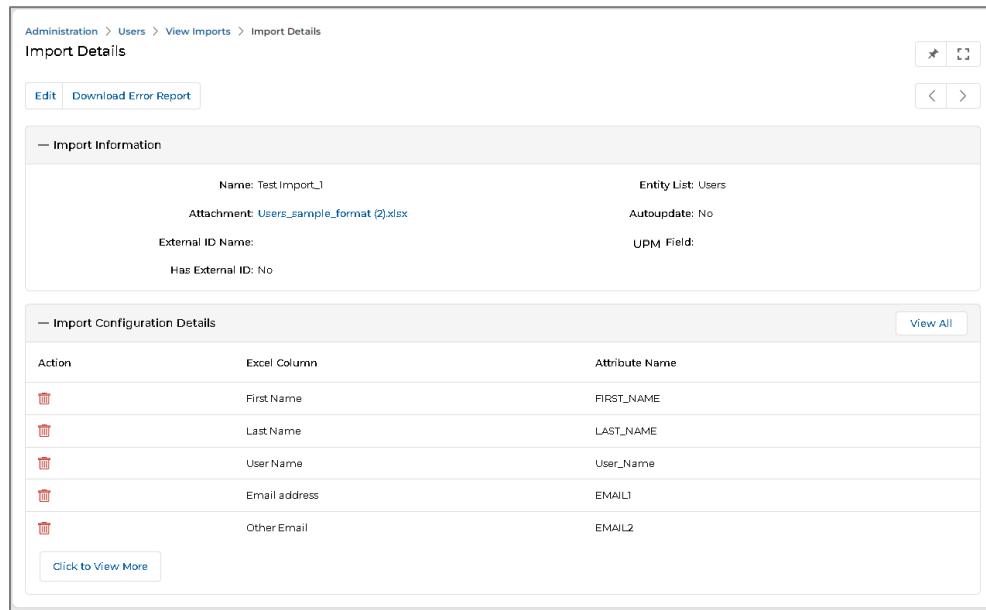
4. The next step is to map the fields:

- a. In this window, the headers in the excel worksheet are mapped with the fields of the entity. The labels next to each checkbox are the names of the header fields in the Excel and the corresponding entity fields appear in the drop-down. You need to choose the proper entity field in the dropdown to map the record set properly. *You can review the mapping configuration in the right pane of the window.*
- b. Once all the mappings are done, click **Next** to finish the upload process.



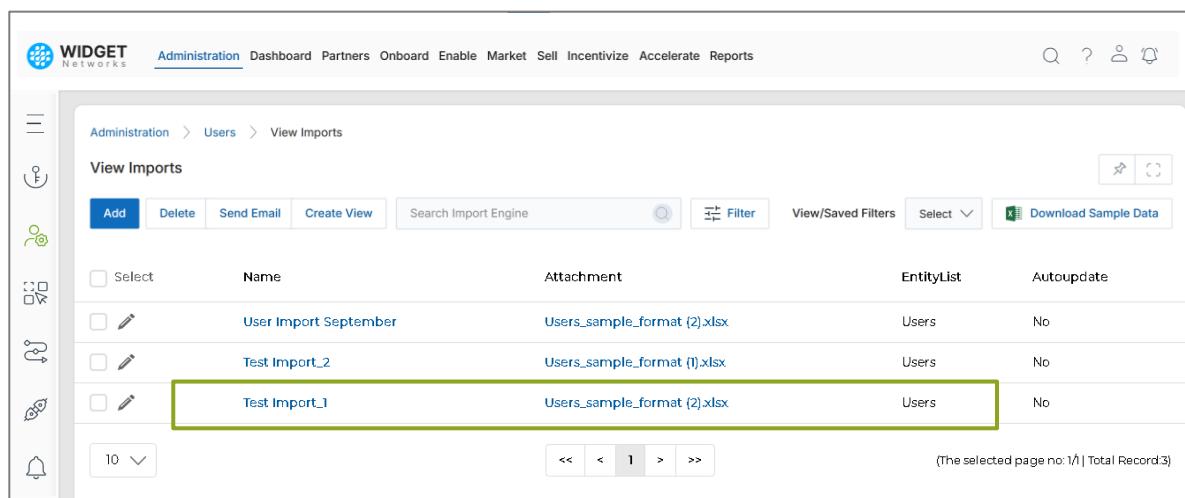
The screenshot shows the 'Select and Mapping Fields' window. At the top, it says 'Administration > Users > View Imports > Add/Edit an Imports'. Below that is a 'Select and Mapping Fields' section with a 'Next' button. The main area is titled 'Test Import\_2' and contains two columns of fields. The left column lists source fields (e.g., Company Name, First Name, Profile, Status, User Name, Other Email, Direct Phone, Main Phone, Primary Address, Group, Assign Countries, Partner Administrator, Record Assign to Groups, Record Assign to Users) with dropdown menus. The right column lists target fields (e.g., Contact, Last Name, Status, Email address, User Name, Language, Reports To, First Name, Last Name, User Name, Email address, Other Email, Contact, Status, Company Name, Profile, Secondary Profiles, Reports To, Title, Direct Phone, Mobile, Main Phone, Department, Primary Address, City, Country, State, Postal Code, Language, Group, Secondary Groups, Assign Countries, Time Zone, Multi Factor Authentication Enabled, Record Assign to Groups, Record Assign to Users). A large green box highlights the 'First Name' field in the source list and its corresponding 'First Name' field in the target list. The right pane shows a detailed list of field mappings for various entities like Contact, User, and Record.

5. After clicking **Next**, the screen for the Import Details page appears as shown below.

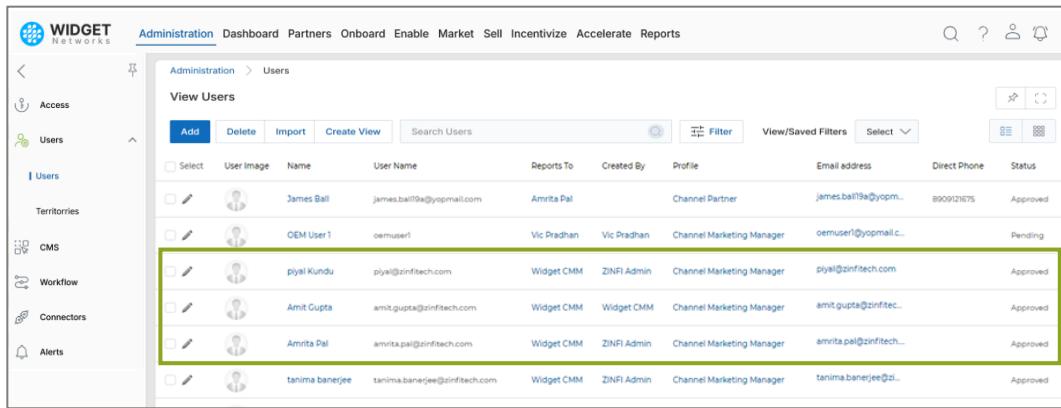


The screenshot shows the 'Import Details' page. At the top, there are buttons for 'Edit' and 'Download Error Report'. Below this is a section titled 'Import Information' containing fields: Name (Test Import\_1), Attachment (Users\_sample\_format (2).xlsx), Entity List (Users), Autoupdate (No), External ID Name (None), UPM Field (None), and Has External ID (No). The next section is 'Import Configuration Details', which lists columns: Action, Excel Column, and Attribute Name. It shows five rows for mapping columns: First Name (FIRST\_NAME), Last Name (LAST\_NAME), User Name (User\_Name), Email address (EMAIL1), and Other Email (EMAIL2). A 'View All' button is at the top right of this table, and a 'Click to View More' button is at the bottom left.

6. Once the process is completed, the list that you have imported will get reflected in the “View Imports” page and the names of the users contained in the list will get displayed on the listing page of Users (View Users page) as shown in the images below.



The screenshot shows the 'View Imports' page. The top navigation bar includes 'Administration', 'Dashboard', 'Partners', 'Onboard', 'Enable', 'Market', 'Sell', 'Incentivize', 'Accelerate', and 'Reports'. The main area shows a table of imported items. The columns are: Select, Name, Attachment, EntityList, and Autoupdate. The table contains three rows: 'User Import September' (attachment: Users\_sample\_format (2).xlsx, EntityList: Users, Autoupdate: No), 'Test Import\_2' (attachment: Users\_sample\_format (1).xlsx, EntityList: Users, Autoupdate: No), and 'Test Import\_1' (attachment: Users\_sample\_format (2).xlsx, EntityList: Users, Autoupdate: No). The row for 'Test Import\_1' is highlighted with a green border. At the bottom, there are navigation buttons for page 1 of 3.

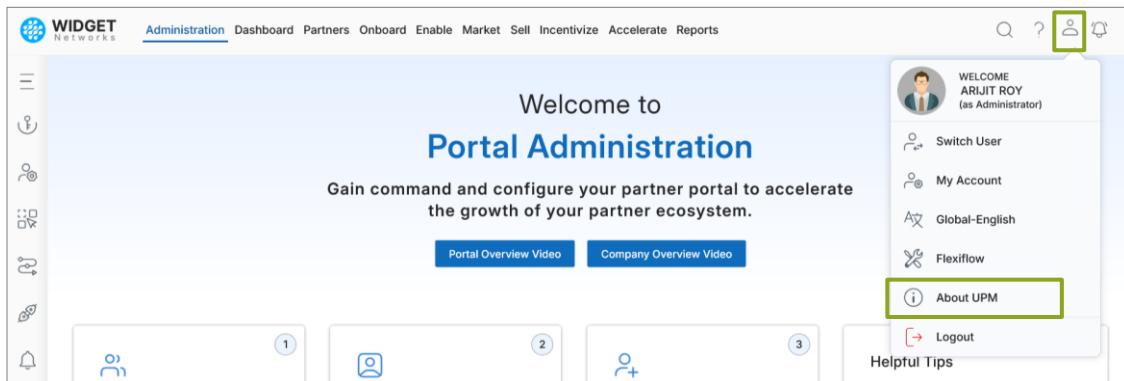


Select	User Image	Name	User Name	Reports To	Created By	Profile	Email address	Direct Phone	Status
<input type="checkbox"/>		James Ball	james.ball9a@yopmail.com	Amrita Pal	Channel Partner	James.ball9a@yopmail...	8909121675		Approved
<input type="checkbox"/>		OEM User 1	oemuser1	Vic Pradhan	Vic Pradhan	Channel Marketing Manager	oemuser1@yopmail.c...		Pending
<input type="checkbox"/>		piyali Kundu	piyali@zinfitech.com	Widget CMM	ZINFI Admin	Channel Marketing Manager	piyali@zinfitech.com		Approved
<input type="checkbox"/>		Amit Gupta	amit.gupta@zinfitech.com	Widget CMM	Widget CMM	Channel Marketing Manager	amit.gupta@zinfitec...		Approved
<input type="checkbox"/>		Amrita Pal	amrita.pal@zinfitech.com	Widget CMM	ZINFI Admin	Channel Marketing Manager	amrita.pal@zinfitech...		Approved
<input type="checkbox"/>		tanima banerjee	tanima.banerjee@zinfitech.com	Widget CMM	ZINFI Admin	Channel Marketing Manager	tanima.banerjee@zi...		Approved

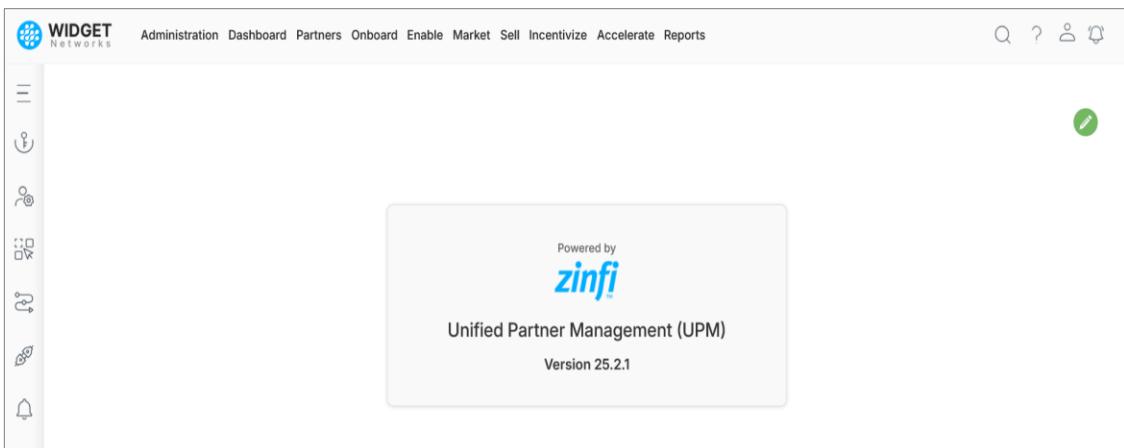
## Accessing About UPM menu to detect Portal Version

ZINFI UPM is constantly updated through a defined release cycle at least each quarter. In order to detect the version of the UPM Portal, the user needs to login and navigate to the following:

1. Click on the **Profile icon** followed by a click on **About UPM**.



2. Clicking **About UPM** will display the following page, with the **UPM Portal Version**.

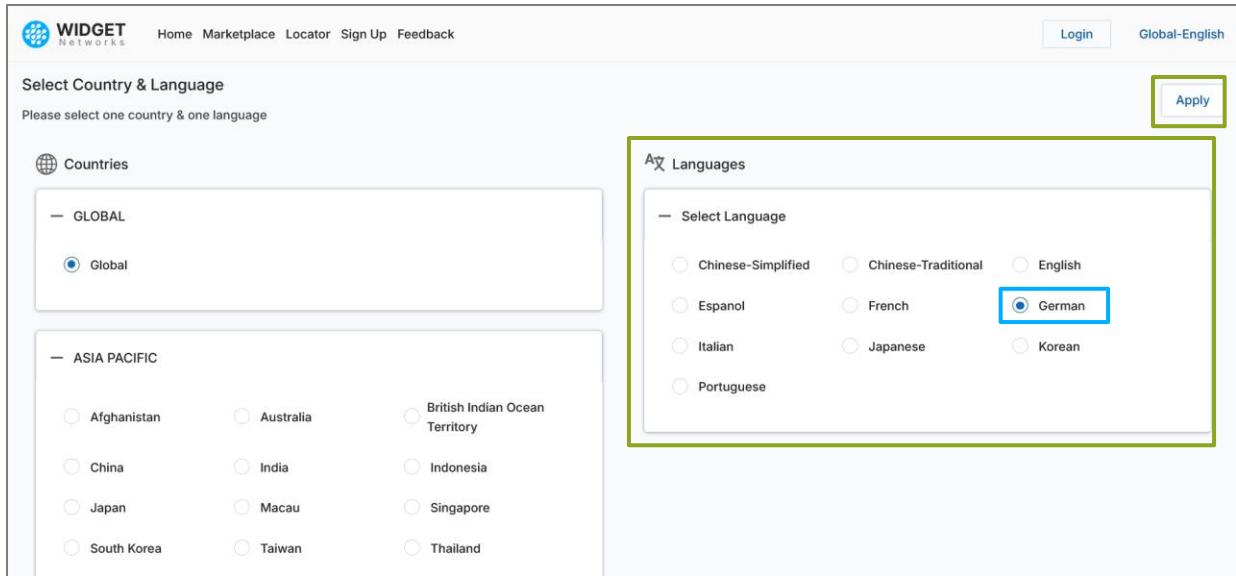


Powered by  
**zinfi**  
 Unified Partner Management (UPM)  
 Version 25.2.1

## Country Language Pre-login Page (Multilingual)

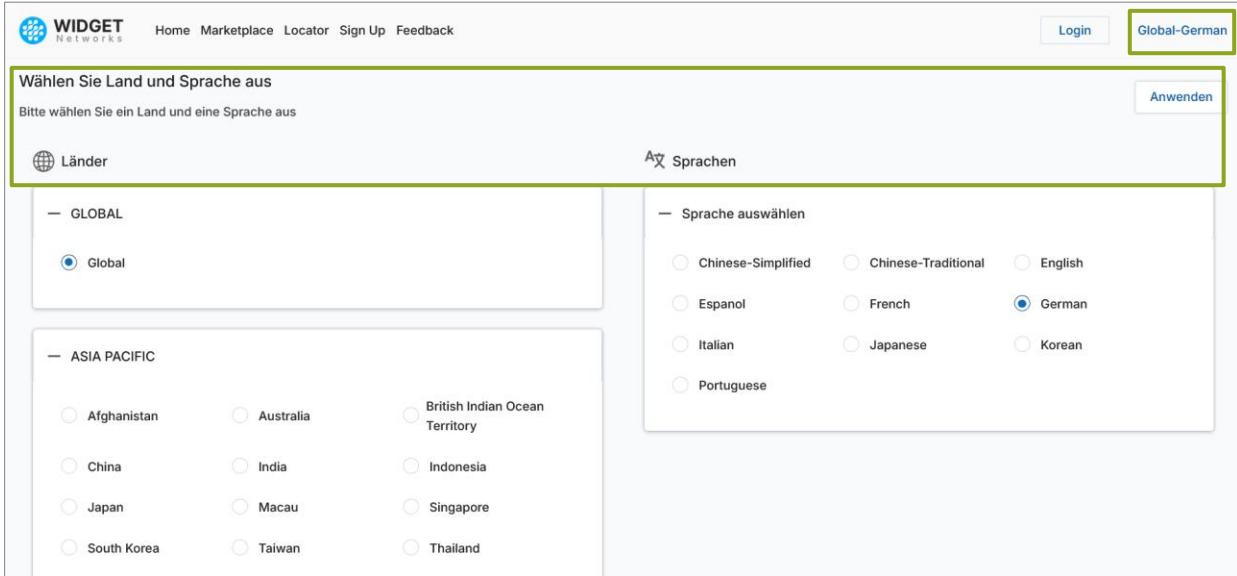
The ability to select different languages on the Country-Language Pre-login page and thus translate the page's content on the UPM is a powerful feature that enhances accessibility, improves user experience, and expands UPM's reach to a diverse audience. It demonstrates a commitment to inclusivity and user-centric design, benefiting both the users and the business. Supporting translation into multiple languages allows you to reach a wider, global audience, catering to users from different regions and backgrounds.

1. On the **Select Country & Language** page, select any language other than English from the Languages section. In this example, we've selected **German** language and click **Apply**.



2. Once the **Apply** button is pressed, the content on the **Select Country & Language** page gets translated into German.

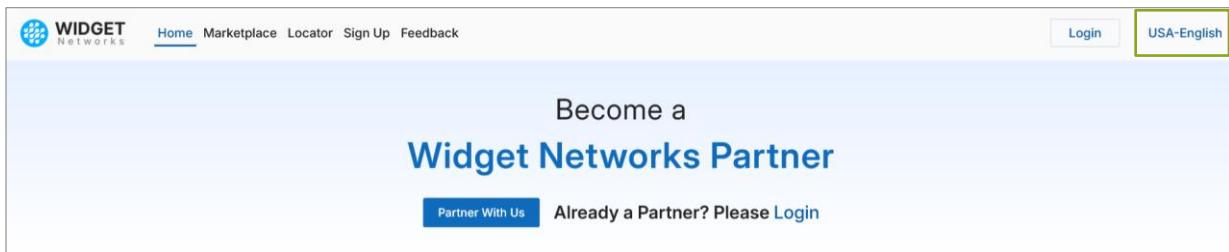
**Note:** The sign-up page automatically appears in user's chosen language, so prospective Partners can register easily without seeing text in another language.



## Automatic Country & Language Selection Based on Browser Settings

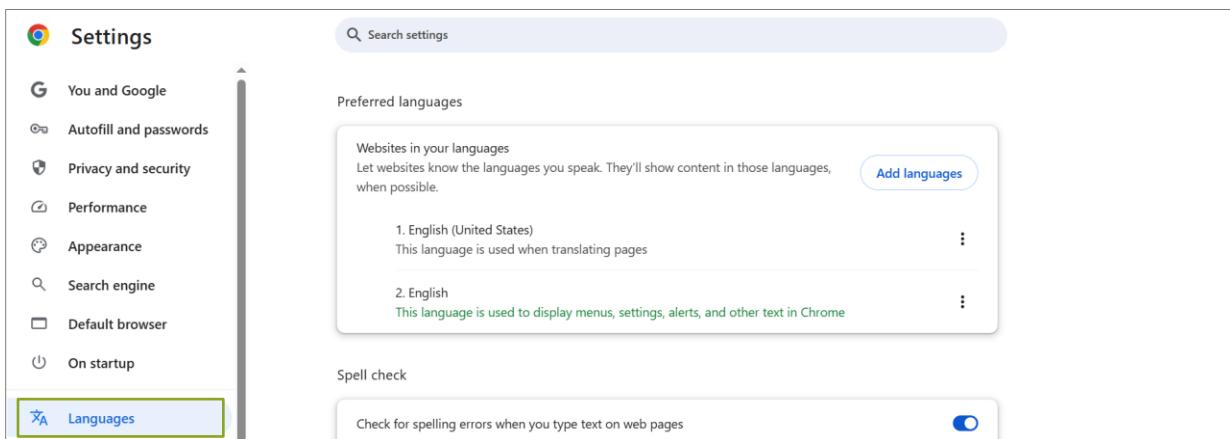
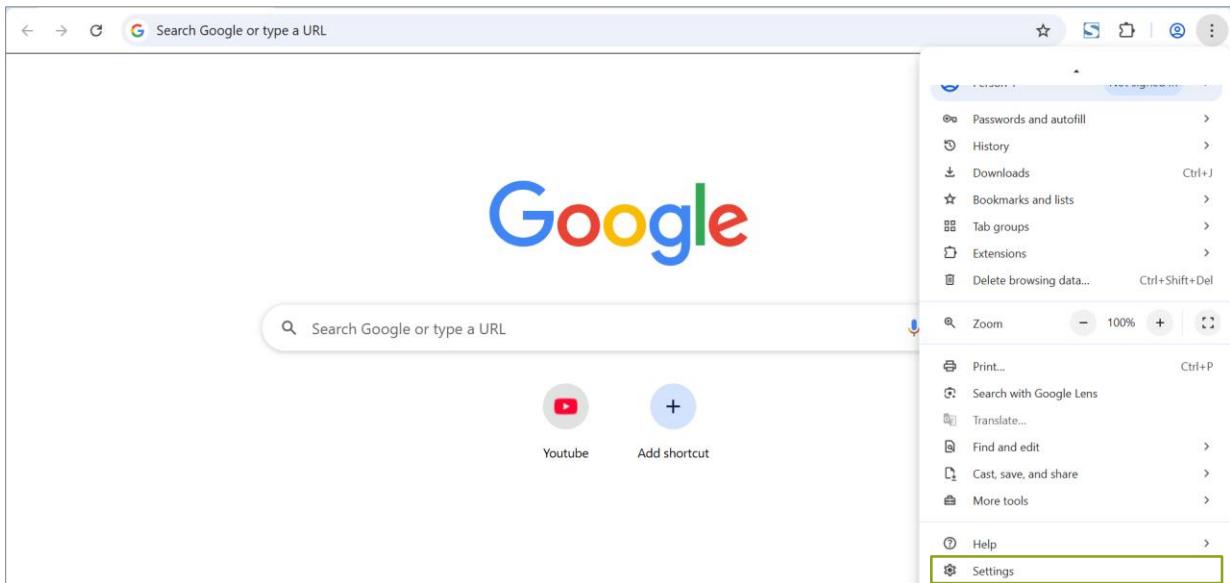
The Automatic Country & Language Selection feature auto-configures the platform's language and country settings based on the user's browser's country and language preferences. When a user accesses UPM for the first time, it detects and applies the browser's applied language and country settings, without requiring manual intervention. If the detected language is not supported by the platform, the platform redirects to the "Select Country & Language page". Users can also manually override automated country-language selection from the "Select Country & Language page".

1. Open the UPM portal in a browser e.g. Google Chrome.
2. We observe that on the pre-log in page, country and language have been selected as USA and English, respectively.

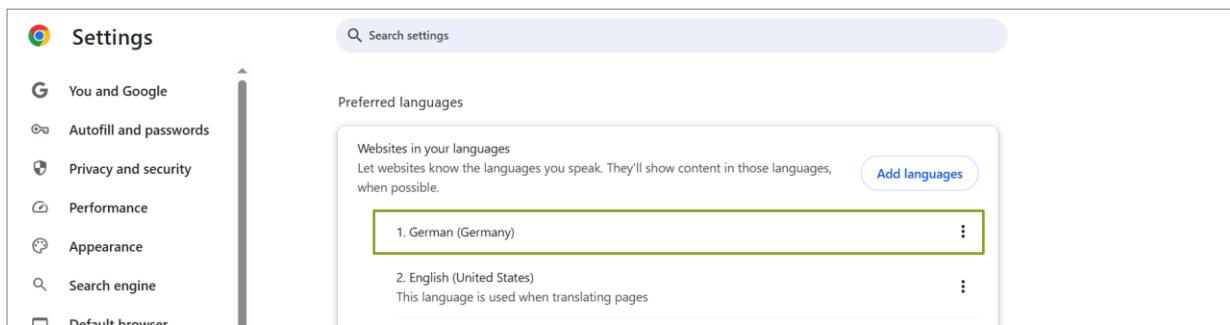


3. Open Chrome and click on the three-dot menu (top-right corner).

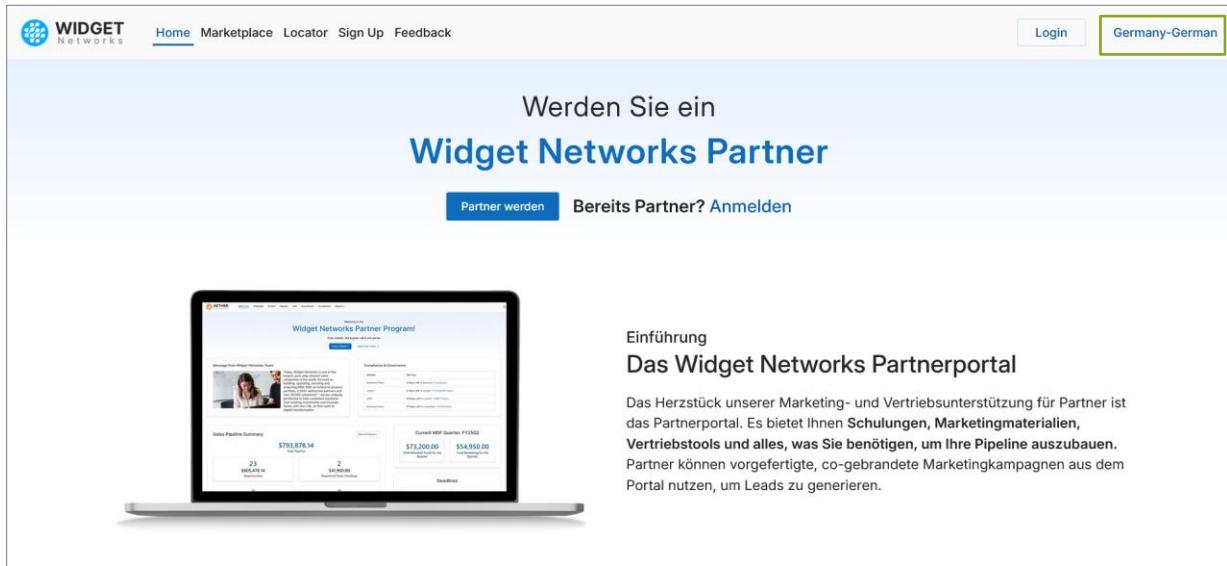
4. Go to Settings and scroll down and click Languages.



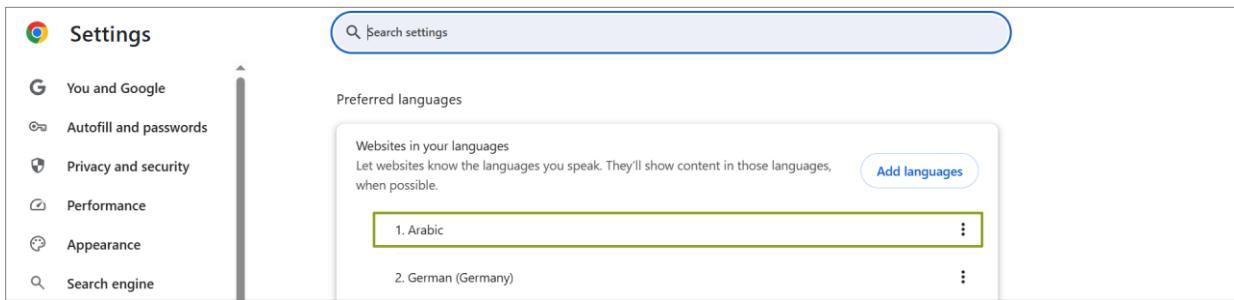
5. We see that the language is selected as English (United States).  
 6. Click Add Languages, select a language other than English, e.g., German (Germany), move it to the top, and refresh the page for the changes to take effect.



- Now, go back to the UPM screen and refresh the page. The new Country-Language selection (Germany-German) will be visible on the pre-log in page.



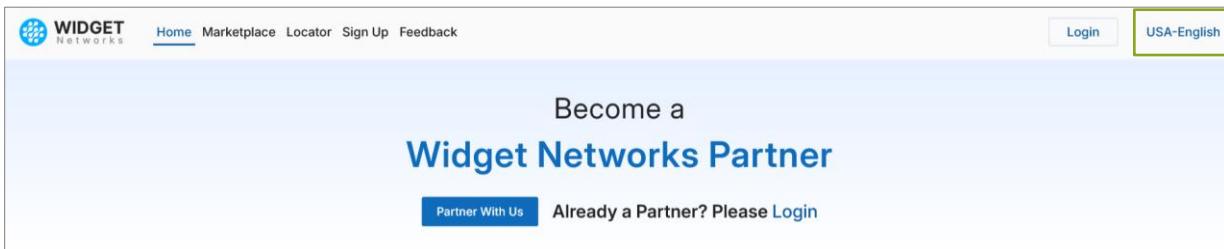
- If the browser's selected language and country do not match any available options on the UPM Select Country & Language page, the user will be redirected to the Select Country & Language page on the UPM, where he needs to manually select the country and language.
- If only one of them (country or language) is mismatched, the user will still be redirected to the Select Country & Language page for manual selection.
- On the browser, we add Arabic and move it to the top.



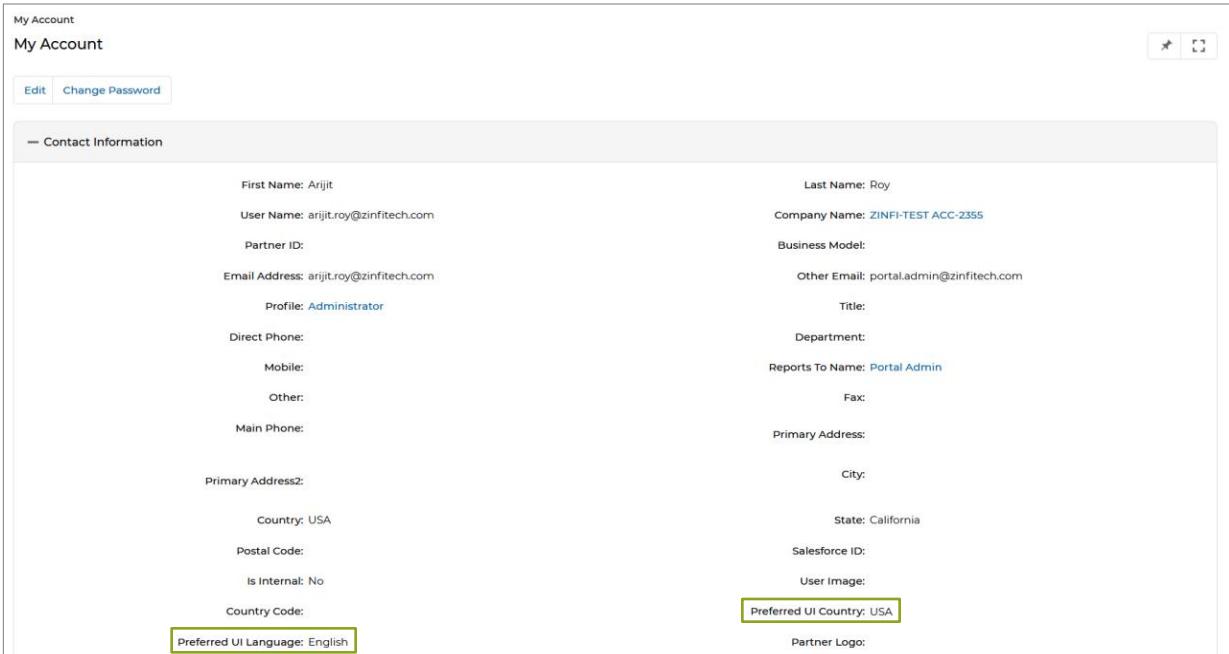
- Now we go back to the UPM pre log in page, refresh the page, and find that we are redirected to the Select Country & Language page for manual selection since Arabic was not a valid language selection in UPM.

## Tracking and Applying Preferred UI Country & Language

- On the pre-login page, the user initially selects USA as the Country and English as the Language.



2. This selected Country-Language combination is stored securely on the server as the user's preferred Country and Language settings.
3. These preferences are visible on the My Account page, where two new fields – Preferred UI Country and Preferred UI Language have been introduced to display the selected values.



The screenshot shows the 'My Account' page. At the top, there is a 'My Account' header with 'Edit' and 'Change Password' buttons. Below this is a 'Contact Information' section. The page contains various input fields for contact information, including First Name, Last Name, Company Name, Business Model, Other Email, Title, Department, Reports To Name, Fax, Primary Address, City, State, Postal Code, Salesforce ID, User Image, and Partner Logo. A 'Preferred UI Country: USA' field is highlighted with a green border. At the bottom of the page, there is a 'Preferred UI Language: English' field.

4. The user then manually changes the selection to France and French, which are immediately updated and visible under the same My Account fields.

Mon compte

Mon compte

[Edit](#) [Modifier le mot de passe](#)

— Informations de contact

Prénom: Arijit	Nom de famille: Roy
Nom de l'utilisateur: arijit.roy@zinfitech.com	Nom d'entreprise: ZINFI-TEST ACC-2355
Identifiant du partenaire:	Modèle d'affaires:
e-mail: arijit.roy@zinfitech.com	Autre courriel: portal.admin@zinfitech.com
Envoyé: <a href="#">Administrator</a>	Titre:
Téléphone direct:	Département:
Mobile:	Rapporter à nom: <a href="#">Portal Admin</a>
Autres:	Télécopieur:
Téléphone principal:	Adresse principale:
Adresse principale 2:	Ville:
Pays: USA	État: California
Code postal:	Identifiant de la force de vente:
Is Internal: No	Image de l'utilisateur:
Country Code:	Preferred UI Country: France
Preferred UI Language: French	Partner Logo:

5. Upon logging out and logging back into the portal, the system automatically reverts to the initially saved preferences – USA and English – as the default Country-Language selection.

My Account

My Account

[Edit](#) [Change Password](#)

— Contact Information

First Name: Arijit	Last Name: Roy
User Name: arijit.roy@zinfitech.com	Company Name: ZINFI-TEST ACC-2355
Partner ID:	Business Model:
Email Address: arijit.roy@zinfitech.com	Other Email: portal.admin@zinfitech.com
Profile: <a href="#">Administrator</a>	Title:
Direct Phone:	Department:
Mobile:	Reports To Name: <a href="#">Portal Admin</a>
Other:	Fax:
Main Phone:	Primary Address:
Primary Address2:	City:
Country: USA	State: California
Postal Code:	Salesforce ID:
Is Internal: No	User Image:
Country Code:	Preferred UI Country: USA
Preferred UI Language: English	Partner Logo:

6. For all future logins, the system continues to apply the previously chosen preferences unless the user updates them manually.

## Cookie Consent Management

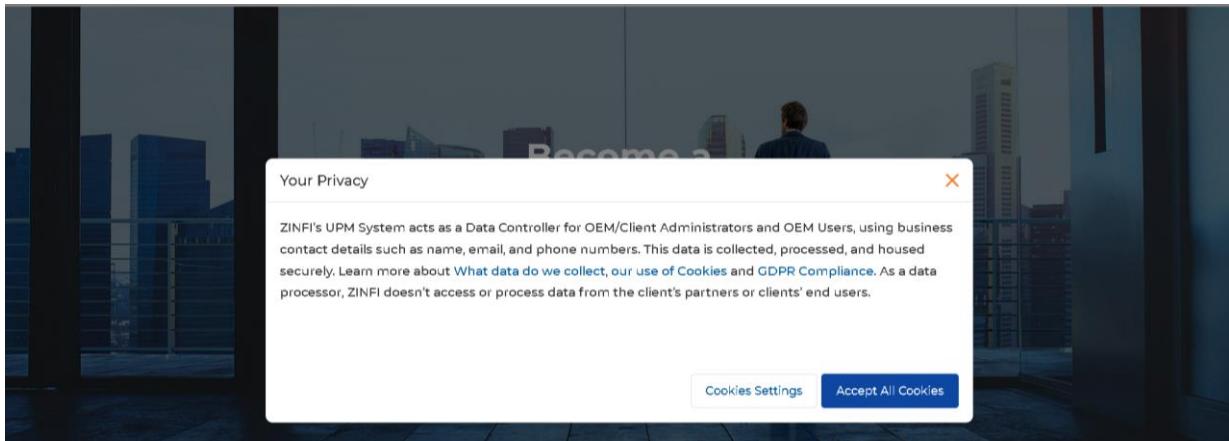
The Cookie Consent Management feature on the ZINFI platform enables users to manage their data-sharing preferences in compliance with privacy regulations. Through an intuitive interface, users can choose to accept, decline, or customize their consent settings across various cookie types.

Data tracking is categorized into:

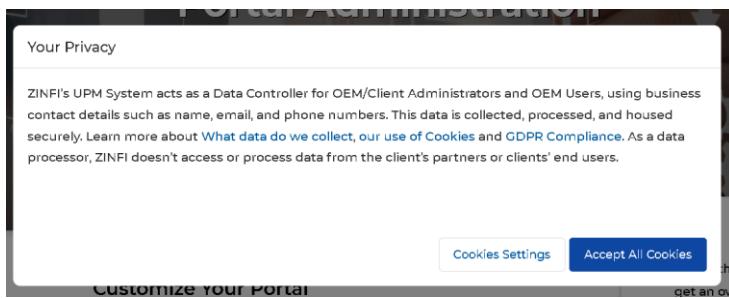
- **Necessary Cookies**—These trackers are used for activities that are strictly necessary to operate or deliver the ZINFI Platform services requested and, therefore, do not require consent. As already requested, they are essential for platform functionality and are always enabled.
- **Functionality Cookies**—These trackers enable basic interactions and functionalities that allow users to access selected features of the ZINFI Platform service and facilitate communication with the ZINFI Team for better portal performance. Users can enable or disable them according to their preferences.

The Cookie Consent Notification Interface appears before and during login. In the pre-login stage, users have the option to dismiss this notification. Users may select "Accept All Cookies" to consent to all categories or click "Cookie Settings" to customize their preferences. Once they click "Save and Continue", the platform will save these preferences, preventing the consent notification from reappearing in future sessions.

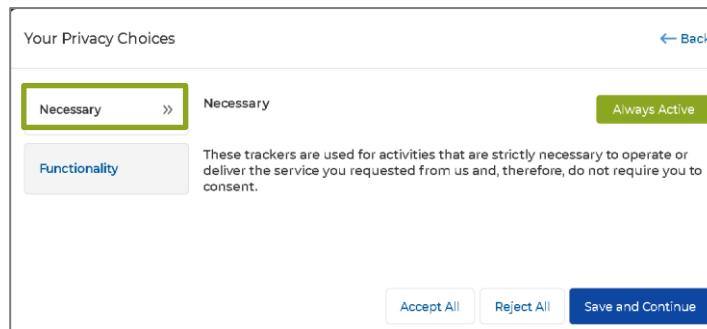
1. Once the user opens the UPM Portal, the 'Cookie Consent Notification Interface' is displayed.



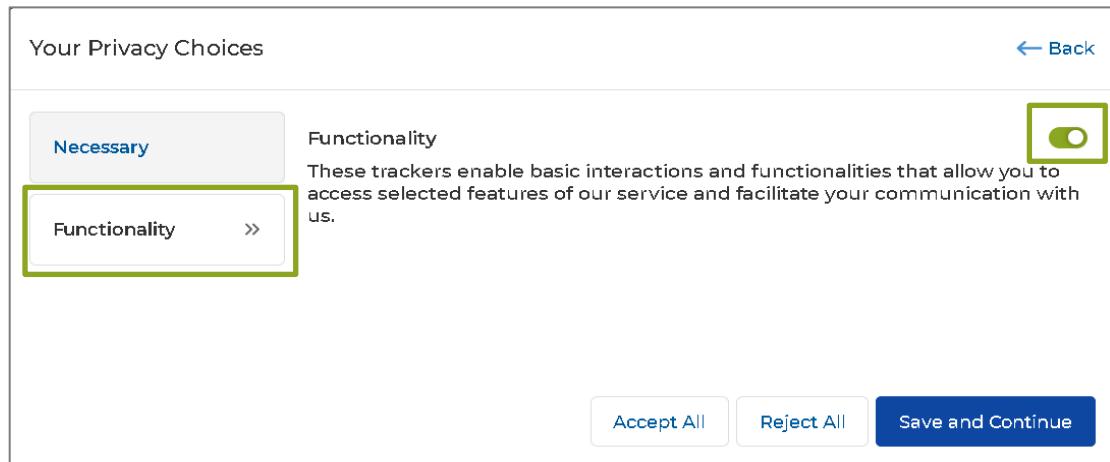
2. The User can close the Cookie Consent Popup and proceed with Login. Once logged in, the User is now manually required to provide his/her consent for cookie use.



3. Users are displayed with the ZINFI Platform Privacy Policies, which they can click from the Cookie Consent Manager Form (image above) to access the relevant policies hosted on the ZINFI official Website (<https://www.zinfi.com/>).
4. Users can select either 'Cookie Settings' or 'Accept All Cookies'.
  - a. **Accept All Cookies** – Selecting 'Accept All Cookies' will provide the user's consent to accept all cookies.
  - b. **Cookie Settings** – Clicking 'Cookie Settings' will display a pop-up showing two Categories of Cookies for acceptance:
    - i. **Necessary Cookies** – Necessary Cookies are essential for the system to function properly and are always active, with no option for the user to disable them. These cookies enable core system operations; without them, the system would not work as intended and needs to be accepted.



- ii. **Functionality Cookies** – Functionality Cookies enablement is optional; users can enable or disable them using the provided toggle key. These cookies are needed for enhanced features.



- iii. **Accept All** – Grants consent to accept all cookies, including optional ones, to enhance the user experience and enable tracking and personalization features
- iv. **Reject All** - Declines all the 'Functionality'(optional) cookies, ensuring that only essential cookies necessary for the website's functionality are enabled.
- v. **Save and Continue** – By clicking "Save and Continue," users consent to their chosen cookie preferences and proceed. Once cookie preferences are selected, the Consent Notification Interface will no longer be displayed, enabling users to tailor their cookie settings according to their needs.

## CENTRi and User Management

The User Management API Library provided in UPM's Centralized Interconnect (CENTRi) workflow scheduling engine provides programmatic access to user accounts that are associated with other platforms. You can integrate such APIs into UPM's administrative workflows to allow authorized administrators to create, update and delete user accounts for the enterprise, and to retrieve information about users and their access to other platforms.

The User Management API allows you to manage multiple identities programmatically rather than individually through multiple user interfaces. It's easy to connect platforms that obtain account management data stored in another identity tool that you might already be using, such as Microsoft Active Directory, and you can use that data in calls to the UPM. You can call such APIs directly to create, manage and remove user accounts.

## User Management Tasks

The Users & Territories Management module gives you direct access to the functionality you need to manage your user accounts and control user access to other platforms.

### Create and Manage User Accounts

UPM services use an identity management system to determine an end user's entitlements. Users are recognized based on their identity. We integrate technologies—namely, SSO and OAuth—to connect to platforms with the respective credentials, thus providing a seamless connection of platforms through a single interface dedicated to management of users.

### Reporting and Analysis

You can use CENTRI to collect user data from other platforms and break it down by product to generate usage reports. You can use these reports to view the number of users associated with specific product profiles and user groups, and to monitor changes over time by storing the information locally.

### Automating User Management with User Sync

CENTRI and UPM's Users & Territories Management tools can automate many of your user management tasks. These features can be used by your existing users without the need for extensive programming.