Workflow Management

Ext.prc.008.06 | 08.13.25

UPM 25.x

ZINFI Confidential & Proprietary
Shared Under NDA

Contents

Introduction

Process Automation

Using ZINFI's Workflow, you can create sophisticated, workflows and approval flows without the headaches, and give every contact in your database the attention they deserve. The Workflow visual editor makes it easy to envision workflows in real time—while building simple or complex follow-up workflows. Use advanced segmentation logic to determine exactly who gets enrolled in your organization's workflows and when.

The Workflow engine automates the regular and repetitive tasks of a business process, allowing your organization to define workflows and approval flows without any code changes, thus saving both time and money. The Workflow engine also helps you to improve the stability of the platform—again, with no code changes required.

Key features include:

- Automated emails based on defined conditions.
- Automated task creation and assignment to users
- Automatic value update in the database based on user-provided criteria.
- Ability to define workflows for MDF, lead management, campaigns, deal registration, etc.

Work Flow & Flow Charting Concepts

What is a Work Flow?

Wikipedia defines a "Work Flow" as:

"A workflow consists of an orchestrated and repeatable pattern of business activity enabled by the systematic organization of resources into processes that transform materials, provide services, or process information It can be depicted as a sequence of operations, declared as work of a person or group, an organization of staff, or one or more simple or complex mechanisms."

This may seem vague and a bit confusing so let's put it into simpler, common terms:

A Work Flow is a process in which work or action is taken to get some business step done. This can be organized and repeatable and is often shown as either a diagram or flow chart – illustrating the necessary steps for each role involved.

So,– a workflow is nothing but a step-by-step process that is formalized to get work done within an organization. These are incredibly important to a business, as they define the agreed-upon steps within a business process that people must take to accomplish that action. These are agreed upon and adopted by all personnel involved and establish a repeatable pattern for this process – so that things are always executed in this expected fashion. Let's take a look now at some common steps involved in a simple or more complex Work Flow.

Work Flow Steps

When considering the steps (or pieces) of a Work Flow, you must first start with several questions:

- **PROCESS: *What action or business process are we trying to define the Work Flow for?*** Define what is the exact business process (internally or for your external teams) that you are trying to accomplish here.
- **PLAYERS: *Who will be involved in this Work Flow?*** Decide which team members (internal and external) will touch steps in this Work Flow, and in what order.
- **TRIGGER: *What action or event begins this Work Flow?*** Make sure you know the exact action that is taken that kicks off this Work Flow – where does it all begin?
- **STEPS: *What steps are taken by the players in this Work Flow as it progresses?*** Once the initial step has commenced, what are the other steps that this process will involve, and how do the players you have defined above touch these steps and are engaged with?
- **RESULT: *What is the end result or goal of this Work Flow?*** Define what the end goal is and what all the steps need to lead to as an output, once all the players have done their actions within this Work Flow.

Answering these questions in a preliminary outlining of your Work Flow will help you get organized and start to play out how this Work Flow will be structured. From there, you can develop a visual Flow Chart (see next section) to diagram the steps and how they relate to each other. From this, you can then build out this process in a manual or automated fashion within your Partner Portal.

Example 1: Simple Work Flow

Let's consider a Work Flow for a Partner Rep to create an opportunity within the Partner Portal.

- **PROCESS:** Partner Rep will create an opportunity from an existing (or new) lead record.
- **PLAYERS:** Partner Rep
- **TRIGGER:** Determine the lead record to create the opportunity from.
- **STEPS:**
    - Does the lead record exist?
    - If yes, proceed to step "d".
    - If no, enter the lead information and create the record.
    - Once the lead record is selected, click to create a "New Opportunity".
    - Enter all necessary Opportunity information.
    - Add line items/products.
    - "Save" to create the Opportunity record.
- **RESULT:** Partner Rep has created a new Opportunity from a new or existing lead record to eventually Register a Deal.

Example 2: Multi-Role Work Flow (with Approvals)

Let's consider here a Work Flow for a Partner Rep to submit a claim against an MDF (Market Development Funds) Plan, to get reimbursed by the OEM (Vendor) for a marketing activity that has been executed.

1. **PROCESS:** Partner Rep will create and submit an MDF Claim for Approval and Payout.
2. **PLAYERS:** Partner Rep, Partner Admin, OEM Admin, OEM Finance Officer
3. **TRIGGER:** Selection of MDF Plan to create a Claim against
4. **STEPS:**
    a. Partner Rep selects the proper Approved MDF Plan to create the Claim against
    b. Click through to create a new MDF Claim for approval submission.
    c. Fills out all necessary Claim information, using their previously Approved MDF Plan as reference.
    d. Attached all necessary POP (Proof of Performance) documentation.
    e. Submits Claim.
    f. Partner Admin receives submitted claim and Approves/Rejects it to go through to the OEM Admin
    g. If 'Rejected', the Claim goes back to the Partner Rep for editing or correction – after which they can re-submit.
    h. If 'Approved', the Claim goes through to OEM Admin.
    i. OEM Admin received the submitted Claim and reviews it for business requirements.
    j. If 'Rejected', it goes back to the Partner Rep for editing or correction – after which they can re-submit.
    k. If Approved, the Claim is passed on to Finance.
    l. Finance Officer reviews the Claim for Approval/Rejection of Claim Payout.
    m. If 'Rejected', the Claim returns to the OEM Admin for further action.
    n. If 'Approved', the Claim is approved for payment, and the payout is processed.
5. **RESULT:** Partner Rep has submitted their MDF Claim, got Approval, and will receive a payout.

Flow Charting a Work Flow

Flow Charting is when you take the outline of the Work Flow steps created, and develop a diagram (often with shapes and connecting directional lines) that shows how the process is navigated through and what paths to results are followed. This makes it easy to visually concept and follow how this Work Flow is executed (which helps all players see how they fit in and help any teams building this process out to develop the tools and resources for each step). Let's get to know the typical elements first.

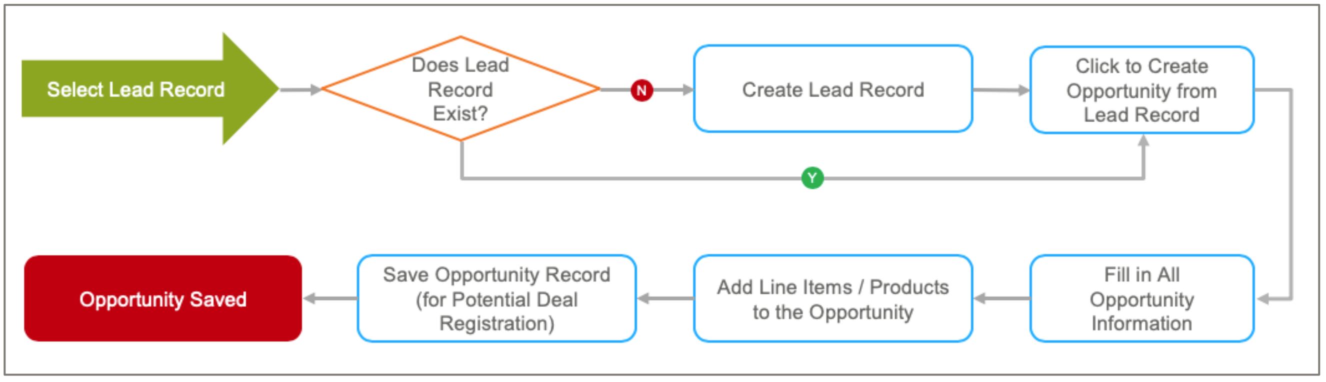
Flow Charting Elements

Here are some common elements to building out a Flow Chart, and how they are represented. Read these definitions and then see how they are used in the diagrams below.

- **Trigger:** This is the first step and the "BEGIN" point of the Flow Chart.
- **Step (Manual):** This is a box or component within the Flow Chart to show a particular step or action point that is done by a manual process.
- **Step (Automated):** This is a box or component within the Flow Chart to show a particular step or action point done by an automated process (usually triggered by the previous manual step).
- **Decision/Criteria:** This is the element in the Work Flow wherein a decision needs to be made, or certain criteria need to be reviewed - and based on the outcome of that decision/criteria (whether manual or automated) various branches are created for the remainder of the Flow, providing alternate paths to an eventual end state.
- **Action:** This is an action (manual or automated) that is triggered by the outcome of a decision/criteria step – that moves to the next steps in the process – and moves ahead in real-time.
- **Scheduled Action:** This is an action (manual or automated) that is triggered by the outcome of a decision/criteria step – that moves to the next steps in the process – and does not happen sequentially, necessarily. This might be scheduled to happen at a later date or at some time occurrence.
- **End/Result:** This is the final and "END" point of any branch of the Flow Chart.

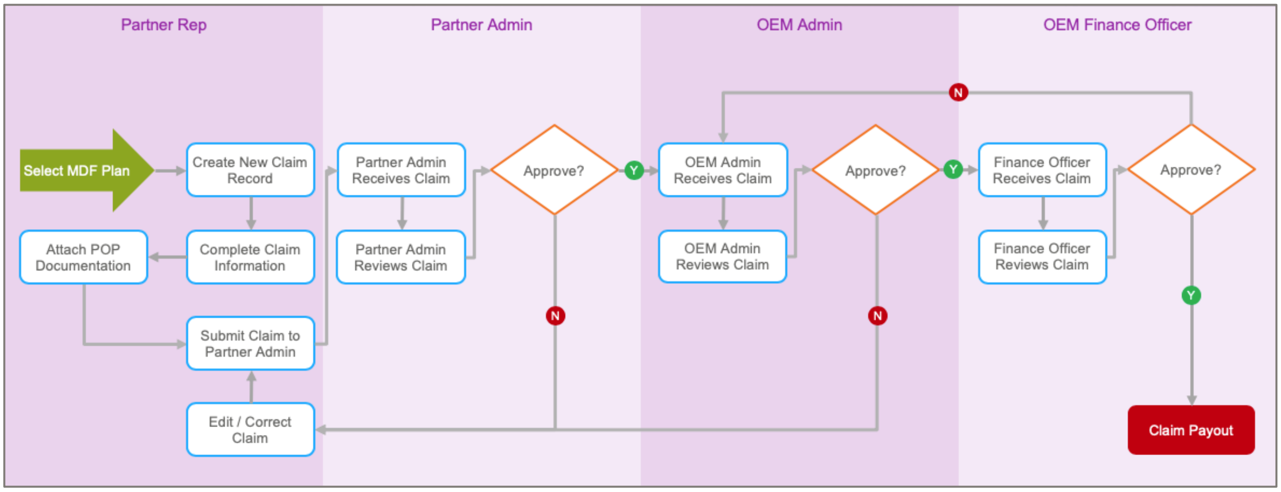
Example 1: Flow Chart of Simple Work Flow

Using a) the Simple Work Flow outlined, and b) the elements as described, in the sections above - here is an example of how the Flow Chart for this might look:



Example 2: Flow Chart of Multi-Role Work Flow (with Approvals)

Using a) the Multi-Role Work Flow (with Approvals) outlined, and b) the elements as described, in the sections above - here is an example of how the Flow Chart for this might look:

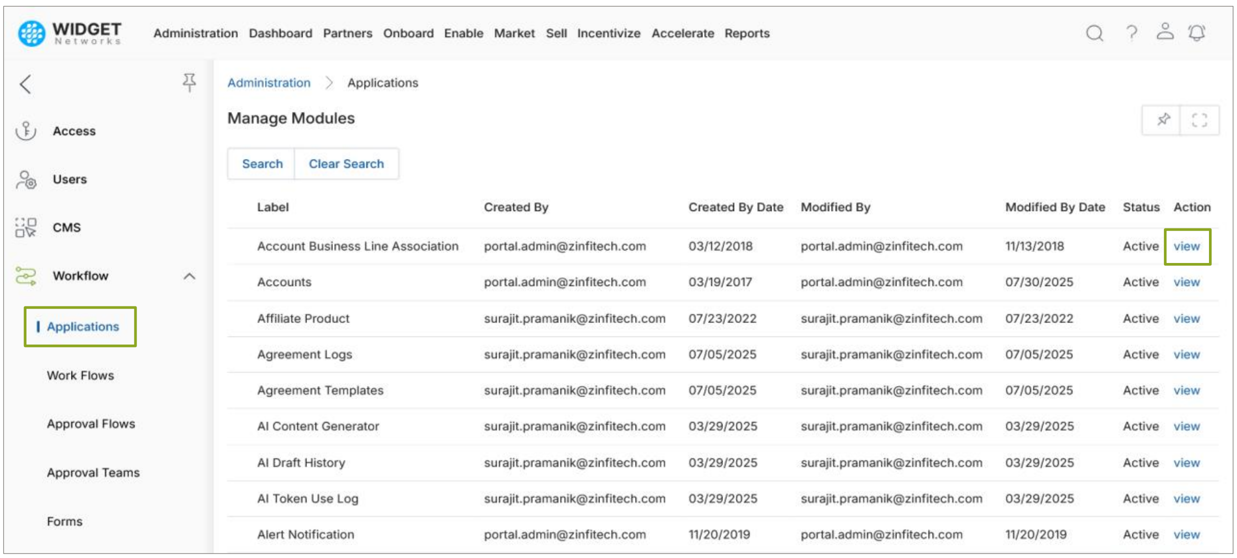


Workflow Tools

Let's use the Workflow backend for the "Prospects and Accounts" (in Leads) module/tool as an example below.

Module Setup

1. Click on **Administration** on the top menu.
2. Click on **Workflow > Applications** from the left menu bar.
3. For each record in the grid, clicking '**View**' opens the selected module details.



View Module Details

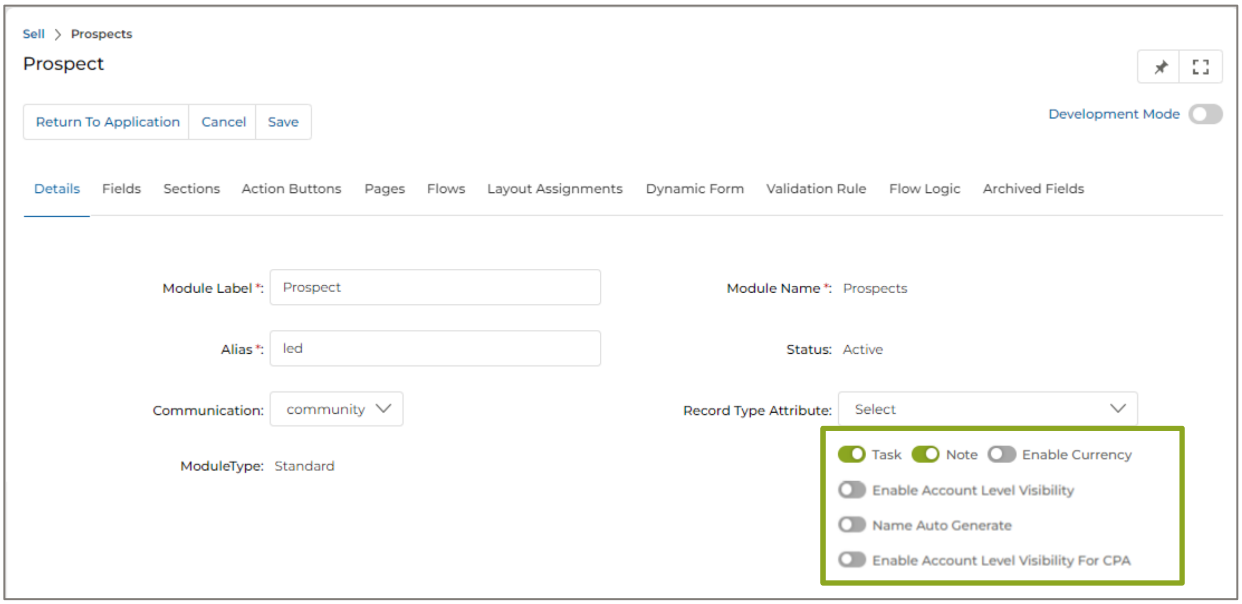
1. View each of the tabs: Details, Fields, Sections, Action Buttons, Pages, Flows, Layout Assignments, Dynamic Form, Validation Rule, X, Flow Logic, and Archived Fields.
2. To modify the details tab information, click 'Edit'**.**

Edit Entity Details

1. You may choose to edit the Module name by renaming it in the **Module Label**, **Module Name,** and **Alias** fields.
2. To make the module available for portal users, the module '**Status**' should be **Active**.
3. If you wish to associate **Tasks, Notes,** and Currency with the chosen module, please select the respective checkboxes.
4. **Communication**: Enable **Community** or **Comments** or **Messages** (as required).
5. **Enable Account Level Visibility** – If the Admin wants to grant permission to let all the Partners/Users reporting to the same Admin and residing at the same access level - view a specific object – irrespective

of the Creator/Record Adder, he needs to enable the toggle key -Enable Account Level Visibility, respective to the Object/Entity ex.: Prospect. Enabling the toggle key will grant permission to all Users/Partners reporting to the Admin to view all records – irrespective of the Creation Status. Disabling the toggle key will only allow the Admin and the Creator of the Record – Partner/User to view the record.

6. **Name Auto Generate – While** creating the entity, we've to define whether the auto-name generation feature would be available for the UPM Entity. This feature would be functional while the UPM Entity would be used as a related list in a module. A more elaborate description of this feature is given below.
7. **Enable Account Level Visibility For CPA –** Enabling this toggle key will grant permission to the specific Channel partner Administrator to view all records – irrespective of the Creation Owner. Disabling the toggle key will only allow the Creator of the Record – Partner/User to view the record.



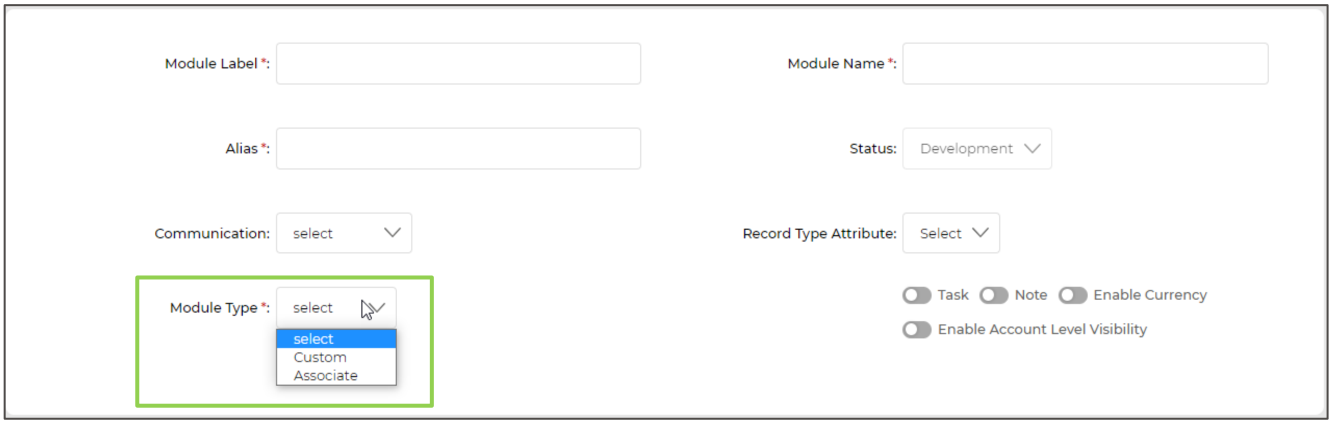
8. Click **Save**.

Option to configure UPM Entity Type as Custom or Associate

UPM's Workflow Module enables admins to configure the UPM **Module Type** as **Custom** or **Associate**. This is a backend feature that needs to be enabled by the Engineering Team. To update the **Module Type**, one must traverse to **Workflow** > **Applications** > **Select a Module** > **Module Details** and **Enable Development Mode** to set the Module Type for that specific Module.

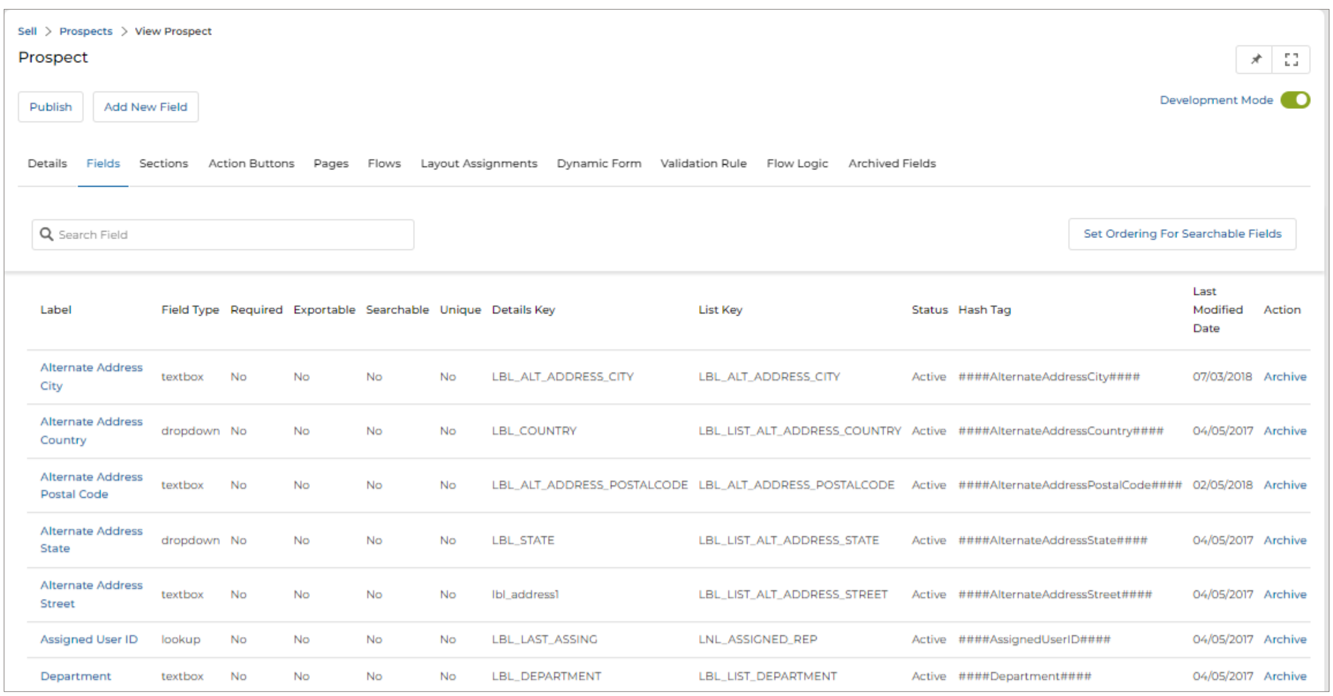
In UPM, we think about database tables as objects, we think about columns as fields, and rows as records. So instead of an Account spreadsheet or Table, we have an Account Module with fields and a bunch of identically structured records. Standard Modules are modules that are included with UPM. Common business Modules like Account, Contact, Prospect, and Opportunity are all standard Modules. Custom Modules are Modules that we create to store information that's specific to a company or industry. Custom Module defines that the UPM Module is a custom one for that specific UPM instance. Associate Module is one which has a relation with another UPM Module.

To update, the Module type, we need to traverse to Workflow > Module Details, with development Mode on, we choose the Module Type and Click Save.



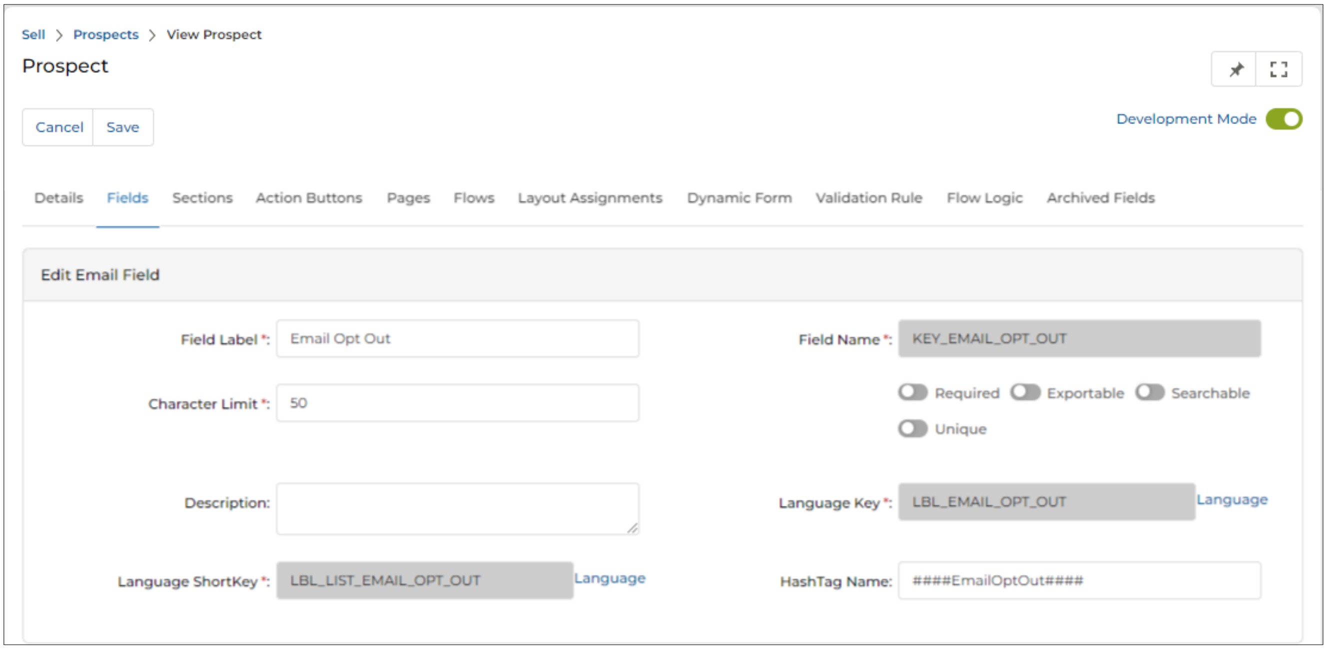
Fields

A field is like a custom Database column. Object field Store the data for the records. ZINFI UPM by default provides few fields with our standard objects those are called standard fields. We cannot delete a standard field. If we want, we can change the label name. The fields that can be created are known as Custom fields. We can delete a custom field in UPM. To edit, **Development Mode** needs to be enabled.



Label	Field Type	Required	Exportable	Searchable	Unique	Details Key	List Key	Status	Hash Tag	Last Modified Date	Action
Alternate Address City	textbox	No	No	No	No	LBL_ALT_ADDRESS_CITY	LBL_ALT_ADDRESS_CITY	Active	####AlternateAddressCity####	07/03/2018	Archive
Alternate Address Country	dropdown	No	No	No	No	LBL_COUNTRY	LBL_LIST_ALT_ADDRESS_COUNTRY	Active	####AlternateAddressCountry####	04/05/2017	Archive
Alternate Address Postal Code	textbox	No	No	No	No	LBL_ALT_ADDRESS_POSTALCODE	LBL_ALT_ADDRESS_POSTALCODE	Active	####AlternateAddressPostalCode####	02/05/2018	Archive
Alternate Address State	dropdown	No	No	No	No	LBL_STATE	LBL_LIST_ALT_ADDRESS_STATE	Active	####AlternateAddressState####	04/05/2017	Archive
Alternate Address Street	textbox	No	No	No	No	lbl_address1	LBL_LIST_ALT_ADDRESS_STREET	Active	####AlternateAddressStreet####	04/05/2017	Archive
Assigned User ID	lookup	No	No	No	No	LBL_LAST_ASSING	LNL_ASSIGNED_REP	Active	####AssignedUserID####	04/05/2017	Archive
Department	textbox	No	No	No	No	LBL_DEPARTMENT	LBL_LIST_DEPARTMENT	Active	####Department####	04/05/2017	Archive

Editing an Existing Field



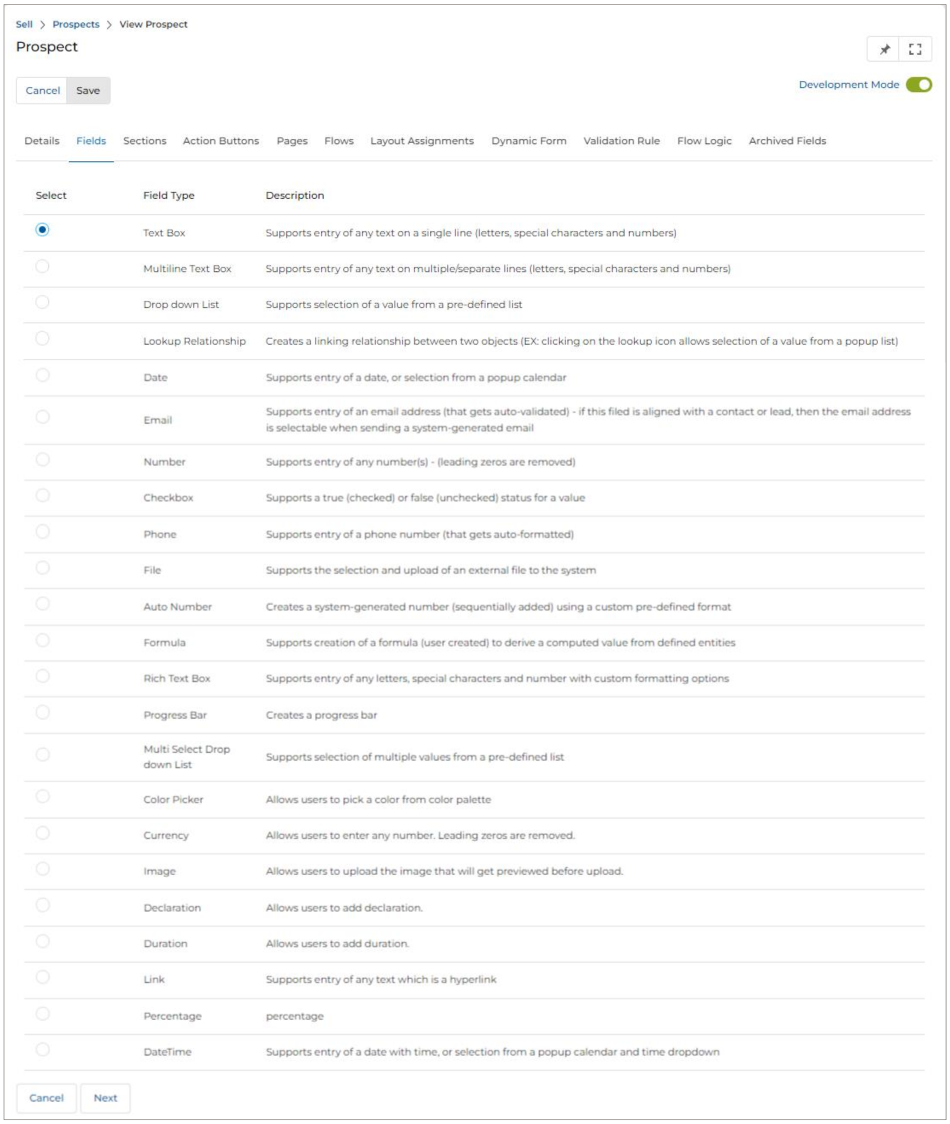
Once a field is created, when editing an existing field – you can only edit certain elements of it:

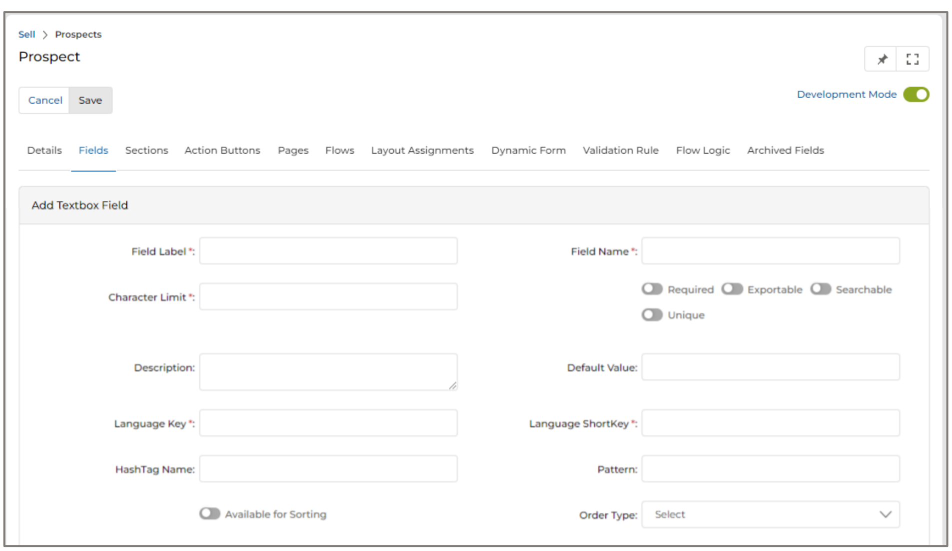
1. **Field Label** – there are three options you have under the name input here:
    a. **Required:** Sets field as a mandatory requirement.
    b. **Exportable:** The field can be exported to other modules.
    c. **Searchable:** The field is searchable by keying search text (the field label)
2. **Language Keys** – You can pick which language(s) this field will appear under.
3. **HashTag Name** - You can set the associated hashtag name, if any.
4. **Description** - What is the description of this field.

Adding a New Field

Select Field Types

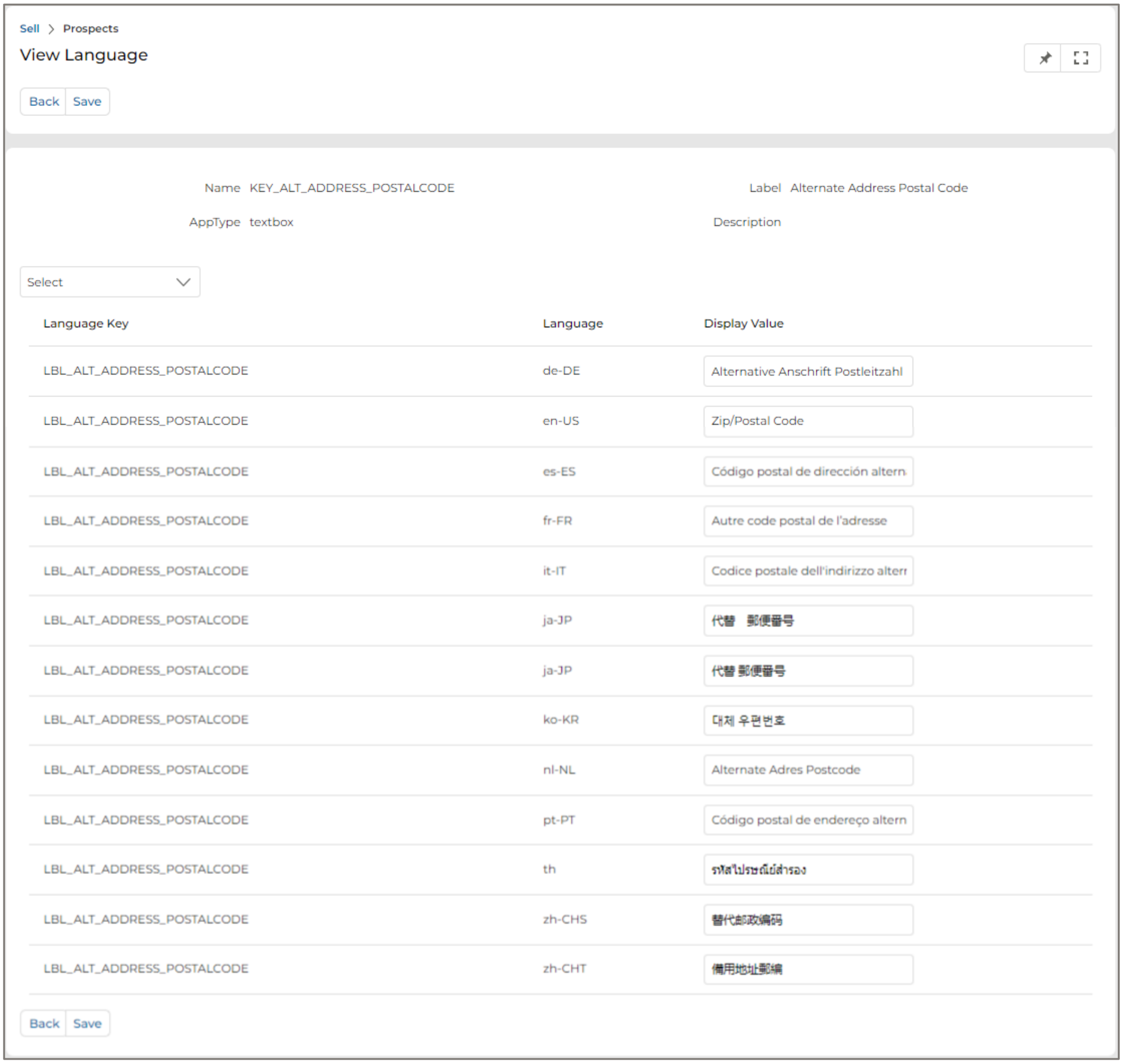
When you click on **Add New Field**, you are redirected to a page where you can select the specific field type. Select the appropriate field type (e.g., Text Box) from the available field types to create the specific field. You can see the field type options and short descriptions of each on this page.


Sell > Prospects > View Prospect
Prospect
Cancel
Save
Development Mode
Details
Fields
Sections
Action Buttons
Pages
Flows
Layout Assignments
Dynamic Form
Validation Rule
Flow Logic
Archived Fields
Select
Field Type
Description
Text Box
Supports entry of any text on a single line (letters, special characters and numbers)
Multiline Text Box
Supports entry of any text on multiple/separate lines (letters, special characters and numbers)
Drop down List
Supports selection of a value from a pre-defined list
Lookup Relationship
Creates a linking relationship between two objects (EX: clicking on the lookup icon allows selection of a value from a popup list)
Date
Supports entry of a date, or selection from a popup calendar
Email
Supports entry of an email address (that gets auto-validated) - if this filed is aligned with a contact or lead, then the email address is selectable when sending a system-generated email
Number
Supports entry of any number(s) - (leading zeros are removed)
Checkbox
Supports a true (checked) or false (unchecked) status for a value
Phone
Supports entry of a phone number (that gets auto-formatted)
File
Supports the selection and upload of an external file to the system
Auto Number
Creates a system-generated number (sequentially added) using a custom pre-defined format
Formula
Supports creation of a formula (user created) to derive a computed value from defined entities
Rich Text Box
Supports entry of any letters, special characters and number with custom formatting options
Progress Bar
Creates a progress bar
Multi Select Drop down List
Supports selection of multiple values from a pre-defined list
Color Picker
Allows users to pick a color from color palette
Currency
Allows users to enter any number. Leading zeros are removed.
Image
Allows users to upload the image that will get previewed before upload.
Declaration
Allows users to add declaration.
Duration
Allows users to add duration.
Link
Supports entry of any text which is a hyperlink
Percentage
percentage
DateTime
Supports entry of a date with time, or selection from a popup calendar and time dropdown
Cancel
Next

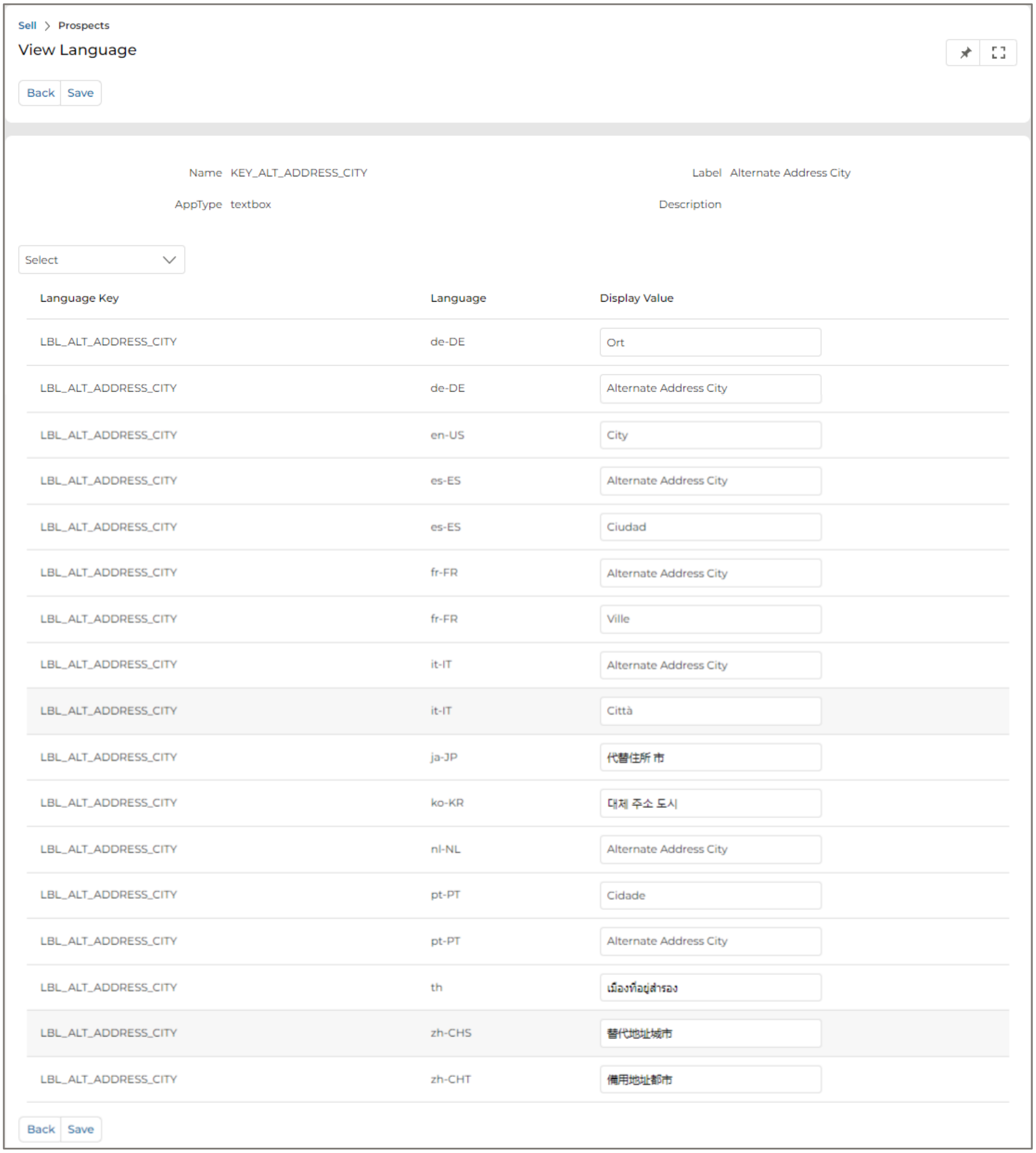

Sell > Prospects
Prospect
Cancel
Save
Development Mode
Details
Fields
Sections
Action Buttons
Pages
Flows
Layout Assignments
Dynamic Form
Validation Rule
Flow Logic
Archived Fields
Add Textbox Field
Field Label *:
Field Name *:
Character Limit *:
Required
Exportable
Searchable
Unique
Description:
Default Value:
Language Key *:
Language ShortKey *:
HashTag Name:
Pattern:
Available for Sorting
Order Type:
Select

Creating Field Values

1. **Field Label** – The actual displayed name of this field in its label. (see *Editing a Field* above)
2. **Field Name** – The name of this field in the system
3. **Character Limit** – How many characters is this field limited to have typed in?
4. **Description** – What is the description of this field?
5. **Language Key** – The ability to set what display value you wish this field to have when viewed in different languages of the UI:



6. **Language Short Key** – Ability to select which language(s) you want this field to be available for.



Sell > Prospects

View Language

Back Save

Name KEY_ALT_ADDRESS_CITY

Label Alternate Address City

AppType textbox

Description

Select

Language Key	Language	Display Value
LBL_ALT_ADDRESS_CITY	de-DE	Ort
LBL_ALT_ADDRESS_CITY	de-DE	Alternate Address City
LBL_ALT_ADDRESS_CITY	en-US	City
LBL_ALT_ADDRESS_CITY	es-ES	Alternate Address City
LBL_ALT_ADDRESS_CITY	es-ES	Ciudad
LBL_ALT_ADDRESS_CITY	fr-FR	Alternate Address City
LBL_ALT_ADDRESS_CITY	fr-FR	Ville
LBL_ALT_ADDRESS_CITY	it-IT	Alternate Address City
LBL_ALT_ADDRESS_CITY	it-IT	Città
LBL_ALT_ADDRESS_CITY	ja-JP	代替住所 市
LBL_ALT_ADDRESS_CITY	ko-KR	대체 주소 도시
LBL_ALT_ADDRESS_CITY	nl-NL	Alternate Address City
LBL_ALT_ADDRESS_CITY	pt-PT	Cidade
LBL_ALT_ADDRESS_CITY	pt-PT	Alternate Address City
LBL_ALT_ADDRESS_CITY	th	เมืองที่อยู่สำรอง
LBL_ALT_ADDRESS_CITY	zh-CHS	替代地址城市
LBL_ALT_ADDRESS_CITY	zh-CHT	備用地址都市

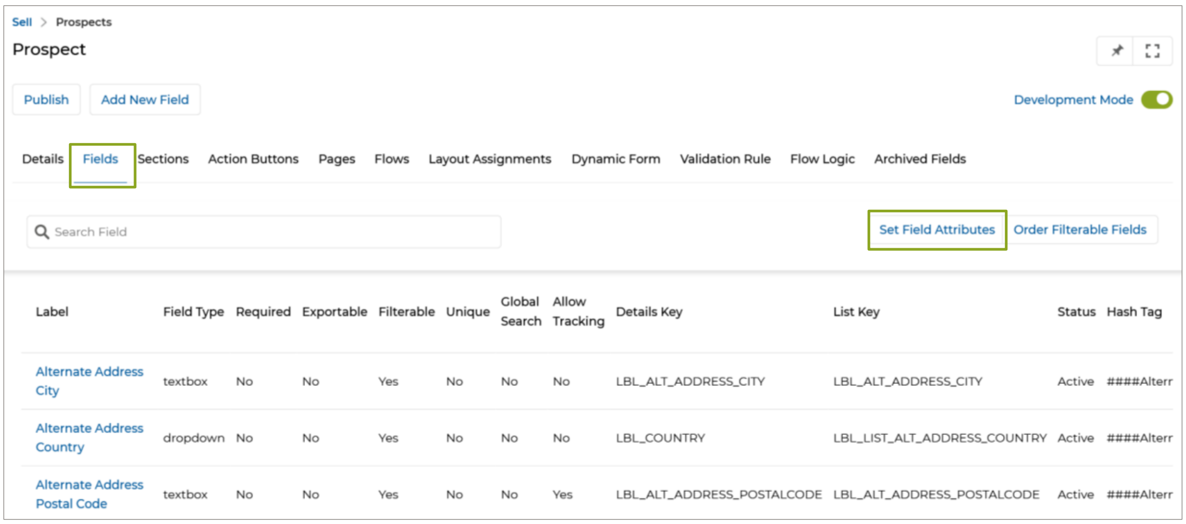
Back Save

7. **Status** – What is the status of this field, as far as being enabled?
8. **Hash Tag Name** – What do you want the hash code name for this field to be? *(this would be the hashcode that can be used and placed in marketing materials to dynamically pull in values from this field into those content pieces).*

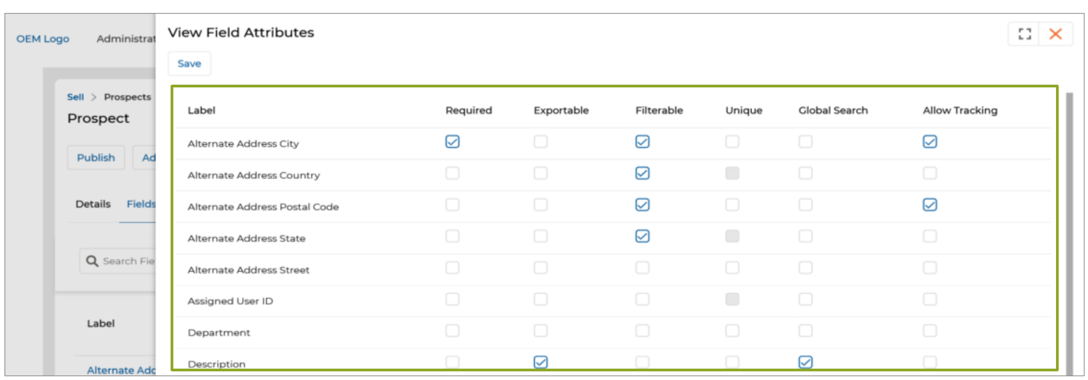
Set Field Attributes Panel

ZINFI has introduced a centralized panel to manage field-level attributes, viz. Required, Exportable, Unique, etc., with ease and efficiency. This streamlines the user experience by enabling direct, bulk attribute management across multiple fields in a single window, eliminating the previous need to navigate individually through each field's configuration in the workflow application.

- Click on Set Field Attributes.



- This opens a scrollable and searchable matrix where you can:
  - Filter fields.
  - Check/uncheck attributes.
  - Click "Save" to apply updates in real time.

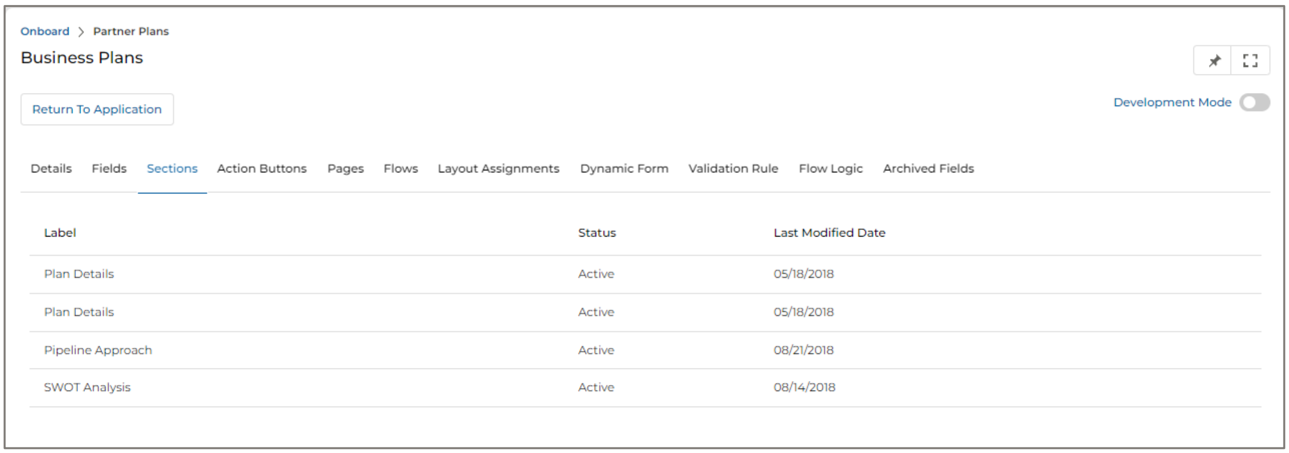


- With the introduction of the Set Field Attributes feature – accessible via the Fields tab in Workflow – users can now:
  - View a consolidated matrix of all fields and their current attribute statuses.
  - Enable or disable field-level properties (like Required, Exportable, Filterable, Unique, Global Search, Allow Tracking) across multiple fields in bulk.

- Instantly update attributes via checkbox toggles with real-time UI feedback.
- Avoid accidental misconfigurations by working within a clean, tabular layout.

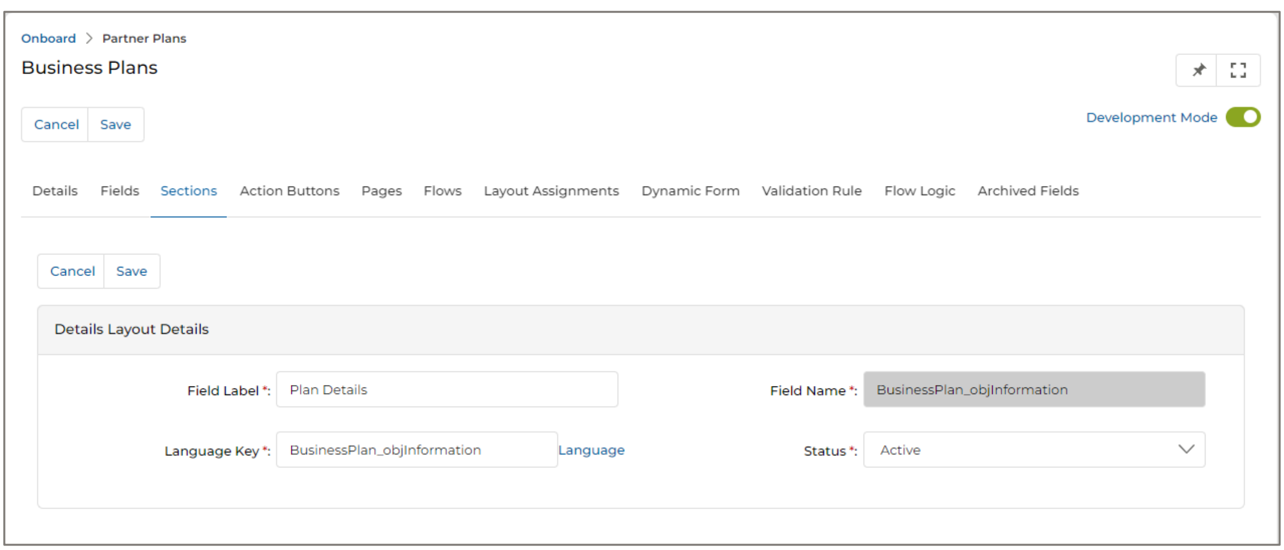
Sections

A section is a container of fields in ZINFI UPM. The user creates a section in ZINFI UPM and puts fields already created into the section to make it usable. To view sections associated with a module, click on **Sections**. To edit a particular section, click on that section.



Editing an Existing Section

Workflow users can update the following values of a section (marked with a red asterisk in the figure below):



1. **Language Key** is where you select the display values for the label (header) display when viewed in various language UIs.

2. **Status** can be set as Active or Inactive
3. ***Only the creator of a section can update the name field.***

Adding a NEW Section

To create a new section click **Add New Section** (as shown in *Fig i* below) and then enter the required values (as shown in *Fig ii* below)

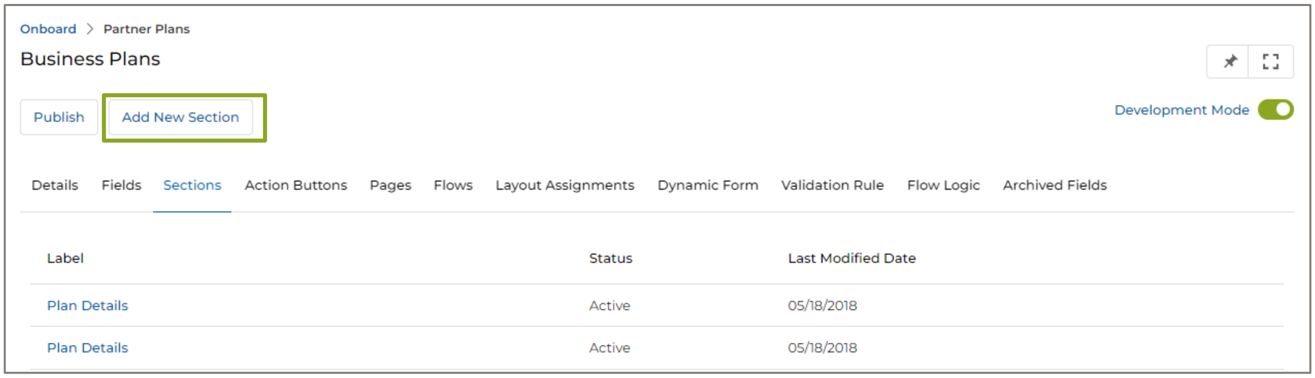


Fig i

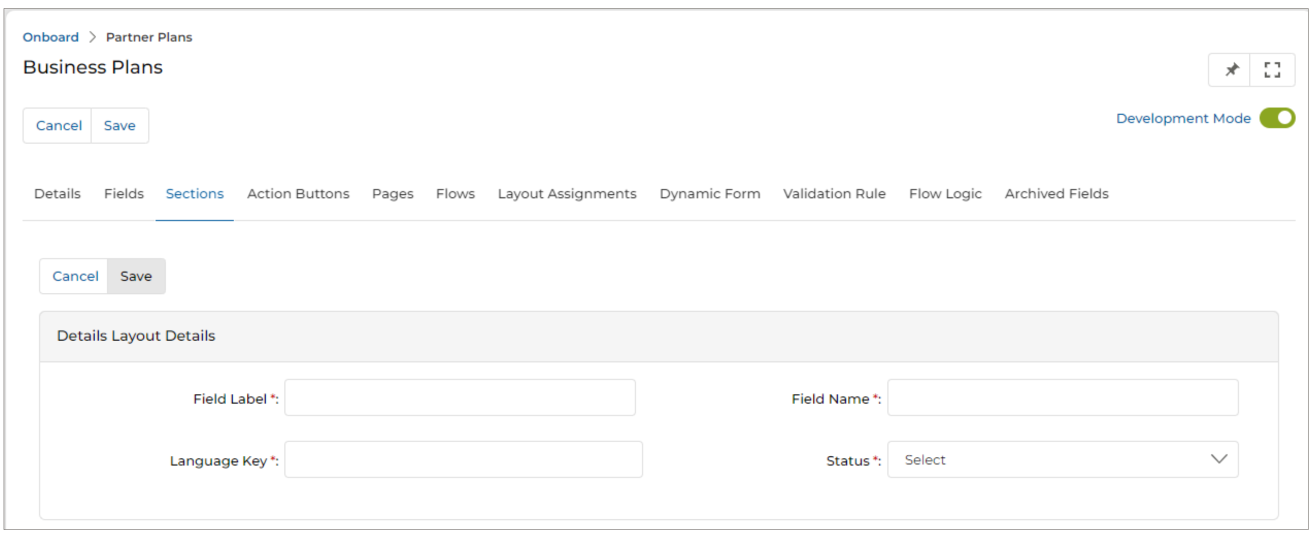


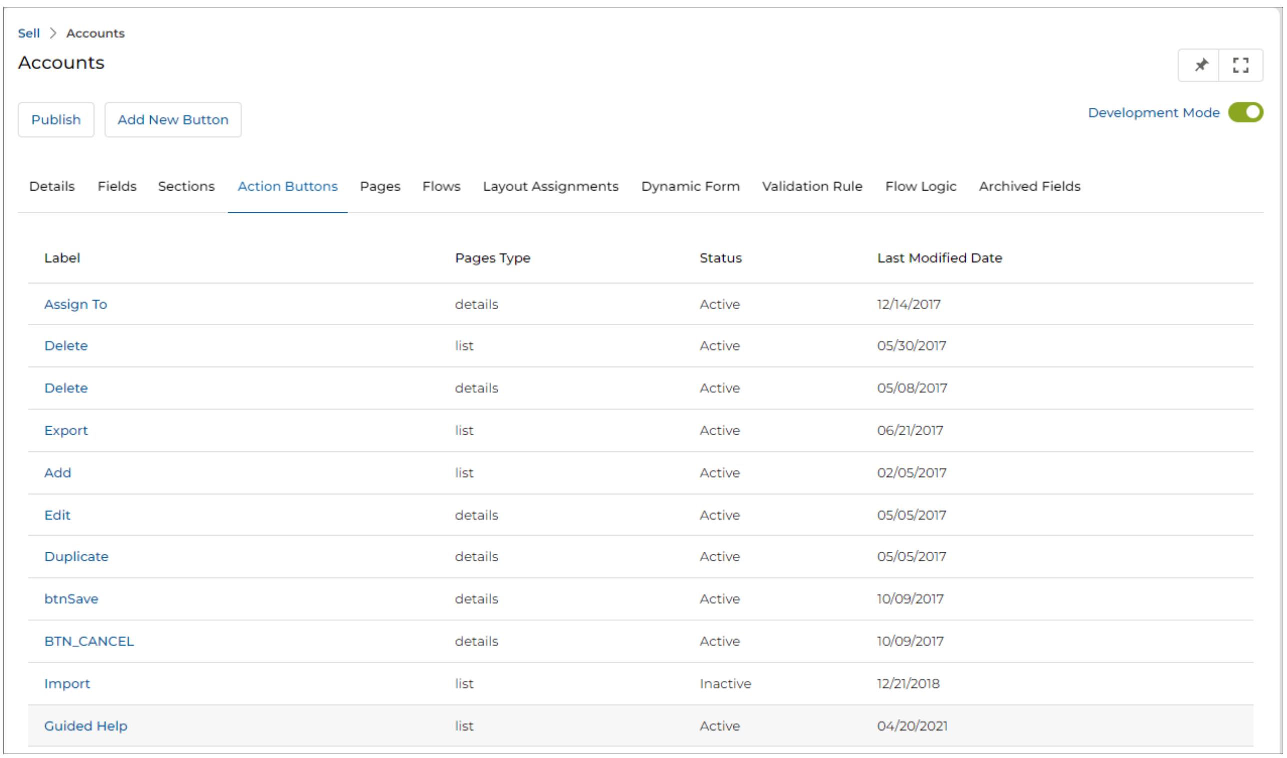
Fig ii

1. **Field Label** – What is the name to be displayed at the top of this section on the page?
2. **Field Name** – What is the system name of this section?
3. **Language Key** – Select what display (label) values show in different language UIs.
4. **Status** – Can be set as Active or Inactive
5. Once you have entered the values, click on **Save** to save the newly created section.

Action Buttons

Action buttons provide a specific set of actions to users for the page in which it is viewable. Examples of action buttons are Add, Edit, Delete, Search, etc.

The page associated with “Action Buttons’ provides the default list of actions that can be performed in the specific module.



Label	Pages Type	Status	Last Modified Date
Assign To	details	Active	12/14/2017
Delete	list	Active	05/30/2017
Delete	details	Active	05/08/2017
Export	list	Active	06/21/2017
Add	list	Active	02/05/2017
Edit	details	Active	05/05/2017
Duplicate	details	Active	05/05/2017
btnSave	details	Active	10/09/2017
BTN_CANCEL	details	Active	10/09/2017
Import	list	Inactive	12/21/2018
Guided Help	list	Active	04/20/2021

The following list of actions are provided by default for any specific module:

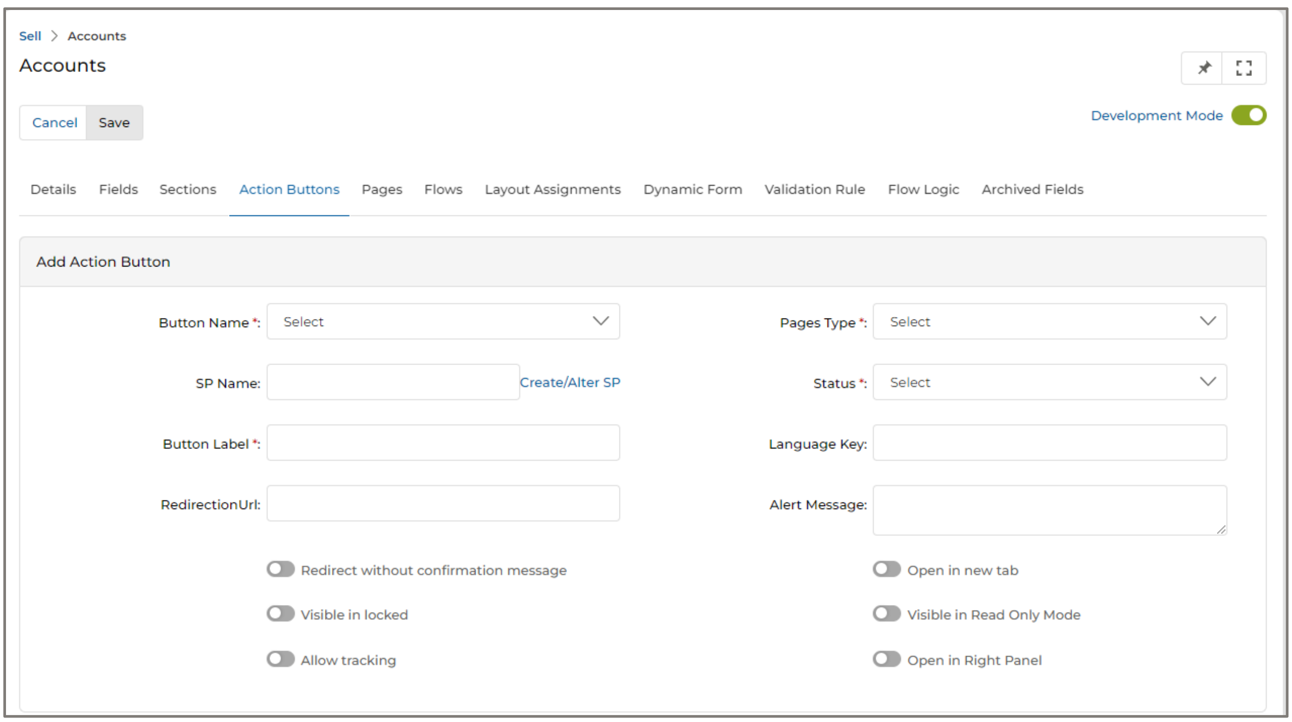
- Add
- Edit
- Delete
- Save

- Cancel
- Assign To
- Export
- Sort Order (available in the related list; requires support from the ZINFI configuration team)
- Approve
- Reject
- Recall

Created actions can be edited. Editable fields are like those specified in the Add Action section below.

Add a NEW Action Button

Clicking the 'Add New Button', a new page opens up where the user is required to input values for each of the fields as discussed below:



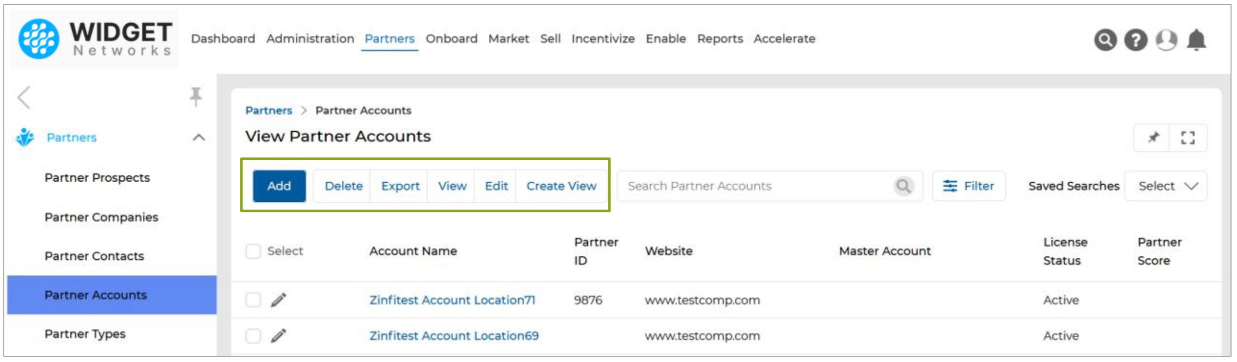
1. **Button Name:** Can be selected from the drop-down list (Add, Assign To, Cancel, etc.)
2. **Page Type:** Can be set as List Page or Details Page
3. **Button Label:** What is the display name for this button?
4. **Status:** Can be set as Active or Inactive
5. **Redirection URL:** What URL/page does this button redirect around to?
6. **Open in a new tab** (checkbox): If enabled, the page uniformly opens in a new tab

7. **Redirect without confirmation message** (checkbox)**:** If enabled, the page redirects without displaying a message
8. **Visible in locked** (checkbox)**:** If enabled, the action is visible for the locked record.
9. **Allow Tracking** (checkbox): Once enabled, a log is generated and maintained at the back end, for this particular action button, capturing information viz. Created On, Clicked By, Clicked On, etc. If required, any specific log report associated with this action button can be extracted.
10. **Visible in Read Only Mode** (checkbox)**:** If enabled, the page becomes visible in the 'Read Only' mode only.
11. **Open in Right Panel:** Once enabled, the page will open from the right panel**.**
12. **Save:** Once done, click the **Save** button**.**

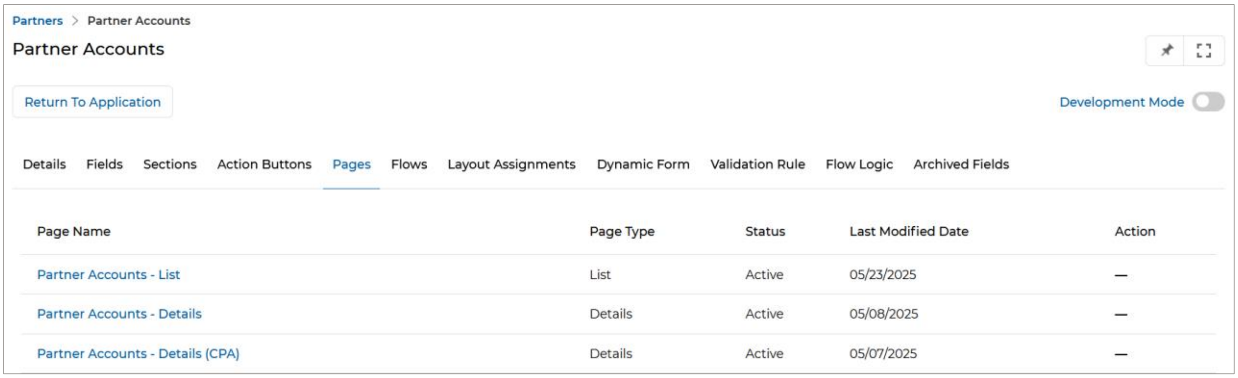
Collapsible CTA Button

This feature enhances user experience by allowing Admins to configure a clear and clutter-free action area through a collapsible primary CTA (Call-to-action) button setup. Admins can designate a single action, such as "Add", which is prominently displayed, while grouping less frequently used actions under a collapsible dropdown. This simplifies the interface, helps users focus on key tasks, and reduces visual noise by hiding secondary actions until needed.

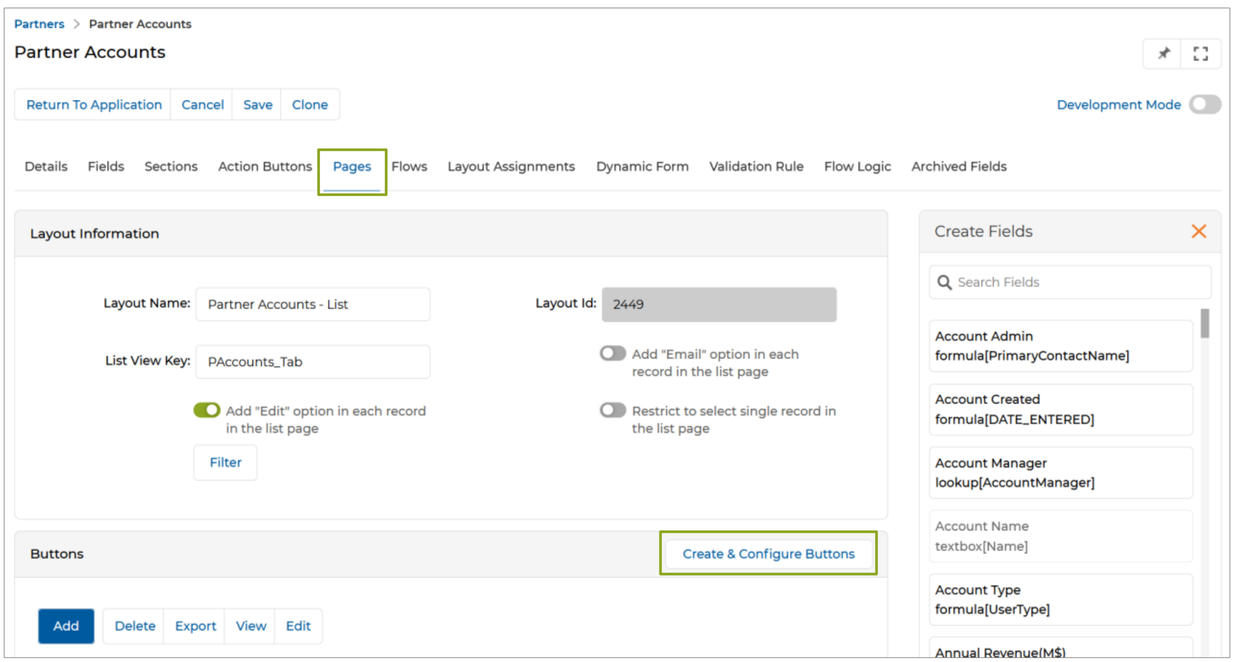
1. Log in to the portal as an Admin and navigate to Partners > Partners > Partner Accounts, to reach the View Partner Accounts page, where all the Partner Accounts are listed.



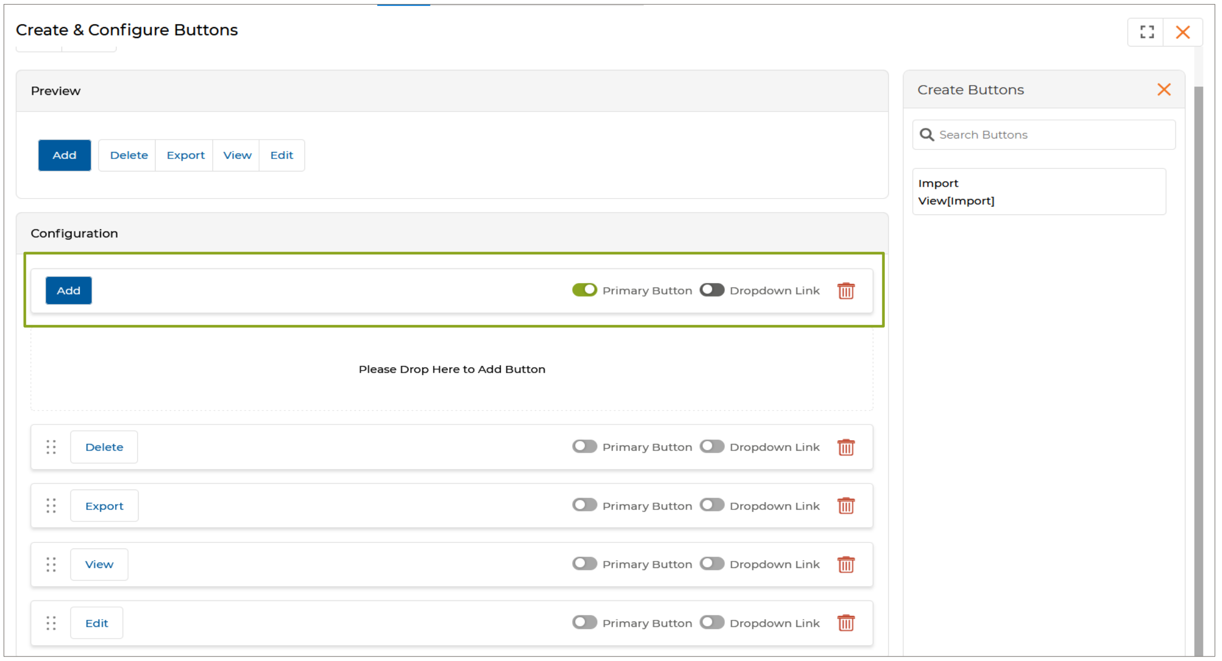
2. Now, navigate to Workflow > Pages > Partner Accounts – List and go to the configuration page.



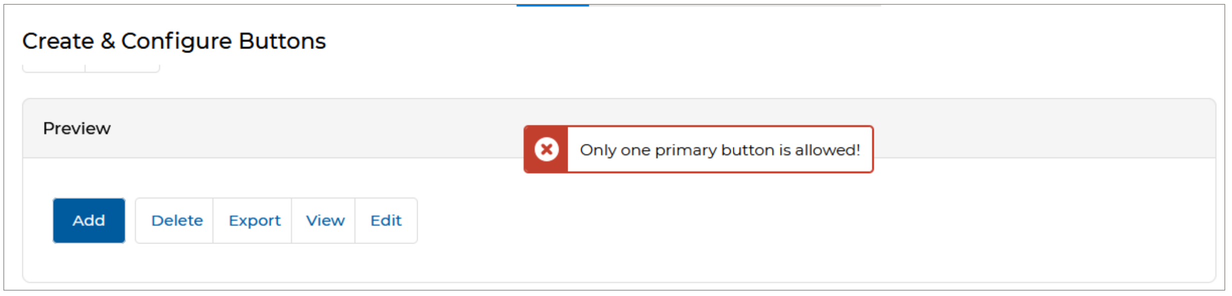
3. Click "Create & Configure Buttons" page and reach Create & Configure Buttons page.



4. We see that by default "Add" button is already configured as the Primary Button.

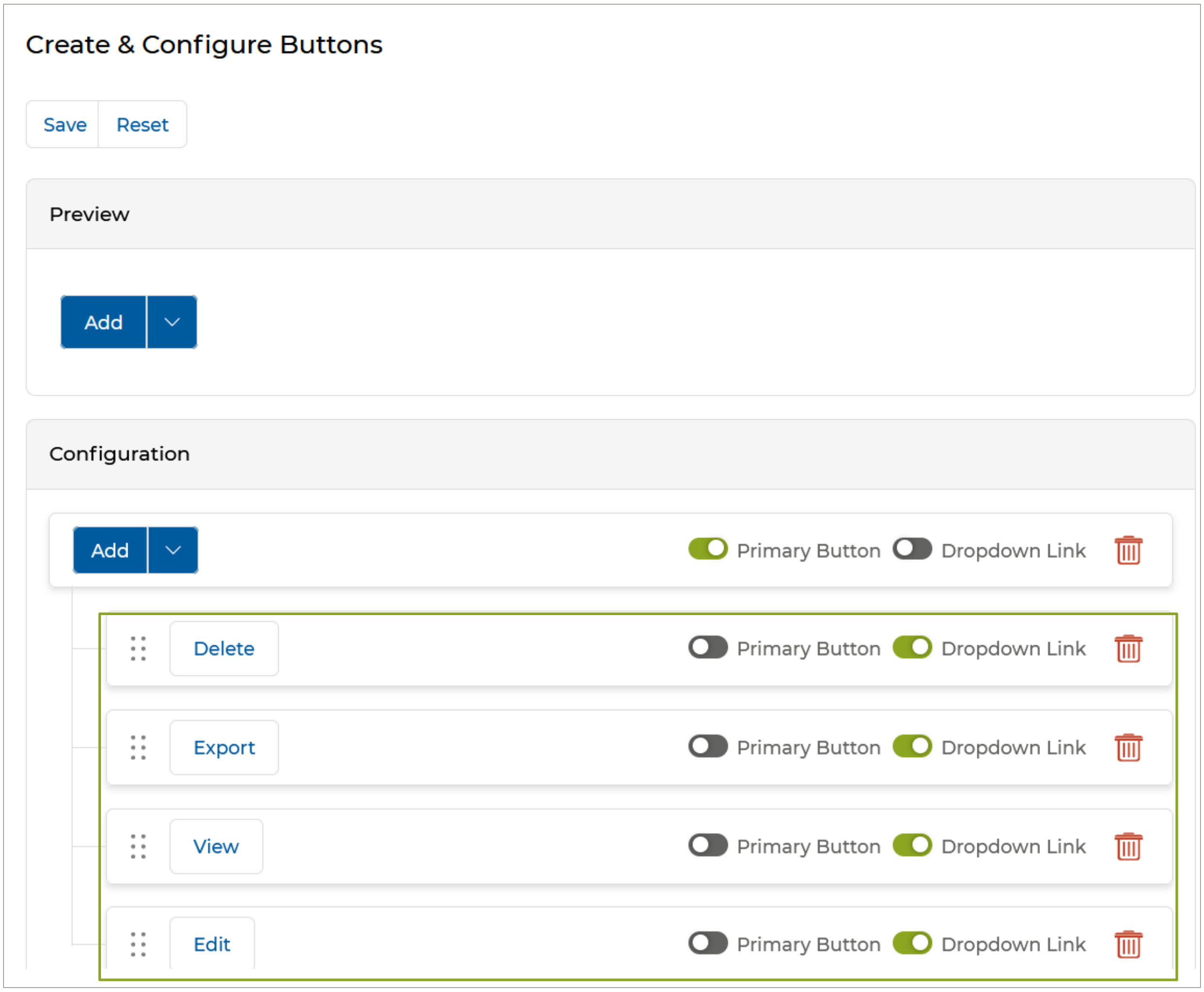


5. Admins can configure one button as each page's "Primary" action. Only one button can be marked as Primary at a time. If another button is selected, the system alerts the admin that only one primary button is allowed.

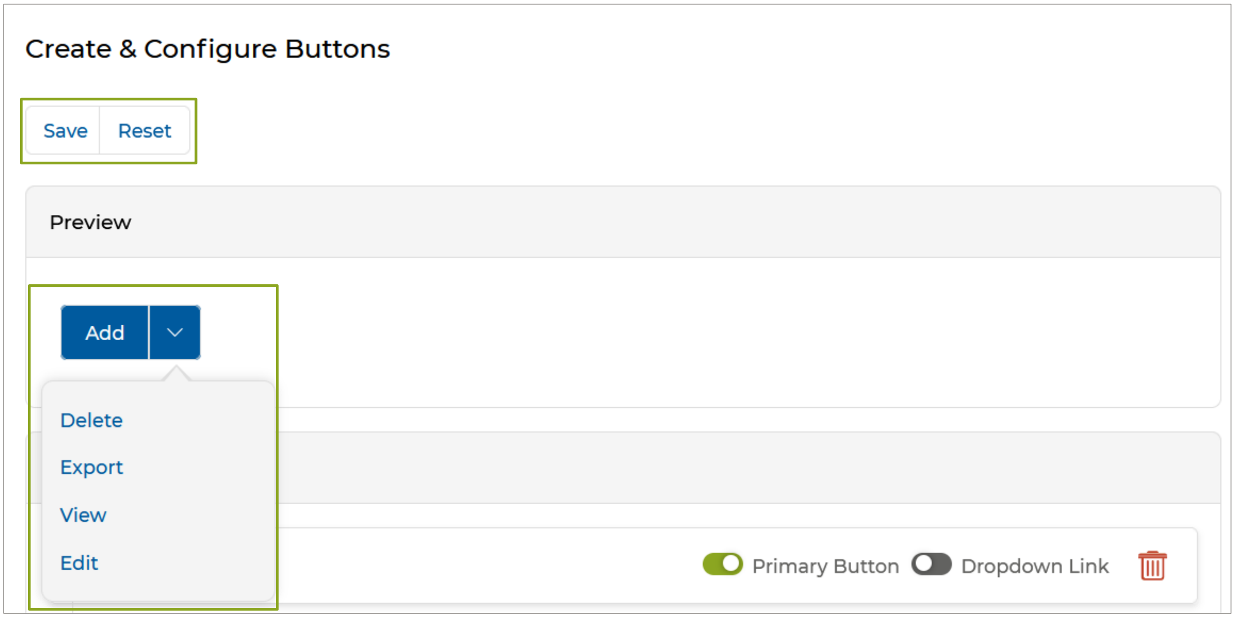


6. The primary button is visually distinct and blue to indicate the main action expected from the user.

7. Less frequently used buttons (e.g., “Delete,” “Export,” “View,” “Edit,” etc.) can be placed inside a collapsible dropdown menu by enabling the “Dropdown Link” toggle button.



8. This menu appears when the user hovers over or clicks a down-arrow icon beside the primary button. This helps maintain a clean interface by hiding secondary actions while keeping them easily accessible.

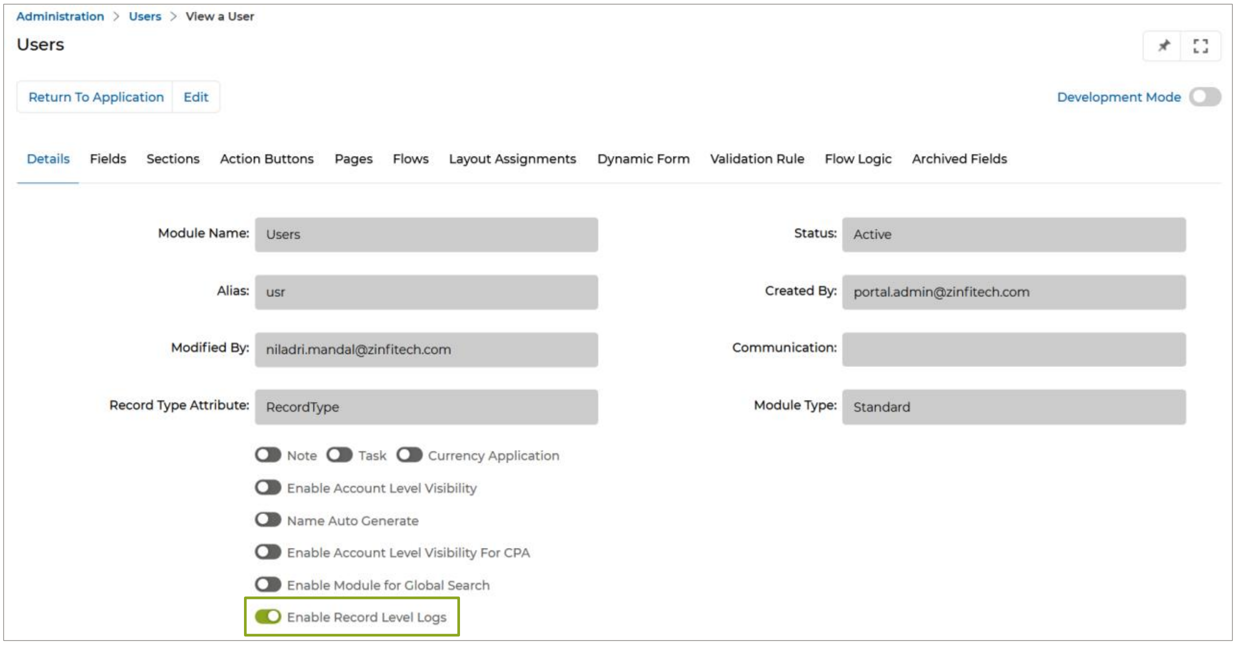


9. A real-time preview panel reflects changes instantly, helping admins visualize the final UI before saving.
10. Once the desired configuration is set, admins can click "Save" to apply the changes to the application page. A "Reset" button is available to revert to the default layout, i.e., the original setup before any customizations.
11. Once we return to the View Partners Accounts page, we see a streamlined interface with the most important action (Primary Button). All secondary actions are grouped under a collapsible menu, reducing visual clutter and making the interface more intuitive and focused.

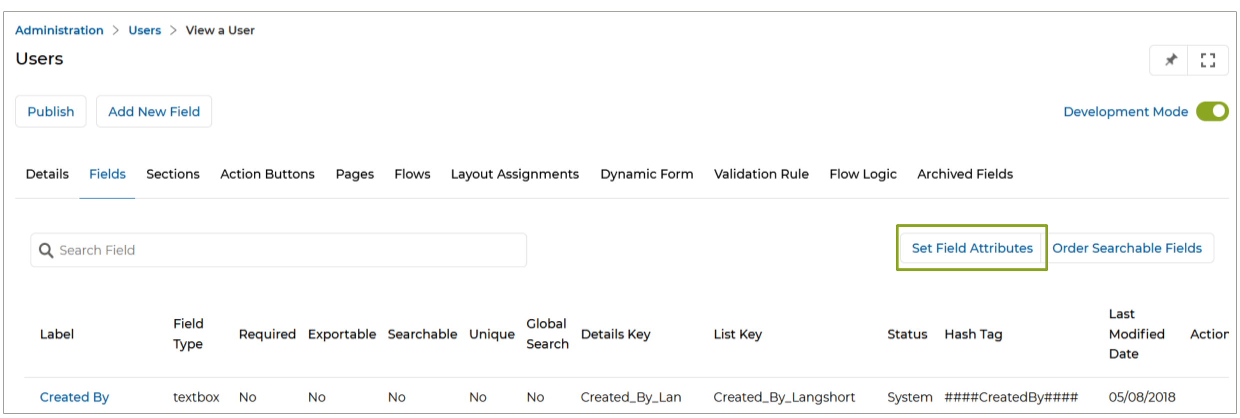
Record-Level Log History

Within Workflow, Record-Level Log History is an administrative configuration that enables tracking of all changes made to records in any application (like Prospects, Contacts, etc.). This feature helps ensure data accountability by capturing detailed logs of field-level changes, accessible to both Admins and Partners based on their field access rights.

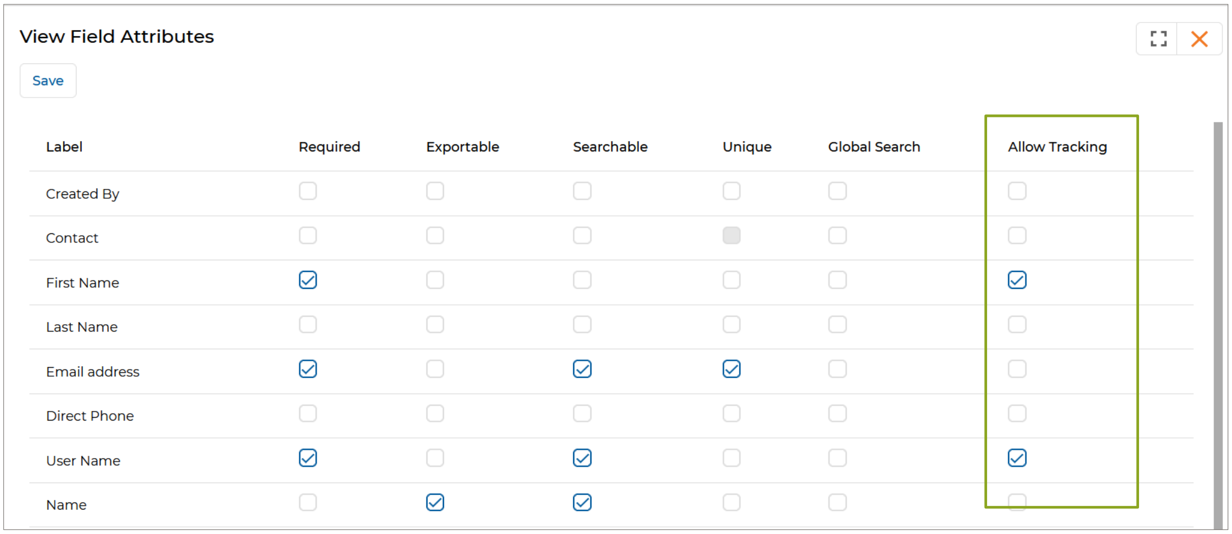
1. Navigate to Workflow and open the desired application in Edit mode. In this example, we have selected Users.



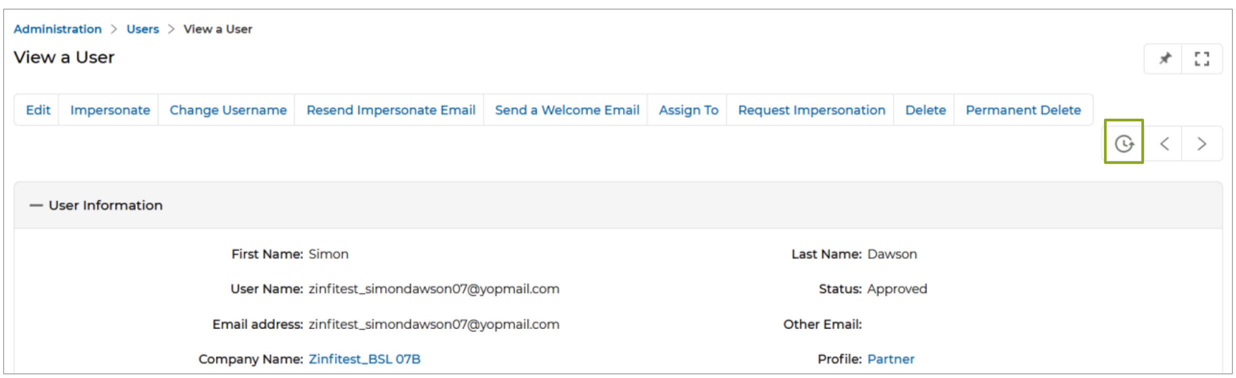
2. Enable "Enable Record Level Logs" as shown in the above image. This enables the history icon to appear on records under that application.
3. Now, we go to the Fields section within the same application and enable Development Mode.
4. We click Set Field Attributes to open the side configuration panel (View Field Attributes).



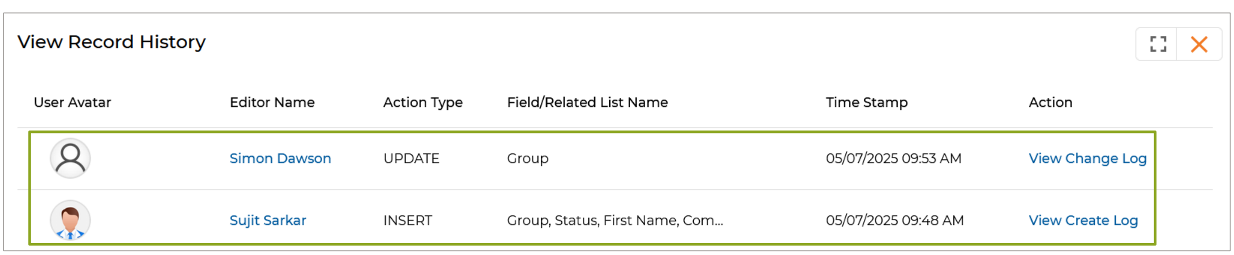
5. For each field we want to track, enable the "Allow Tracking" option (as shown in the above image). Only changes to fields with this setting enabled will be logged. Once done, click Save.
6. From this point on, any inserts (creation) or updates to tracked fields will be captured in the system.



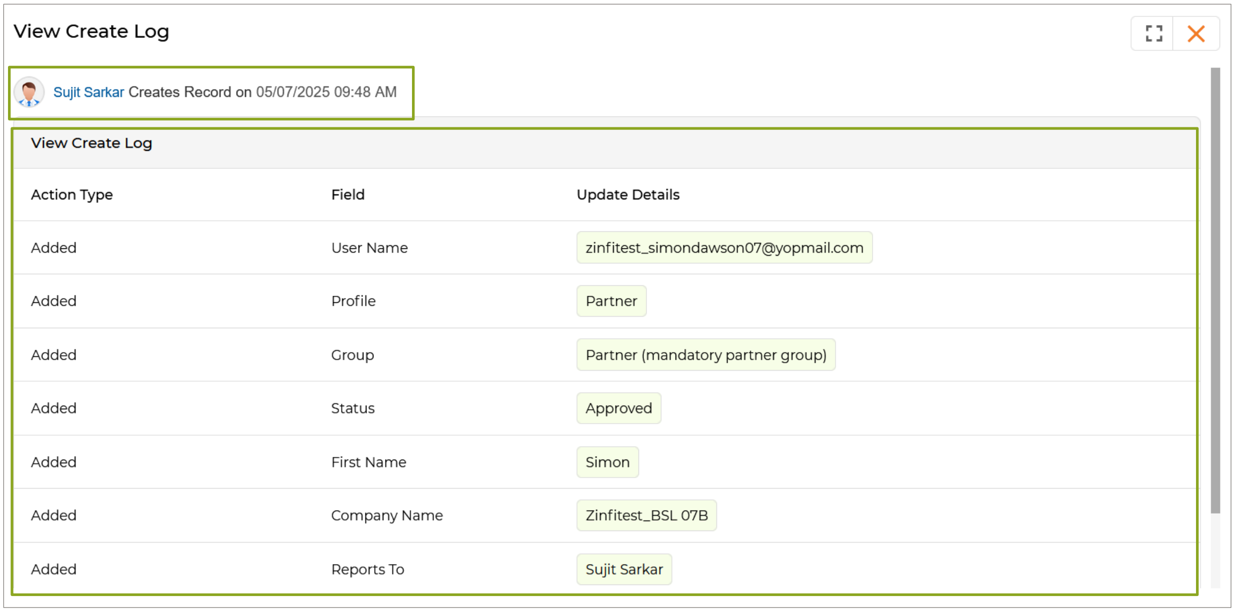
7. From then on, any inserts (creation) or updates to tracked fields will be captured in the system.
8. Once we go to the user details page, the History icon appears.



9. Clicking the History icon takes us to the View Record History window, where logs are visible.



10. Clicking View Create Log opens a detailed view showing the trackable fields and their corresponding values that were entered when the user record was created.



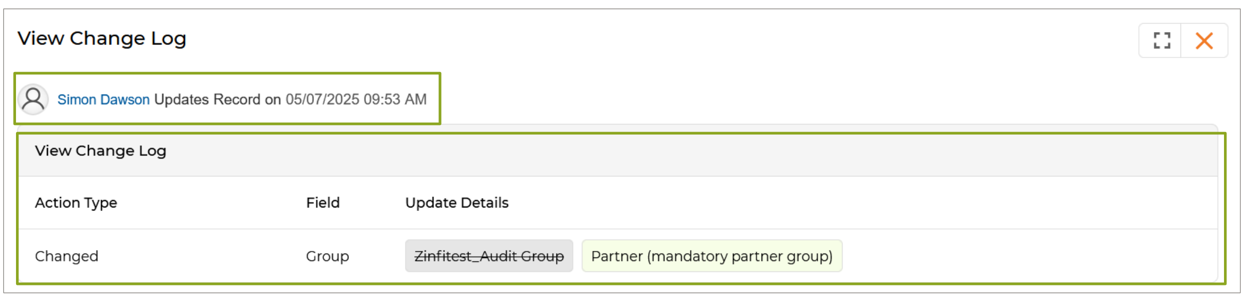
View Create Log

Sujit Sarkar Creates Record on 05/07/2025 09:48 AM

View Create Log

Action Type	Field	Update Details
Added	User Name	zinfitest_simondawson07@yopmail.com
Added	Profile	Partner
Added	Group	Partner (mandatory partner group)
Added	Status	Approved
Added	First Name	Simon
Added	Company Name	Zinfitest_BSL 07B
Added	Reports To	Sujit Sarkar

11. Clicking View Change Log displays the details of any modifications made to trackable fields, including the original and updated values.



View Change Log

Simon Dawson Updates Record on 05/07/2025 09:53 AM

View Change Log

Action Type	Field	Update Details
Changed	Group	~~Zinfitest_Audit Group~~ Partner (mandatory partner group)

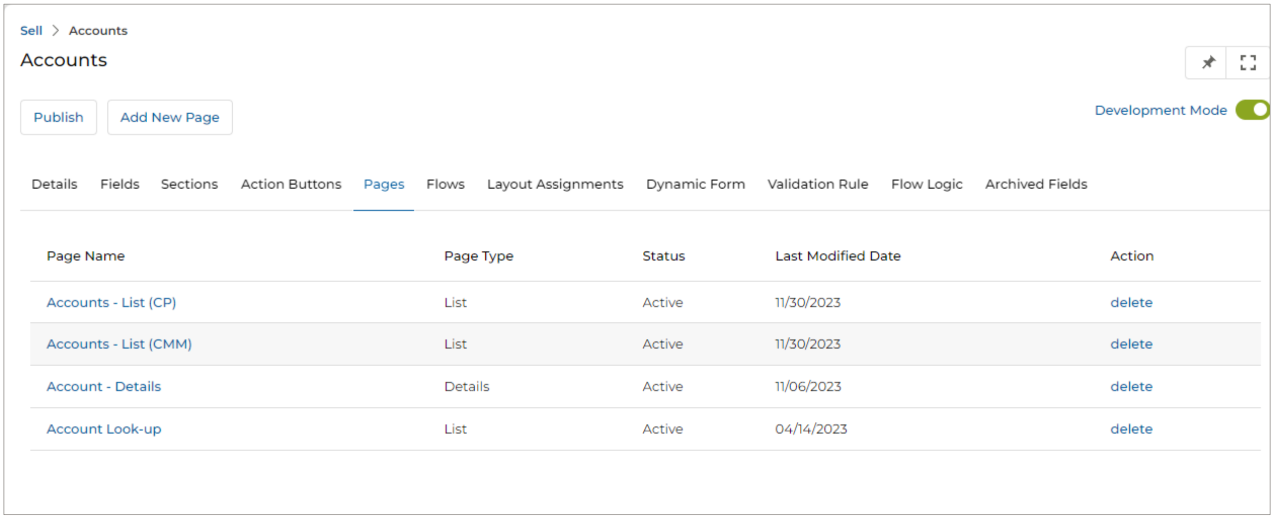
Pages

FlexiFlow Pages lets you create your pages containing the required action buttons, sections, and fields that have already been created.

Pages are generally of two types:

- **List pages** – These are the pages that show the listing of records or content (the View or Library pages)
- **Detail pages** – These are the pages that contain the details of records or content (the clickthrough into details)

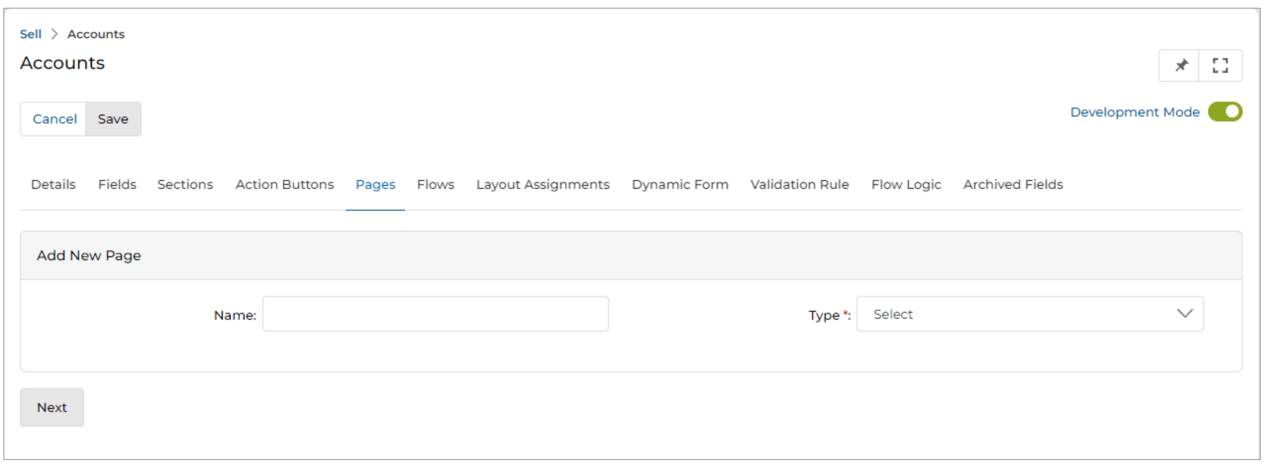
Existing pages can be viewed and edited as per the figure below:



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

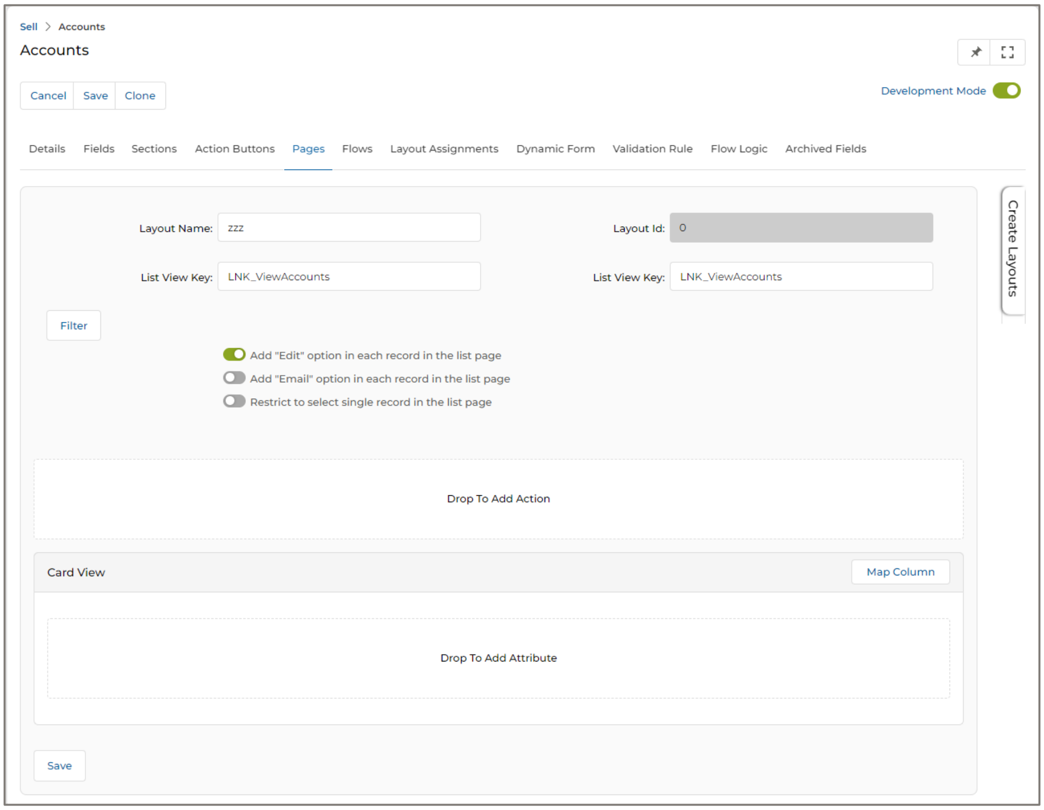
Add a NEW List Page:

A new page can be created by clicking **'Add New Page'** when the following page opens**.**



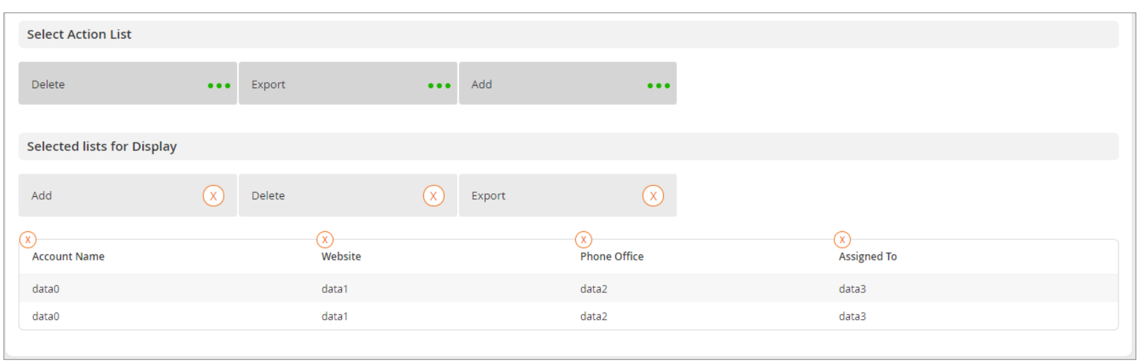
1. **Name:** What is the name of this page?
2. **Type:** Select *List* as the type for this page.

3. Once done click on **Next** and fill up the required fields.



The following operations are carried out next:

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



Add a NEW Details Page

FlexiFlow Pages lets you create/update UPM portal pages inclusive of action buttons, sections, and fields.

Pages are generally of two types:

- List pages – Pages that show the listings of records for a specific module.
- Detail pages – Pages that hold the details of records for a specific record of a specific module.

The following update extends the layout architecture configurability by UPM Admins and Users. You can create or edit the details page (which can be thought of as a form), by configuring the Layout - initially containing one row and one column, and all dimensions are in Point of View. When creating or editing such pages, you can add rows and columns to a form, as necessary.

Your page layout plays a large role in how well you reach out to your users and partners. That's because a great page layout leads to seamless page view and update/completion. Users and Partners will easily operate at ease once you've created a page that's hassle-free and feels both professional and thoughtful.

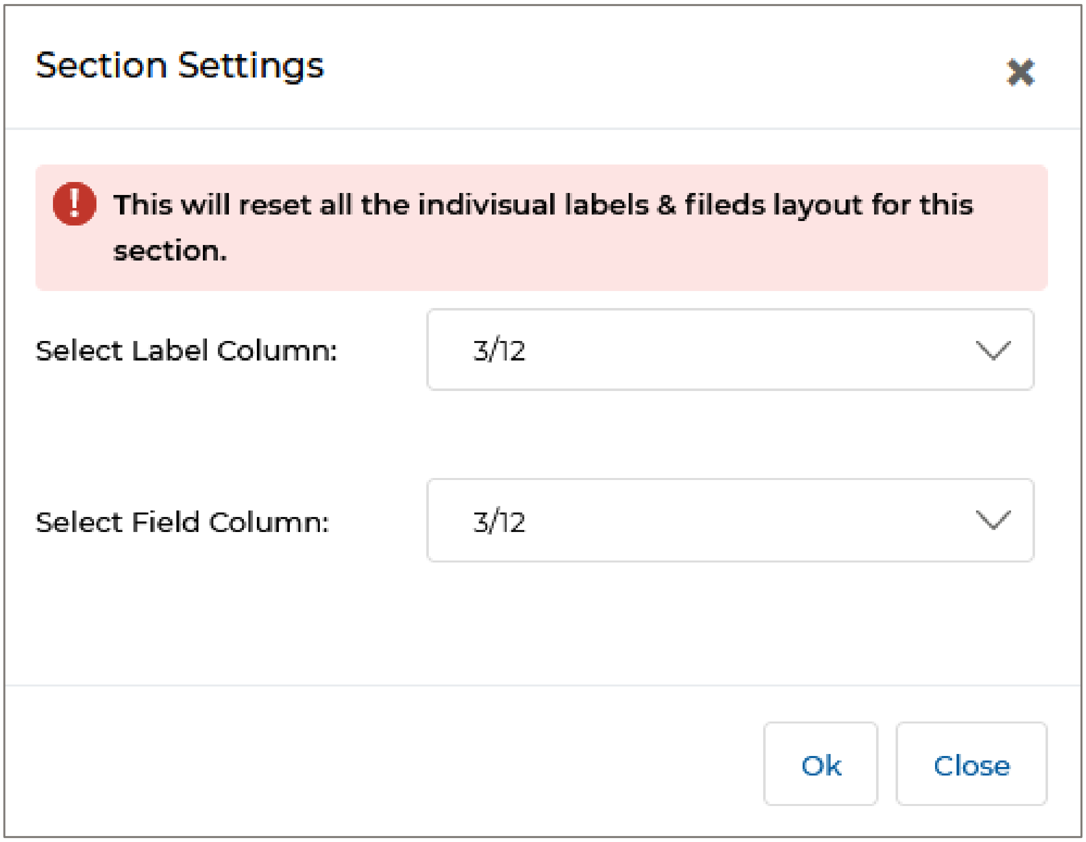
Colum Page Layouts keep the location and order of all your fields as straightforward as possible. By organizing your fields this way, your users won't miss a field, they'll complete the fields in the order that makes the most sense, and they'll be able to submit records faster.

The following operations are possible in creating a details page:

1. Add sections
   a. Add fields by dragging **Field(s)** from the adjoining **Create Layouts** window.

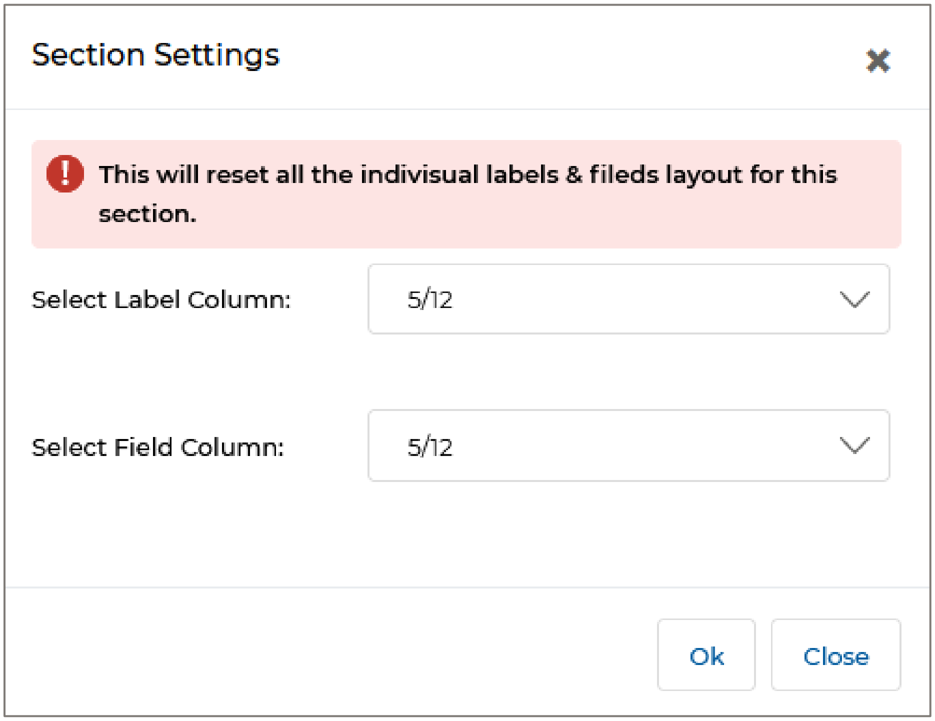
b. **Fields** can be marked as **read-only** on the **Add** and **Edit** page by clicking the '**Settings'** button of each individual **Label** and **Field**.

c. Clicking the '**Settings'** button opens up the following window, where measurement of **Label**

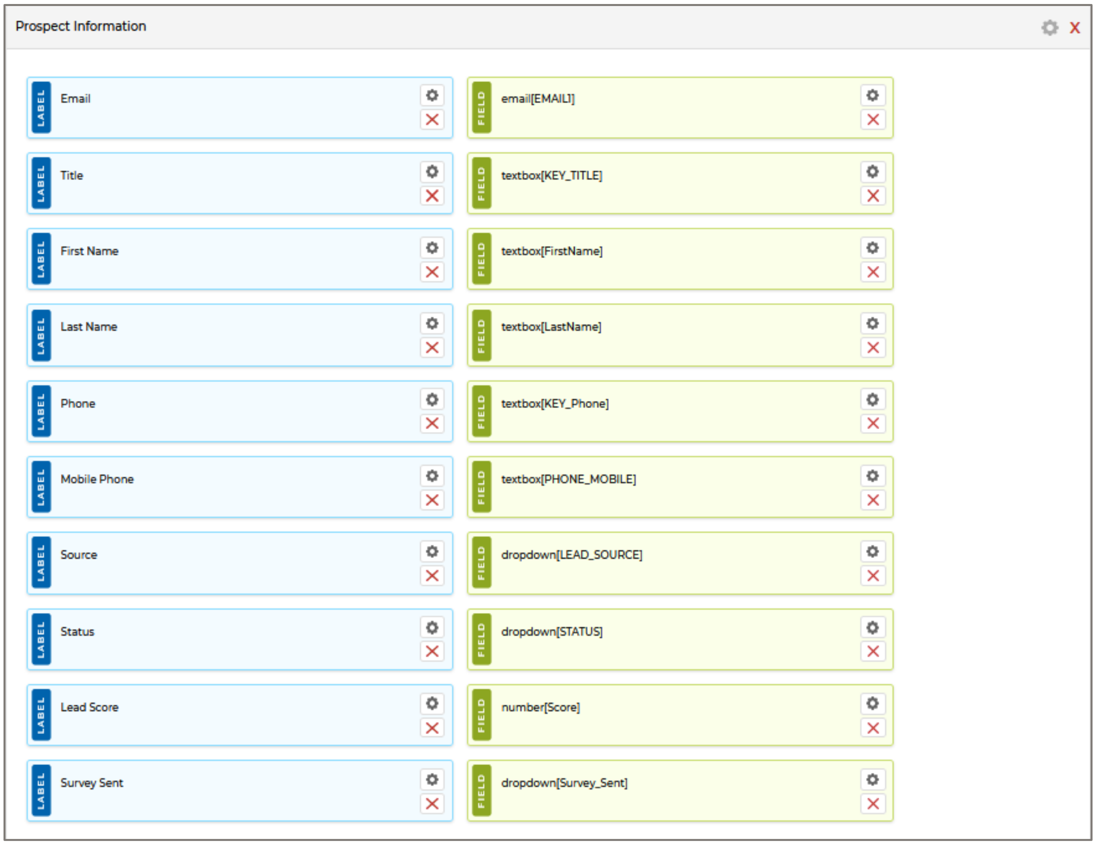


Columns and **Field Columns** are defined. Measurement as per Grid Layout can be changed from dropdown in the same window as well.

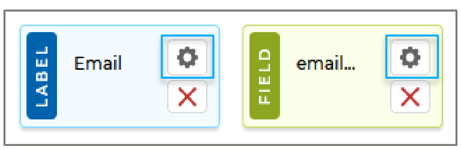
d. Now we change the **Label Column** and **Field Column** Grid Layout measurements of the **Section**.

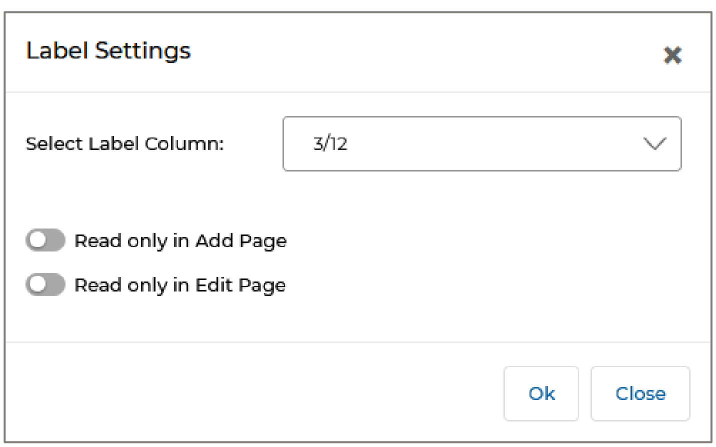


e. Now, the layout **Labels** and **Fields** will appear to be like the following image.

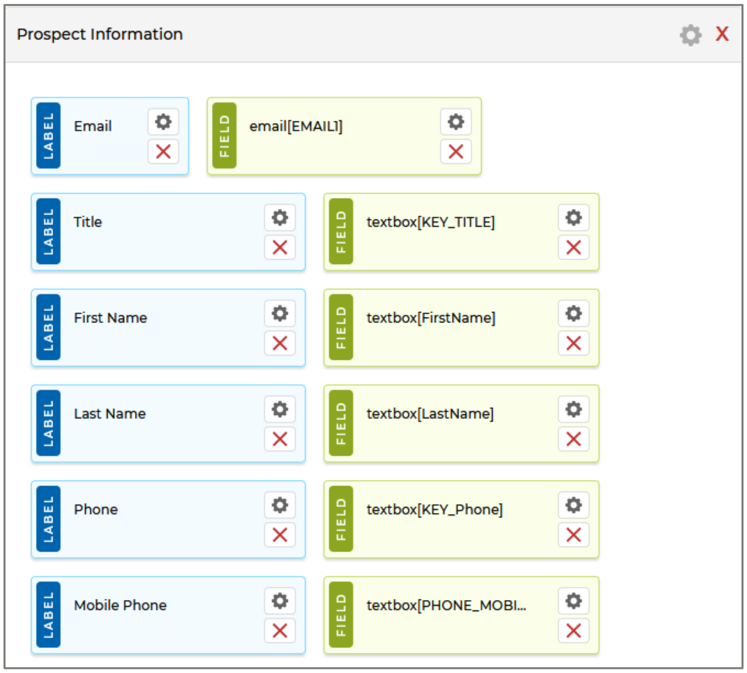


f. Now, we change the alignment and measurement of individual **Labels** and **Fields** by clicking the '**Settings**' buttons of individual **Labels** and **Fields**.

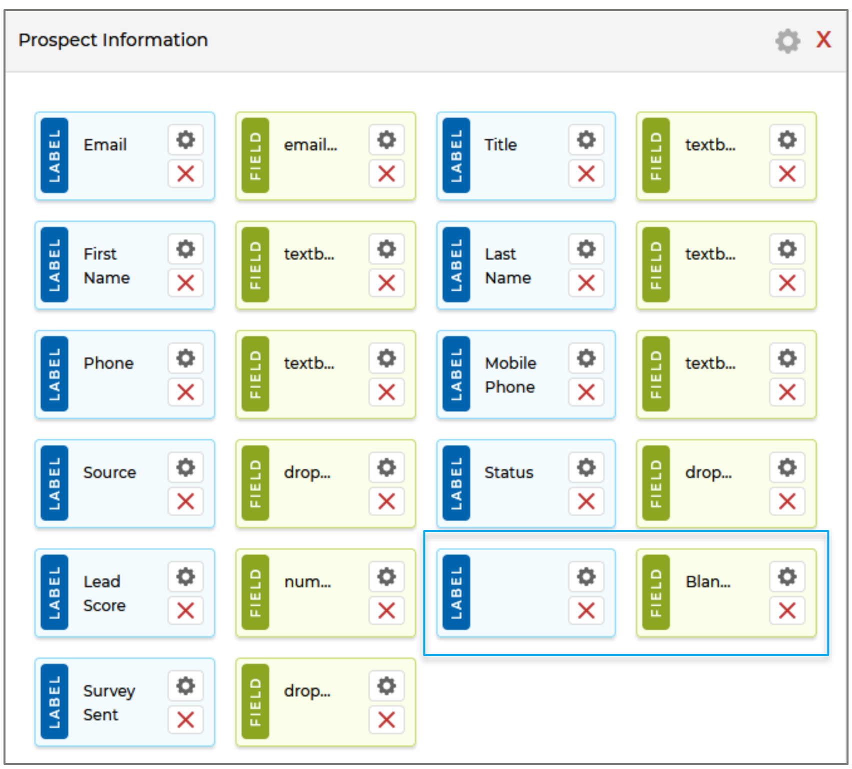




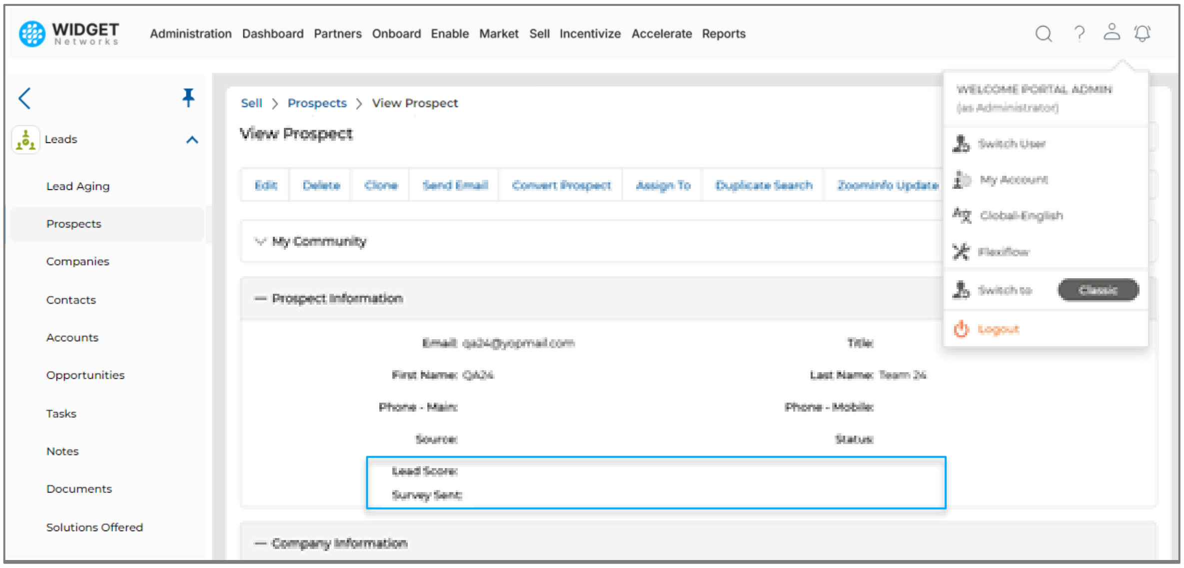
g. Now, the layout of **Labels** and **Fields** will appear to be like the following image.



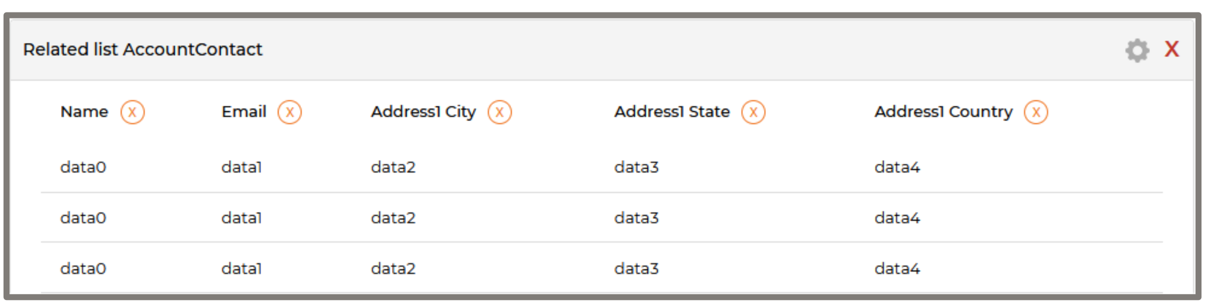
h. We can also insert Blank Fields from the **Create Layout** window to create a layout in the **Prospect Information** Section as per our requirement.



i. Once we save this layout and visit the View Prospect page, we'll see the alignment of Labels and Fields have been changed and look like the image below where the 'Survey Sent' Label has changed its position and has appeared below Lead Score and a Blank Label and Blank Field has been created below 'Status'. Blank Label and Blank Fields are invisible.

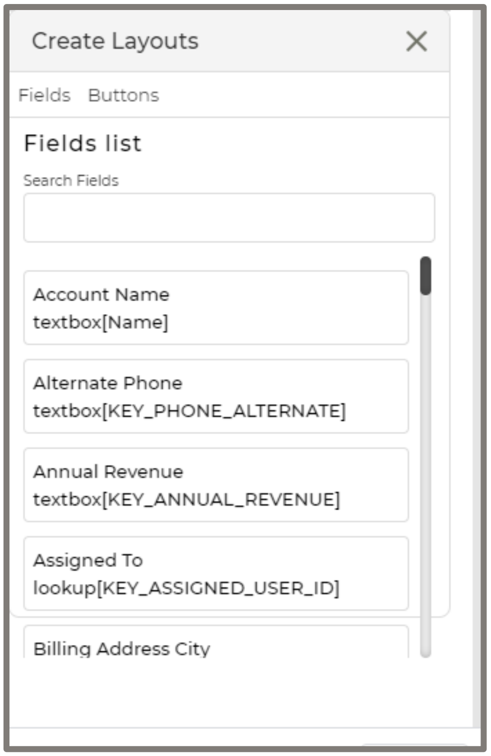


2. Add action buttons.
3. Add a related list.
    a. Select fields to display in the related list.
    b. Add actions of the related list
4. Add, Edit, and Delete are the default options.
5. Can be configured to add only one record in the related list.
6. The Add, Edit, and Delete options can be hidden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


Related list AccountContact X

Name (X)	Email (X)	Address1 City (X)	Address1 State (X)	Address1 Country (X)
data0	data1	data2	data3	data4
data0	data1	data2	data3	data4
data0	data1	data2	data3	data4

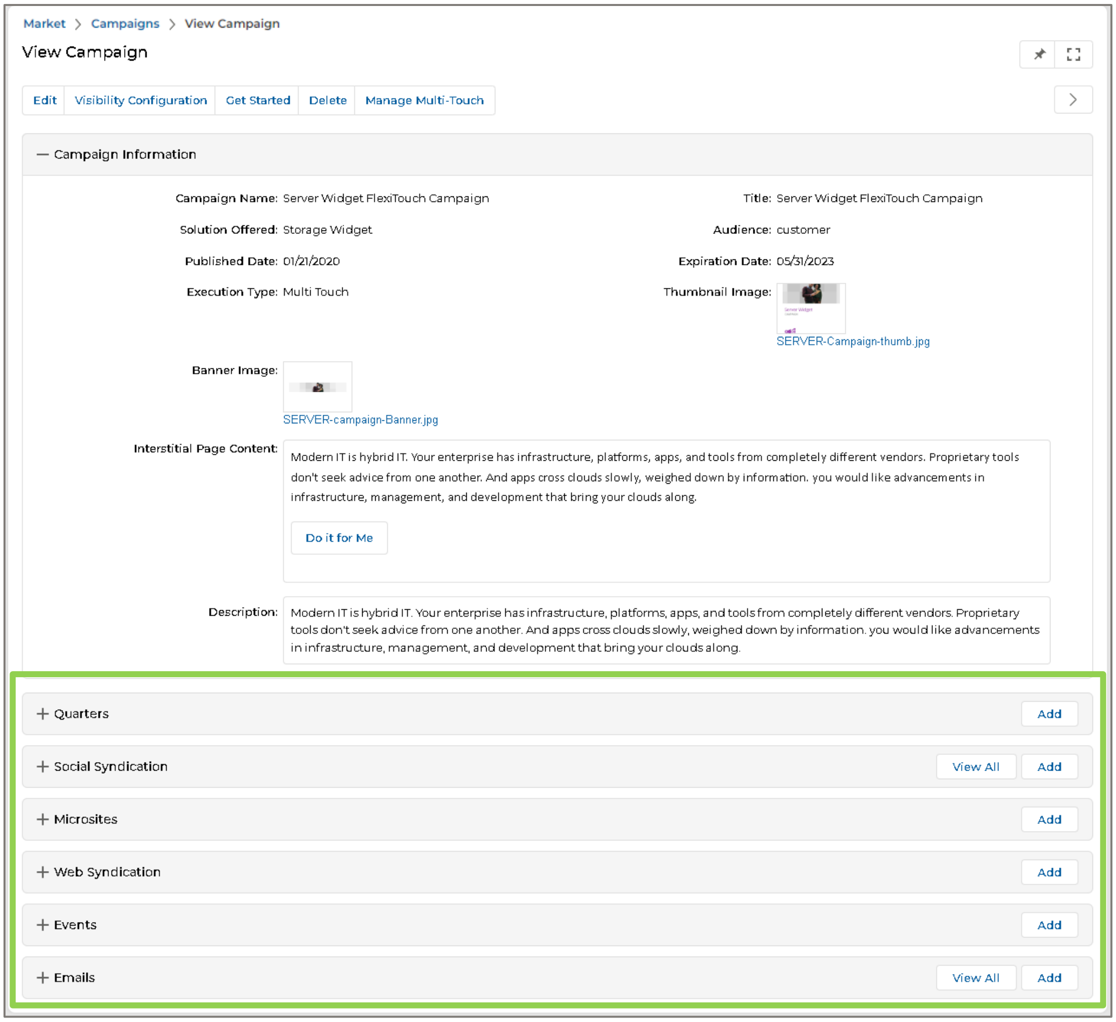
9. Page's layouts can be set by selecting objects from the list depicted in the figure below:



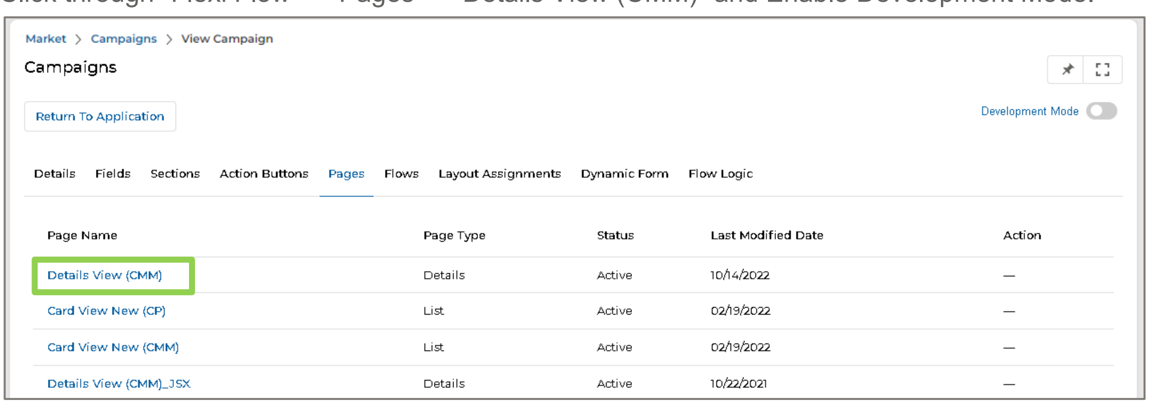
Configurable Expanded Related List by Default

The Related List - A single component shows a list of related records based on one specific object. For example, if you're looking at an Account details page, you can see the mapped Contacts - Related List. This feature allows the Admin User to configure the related list (of a specific module) to open in an Expanded Mode by default. In our example, we will utilize a Campaign Details Page, with multiple Related Lists – Quarters, Microsites, Events, etc.

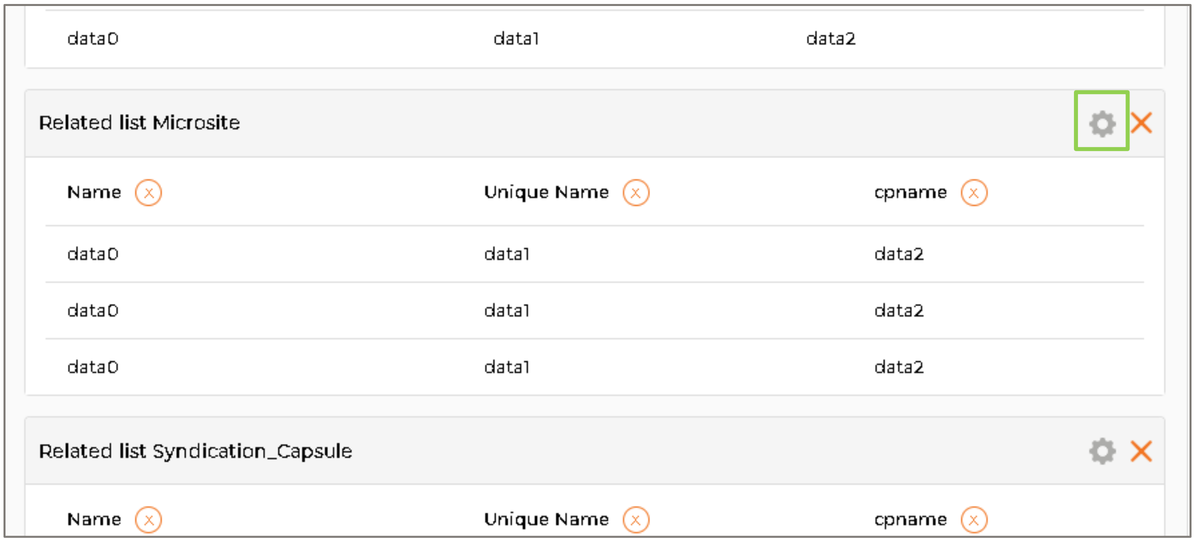
- The image below displays the details page of a campaign, taken from the "Campaigns" module, which is contained in the "Marketing" zone. The area marked with the green border contains all the related lists associated with this campaign and which are all in the contracted form and needs to be clicked on the (+) Sign to expand and view the Related List Records.



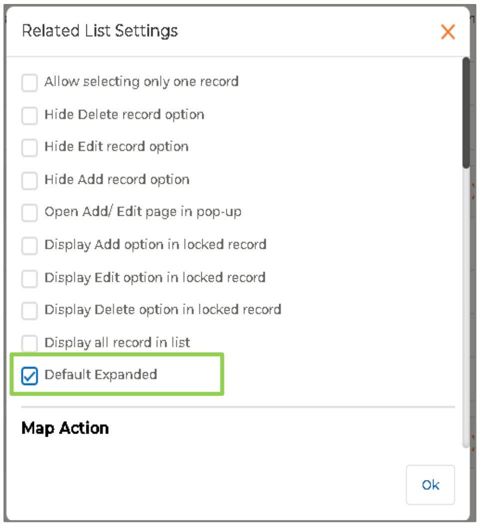
- If you want any of these related lists (say "Microsites") to remain open when any user gets into the details page of this specific campaign, you need to configure it using the Flexi Flow tool. So, click on the profile icon and then on "Flexi Flow".
- Click through "Flexi Flow" > "Pages" > "Details View (CMM)" and Enable Development Mode.



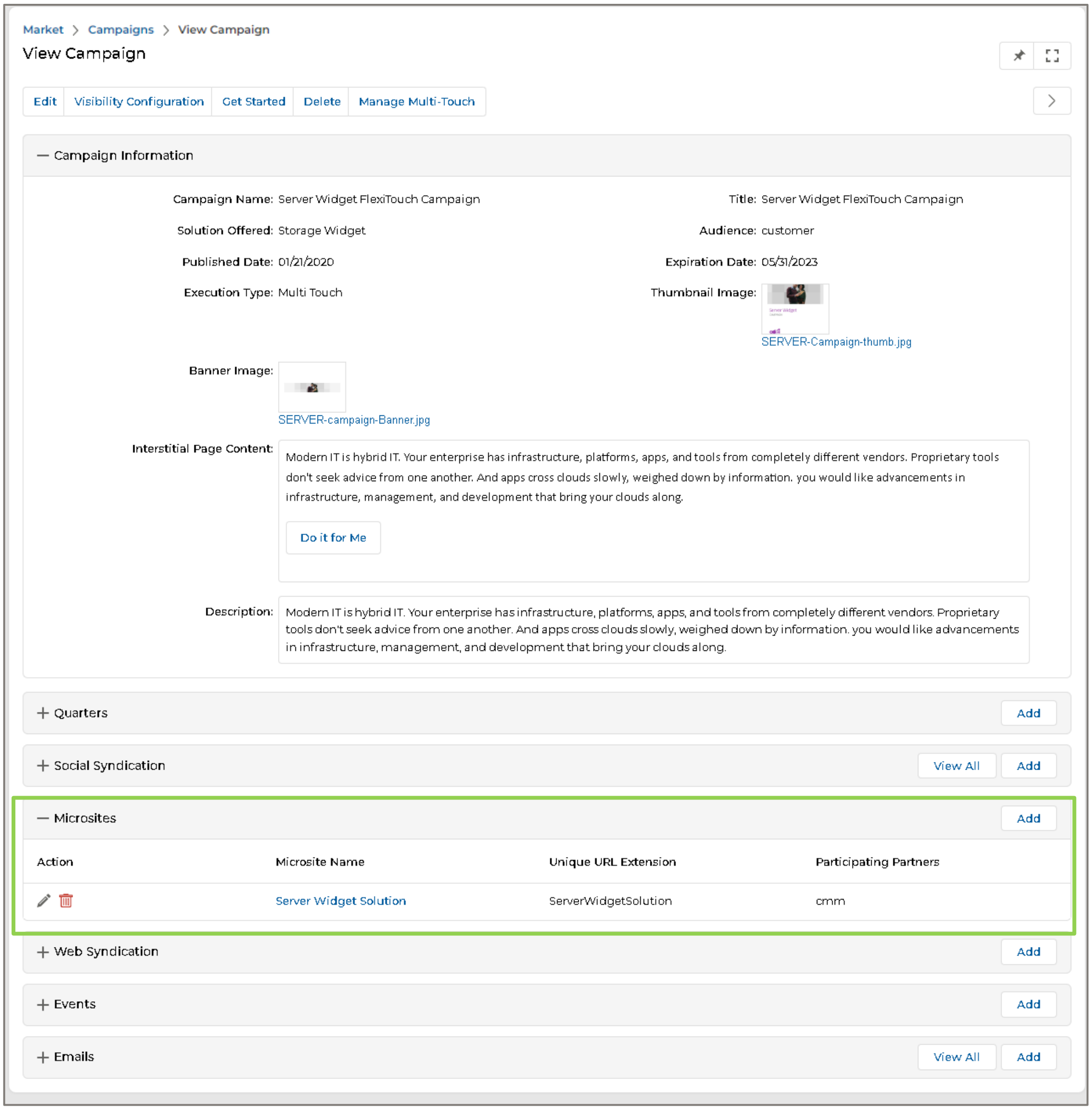
- Now scroll down to “Related List Microsite” and click on the **wheel icon**.



- Clicking the wheel icon will display a pop-up window as shown in the image below, where you need to checkmark the box associated with “Default Expanded” and then click on “OK”.



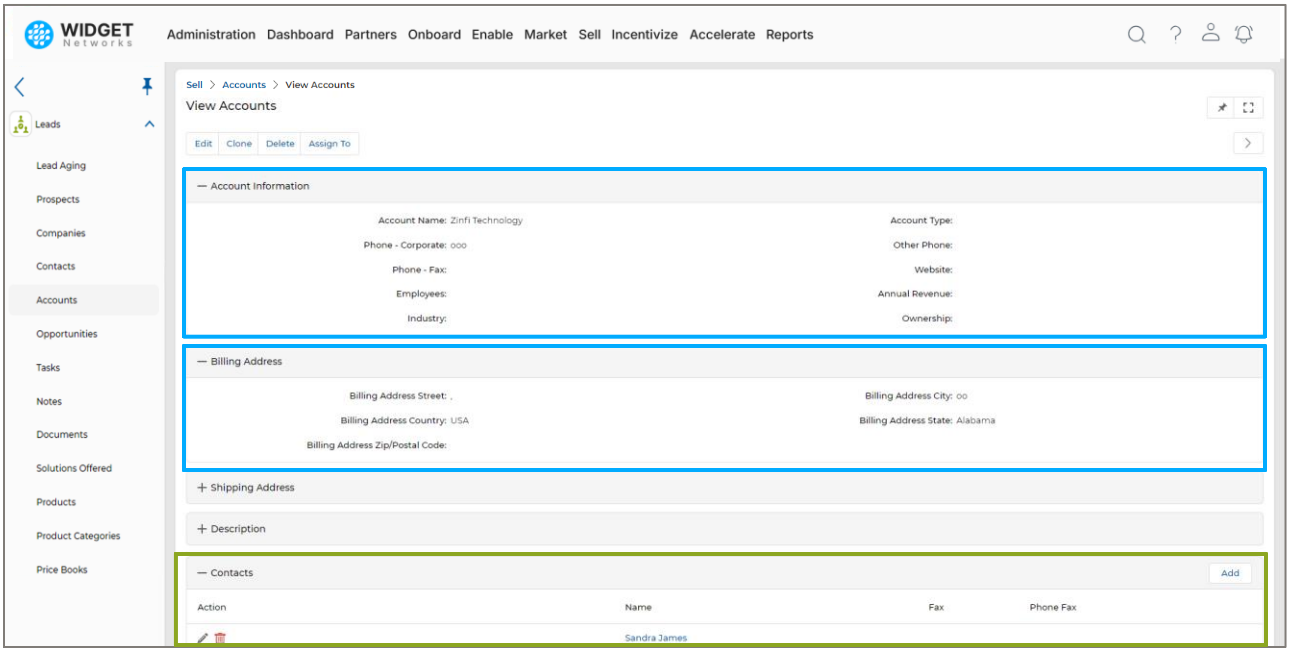
- Clicking on “Save” and then on “Return to Application” will take you to the initial details page of the campaign, where you will find the related list Microsite opening in the expanded form as shown in the image below.

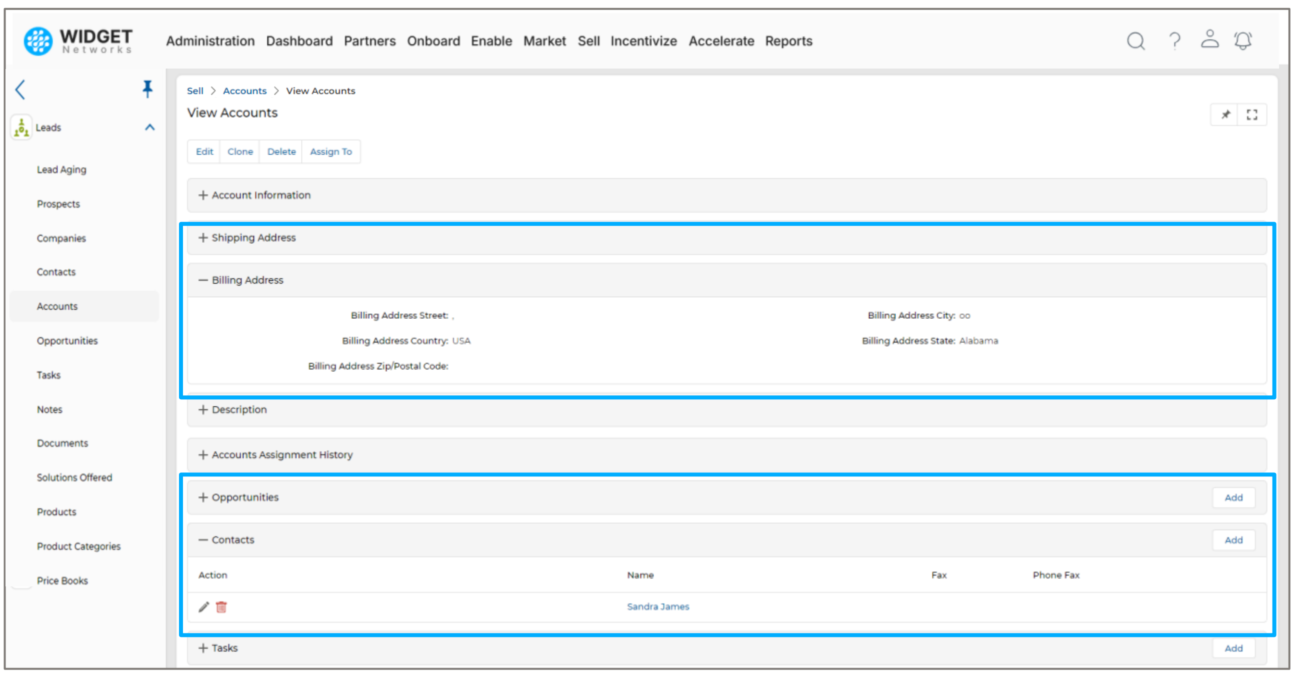


Arrange Page Sections and Related Lists by drag-dropping via Page Layouts

FlexiFlow Pages lets us create and manage the layout of a page which constitutes action buttons, sections, and fields that have already been created. A Module/Entity Detail Page displays the details of a specific record with values for the Record Attributes. A section (Account information, Billing Address highlighted in blue below) is a container of fields in ZINFI UPM. The admin can define a section in a Details Page Layout for an Entity viz. Prospect and group Prospect Fields/Attributes. The Related List - Single component (Mapped Contacts highlighted in green below) shows a list of related records based on one specific object. For example, if you're looking at an Account details page, you can see the mapped Contacts - Related List.

In the example shown below, the Billing Address is drag-dropped after the Shipping Address, and the Related List of Contacts is drag-dropped after the Related Opportunities

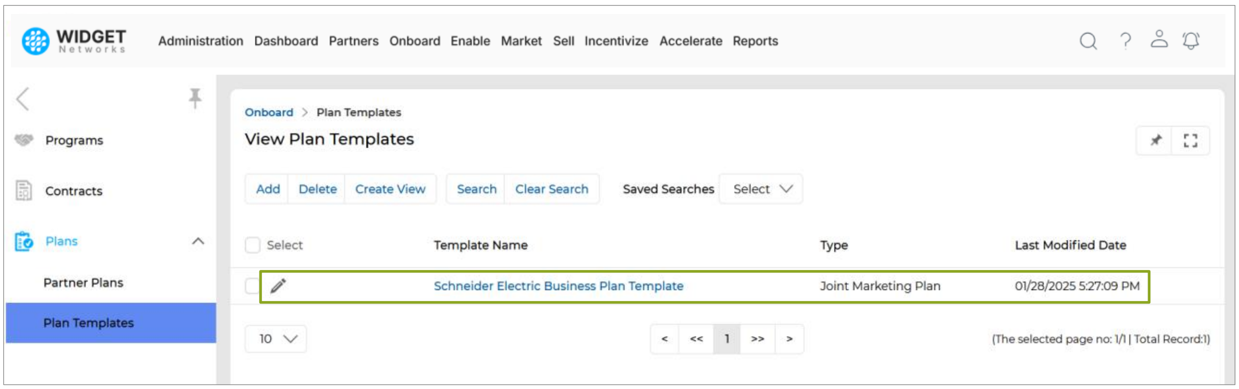

WIDGET Networks
Administration Dashboard Partners Onboard Enable Market Sell Incentivize Accelerate Reports
Leads
Lead Aging
Prospects
Companies
Contacts
Accounts
Opportunities
Tasks
Notes
Documents
Solutions Offered
Products
Product Categories
Price Books
Sell > Accounts > View Accounts
View Accounts
Edit Clone Delete Assign To
Account Information
Account Name: Zinfi Technology
Account Type:
Phone - Corporate: ooo
Other Phone:
Phone - Fax:
Website:
Employees:
Annual Revenue:
Industry:
Ownership:
Billing Address
Billing Address Street: ,
Billing Address City: oo
Billing Address Country: USA
Billing Address State: Alabama
Billing Address Zip/Postal Code:
Shipping Address
Description
Contacts
Add
Action
Name
Fax
Phone Fax
Sandra James


WIDGET Networks
Administration Dashboard Partners Onboard Enable Market Sell Incentivize Accelerate Reports
Leads
Lead Aging
Prospects
Companies
Contacts
Accounts
Opportunities
Tasks
Notes
Documents
Solutions Offered
Products
Product Categories
Price Books
Sell > Accounts > View Accounts
View Accounts
Edit Clone Delete Assign To
Account Information
Shipping Address
Billing Address
Billing Address Street: ,
Billing Address City: oo
Billing Address Country: USA
Billing Address State: Alabama
Billing Address Zip/Postal Code:
Description
Accounts Assignment History
Opportunities
Add
Contacts
Add
Action
Name
Fax
Phone Fax
Sandra James
Tasks
Add

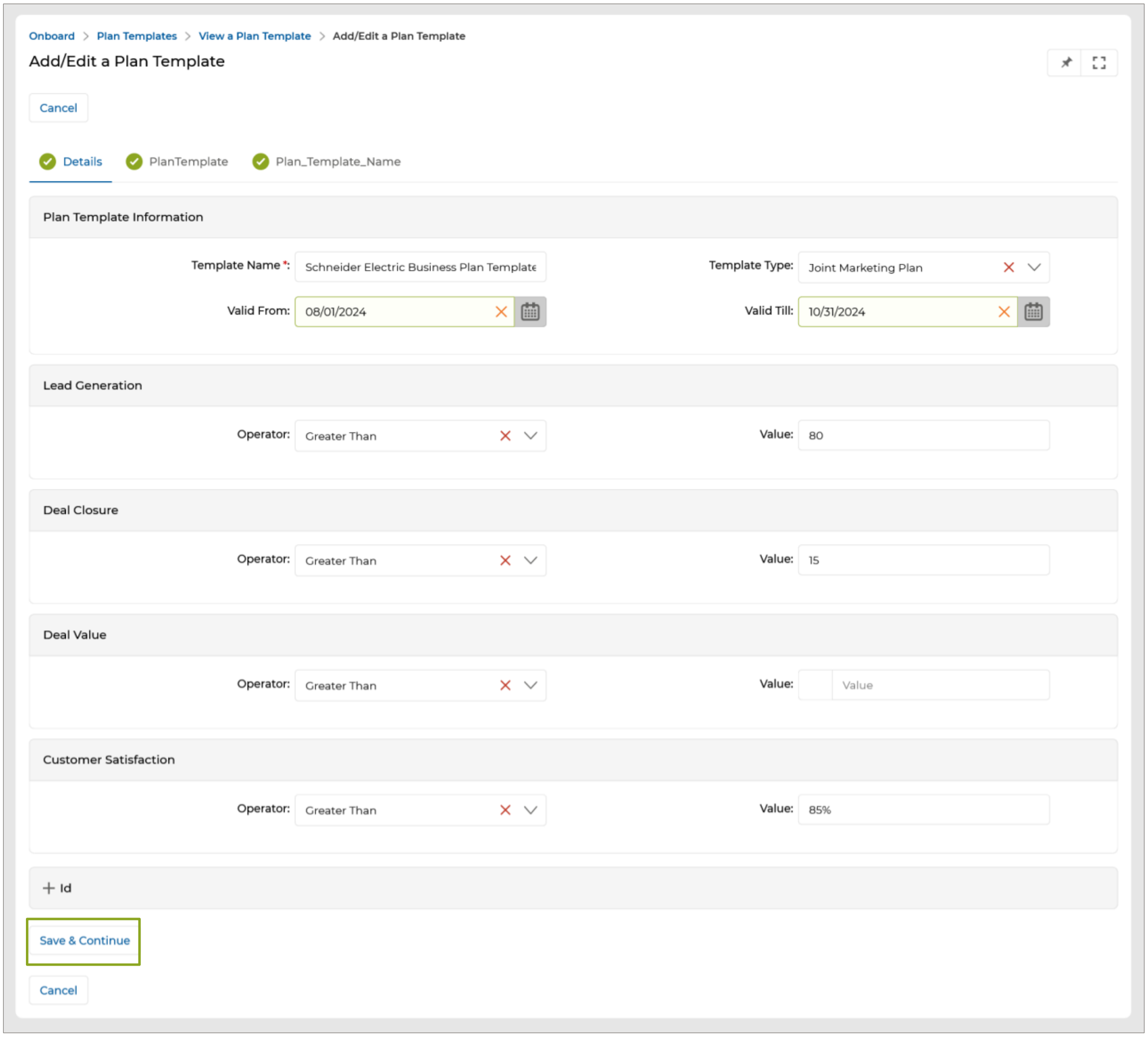
Tabbed View Interface for Application Record(s) Create/View

The **Tabbed View of Record Create/Record View** feature provides a structured and intuitive UI/UX for users to create/view a record for any UPM application. As users complete each tab, the system validates the input, ensuring data accuracy and preventing errors. This ensures a logical flow for creating and viewing records.

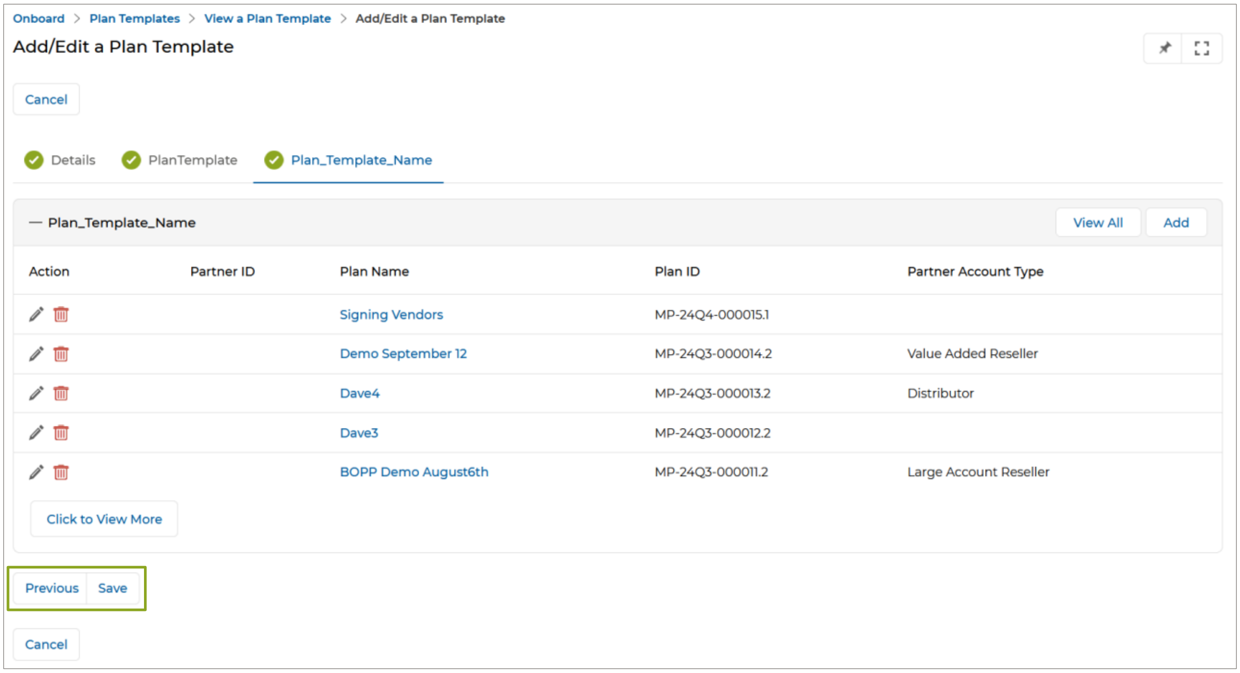
- In the following example, after logging into the UPM, the user navigates to the **Onboard > Plans > Plan Templates**.
- On the View Plan Templates page, clicking the 'Edit' button of the template will take the user to the Add/Edit a Plan Template page.



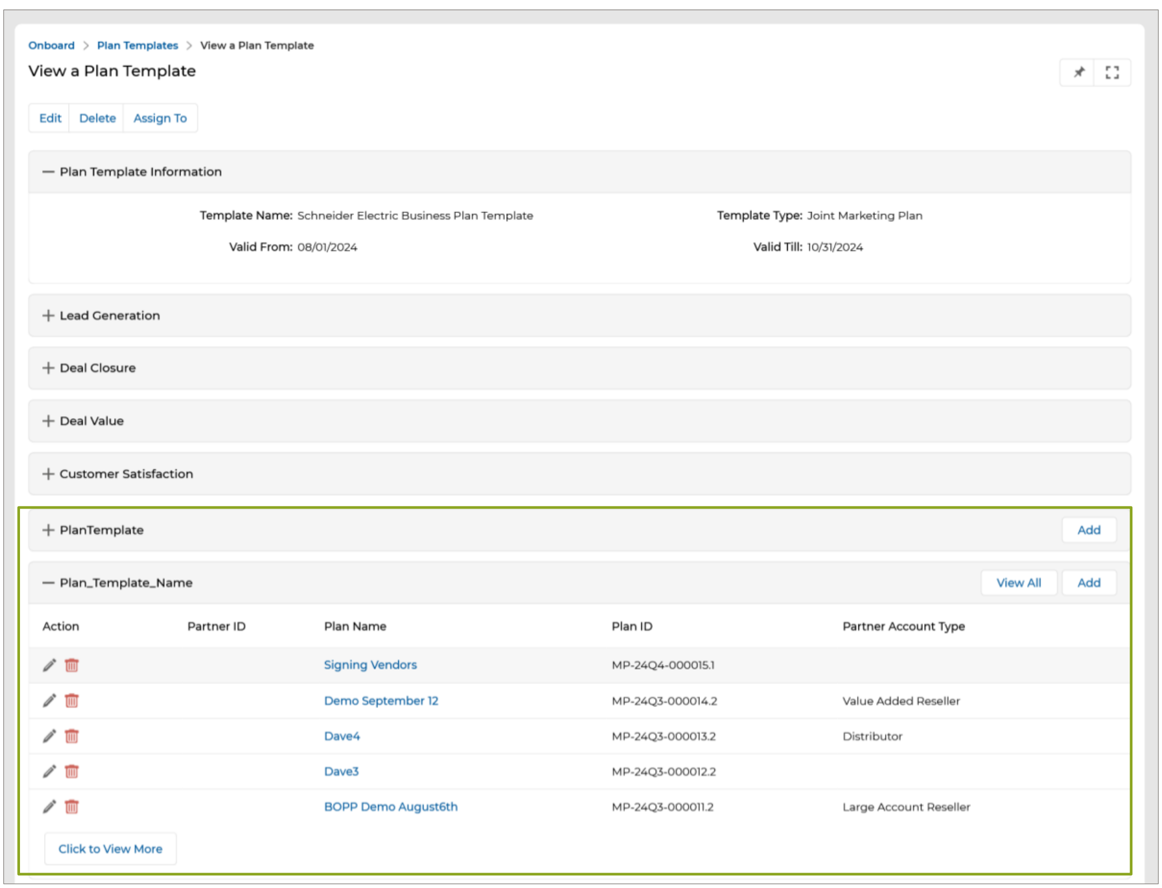
2. On the edit page, the Related Lists will be displayed in a Sequential Tabbed Form, where each tab becomes accessible progressively, as shown in the image below.



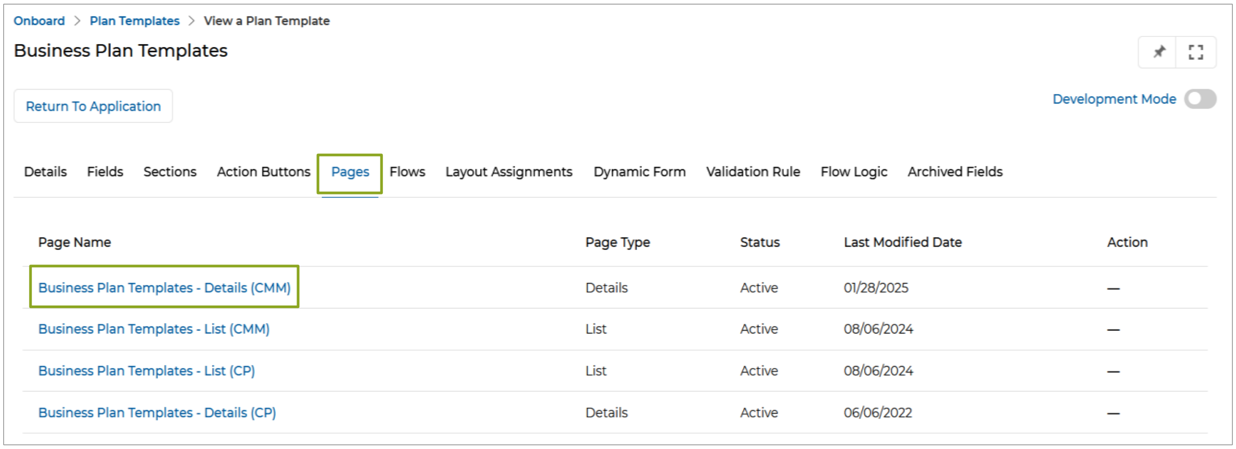
3. To proceed to the next tab, the user must click the **'Save & Continue'** button after entering the required details in the current form.
4. Clicking the 'Previous' button will take the user to the previous Related List.

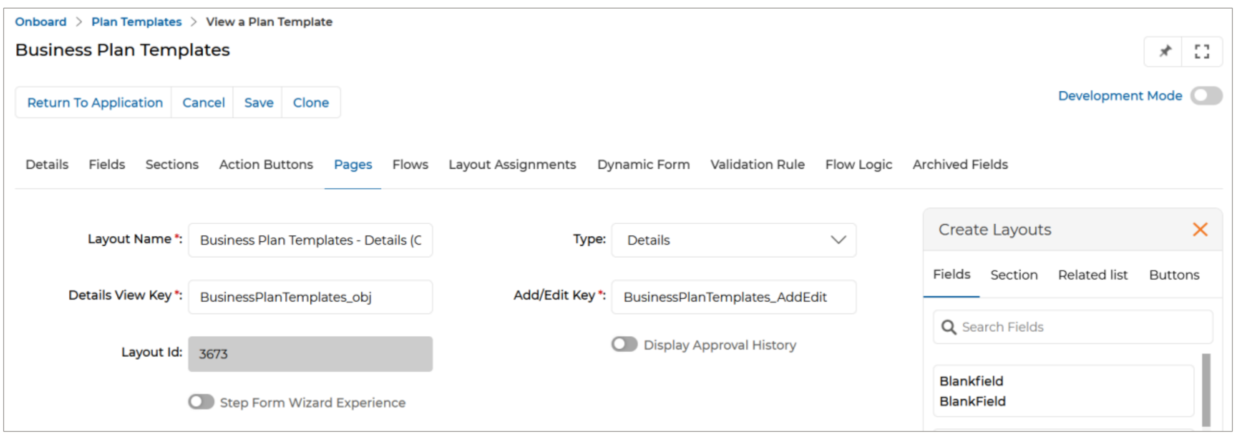


5. Previously, the Related Lists were displayed as shown in the image below.

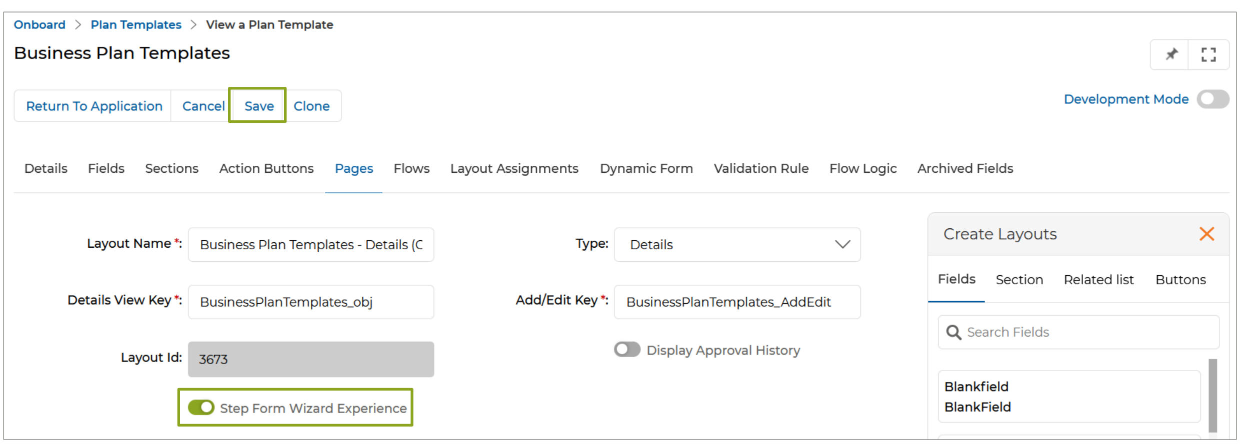


6. To change the layout of the Related Lists to **Tabbed View** from **Expandable** format, the user needs to go to Workflow from the Avatar menu and go to the details page of the application.

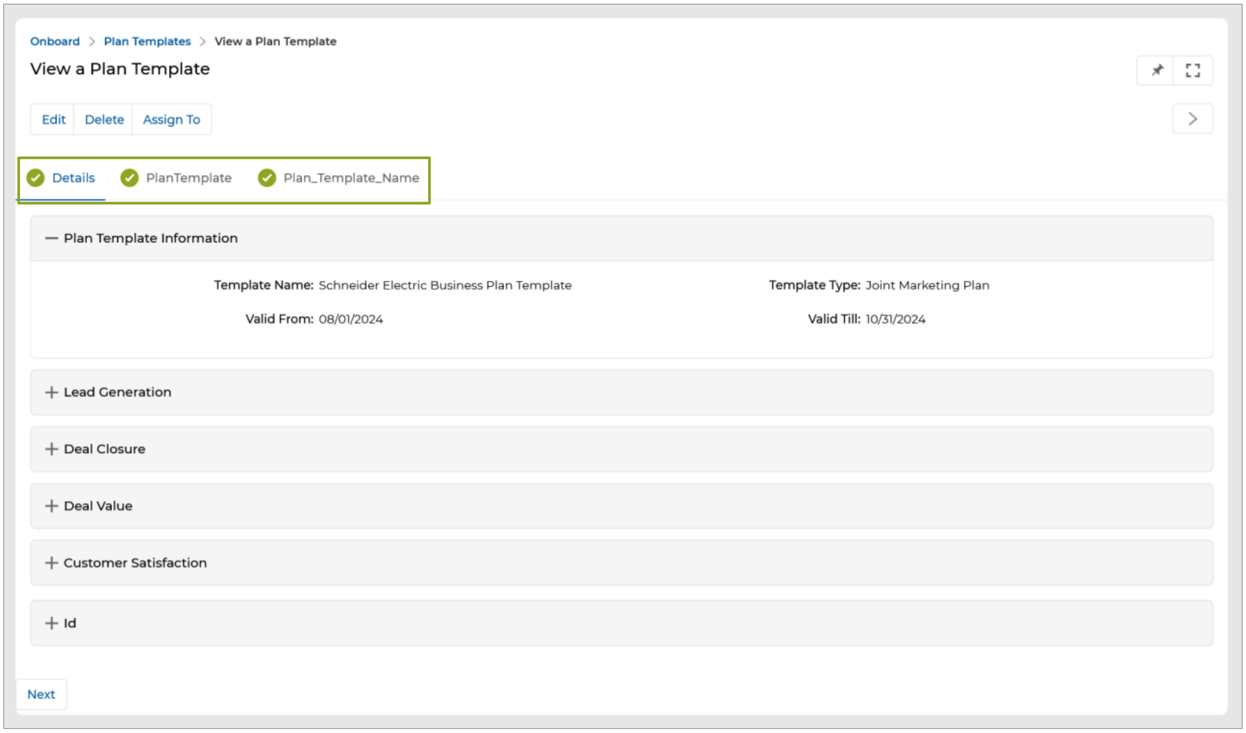




7. To change the layout of the Related Lists to **Tabbed View**, the user needs to enable the toggle key associated with '**Step Form Wizard Experience**' and click Save.



8. Upon returning to the application, the user finds the layout of the Related Lists has been changed to Guided Form.

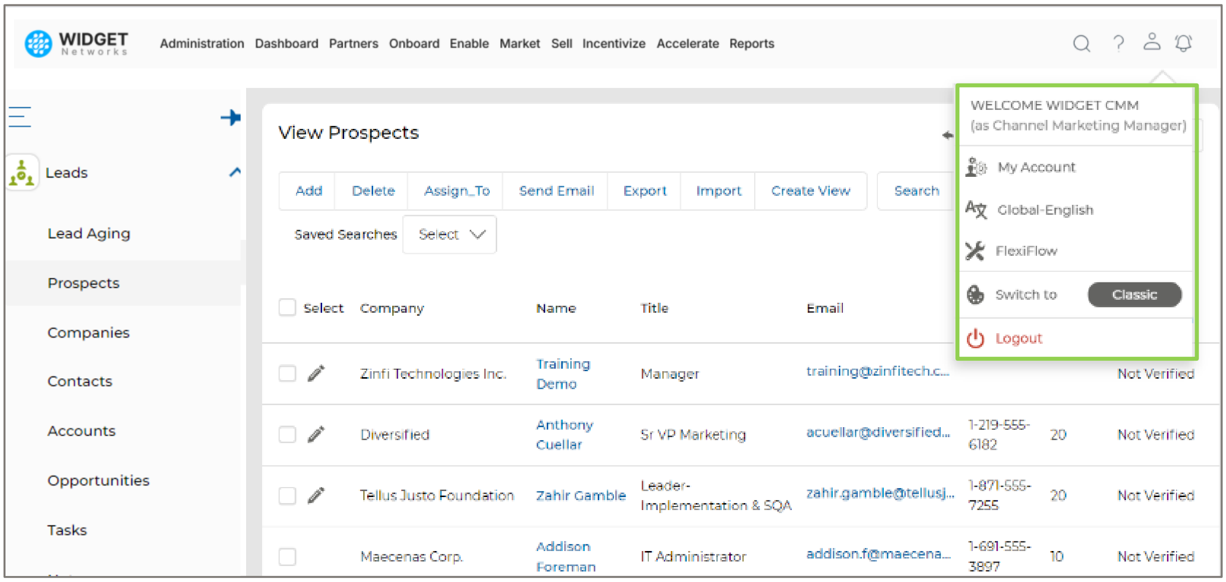


Forms

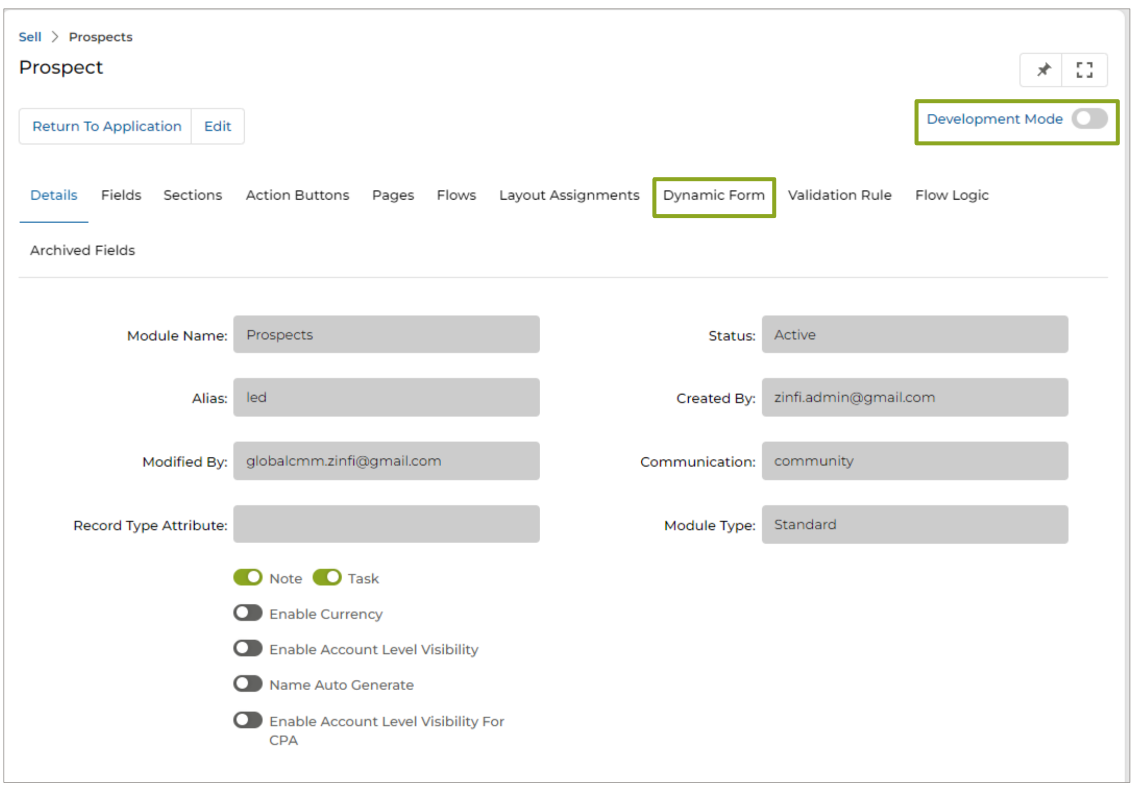
Creating and configuring a Dynamic Form tied to a specific UPM Module

The latest upgrade to the **Workflow** module is the **Forms (Dynamic)** for any specific module. The user can create a dynamic form to capture information, hosted in a specific module. For example, we will create a Dynamic Form for the **Prospects** module, which we can utilize to upload Prospect information to the Prospects Module by integrating the Form to a campaign page. On executing the campaign, the Partner Prospect will receive and duly fill up the form.

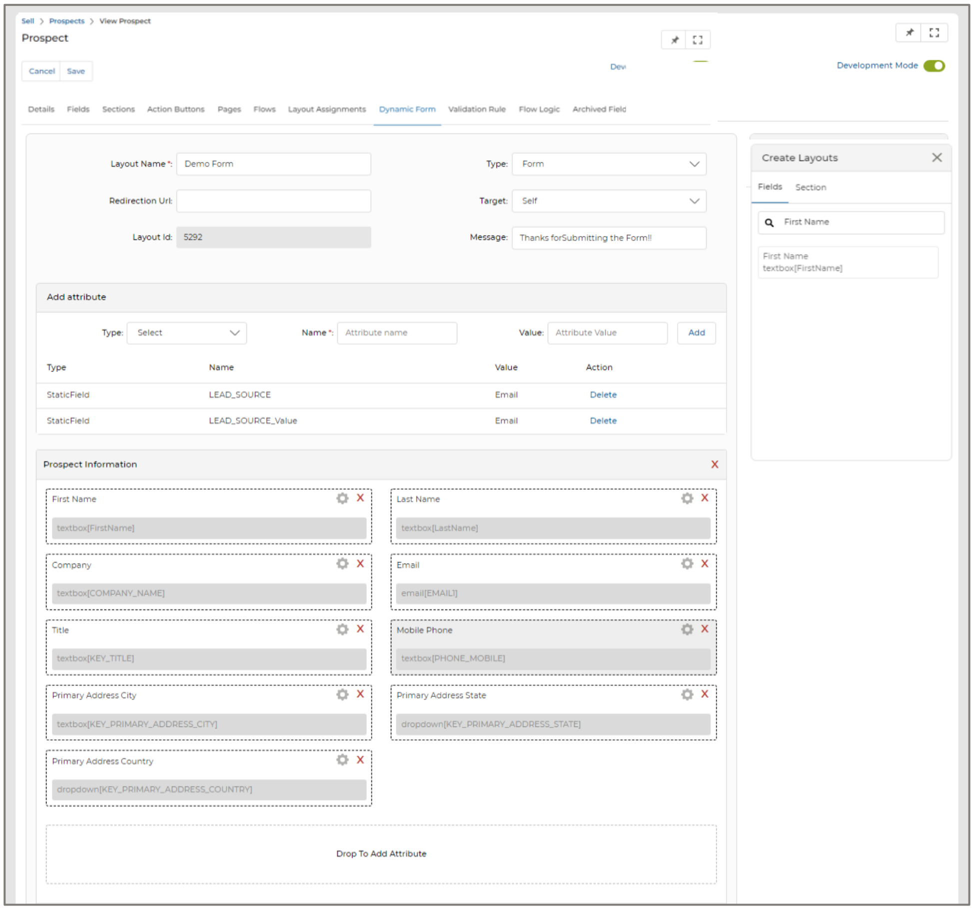
1. The user logs in to the Portal. and navigate to the Prospect Module, for which the Dynamic Form needs to be created. Once in the Prospects Module, we click the FlexiFlow shortcut from the top right corner as shown below.



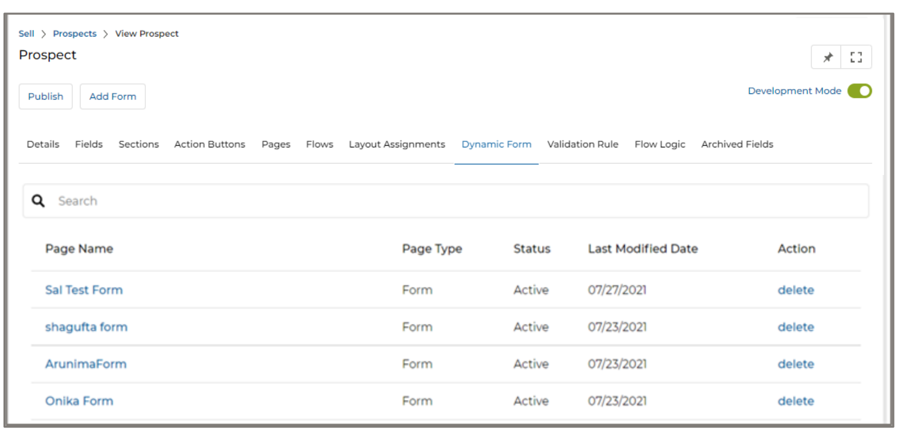
2. Clicking the FlexiFlow button we get into the following image.



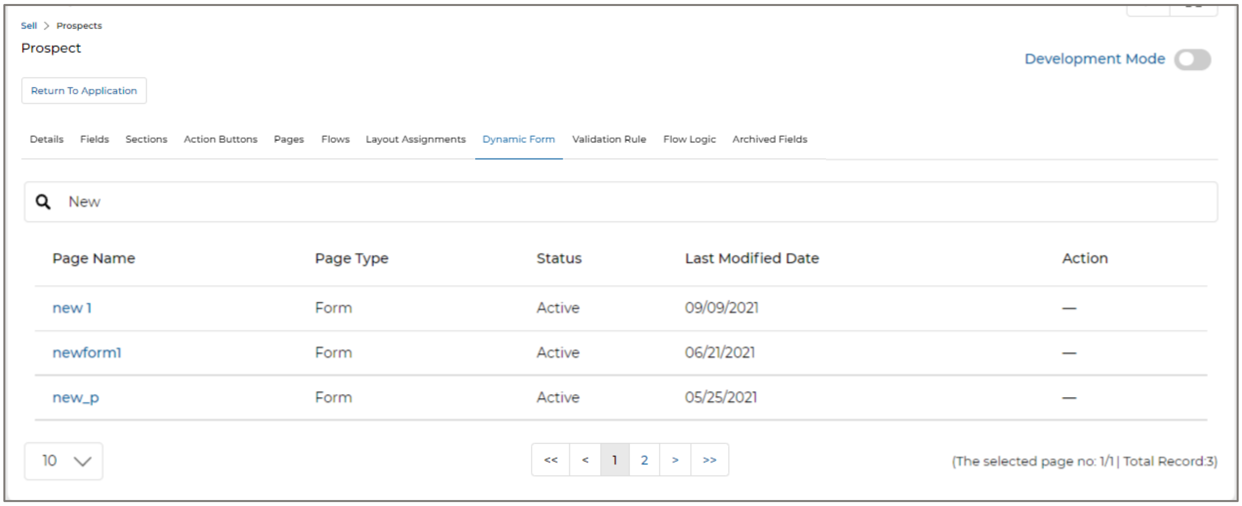
3. Clicking the Dynamic Form button and enabling the Development Mode we get into the following image.



4. Primary Details for the Dynamic Form, viz. Layout Name, Type, Redirection URL, Target, and Message are provided. Add-on Attributes are added to be captured through the Dynamic Form. **Most importantly, Prospect Attribute Information Fields to be captured are set up by searching and dragging Fields from the Create layout Window. Once everything is set we save and Publish the Dynamic Form which can be integrated into Marketing tactic Pages in Microsites, Email, etc.**



5. **Searching a Specific Form –** The ZINFI UPM Platform provides the user the advantage of finding a specific Form through several options as discussed below.



a. **Typing the Name of the Form in the Search box - In the Search box** when the word **New** is typed the listing page displays the names of all the Forms that start with 'New'.
b. **Pagination** – The ZINFI UPM platform provides a page number to each '**Forms'** list page, which makes it easier for the user to search manually for a specific Form of his choice, by switching from one page to the other.
c. **Limiting the Record Count in the grid** – The user can control viewing the count of records in the grid by choosing the grid **Page Size**. This allows the user to view multiple records briefly and locate the desired Form.

Flows

A process flow is a specific type of activity flow that communicates a sequence of actions or movements within a complex system. A flow is a powerful tool for optimizing the paths of people, objects, or information. Connectors and symbols work together to illustrate directions of flow, objects that move, and quantities involved. An important feature of a flow is its ability to incorporate conditional paths that a person or object may follow depending on the state of the condition in question. An example would be a simple user flow that directs a user to their personal account page if they are already logged in or redirects them to a login form if they are not.

FlexiFlow supports the following flows:

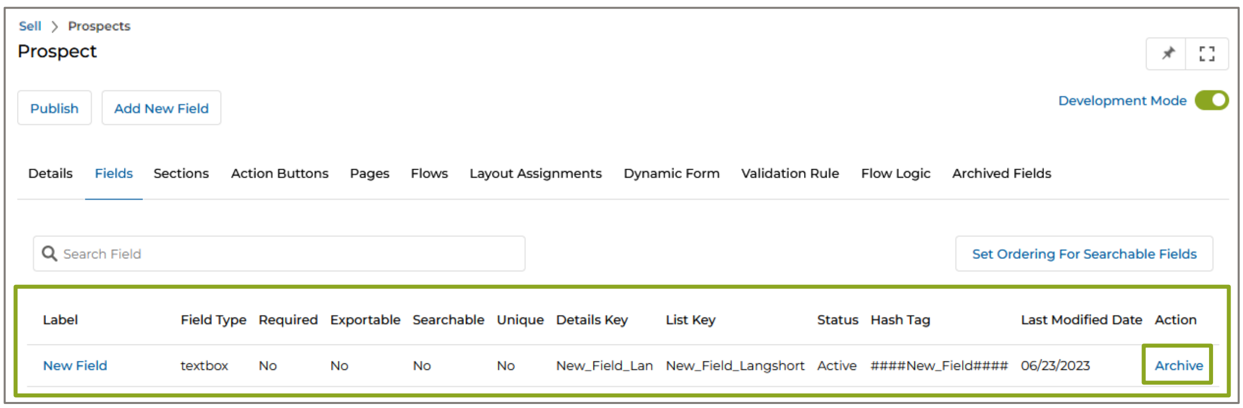
- **Workflow** is one of the most powerful native tools available in ZINFI UPM. Workflow is business logic that evaluates records as they are created and updated and determines if an automated action needs to occur. In a way it allows records to speak up or do something – update data, notify people or external systems. Workflow replaces the constant monitoring Users have to otherwise do via reports, dashboards, or views to know whether or not it is time to act. At the end of the day, workflow accelerates your business processes, by removing the time lag needed for people to review the information and decide if action is needed. As your business grows, and the amount of data that has to be monitored swells, workflow becomes indispensable to organizations to maximize efficiency with their business processes.

- **Approval Flow** is the method used to approve anything from modules like MDF, Deals Rebates, Rewards, Partner Onboarding, etc. that a company wants to automate. Implementing an approval process can standardize an organization's internal processes, and also save time by creating a dependable, repeatable system. Approval processes are a type of workflow, which is any sequence of work from initiation to completion, that you can create to ensure work is approved the same way every time. Additionally, automated approval processes improve transparency and compliance within your organization since everyone is forced to complete work according to predefined criteria. They also improve decision-making, such as whether to adopt a project, because the process you define will help you more clearly identify the costs and benefits of any work proposal.

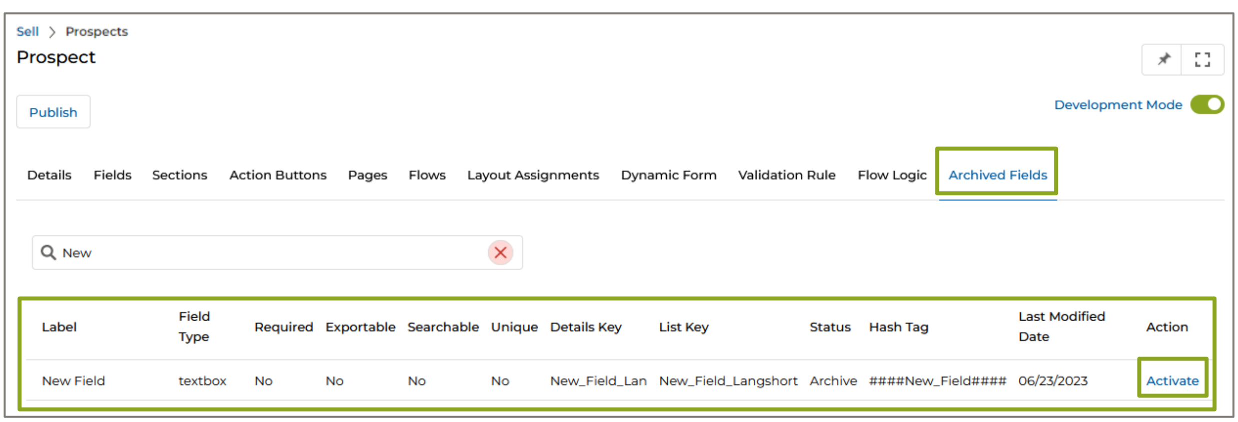
  (See the sections for ***Work Flows*** or ***Approval Flows*** for more details on how to manage these)

Archived Fields

1. Once a Field is created, it gets listed in the **Fields** section as shown in the image below.



2. In order to archive a Field, the User needs to click **Archive** as shown in the above image.
3. Once the User clicks **Archive**, the Field gets removed from the **Fields** sections and would get stored in the **Archived Fields** section.



4. Once the User clicks **Archive**, the Field gets removed from the **Fields** sections and would get stored in the **Archived Fields** section.

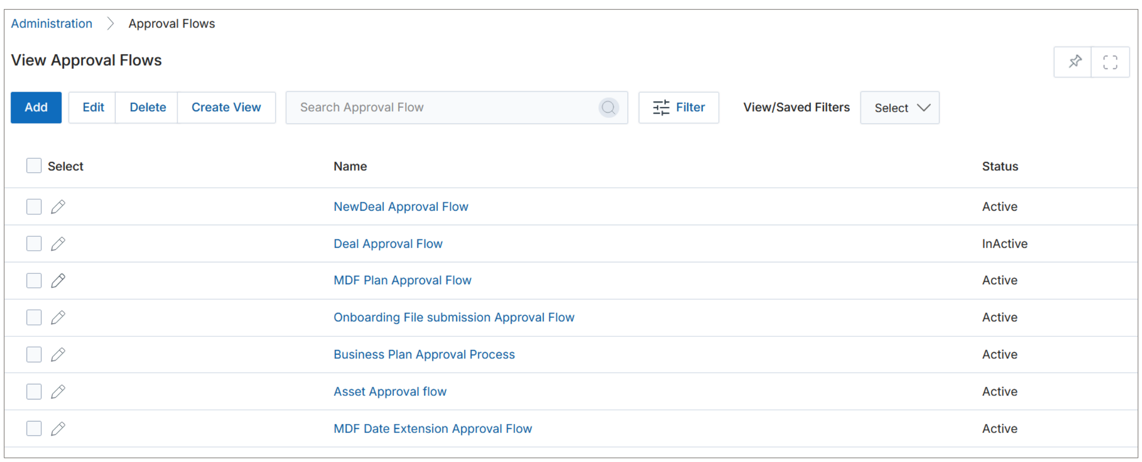
   Note: It is to be noted that, only a UPM Module Field which has not been used in any layouts for that specific Module - can be archived. Making any attempt to archive a Field that is already in use in a layout will trigger an error message. The User needs to remove such a Field from the layout, before archiving it.

Approval Flows

Managing Existing Approval Flows

View Approval Flows

1. The top part of the page provides some actions:
    a. **Add** – Opens a new page to add a new record.
    b. **Delete** – Deletes selected record(s) from the listing page.
    c. **Create View** – This lets you create your own view with a set of columns as needed.
    d. **Search** – Opens a new pop-up window where you can put search criteria to find desired records.
    e. **Clear Search** – Clears the search made.
    f. **Saved Searches** – Shows a list of saved searches in the search dropdown. When selected, two more options are shown:

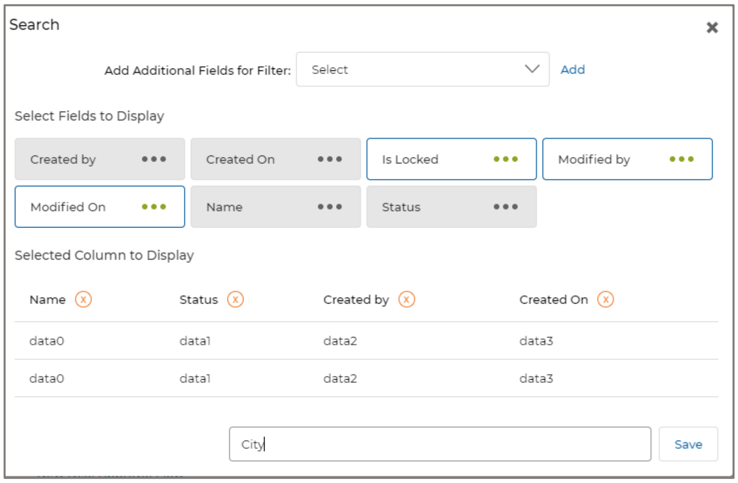


        i. **Edit** – Provides the option to update the selected search name.
        ii. **Delete** – Deletes the selected search name from the search dropdown.
2. For each record in the grid, if you click on:
    a. **Edit (Pen icon)** – Lets you edit the selected record.
    b. **Any linkable item** – Takes you to its details page.

Create New View

1. Choose an additional field and then click on **Add**.
2. Click on Green Dots to select the fields for display.

3. Selected columns are shown in the table. To remove a selected column from the display list – just click on the cross button.
4. Provide a View Name, and then click on **Save** to create the new view.



View Approval Flow Details

1. The top part of the page provides some actions:
    a. **Edit** – Opens the selected flow in editable mode.
    b. **Activate** – Activates the flow.
    c. **Deactivate** – Deactivates the flow.
    d. **Clone** – Duplicates the flow.
2. Displays approval flow information.

Edit/Create an Approval Flow

Utilizing the fully configured automated approval processes implemented via FlexiFlow, you can now submit records for automated approval in ZINFI's UPM platform.

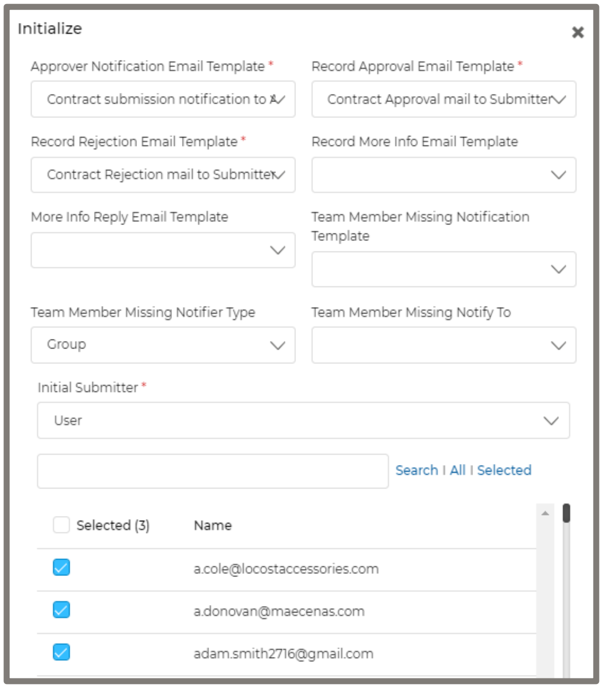
The approval flow can be summarized as follows:

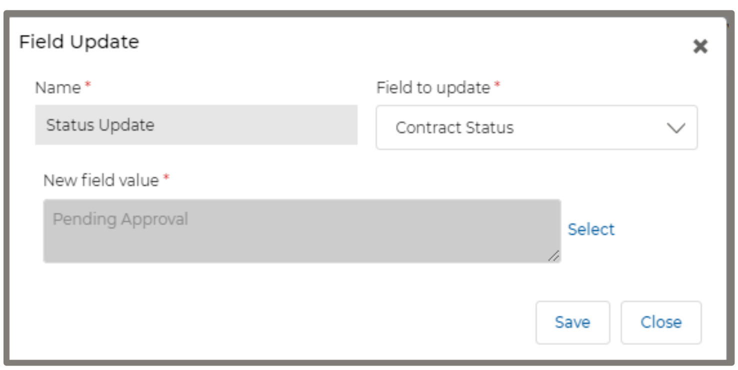
- The approval flow can be configured for a specific module.
- There will be an entry criterion for each approval flow.
- Templates can be initialized by:
    - Approver on submission or approval
    - Submitter on approval
    - Submitter on rejection
        - The initial submitter can be defined as
            - A group of users
            - The manager of the creator of the record
            - Any specific user who is the owner
            - Any related user of the record
- The field update option appears in the initial submission process.
- The nth level of the approval process can be configured at any level.
- Approvers can be defined as
    - Users
    - Groups
    - Managers
    - Related users
- Information can be escalated after a specified time.
- The following actions can be added on approval or rejection at any step.
- New email can be configured.
    - The email can be sent to additional users.
- Field can be updated.
- The record can be assigned to additional users.
- Final approval and rejection – all actions can be defined in final approval or rejection.

You can set up the approval flow from FlexiFlow as specified below:

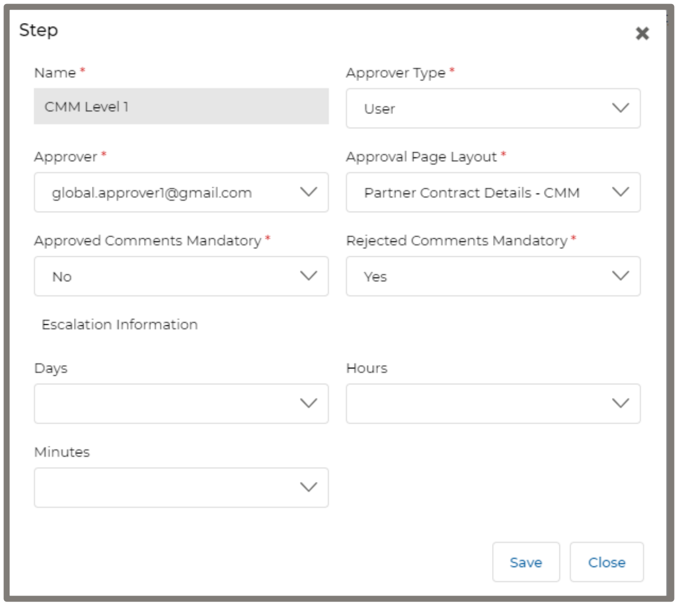
1. **Module –** This indicates the module in which the approval process will be made, such as MDF, Deal Registration, and so on.
2. **Criteria –** This indicates the condition that the record should satisfy to undergo approval processes—e.g., the status field of the record has the value “Ready for submission.”

3. **Initialize –** This is where you set up the email templates to send an email upon approval action. The "initial submitter" can submit the record for approval and field update if required on record submission. For example, if you designate the initial submitter as "CP" and update the status field to "Record Submitted," then CP can submit the record for approval, and upon submission of the record the status field is updated to Record Submitted. Once the record is submitted for approval it is locked and cannot be edited.





4. **Step** – This is where you can designate the "Approver" who can approve the record after submission. The Approval Page layout specifies the details of the record that the approver will see while approving the record. You can also set up escalation information. For example, if no approval action is taken within a predefined time interval, then the record is approved automatically and assigned to the next level of approver if it exists. You can set up multiple steps in the approval process. In every step of the approval process, the submitter is notified about the approval action of the record via email. Upon approval action of a step, the next step approver, if it exists, is notified via email that the record is pending for approval. If the record is rejected in any of the approval process steps, then the approval process stops for that record.



5. **Tools** – There are basically three types of tools you can use upon approval or rejection of a record: Email, Field Update, and Assignment. For every level of the approval process, you can set up approval/rejection actions using these tools—for example, if you want to send an email to user(s) after Step 1 of the approval process is approved or rejected.
    a. **Email –** This where you can set up the email template and specify the recipient type who will be the recipient of the email: a group of users, an email field (if any email field in the record), a manager (the manager of the owner of the record), a related user (if any user object related with the record like owner) and to users. There is also an additional email field where you can designate a CC recipient. (This is similar to Workflows.)
    b. **Field Update** – This is where you can set up any updates to the record field—for instance, if you need to change the status of the record upon approval. (Again, this is similar to Workflows.)
    c. **Assignment** – This is where you can set up the assignment of a record to a group or user upon approval action. (Again, this is similar to Workflows.)
6. **Final Approval Tools** – This is where you can set up final approval actions, such as sending emails to users, updating fields of the record, or assigning the record to users. This will only be executed once the final approval step is approved.

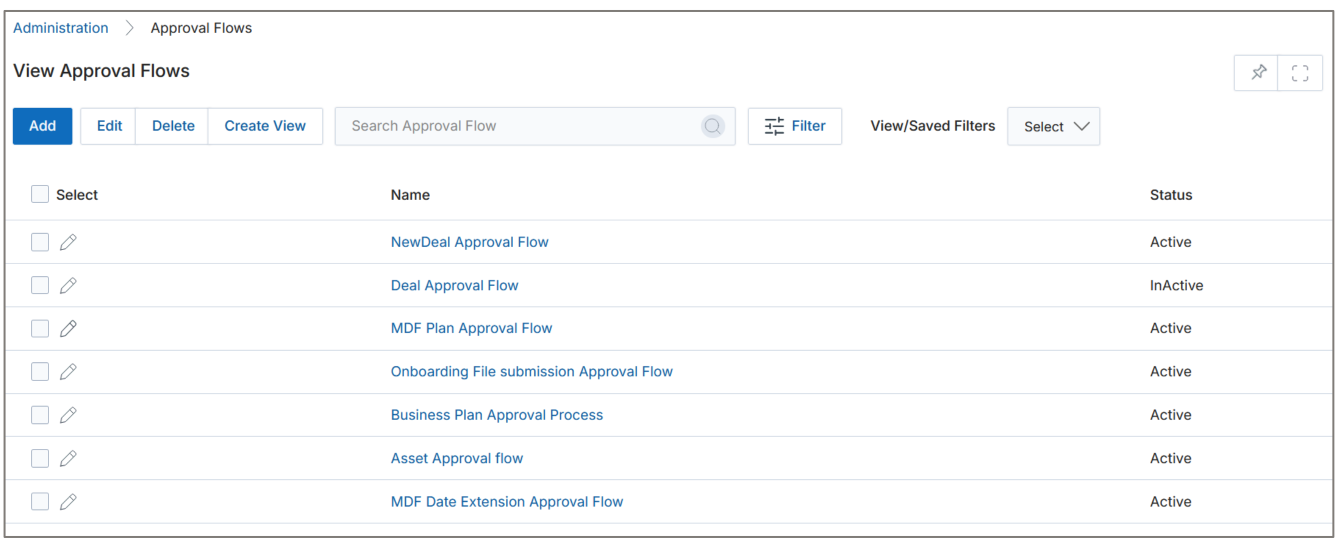
7. **Final Rejection Tools** – This is where you can set up final rejection actions, such as sending emails to users, updating fields of the record, or assigning the record to users. This will execute if any approval step is rejected.

When the approval flow is created it is in "Inactive" mode. There are two possible actions when you view the approval flow details.

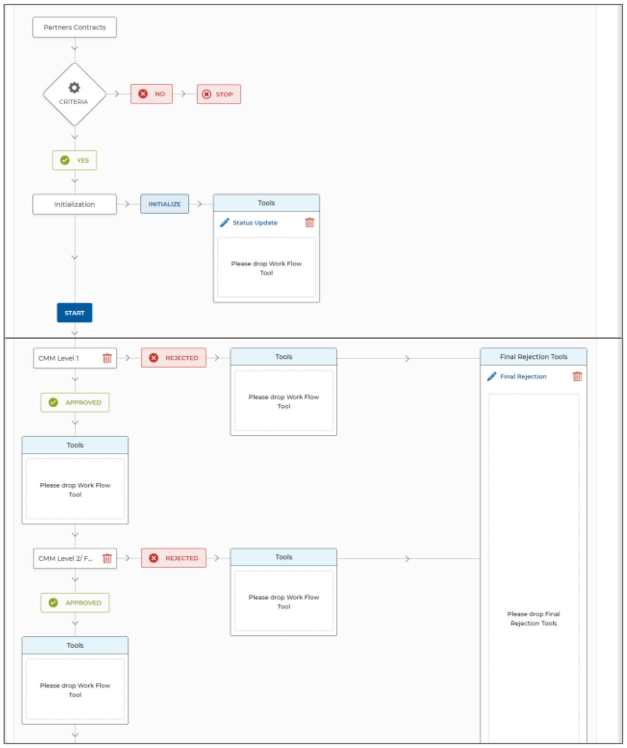
- "Activate" activates the workflow.
- "Deactivate" makes the Approval Flow inactive. If any edit is required in the Approval Flow, you need to deactivate the Approval Flow with this action before you can make changes. The process of deactivation of Approval Flows in UPM, can be done even when the approval flow is in queue for processing. When an Approval Flow is created it is in "Inactive" mode by default. Deactivation can now be performed even if all scheduled actions have not been completed:

View Approval Flows

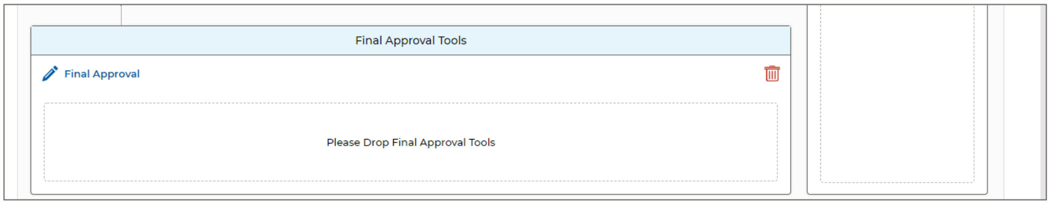
Approval flows can be viewed in the figure below:



Approval Flow Example



Approval flows can be simultaneously edited, activated, deactivated, and cloned.



Workflow Tools

The Workflow Canvas has an array of features letting you create extensive workflows for automating your business processes. Primarily divided into three sections, the canvas along with the tools; provided through the toolbar lets you drag and drop objects to create the workflow at the optimum pace and definition to map your custom business process.

The Menu Bar lets you Save the Workflow. The cancel option is provided to let you stop the workflow development process and attend to your urgent jobs at hand.

The Canvas is housed with a mandatory Rule Name, which needs to be provided to save the Workflow, as, without the Workflow Rule Name, the workflow cannot be referred to for future usage and current automation of operations. The Canvas further provides a blank space as an interface which lets you drag and drop objects from the Tool Bar to create the Workflow to demonstrate and automate your custom business process. The blank space surrounded with dashed lines is the start block and you need to kick start by dropping a module.

Tool Bar

The Tool Bar consists of the following which will be further covered in detail:

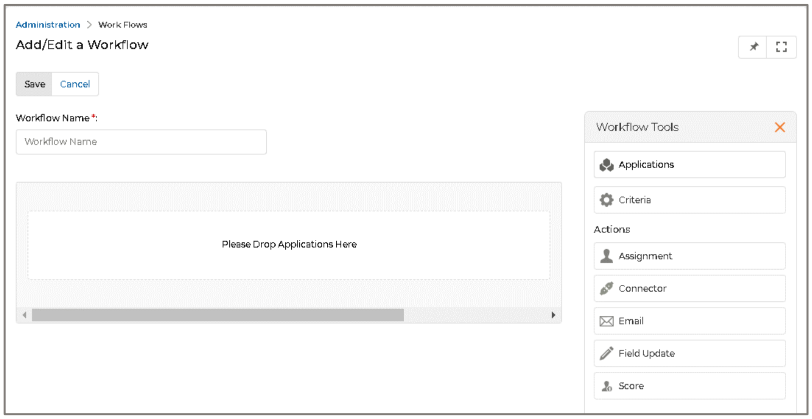
- **Application/Module** – The Application/Module is nothing but a UPM Object (which has attributes/properties/fields and has a respective function in the processing of a business objective). Prospects, Contacts, Accounts, viz. are considered as UPM Objects.
- **Criteria** – Is a UPM Object listener, whenever a criteria specified by you is fulfilled for that specific Object, then the following set of defined actions would be evaluated/processed.
- **Actions**
  - **Assignment** - Based on the criteria set up and resultant success/failure, the UPM object is assigned to a specific business process.
  - **Email** – Based on the evaluation of the criteria, emails can be sent to specific users/groups.
  - **Field Update** - Fields can be set to auto-update based on the criterion result of the UPM Object.
  - **Score** – Set score value to be achieved on completion of the specific action.
  - **Connector** – CENTRi provides an OOTB Connector Element integrated into our cross-platform workflow server - FlexiFlow for major industry-specific CRM viz. SugarCRM, MS Dynamics, HubSpot, and Salesforce. The Connector element for each CRM is pre-configured with field mappings for syncing Deals, Accounts, Contacts, and more to the above-mentioned CRMs.

    The ‘Connectors’ element in FlexiFlow lets users design workflows respective to Connector Actions, viz. based on a criterion-prospect sync, based on a criterion-account sync, and so on. The Connector configured at CENTRi and integrated into FlexiFlow comprises the following elements:

    - **Name** – A name for the connector needs to be provided. (in our example case, we want to sync Opportunity to HubSpot, on a specific Opportunity criterion being True, thus we name it HubSpot Opportunity Sync)
    - **Connector** – The Connector configured at CENTRi, is utilized to connect to a specific system.

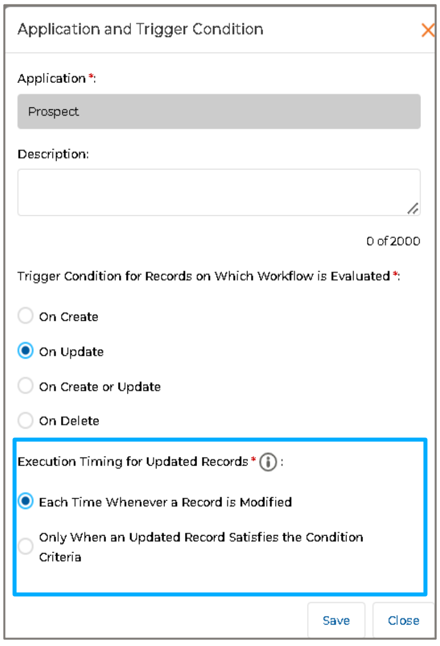
For the time being, the following connectors configured at CENTRi are available – MS Dynamics, HubSpot, Salesforce, and SugarCRM.

- **API Connection** – Defined through UPM Connectors at CENTRi, is the specific API Connection utilized by the connector. For example, we want to push Opportunity to HubSpot in our example case, thus we need to select the pre-configured HubSpot Opportunity Sync API Connection for the desired job.



Applications

The Applications Tool lets you initiate the Work Flow process, by setting up the mandatory primary object, based on which the workflow initiates. Once you drag the Application Tool from the Workflow Tool Bar and drop in the Canvas, the 'Application and Trigger Condition' Tool window opens up and lets you select any UPM Objects (pre-loaded/custom), put in a description, and select the Trigger Condition for records on which the Workflow would be evaluated. The following Trigger Conditions are supported:



I. **On Create –** Whenever a UPM Object Record is created, the Workflow is evaluated.

II. **On Update –** To trigger the workflow based on the update of a record, the admin user needs to select this option. The workflow will be triggered when the criteria specified in the Criteria section are met

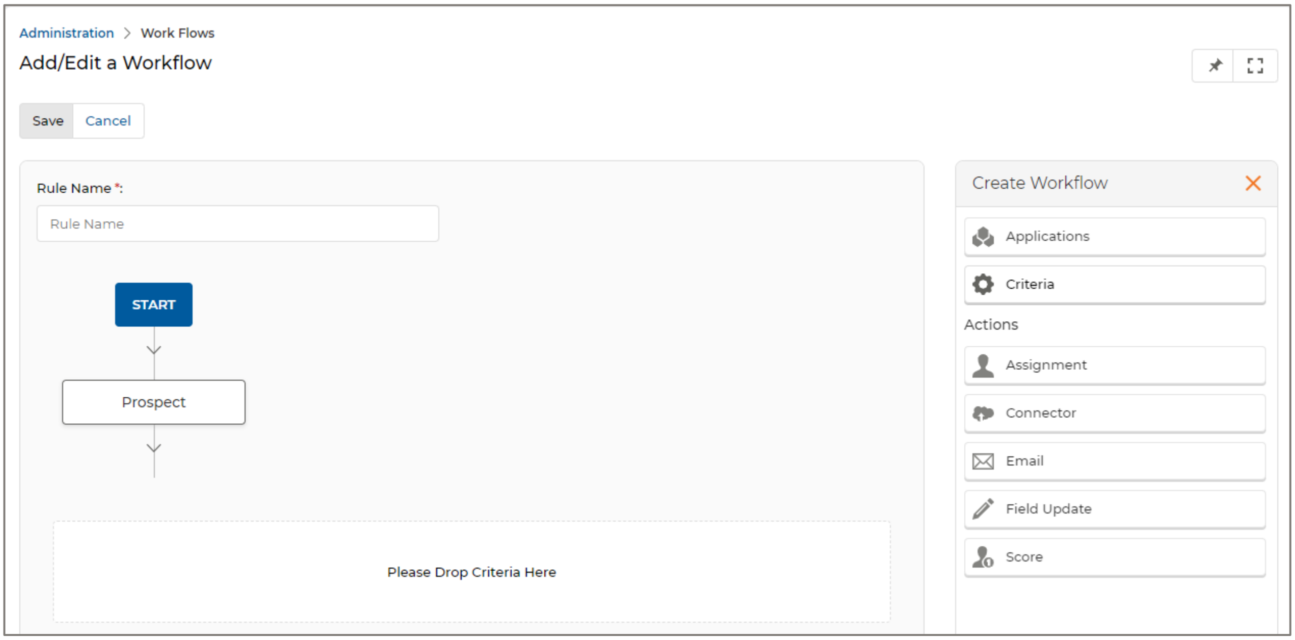
III. **On Create or Update -** This capability allows the system to trigger the workflow based on either the creation or update of any record. In both cases, the workflow is activated only if the criteria specified in the criteria section are met.

IV. **On Delete –** This feature allows the system to trigger a workflow when an application's record is deleted, provided the conditions specified in the criteria section are satisfied.

Note: Activating the toggle key linked to either (ii) or (iii) will activate **the 'Execution Timing for Updated Records'** where the admin user gets the provision to tell the system when to execute the workflow.

In our Example Case, the **Prospect** Object is selected, the description is provided, and the Rule is set up and saved.

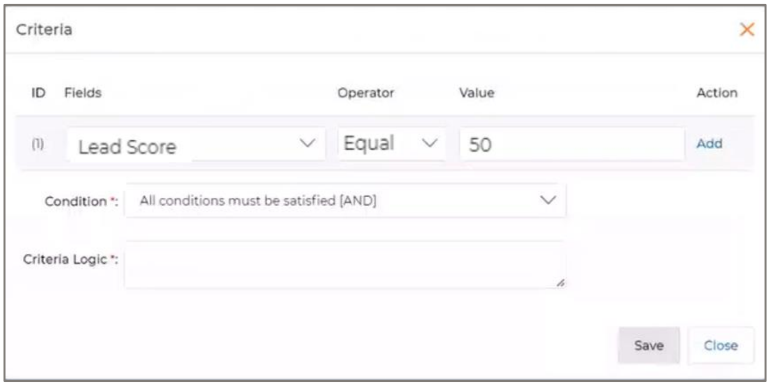
On providing the above parameters and saving, the Canvas auto-updates to a view as presented below



Now, as we see, the workflow is initiated with a Start and a UPM Object has been set up as the Primary Application, we will proceed to set workflow criteria.

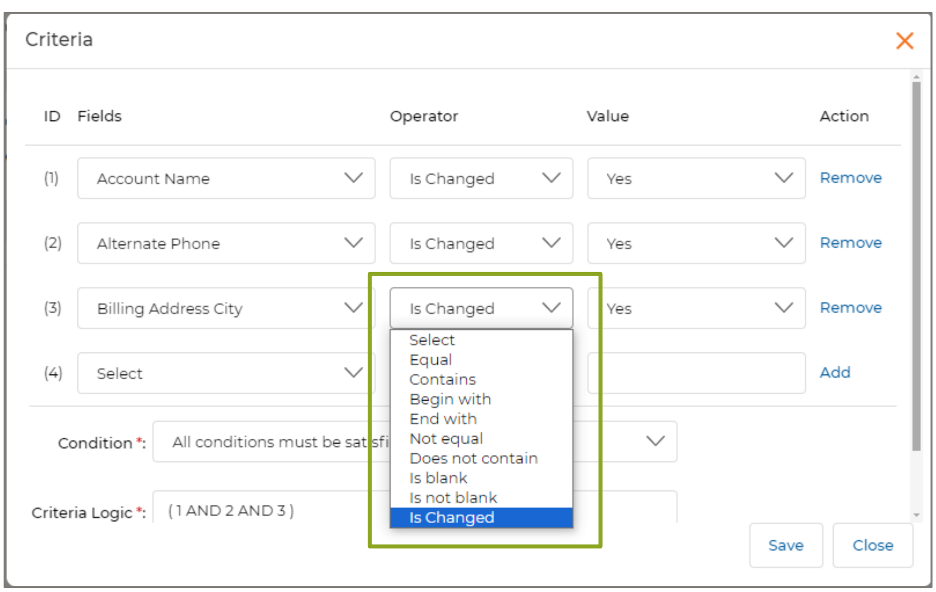
Criteria

The Criteria Tool lets you set up the criteria for the workflow processing. For our example case; we would need to create a criteria wherein Leads created with a Lead Score above 50 are automatically pushed to the Connector. We will start by drag-dropping the criteria in the Criteria Canvas space and selecting the “Field,” viz. Lead Score, set up the Operator and value to be referenced for evaluation of the criteria. In the example case, we have set the operator to Equal and the value as 50, resulting in a scenario where whenever the Lead Score of a created Prospect equals 50, the Criteria would be evaluated as a success.



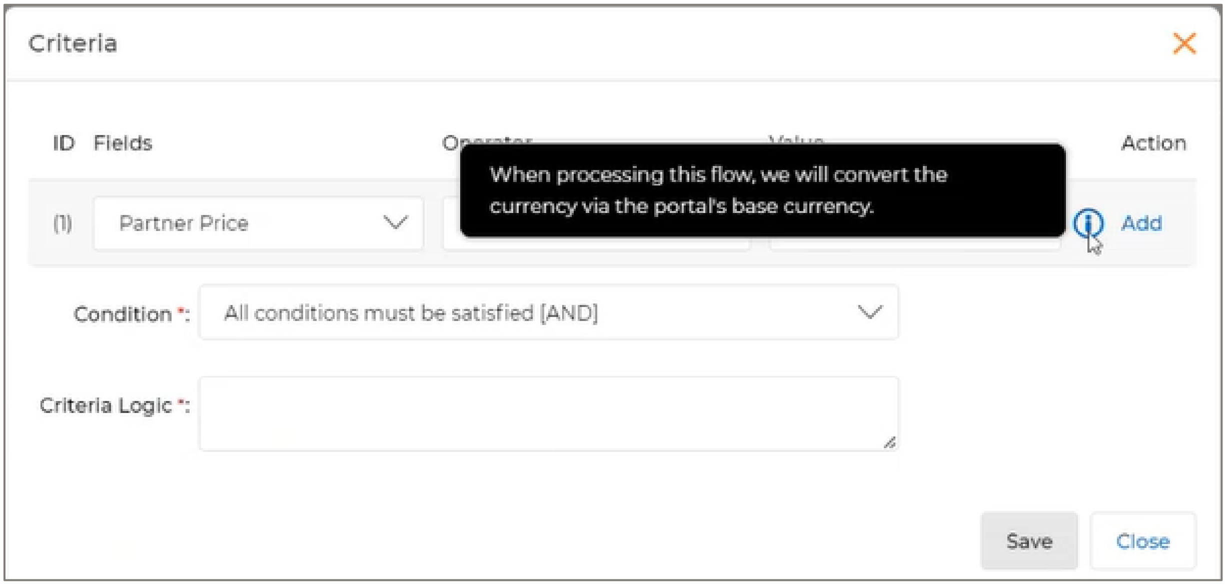
- To enhance the efficiency of defining a business flow, various operators based on the Field Type are introduced, allowing for multiple operations. Each Field Type is associated with a specific set of operators essential for defining business logic. Compatibility between operators and field types ensures that inappropriate operators are not available (e.g., text fields won't have "greater than" or "less than" operators, while integer/number fields will). Boolean operators such as "Is Blank" and "Is not blank" have been incorporated to manage data based on its existence or absence selectively

  Currently the following operators are in use:



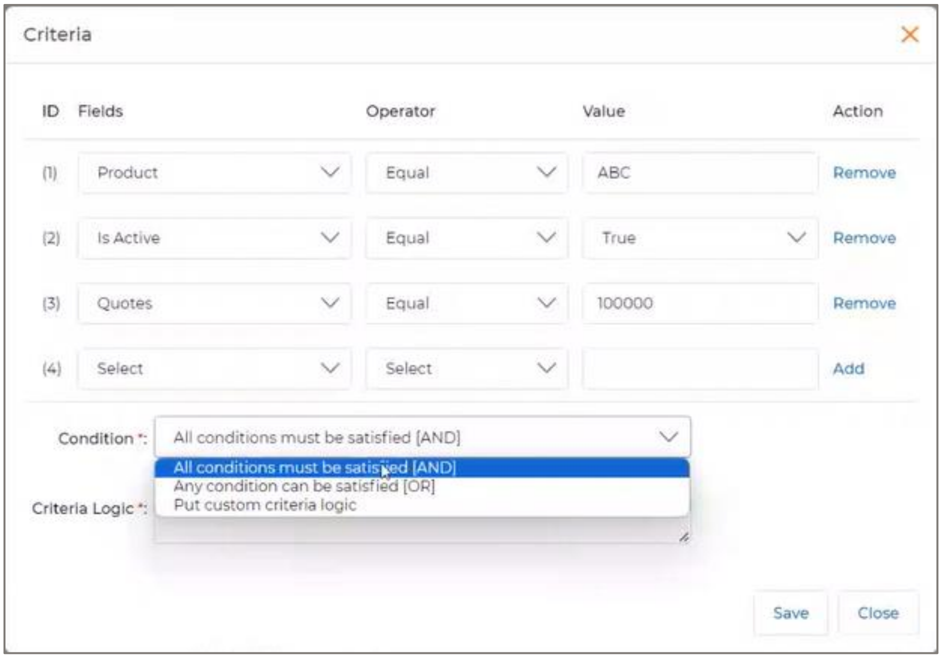
- **Equal:** The 'Equal' operator evaluates whether two values are identical. If the values being compared are equal, it returns true; otherwise, it returns false
- **Contains:** This is commonly used to determine whether a particular value or substring exists within a larger value or string. If the specified value or substring is contained within the target value or string, the operator returns true; otherwise, it returns false.
- **Begin With:** The 'Begin With' operator verifies whether a given string starts with a specified substring. If the target string begins with the provided substring, it returns true; otherwise, it returns false.
- **End With:** The 'End With' operator evaluates whether a given string ends with a specified substring. If the target string concludes with the provided substring, it returns true; otherwise, it returns false.
- **Is not null:** The 'Is not null' operator evaluates whether a variable, field, or expression contains a valid value, indicating that it is not null or empty. If the value is present, it returns true; otherwise, it returns false.
- **Not Equal:** The 'Not Equal' operator compares two values to determine if they are not equal to each other. If the values being compared are not equal, it returns true; otherwise, it returns false.
- **Does not contain:** The 'Does not Contain' operator evaluates whether a specified value or substring is absent within another value or string. If the specified value or substring is not found within the target value or string, it returns true; otherwise, it returns false.
- **Is blank:** The 'Is blank' operator checks whether a variable, field, or expression holds no value or is empty. If the value is empty or contains no data, it returns true; otherwise, it returns false.
- **Is not blank:** The 'Is not blank' operator checks whether a variable, field, or expression holds a value or is not empty. If the value is present and contains data, it returns true; otherwise, it returns false.
- **Is Changed:** When the field's value is updated, the workflow will return true.

Note: When dealing specifically with a "Currency" type field such as "Partner Price," a tooltip will appear to inform users that during processing, the currency will be converted to the portal's base currency.



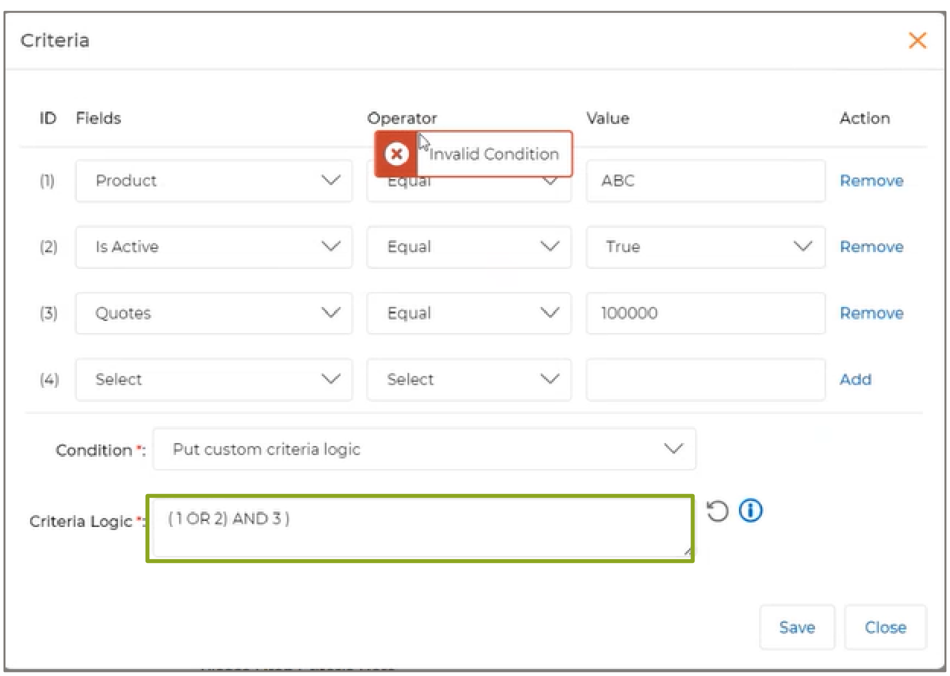
- **Condition:** The user has the flexibility to choose the specific condition for the criteria logic according to clearly defined parameters, catering to the distinct needs of various situations or contexts. Among the available options, the user can select any one of the following conditions.
  - All conditions must be satisfied (AND)
  - Any condition can be satisfied (OR)

    Note: On selecting AND/OR, automatically, the Criteria Logic Field is updated.
  - Put Custom Criteria Logic

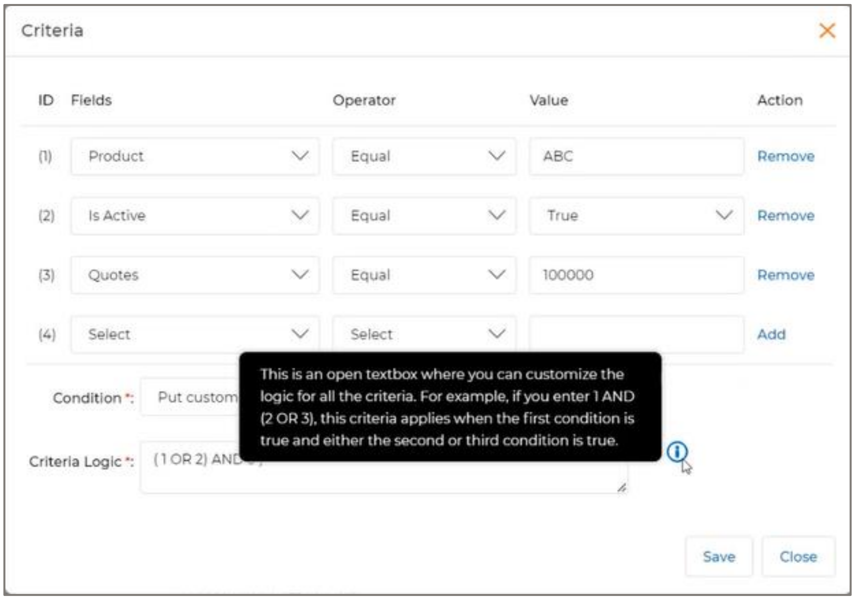


- **Criteria Logic:** When the user selects the "Put Custom Criteria Logic" option, they are required to manually define the "Criteria Logic", using a logical expression format (e.g., (1 AND 2) OR (3 AND 4)), where 1, 2, 3, and 4 represent criteria IDs. The "Criteria Logic" also undergoes validation to prevent invalid logical expressions.

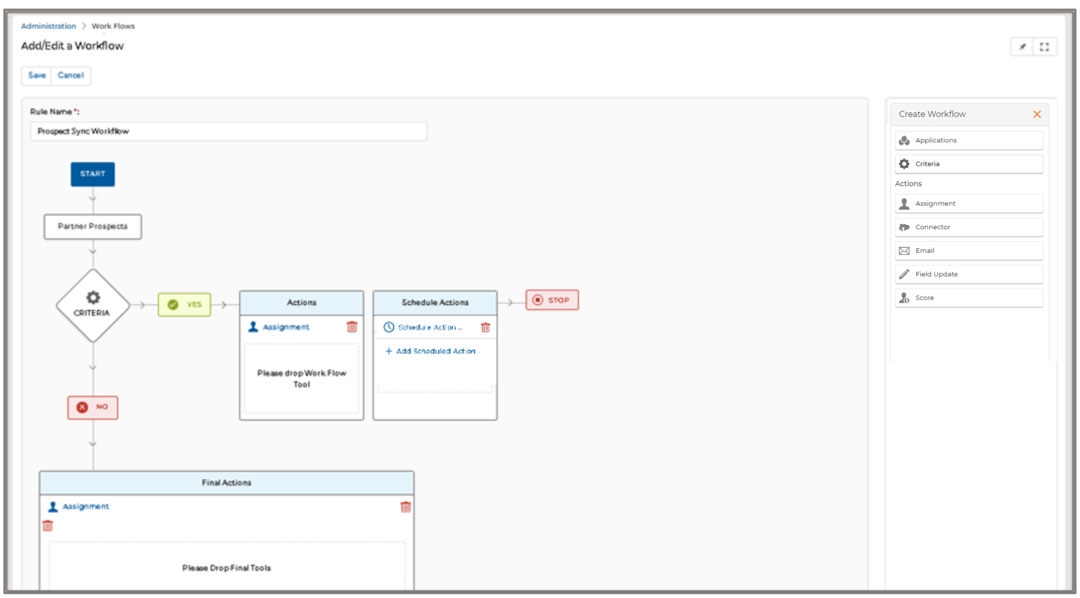
  For example, if there are four criteria and the user defines custom logic such as "(1 AND 2) OR (3 AND 4)" and then deletes Criteria ID 4, the system will not permit saving these custom criteria as it becomes invalid.



The tooltip provides guidance to the user on how to configure the criteria logic.



A Criterion yields two sets of actions, once when it succeeds and another when it fails. These two actions are named Yes, for success, and No, for failure. Once the above criteria action is set up and saved. The canvas is updated with the following tools.



On the Criteria being True, you now have the privilege to set up Actions or Schedule Actions. We will set up an Action to push the Prospect to Connector and may schedule the push at a specific time of the day/month, as per the business process.

On the Criteria being False, Final Actions can be set up by drag-dropping Actions which are processed on the failure of the Criteria, in our example case we will set up an Email to be sent on the non-fulfillment of the Criteria, viz. when the created Prospect's Lead Score is not 50, an Email would be sent to the Channel Marketing Manager (CMM), stating the same and because of the score the respective Lead wasn't pushed to Connector.

Actions

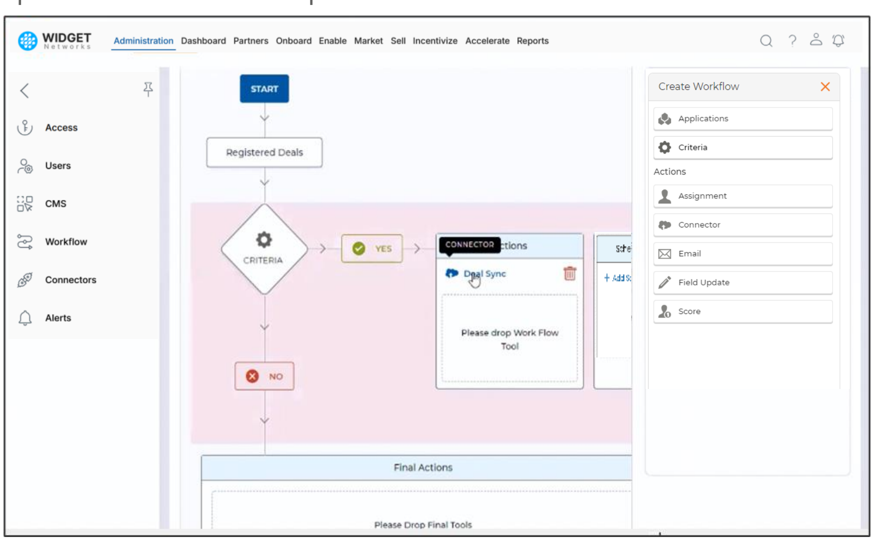
Actions are the endpoints of the workflow process and can be set up on the successful evaluation of the Criteria/failure of the evaluation of the Criteria. For our example case, we will drag-drop the Third-party Connector Action for the Criteria True set of Actions Window and drag- Action for the Final Action, when the Criteria is evaluated as False. drop Email.

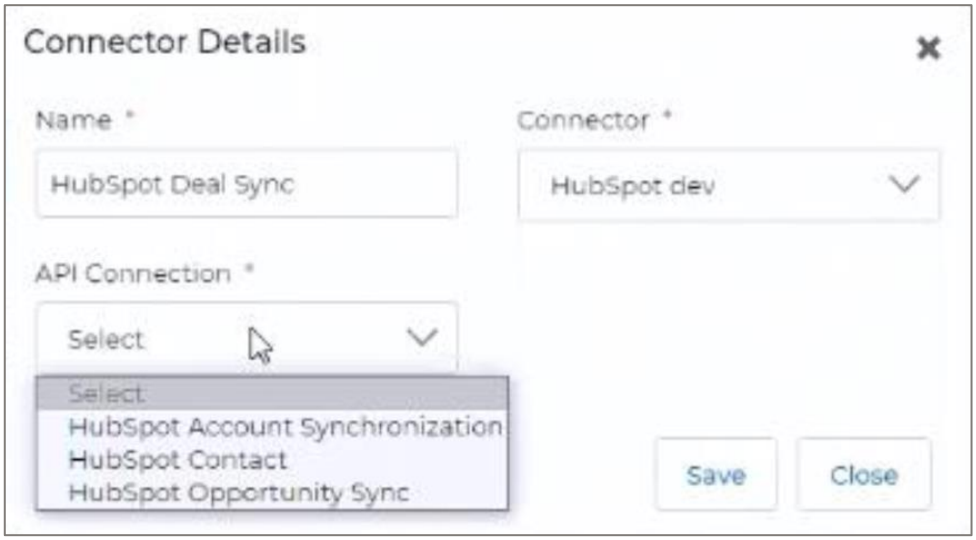
Connector

Workflow-based record sync across all configured and integrated third-party platforms is available with the latest CENTRi version 3 launch of the ZINFI UPM platform. Support for automated and custom data synchronization in a defined time or period is integrated with CENTRi's backend FlexiFlow Engine. Data sync algorithms can be easily created and configured through workflows to process workflow-based record synchronizations.

Using ZINFI UPM's FlexiFlow we can easily edit criteria-based workflows and utilize actions to enable Synchronization Actions. For example, we have a registered deals workflow, based on conditions such as Sales Stage and triggering value as '10 - Closed Won'. We can add additional attributes or criteria - the rule criteria, for example, we set up a criterion 'Amount is greater than 2000' and Save the workflow. Once the workflow and the criterion for the Action are defined, we can add 'Synchronization Actions' like 'Deal Sync with the salesforce connector' (these actions are preconfigured with the respective platform – Salesforce Connector at CENTRi). Such Record sync based on workflow custom criteria can be configured, and processed for any third-party platform which has been integrated with ZINFI UPM through CENTRi. We can simply drag the connector action from the Tools panel into the workflow and provide a name based on the connectors.

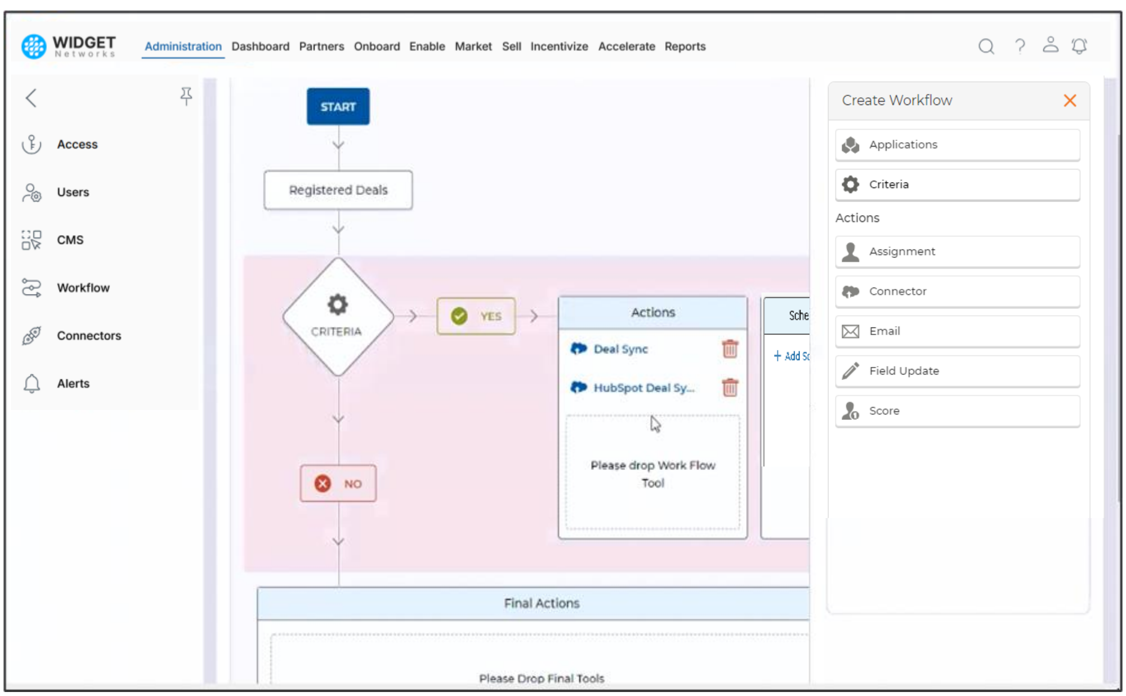
For example, if we want to sync Deal based on the workflow criteria to HubSpot, we will name it 'HubSpot Deal Sync' and choose the HubSpot API connector (configured at CENTRi) for the data push and pull operations between HubSpot and ZINFI.





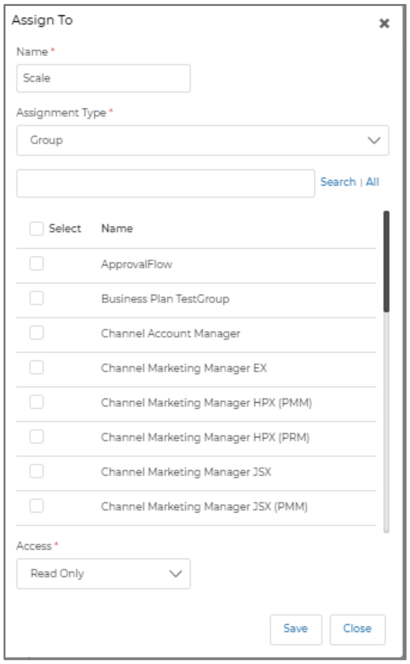
The updated feature incorporated at CENTRi, allows you to sync single data or record sets to multiple third-party platform instances from the ZINFI UPM, viz. Sync Lead X to both Salesforce and HubSpot. We need to properly map Entities viz. Deals at UPM with Opportunities at HubSpot and their respective attributes between the two systems for such data synchronizations.

For the above example, we can utilize the Opportunity Sync mapper or the HubSpot API connection and save the workflow (defined above) to simultaneously sync the deal to HubSpot along with Salesforce. We can add as many connectors as we want based on the integrations that we have configured at CENTRi, and based on our selection of the connector, the relevant API connections and respective actions can be added to the Work Flow.



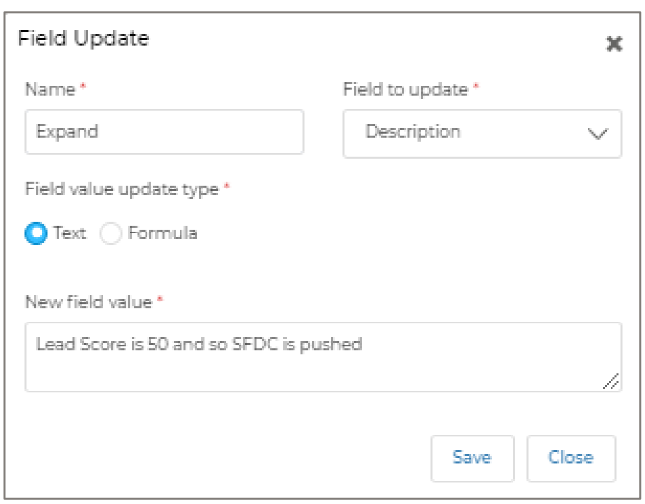
Assignment

The Assignment Action - Lets you provide a mandatory name for the specific Action assign the UPM object to a User/Group and set Access to Read/Read-Write.



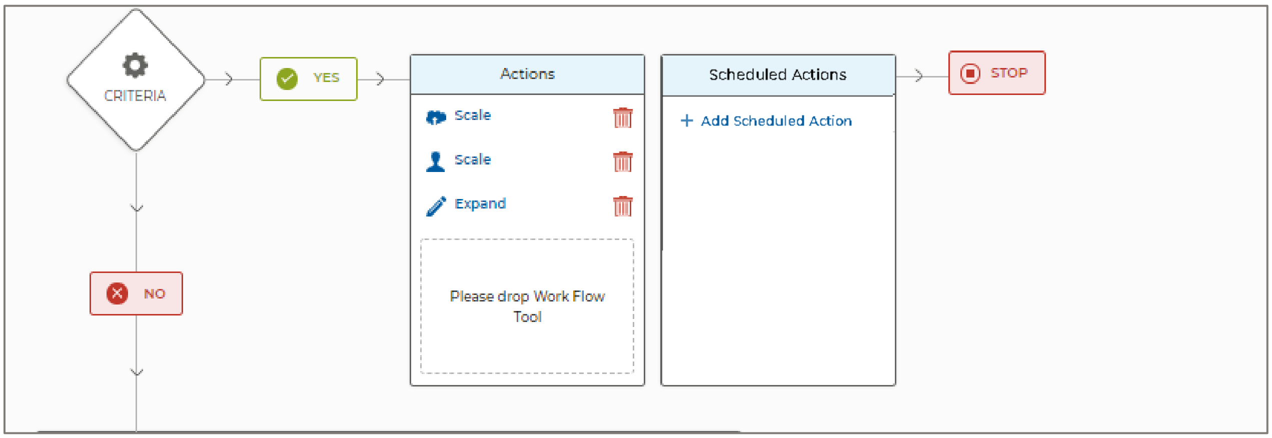
Field Update

Based on the evaluation of the Criteria, specific Fields of the primary UPM Object (selected from the Module Action) can be set to be updated automatically with a specific value based on a formula.



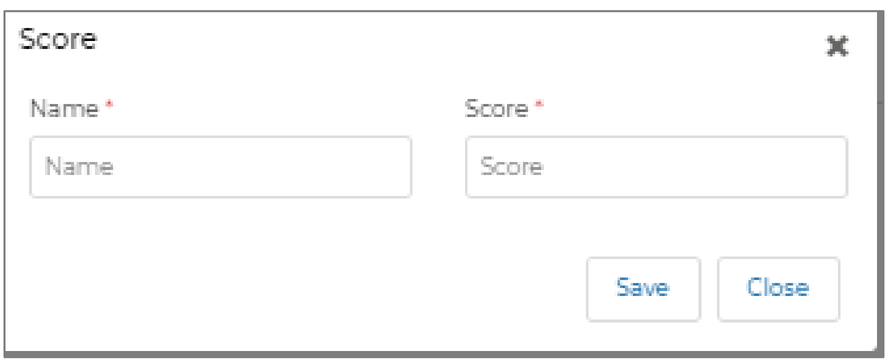
In the example case, we are setting up Field Update Action to update the Description Field of the Prospect UPM Object (whose Lead Score equals 50 and Criteria evaluation is Success/True) to update its value to the text provided in the New Field Value and Save the Action.

The Additional Actions are saved and respectively updated on the Workflow Canvas as per the following image and can be deleted through the respective delete icons against each of the Actions.



Score

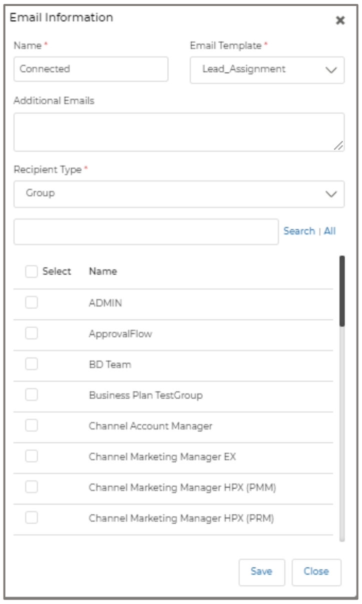
Based on the evaluation criteria, we can set up scores that would be achieved on completion of a workflow action. We have options to save a Name and a Score Value for the Score Element.



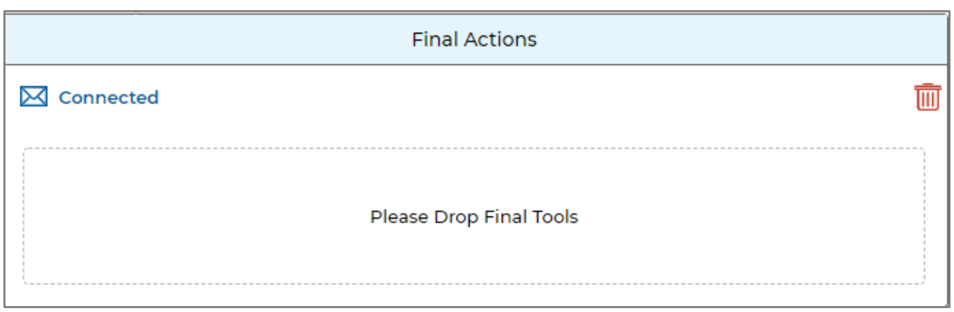
Email

In our example case, we had planned to set up the Workflow, to send out an email to the CMM, stating that the created Prospect's Lead Score is not equal to 50, and is not being Pushed to the Connector. Thus, this Action would be provided in the False (Criteria Evaluated as False) Action Window. You need to drag-drop the Email Action from the Tool Bar to the Final Action window, which is the False Action Window.

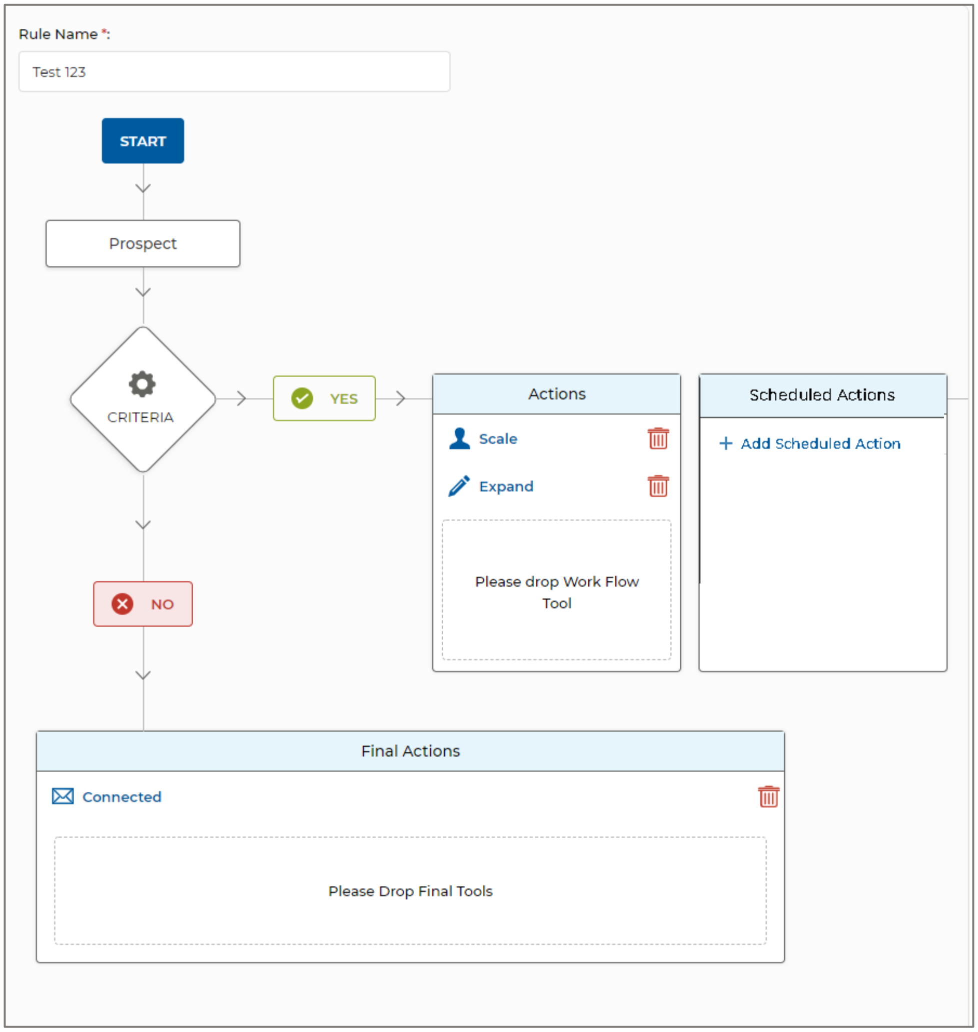
The Email Action lets you set up the following Email parameters, the Name of the Action, the Email Template (selected from a list of System Emails), the Recipient type – User/Group, the Group Name in case of Group and finally Saved.



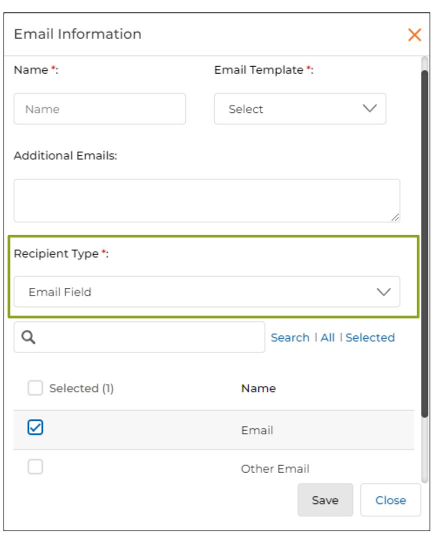
The Workflow Canvas is updated with the Email Action and is displayed as the following:



Thus, we have successfully created the Workflow as per our desired example case, and have the final Workflow as below:



Email notifications can be sent to the "Email field" component in the list of information entered by new prospects when they're registered at UPM.

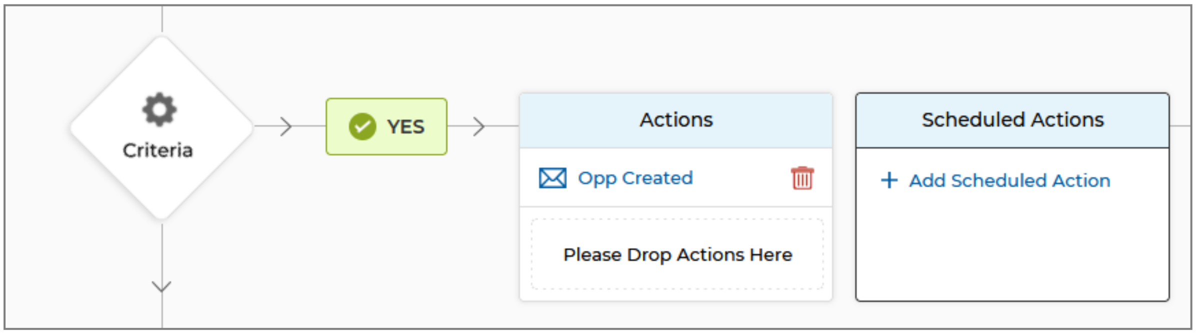


Schedule Actions

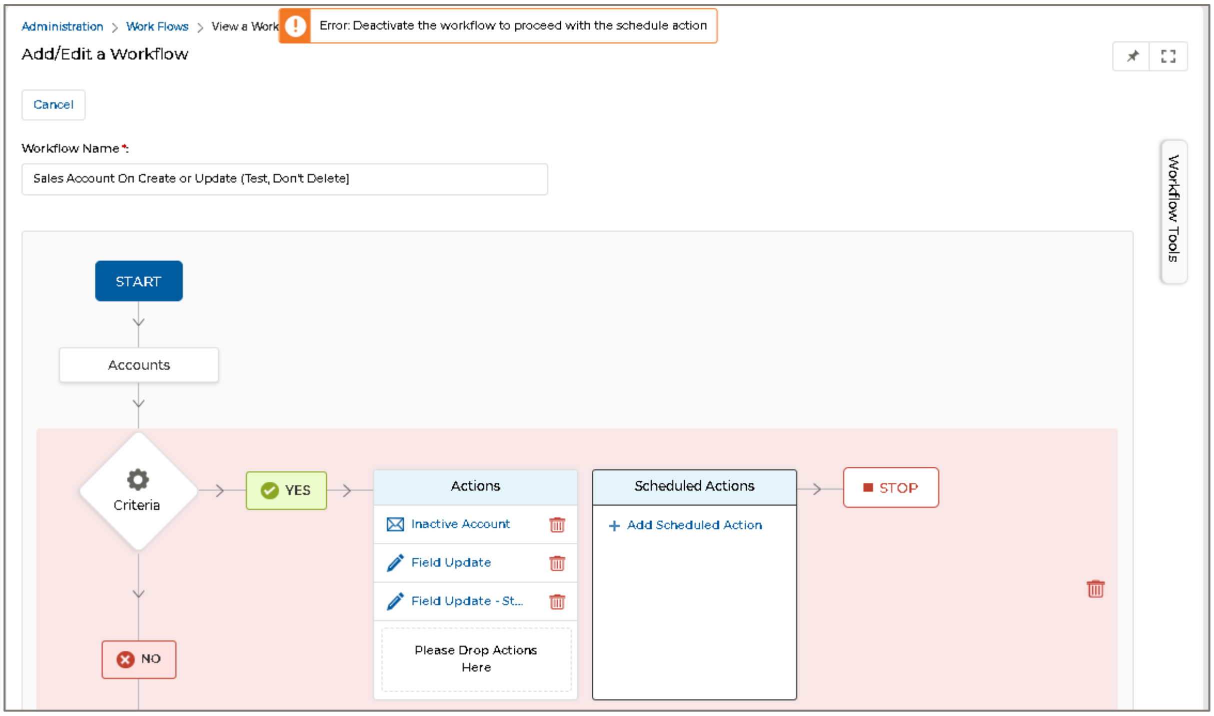
Admins can automate and schedule specific actions within Work Flows according to predefined times and conditions. With a detailed criteria editor for precise configuration and validation, this feature ensures that tasks are executed on time, optimizing resource allocation. Automating repetitive tasks reduces manual errors and boosts overall operational efficiency, enhancing productivity and ensuring seamless process automation.

Enabling the definition of scheduled actions within Work Flows empowers admins to automate repetitive tasks and streamline business processes effectively. By automating actions planned, admins can ensure the timely execution of critical tasks, optimize resource allocation, minimize manual errors, and enhance overall operational efficiency. This capability boosts productivity, reduces administrative burden, and allows teams to focus on strategic initiatives, ultimately driving business growth and success.

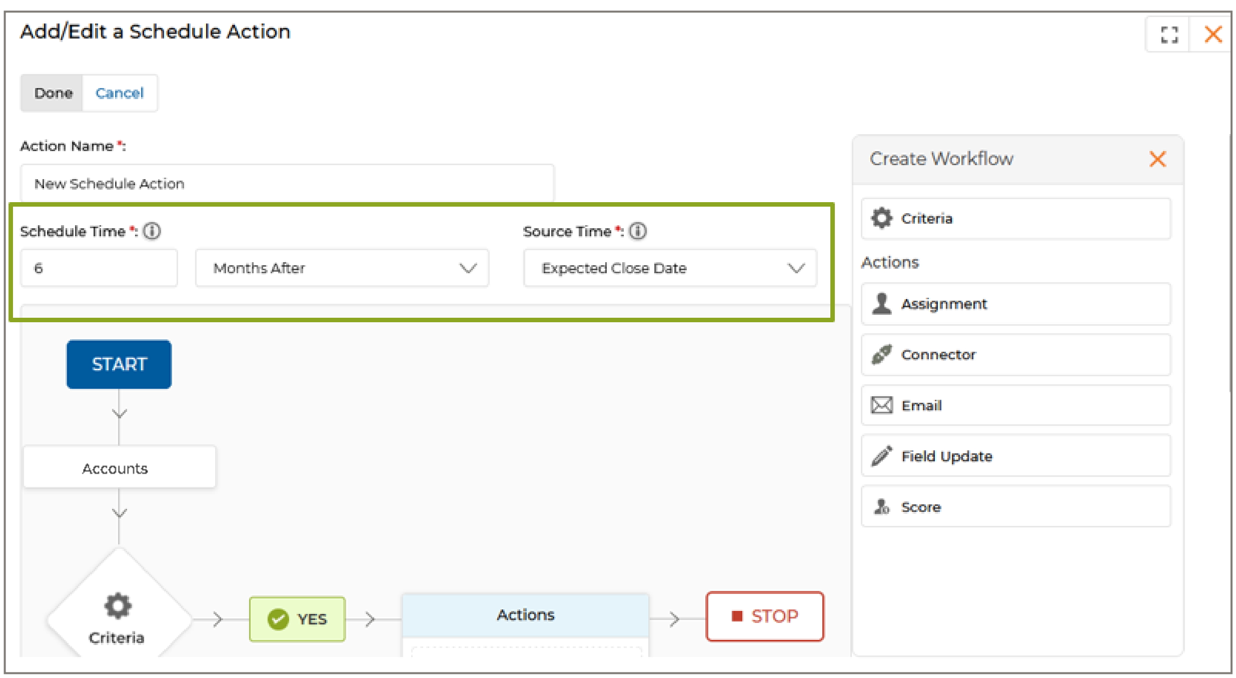
1. With every criterion resulting to Success/YES, there is an **Action** box and a **Scheduled Action** box.
    - **Actions**: This box can only take actions as input via drag and drop.
    - **Scheduled Actions**: This box will not allow any drag and drop of any component.



2. Actions can be scheduled only for Work Flows that are deactivated. Attempting to schedule an action for an active Work Flow will display an error message, as shown in the image below.



3. To schedule an action for a specific criterion of a deactivated Work Flow, click the '**Add Scheduled Action**' button. Clicking this button will open the right-hand panel to set up a Scheduled action where you need to configure the following Fields.

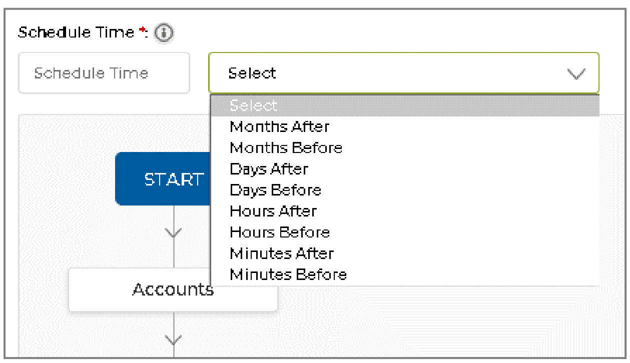


a. **Action Name**: Shows the 'Action Name'. The text type field will store the scheduled action's record name. (MAX Limit: 80 Char).

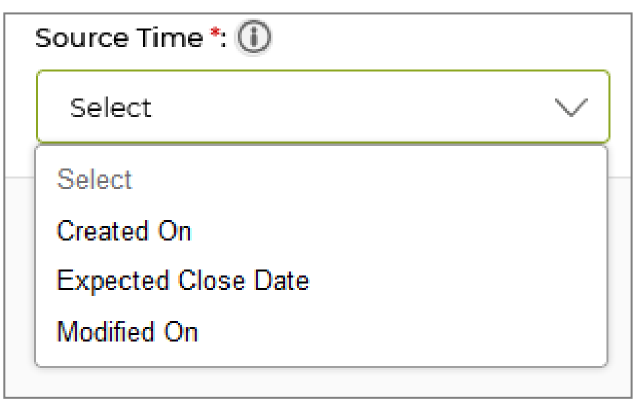
b. **Schedule Time:** The first box will take the offset value for Scheduling purposes; this will only accept numeric values. (MAX Limit: 3 Chars, >=0). The duration value must be a whole number. Fractions are not allowed.

c. **Duration Dropdown:** Drop-down value to control the offset value with its nature of execution. They are:

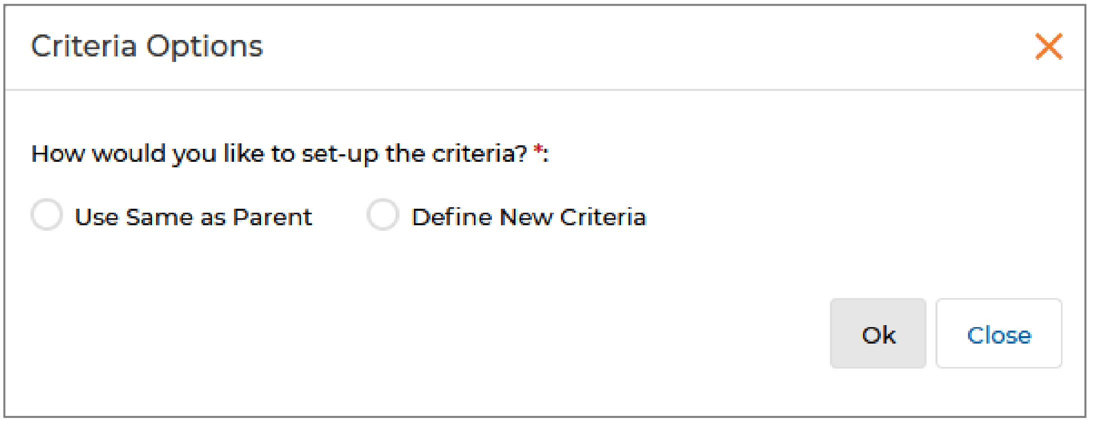
- Months After
- Months Before
- Days After
- Days Before
- Hours After
- Hours Before
- Minutes After
- Minutes Before



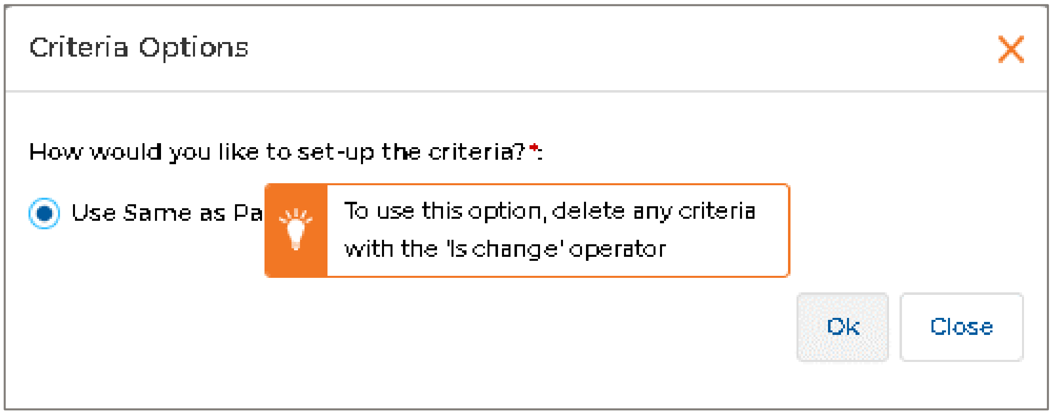
d. **Source Time**: This will bring up all the date and date time fields based on the application on which the workflow is based.



4. After setting up the above, we must create a valid **Criteria** using the canvas. When you drag and drop the 'Criteria' into the Criteria Canvas space, a pop-up will appear where you need to select:



   a. **Use Same as Parent**: Selecting this and clicking OK will automatically set the criteria based on the parent workflow criteria. However, if the parent criteria contains the 'Is Changed' operator for any of the fields, an error message will appear, preventing you from proceeding further.



   b. **Define New Criteria**: Selecting this will bring up the criteria editor for Admin where you need to select the necessary "Field(s)" and configure the appropriate operators and values.

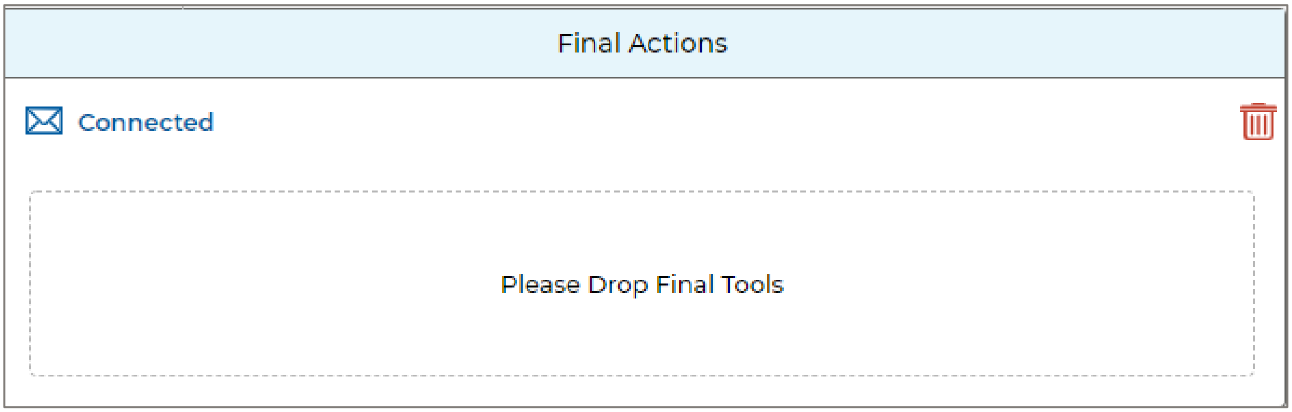
5. To save a scheduled action, click the "Done" button.

6. We can add multiple ‘Scheduled Actions’ for any specific criteria based on our requirements..

The Work Flow can be saved, for future reference, and post-save can be Edited, Activated, or Deactivated as per the business process requirement.

Final Action

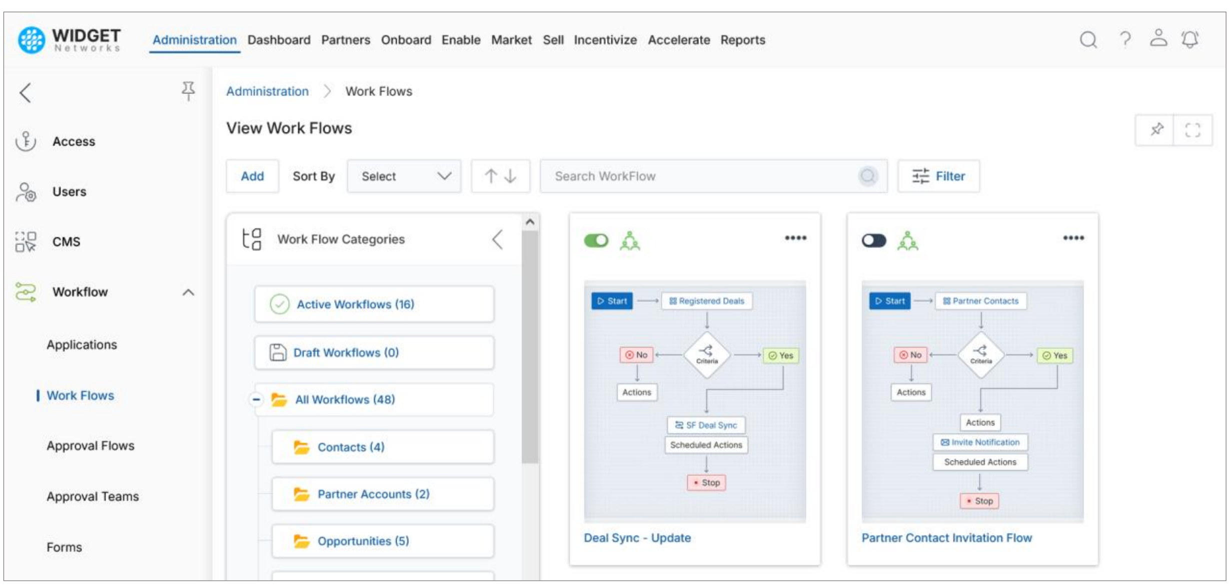
Represents the last action/set of actions processed by the Work Flow. In our example case, when the criteria as evaluated as a false, Email Action was set up as the Final Action.

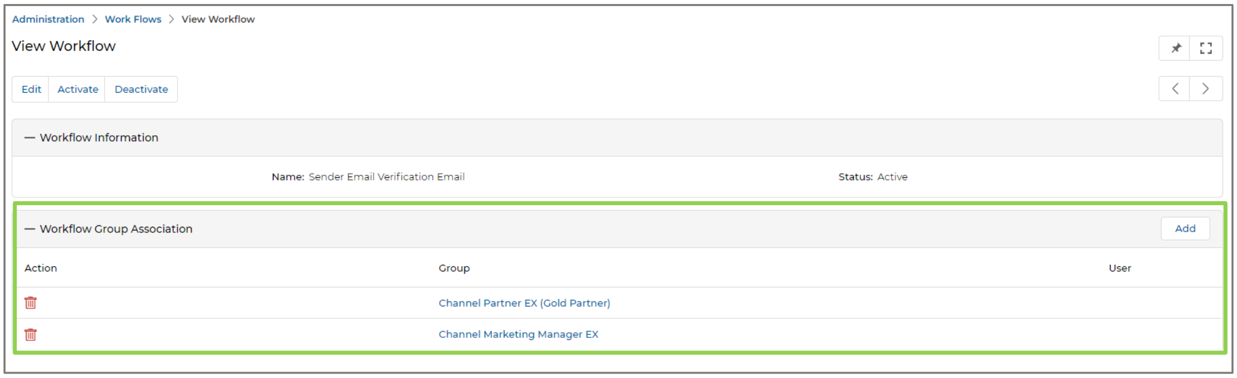


Add Users to Groups associated with Active Workflows

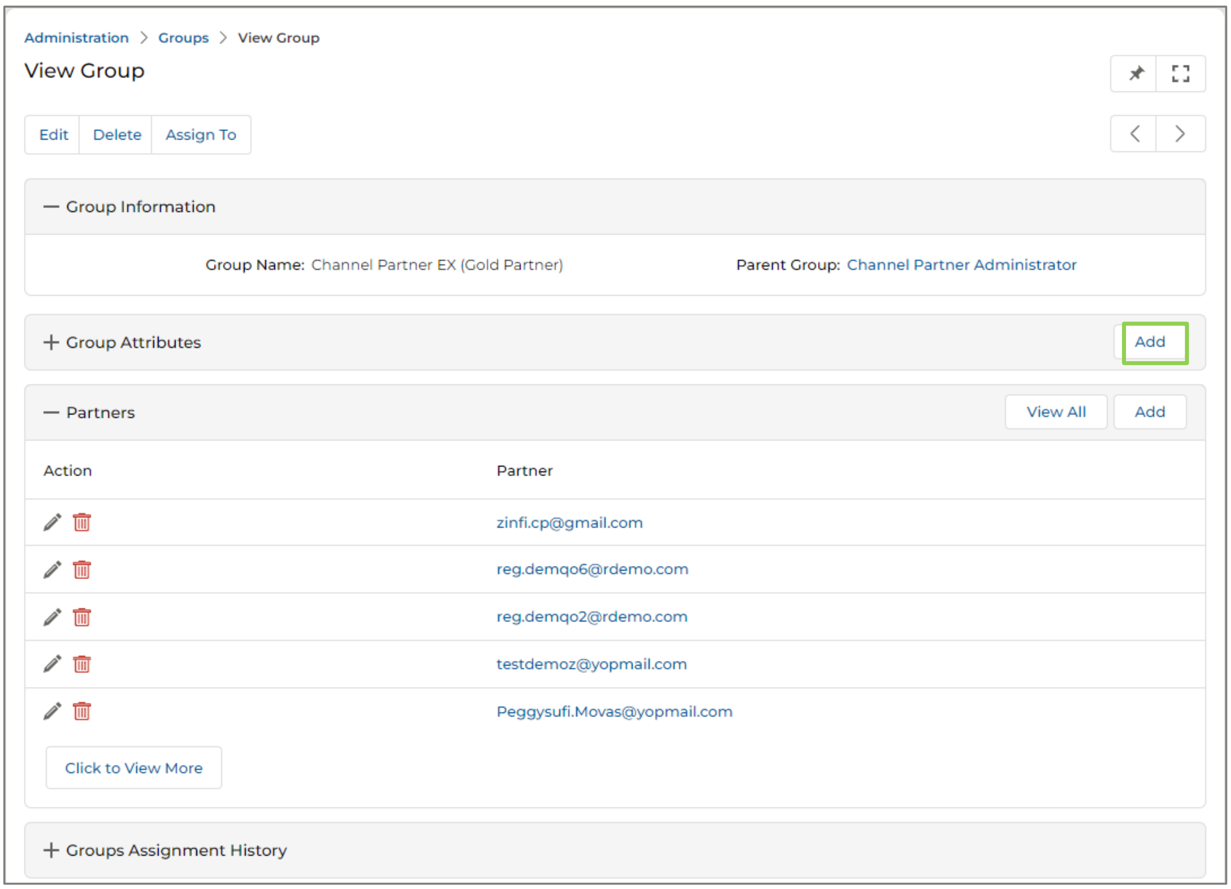
Workflows are associated with Groups for business process automation. Implementation of this release feature ensures that the workflow remains **Active for the associated Group(s),** even when Users are added to the associated Group.

1. We view the Workflows assigned to Groups by traversing to Administration > Workflow > Work Flows and clicking on a specific Work Flow to view the details of the Workflow.





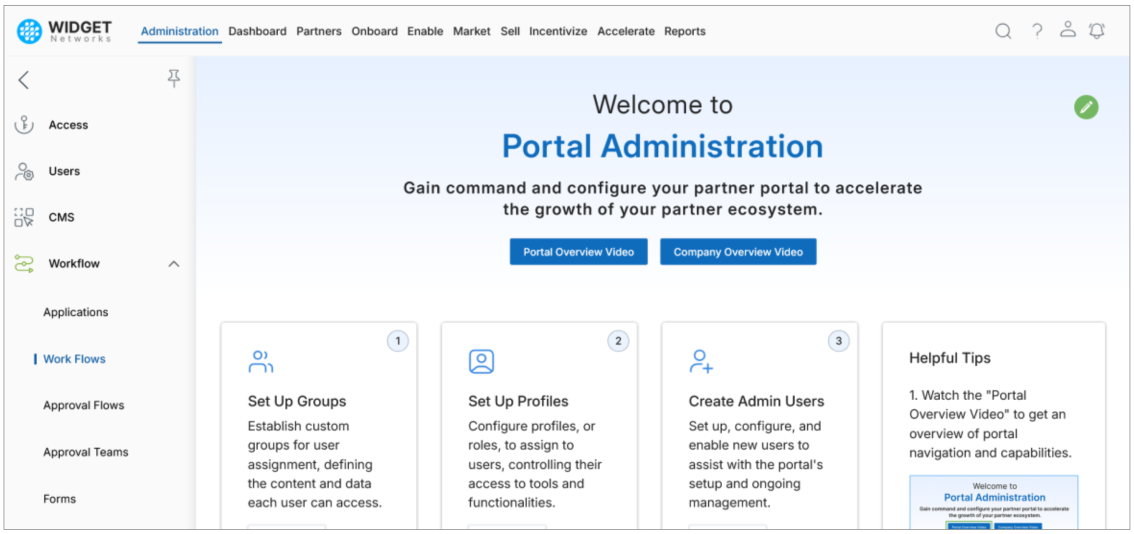
2. Now, if we add more Users to any of these two groups, from Administration -> Access -> Groups, the Workflow remains Active.



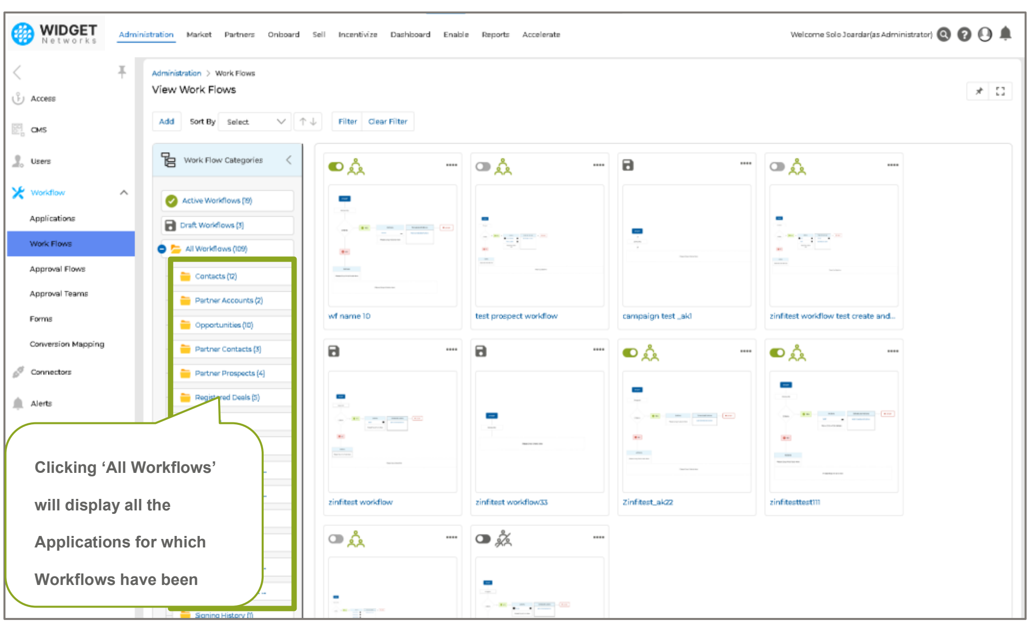
Manage Workflows

Manage Existing Workflows

1. Click **Administration** on the top menu.
2. Click **Workflow > Workflows** from the left menu bar.



View Workflows

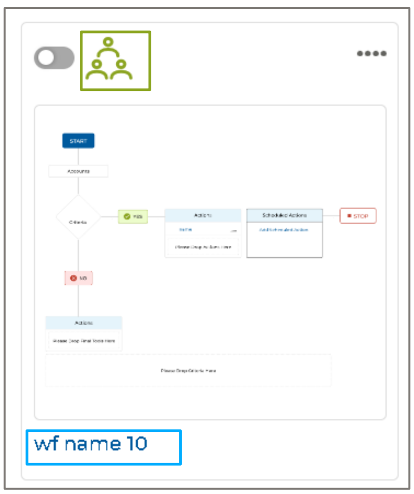


1. The top part of the page provides some actions:
    a. **Add** – Opens a new page to add a new record.
    b. **Sort By** – Allows you to sort the Work Flows based on 'Created On' and 'Modified On'.
    c. **Filter** – Allows you to filter the Work Flows based on the parameters Category, Status, and Workflow.
    d. **Clear Filter** – Helps you to clear the filters.

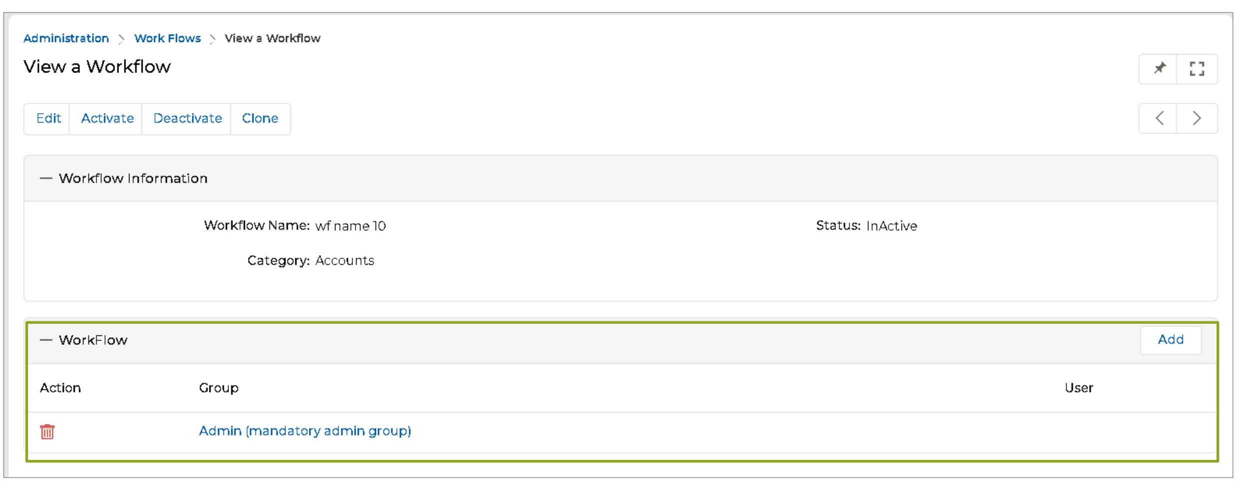
Manage Workflows Galleries

1. A workflow will only function when associated with a group; without this association, it remains inactive. The images below illustrate the workflows linked to groups and those without associations. For all such workflows, clicking the four dots will display the options: View & Edit,' 'Info,' 'Clone,' and 'Delete'.

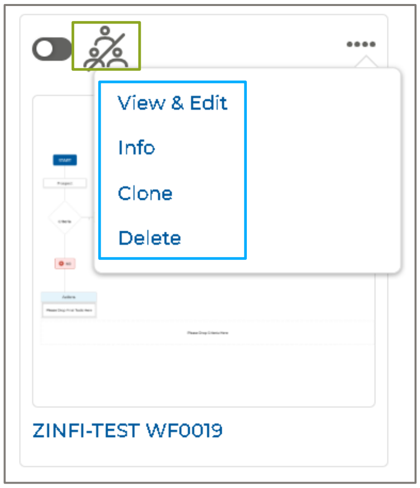
   Work Flow associated with Groups:



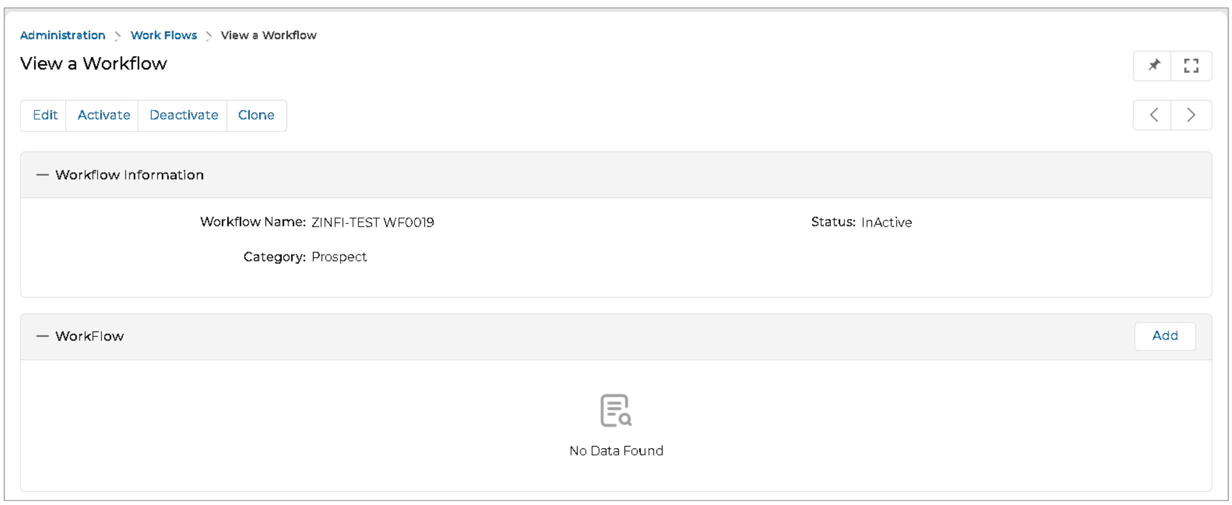
Work Flow associated with Groups



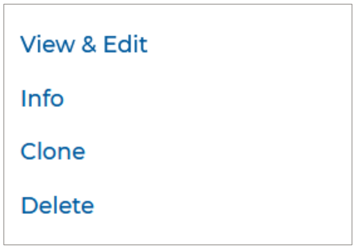
Work Flow not associated with Groups:



Work Flow not associated with Groups



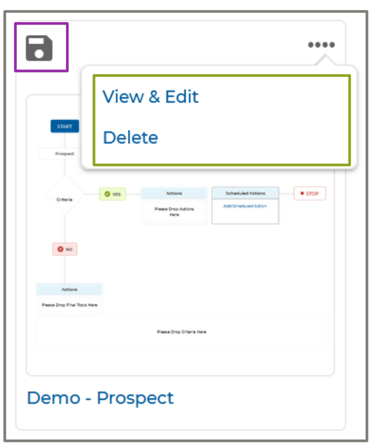
2. **Buttons**:
    a. **View & Edit** – Clicking View **& Edit** will take us to Add/Edit a Workflow page where we can edit the Workflow.
    b. **Info** – Clicking **Info** takes us to the details page of the Workflow.
    c. **Clone** – Clicking **Clone** will help make a duplicate copy of the specific Workflow and open the Workflow in edit mode.
    d. **Delete** – Clicking **Delete** will delete the Workflow.



3. **Active/Inactive Mode:** A workflow that is associated with a Group can only be made active or inactive by enabling/disabling the toggle key (highlighted in green border) as shown in the image below.

Workflow in Inactive Mode

4. **Draft Mode:** A workflow can also exist in the Draft stage, identifiable by the icon shown in the image above (highlighted in purple border). For workflows in the Draft stage, clicking the four dots will display only the options to View & Edit, and Delete.

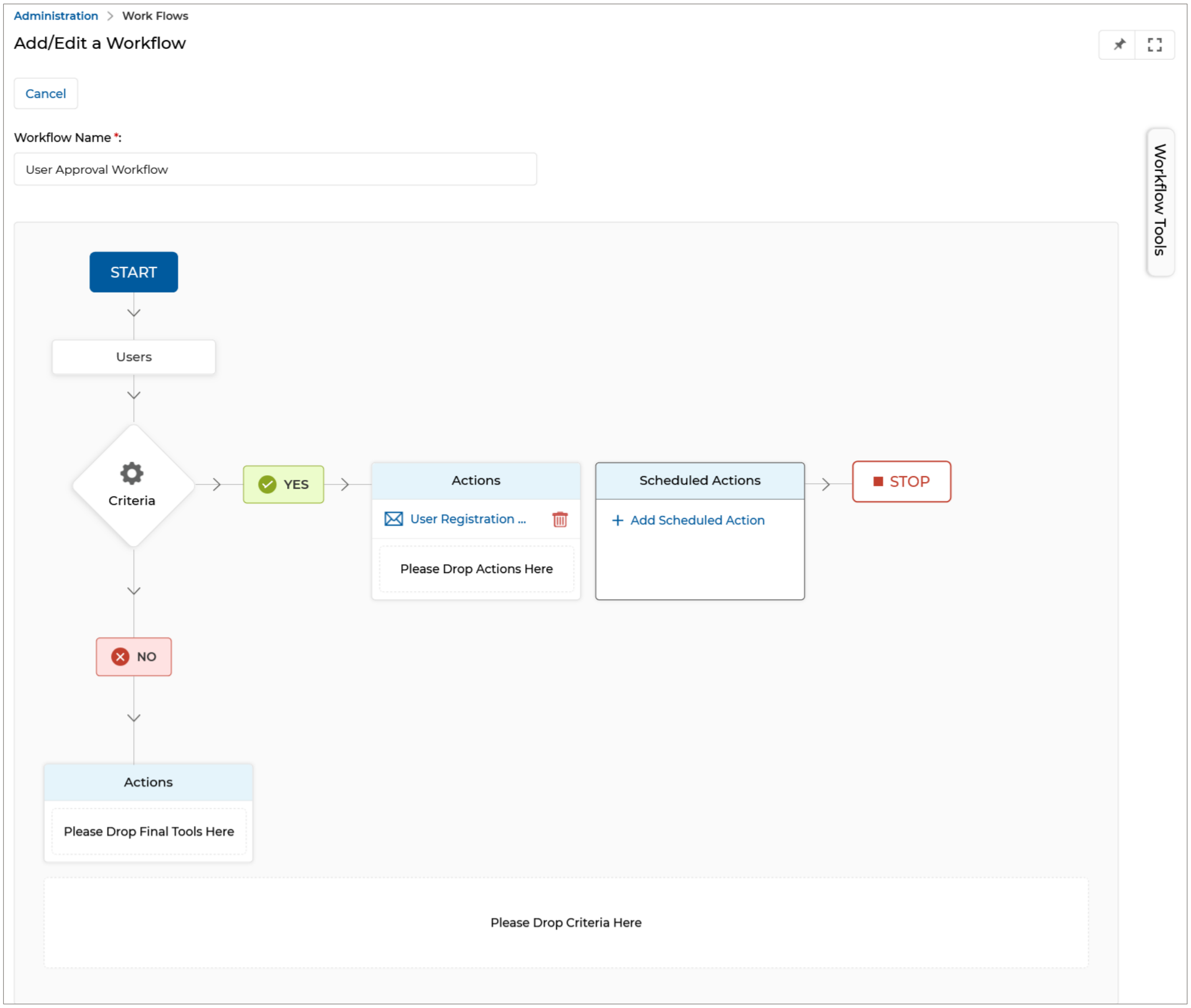


Workflow in Draft Mode

Edit/Create a Workflow

1. Clicking View **& Edit** will take us to Add/Edit a Workflow page where we can edit the Workflow.

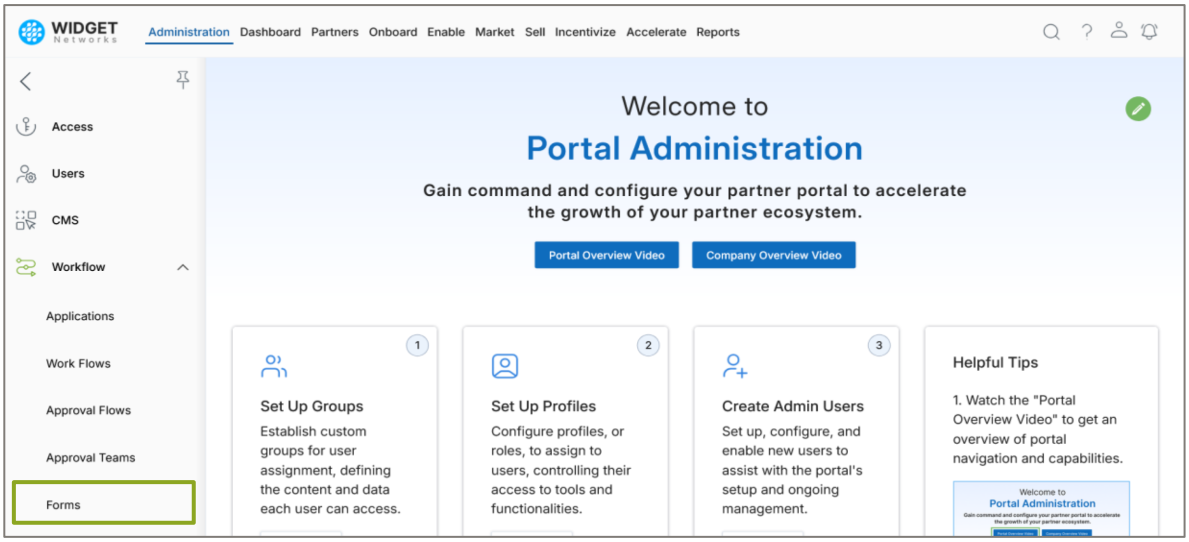
2. Modify the flow as required (see the *Workflow Tools* section above).
3. Click **Save** when done.



Forms

Accessing Forms

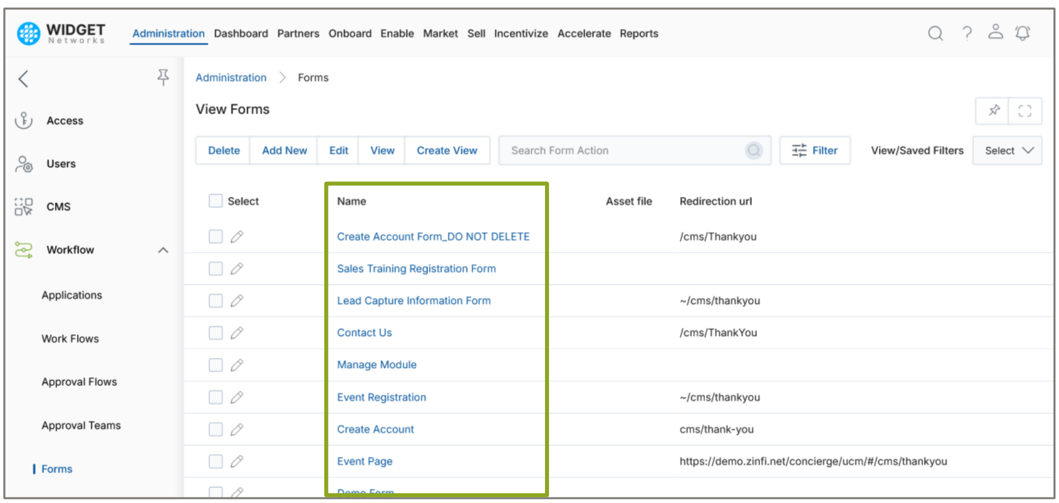
1. Click **Administration** on the top menu.
2. Click **Workflow** > **Forms** in the left menu bar.



View Dynamic Forms

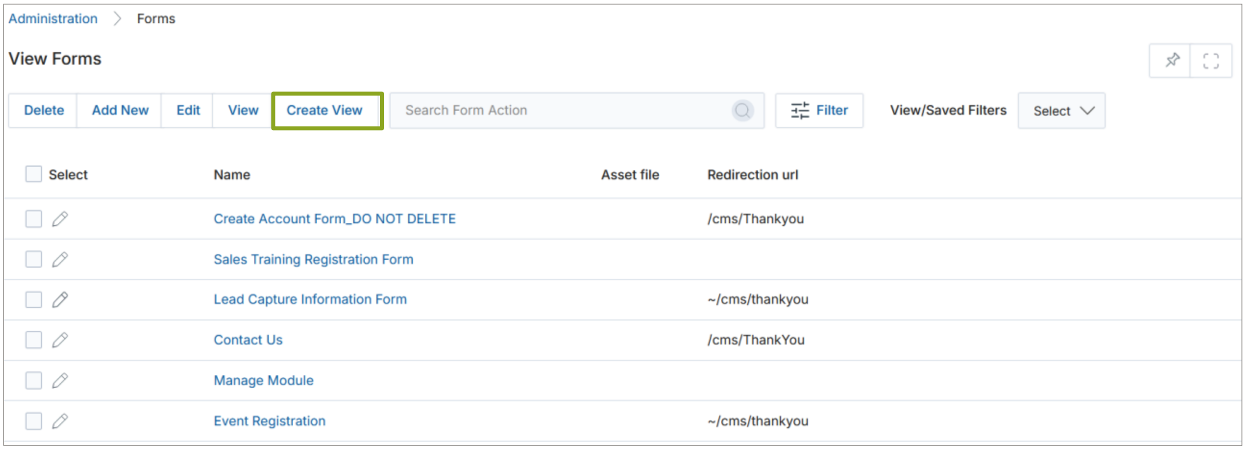
1. Clicking **Forms** from the left menu bar will take you into the Forms Library, where all the currently available Forms are displayed.

2. The top part of the page provides the following actions:
    a. **Add** – Allows you to create a new ‘Form’.
    b. **Delete** – Deletes selected record(s) from the listing page.
    c. **Create View** – This lets you create your view with a set of columns as needed.
    d. **Search** – Opens a new pop-up window where you can put search criteria to find desired records.
    e. **Clear Search** – Clears the search made.
    f. **Saved Searches** – Shows a list of saved searches in the search dropdown. When selected, two more options are shown:
        i. **Edit** – Provides the option to update the selected search name.
        ii. **Delete** – Deletes the selected search name from the search dropdown.
3. For each record in the grid, clicking:
    a. **Edit (Pen icon)** – Let you edit the selected record.
    b. **Any linkable item** – Takes you to its details page.

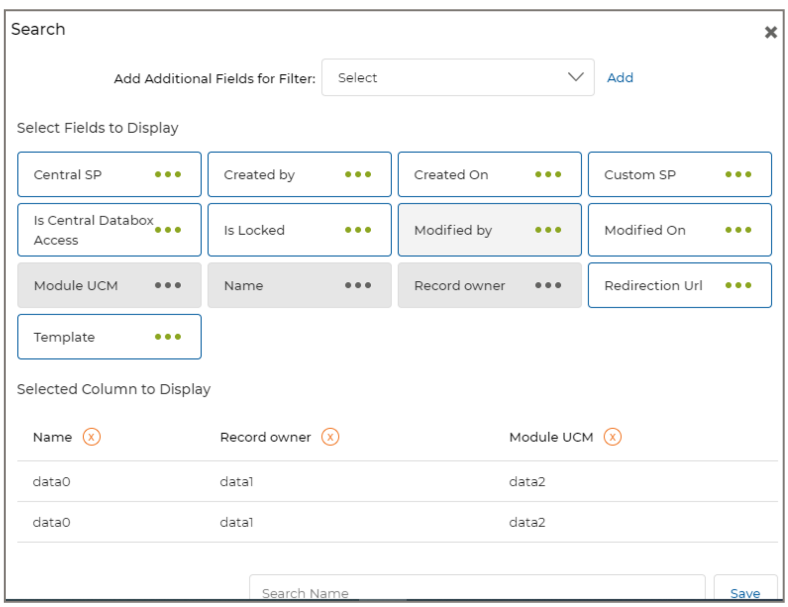


Create View

1. Click the Create view button.

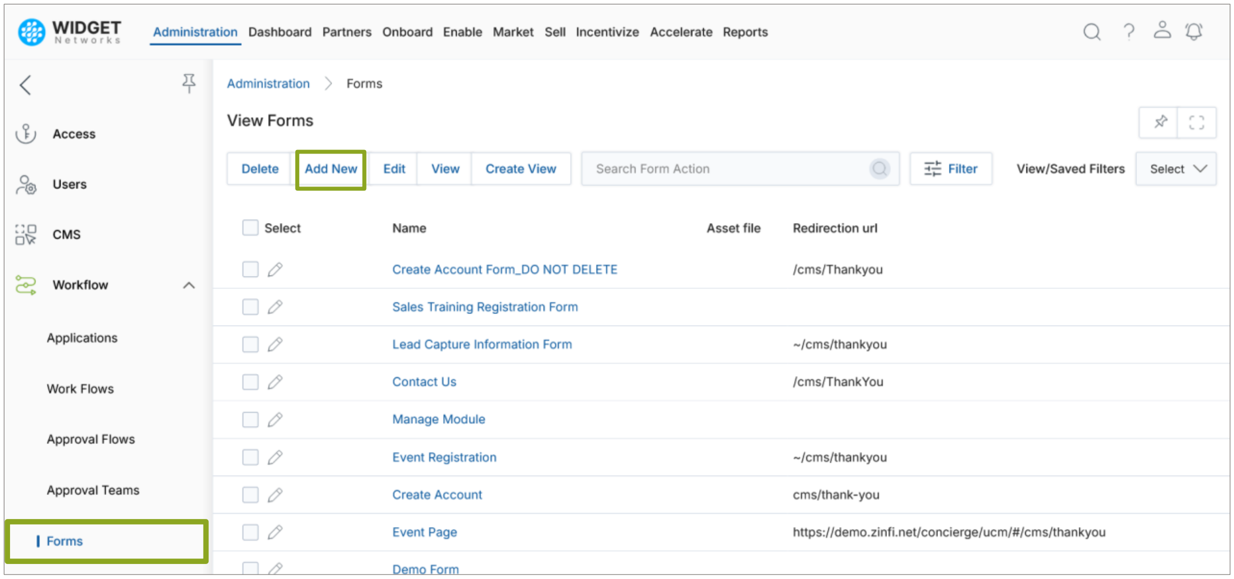


2. Choose the additional fields and then click on **Add**.
3. Click the Green Dots to select the fields for display.
4. Selected columns are shown in the table. To remove a selected column from the display list – just click on the cross button.
5. Provide a View Name, and then click **Save** to create the new view.

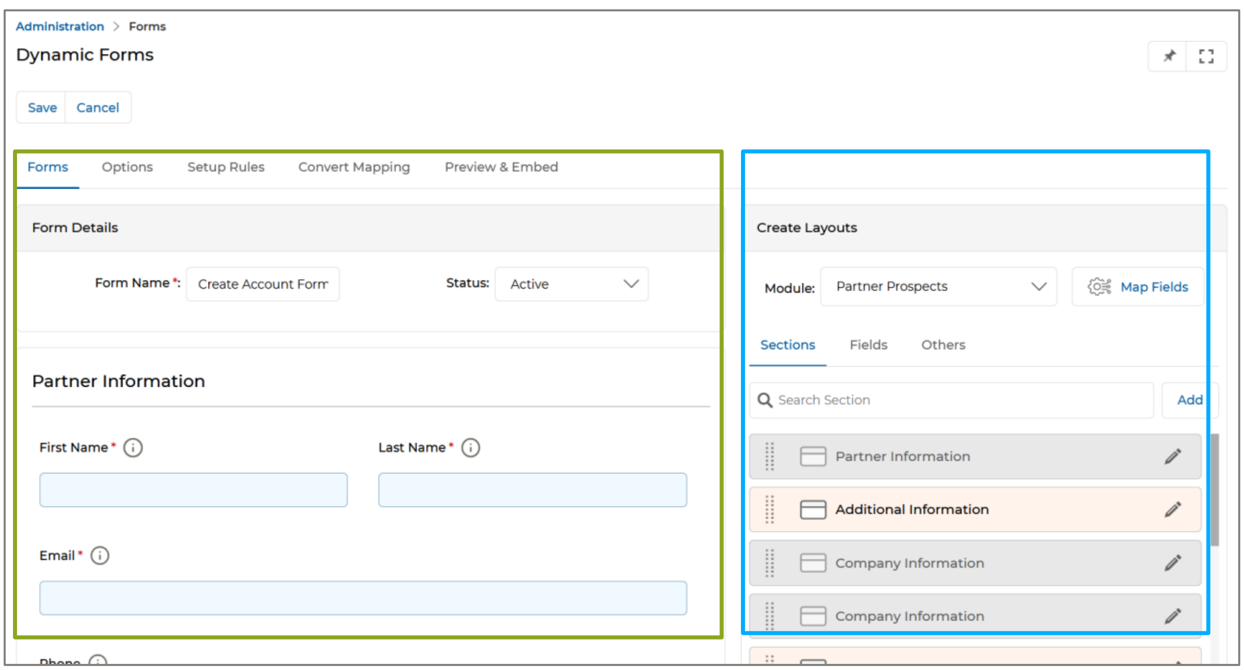


Add New Forms

1. To create a new Form, click the **Add** button.



2. Clicking the Add button takes you to the following page, consisting of multiple tabs, that allows you to configure the Form as per your requirements.



a. Forms: This tab allows you to add Attributes/Fields to the Form to create a record for any of these modules automatically - Prospect/Partner Prospect/Partner Contact (as selected from the Modules Dropdown in the Create Layout manager (Highlighted in Cyan).

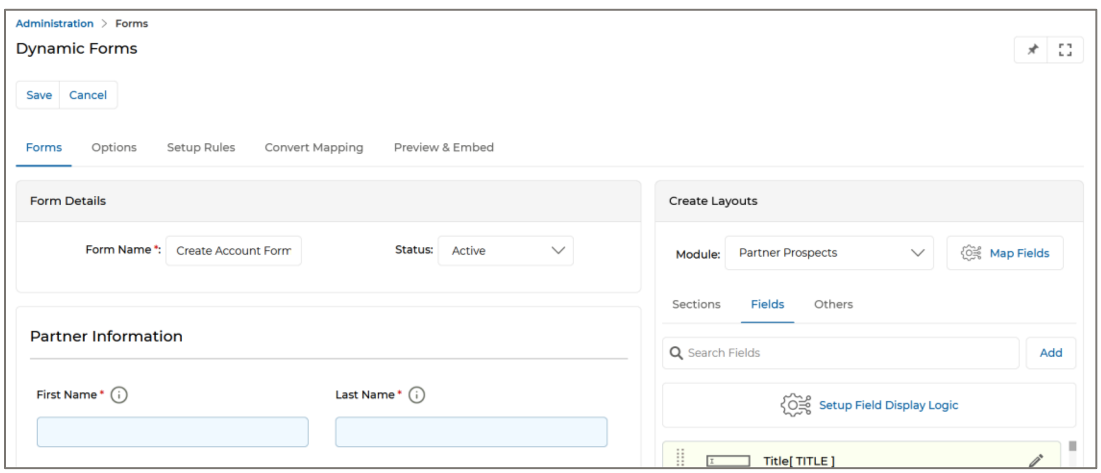
Form Details:

i. **Form Name** – Shows the Name of the Form.
ii. **Status –** You need to choose from the options Active/Inactive. If the Status is 'Active', then only the Form can be used with the CMS editor.

Form Canvas:

Create Layouts - This section allows you to select the module for which the Form is being created. If the Prospects module is selected, records entered through this Form will be saved in the Prospects module. The same applies for all other modules.

i. **Application/Module –** Select the module for which this Form is being created. When the Dynamic Form is associated with registering Prospects, you need to select the Prospects module, and for Registering Users along with Partner Prospects/Partner Contacts, you can select either Partner Prospects or Partner Contacts. To register a Partner Prospect or Partner Contact, you can select the specific Module.
ii. **Sections –** Selecting the required module displays all the Sections currently active in UPM for the respective module. The sections required to configure the 'Form' can be dragged from the **Create Layout** section and dropped in the respective location.
Note: A Field can only be added to a Form Section.
iii. **Fields –** A Section can contain multiple Fields. Clicking Fields will display all the Fields pertaining to the respective section. Similarly, Fields can be dragged and dropped in the respective location. Only 3 Fields can be configured for every row.

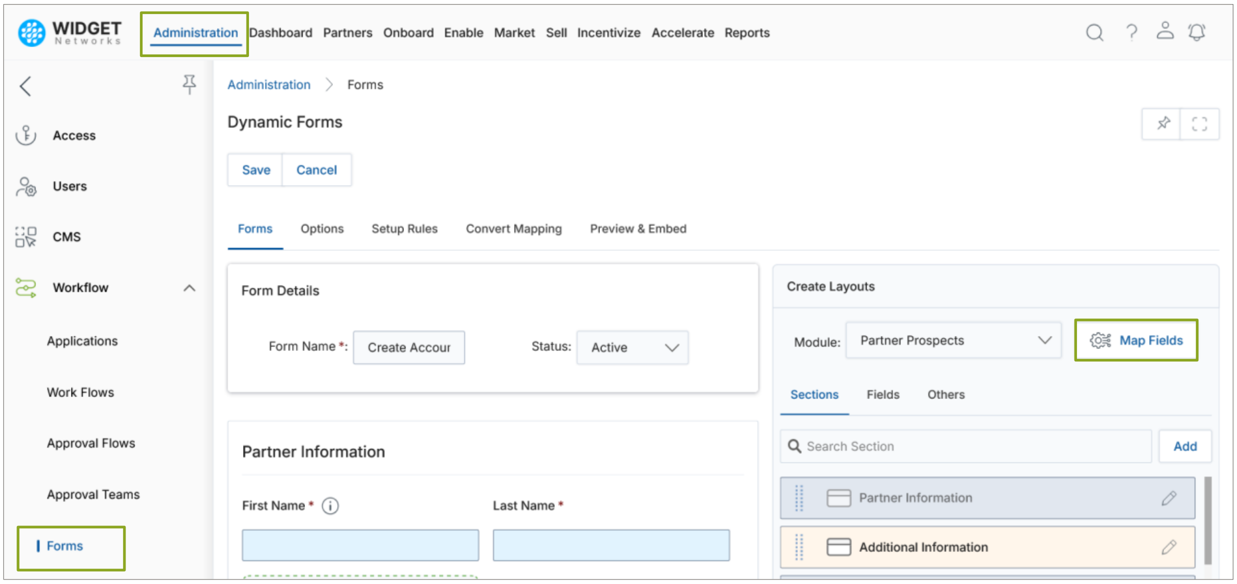


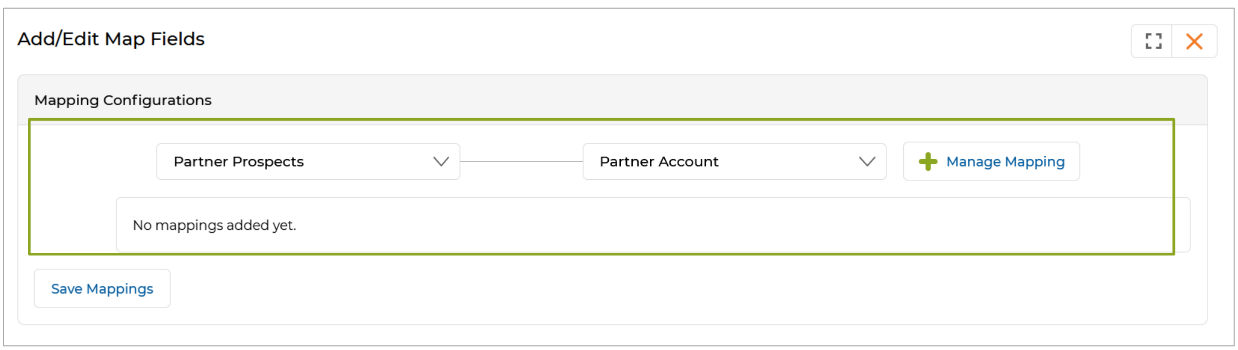
Prospect-to-Account Mapping in Dynamic Form

This feature streamlines the partner registration process by automatically validating and mapping prospect information, such as email addresses, company names, or partner numbers, to existing partner accounts. Auto-populating account details when a match is found reduces manual data entry and errors, improving efficiency and accuracy. The prospect is saved appropriately if no match exists, ensuring no data is lost. This flexible validation system enhances data integrity and simplifies management, accelerating partner engagement and improving user experience.

1. Navigate to Administration > Workflow > Forms and go to the details page of the Dynamic Form.

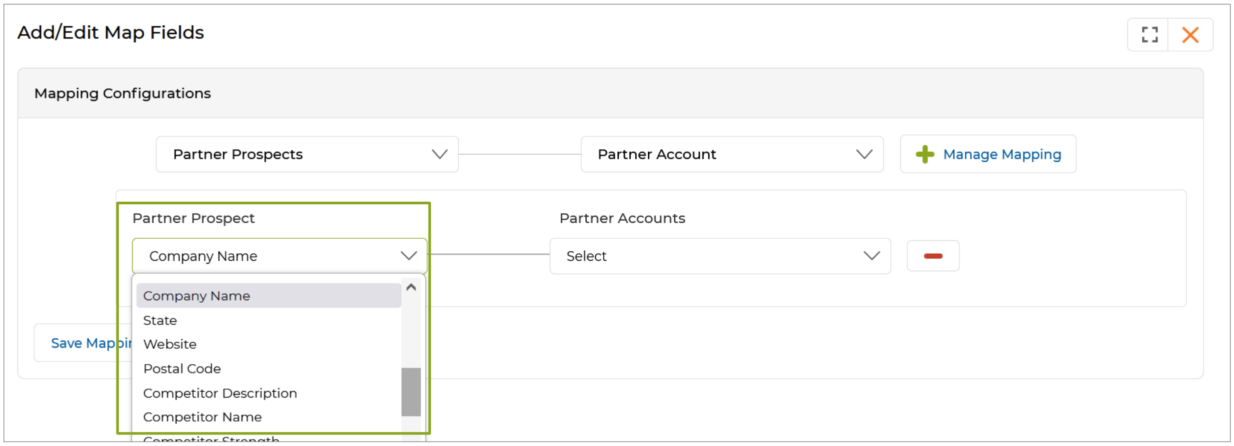
2. Click Map Fields, which takes us to a dedicated window to map Partner Prospect details (such as company name) to existing account details (such as account name) in the platform.



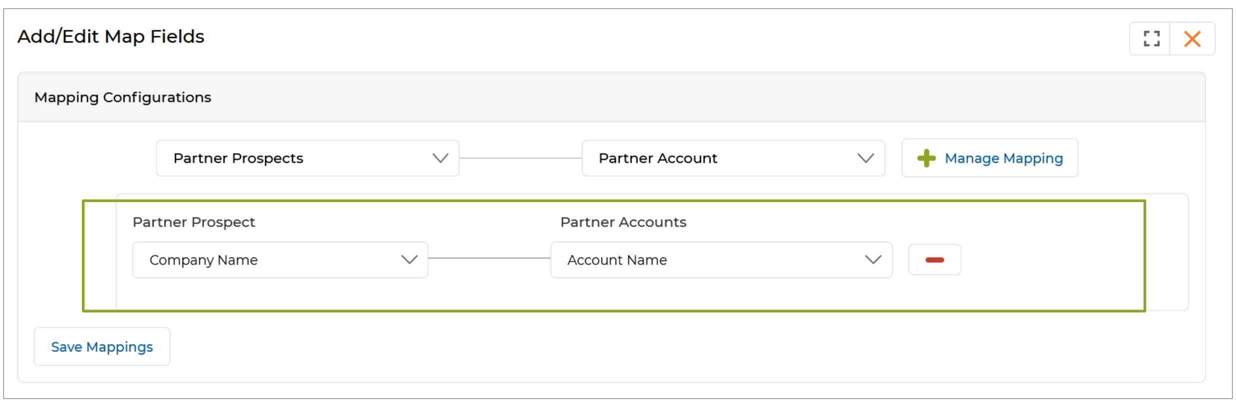


3. Clicking "Manage Mapping" will make the dropdown lists visible, from which the user will be able to select the desired value.

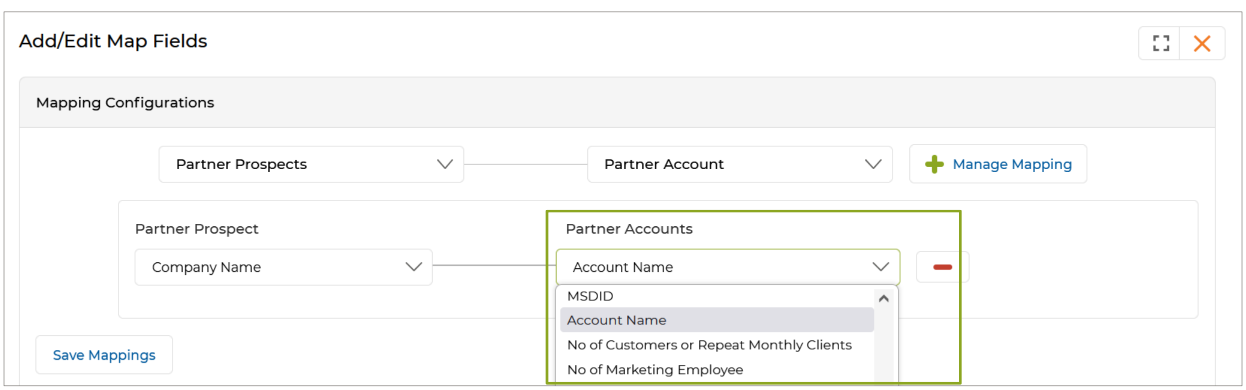
4. In the above example, "Company Name" is selected as the value in the Partner Prospect dropdown list.

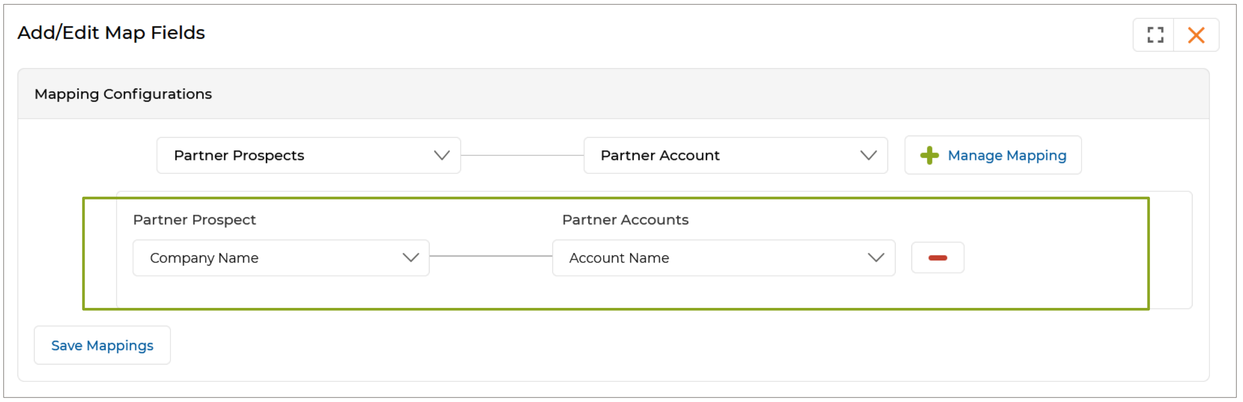


5. In the Partner Accounts dropdown, "Account Name" is selected as the corresponding value.

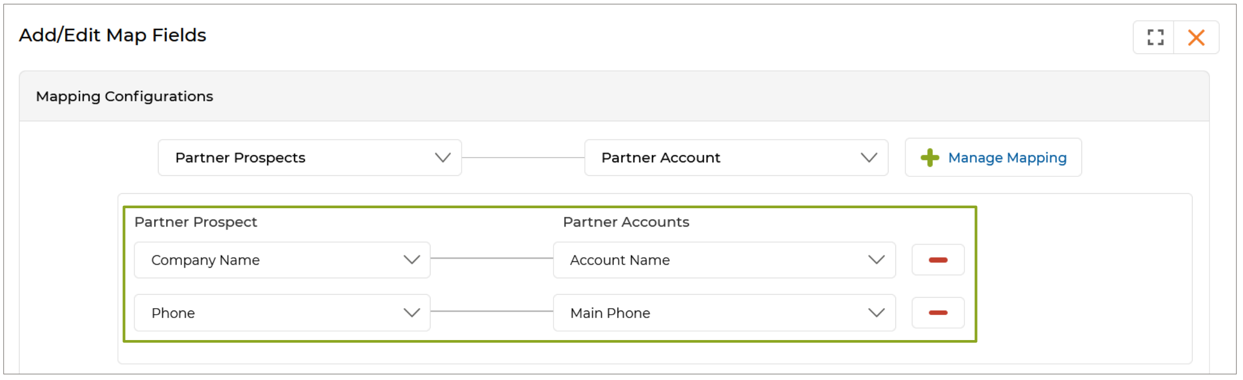


6. Once the field mapping is saved, the system checks whether the Company Name provided in the form submission matches an existing Partner Account.





7. If a match is found based on these parameters, the system auto-populates the account information to streamline data entry.
8. If the entered company name or details do not exist in the portal, the prospect is saved as a "Partner Prospect" by default without auto-population.
9. While multiple parameters can be added for reference, validation is performed based on only one selected parameter.

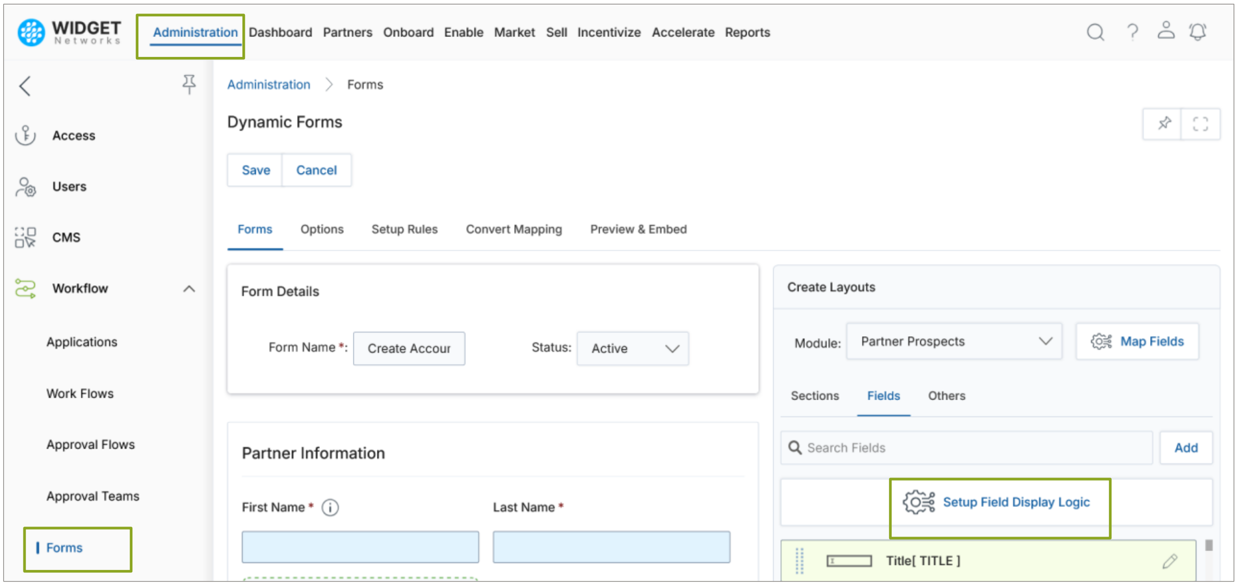


Enhanced Conditional Field Display Logic

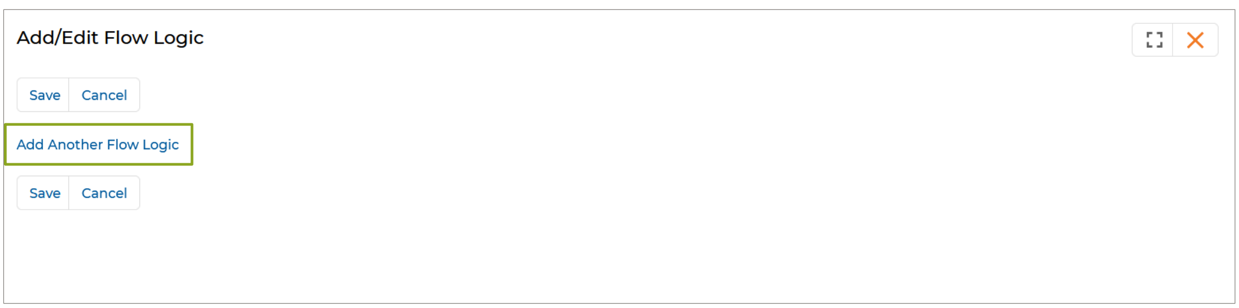
Admins can define rules based on multiple values for a single field, such as “If Country = USA OR Albania”, then show State OR City, respectively. The updated logic supports multiple condition values per field, allowing broader configurations. For example, fields can now be displayed when “Country = Albania OR Andorra”. Admins can define the values that will trigger the visibility using dropdown options. These values are controlled from the backend and can include any combination of countries, partner types, business units, etc. Admins can decide whether specific fields are shown or hidden depending on these conditions, allowing forms to dynamically adjust based on user input and streamline the data collection process.

1. **Example:** If “Country = USA”, then “State” will be shown. If “Country = Albania OR Andorra”, the system will display “City”, while hiding fields specific to the USA.

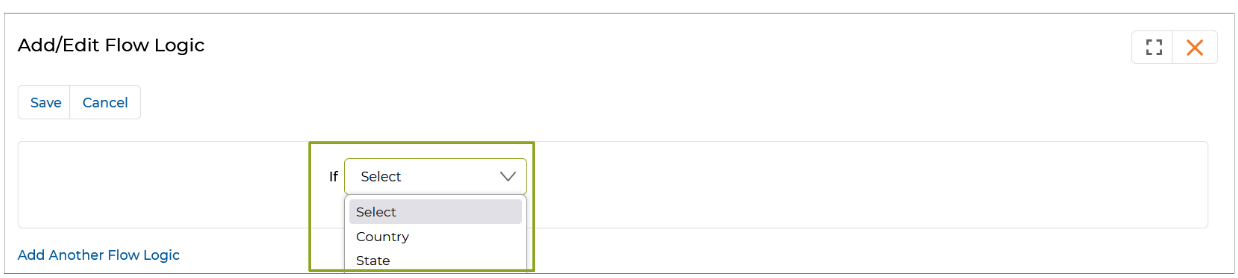
2. Navigate to Administration > Workflow > Forms and go to the details page of the Dynamic Form.



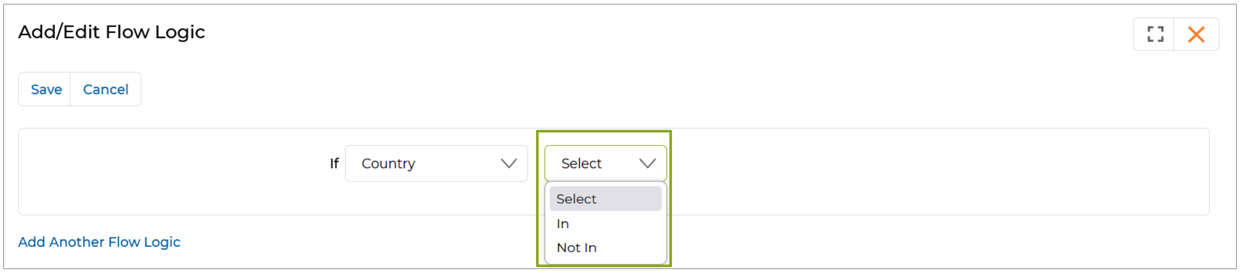
3. Click "Setup Field Display Logic", which takes us to the Add/Edit Flow Logic page.



4. We click the "Add Another Flow Logic" button, which will open the "If" dropdown. This dropdown consists of two values – Country and State.

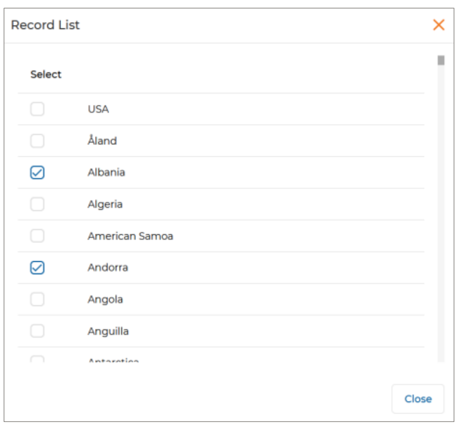


5. In this example, we select "Country" and that opens another dropdown, which consists of "In" and "Not In".

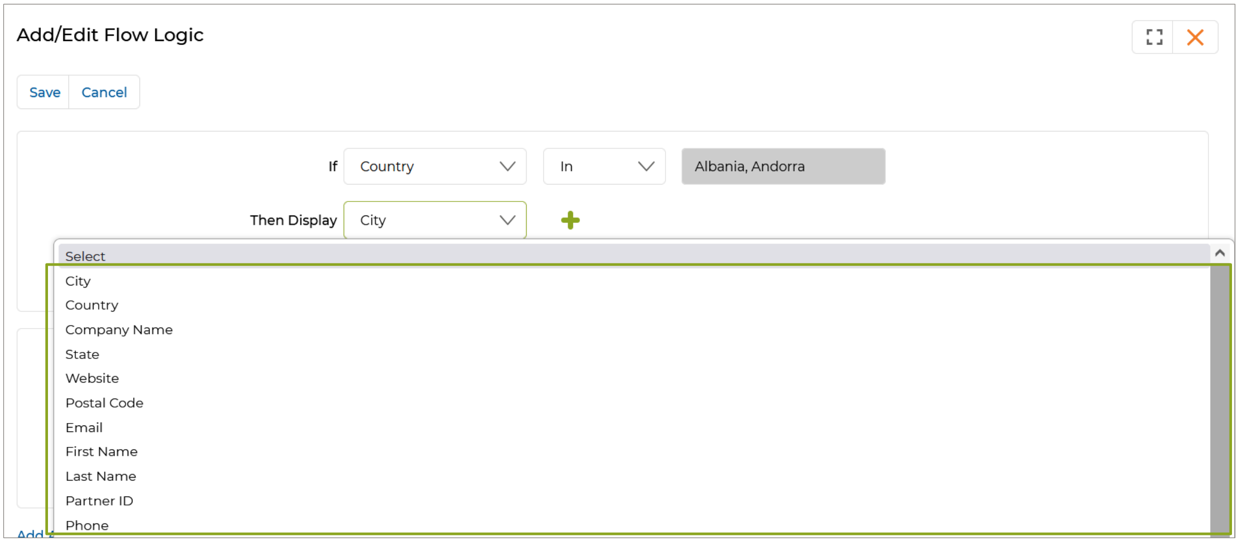


6. Selecting a value in this dropdown will provide us with options to select countries by clicking Select.

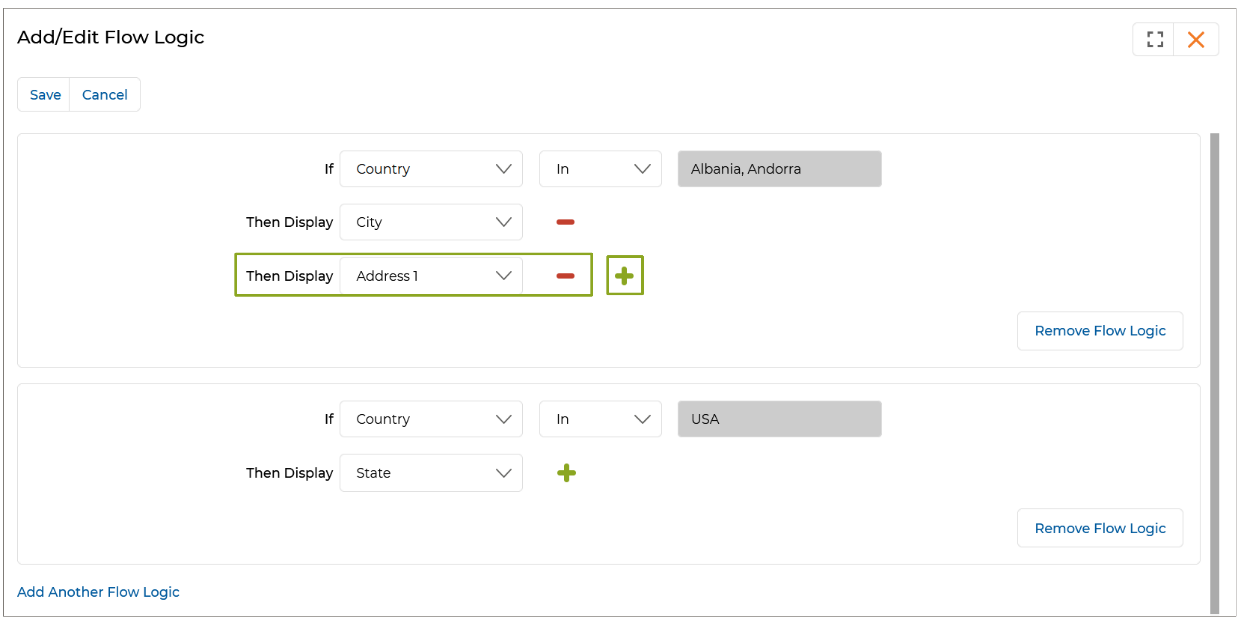
7. Multiple countries can be selected as per requirement.



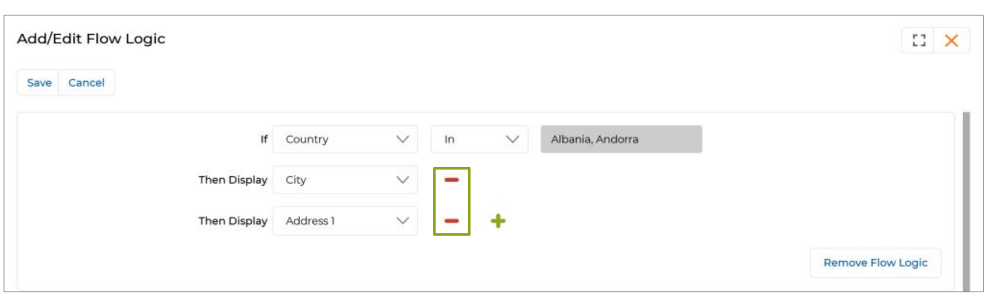
8. Selecting countries will open the "Then Display" dropdown list. We can select appropriate values from there as per necessity.



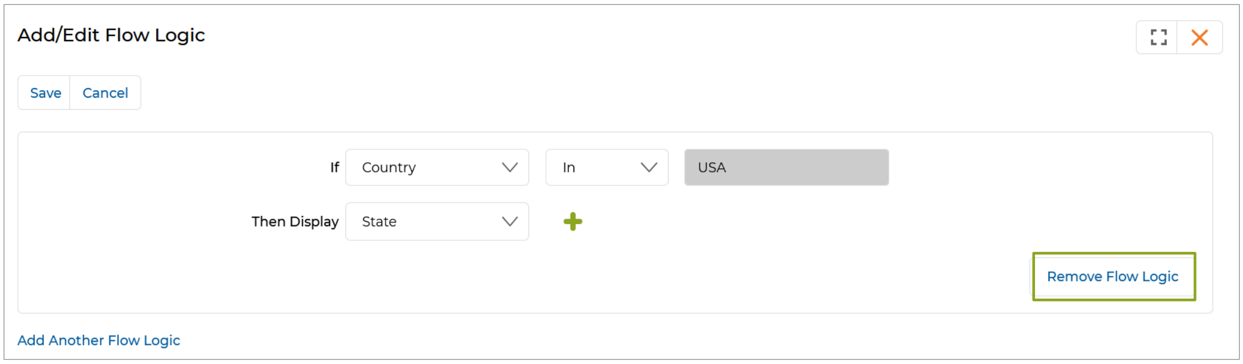
9. By clicking + we can add more dropdown lists to select multiple values.



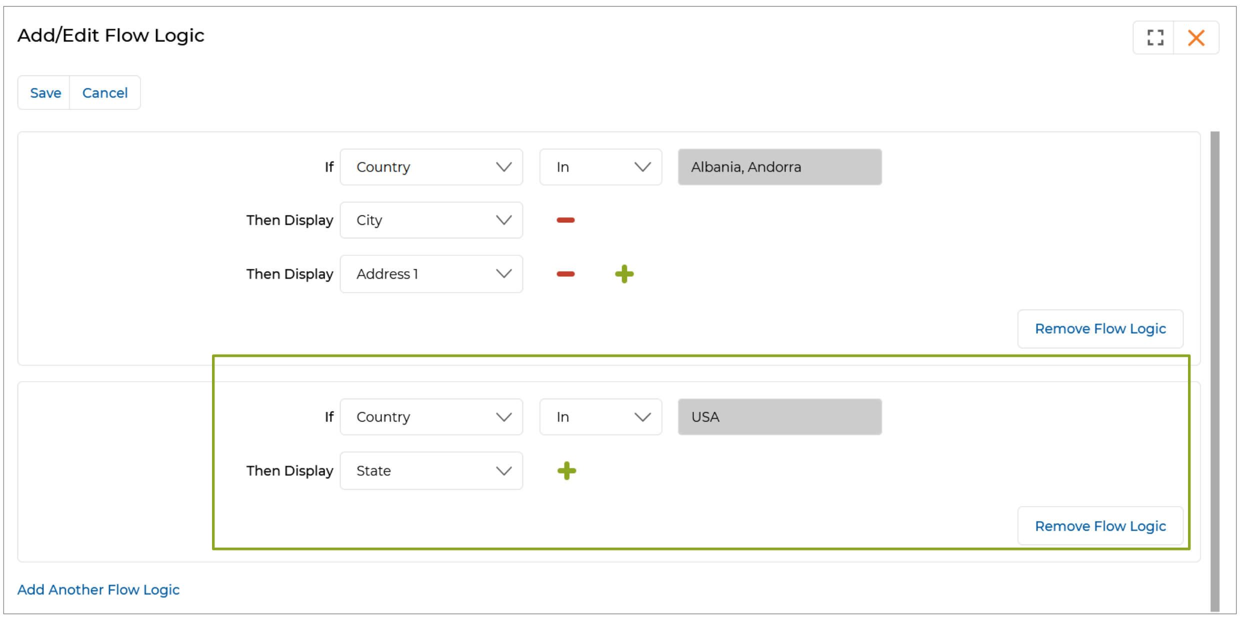
10. If any dropdown is not required, click – to remove it.



11. Remove a Flow Logic by clicking “Remove Flow Logic”.



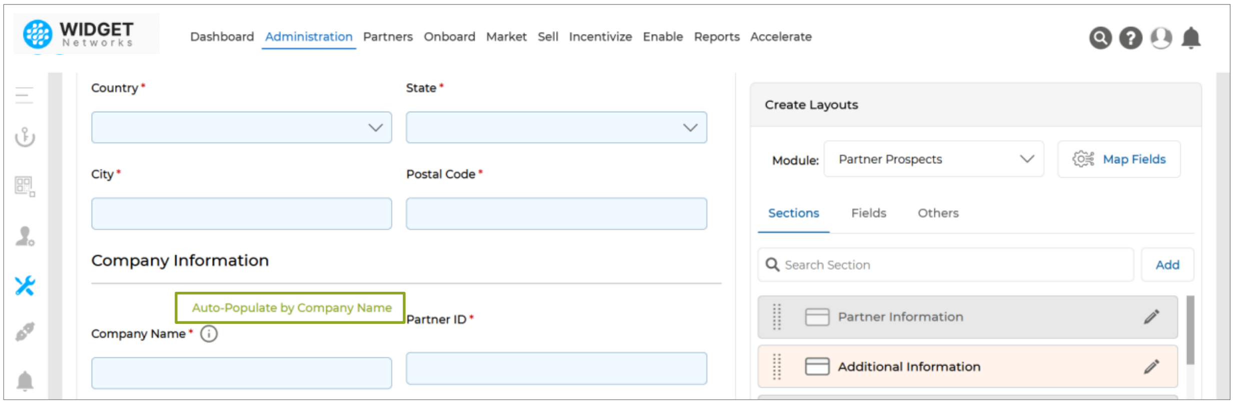
12. To add a new Flow Logic, click “Add Another Flow Logic”.



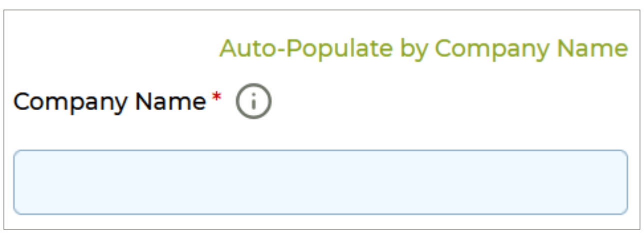
“Auto Populate By” – Primary Field Mapping and Validation in Account Forms

“Auto Populate By” setting in the form configuration allows administrators to designate a single primary field, such as Company Name, Partner Number, or Email, for account validation during form submission. This complements existing options – Auto Populate, Read Only, and Hide. When a user fills out this tagged field, the system automatically checks for an existing account match and, if found, auto-populates other related fields like Country, State, City, and Region. This enhancement offers greater flexibility in form design across different portals, improves data accuracy, and streamlines the user experience by pre-filling known information when a match is detected.

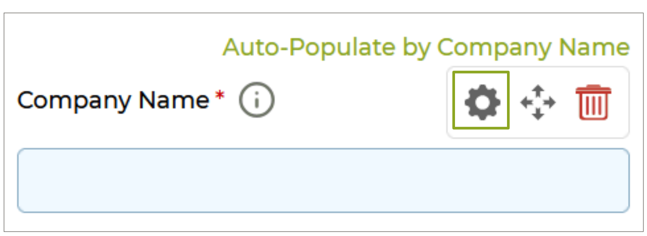
1. Navigate to Administration > Workflow > Forms and open a Dynamic Form.



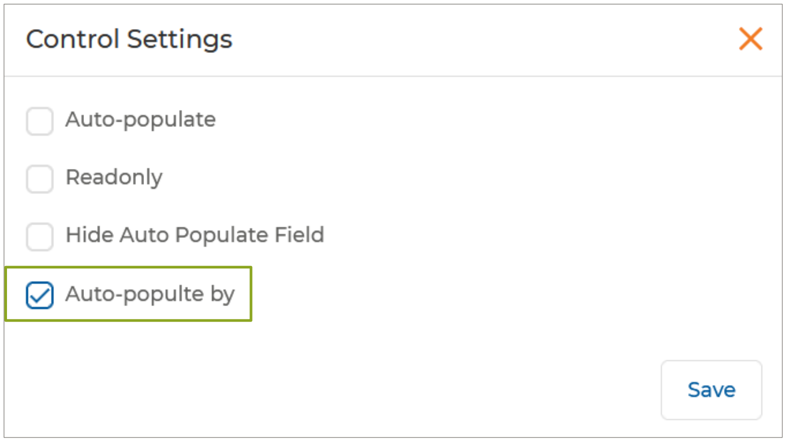
2. In this example, we see that the field “Company Name” is the primary validation field.
3. When a user fills this field, the system attempts to match it with an existing account.
4. If a match is found, other related fields (e.g., Country, State, City) are automatically populated using account data.
5. The field set as “Auto Populate By” is visually highlighted in the form for easy identification.



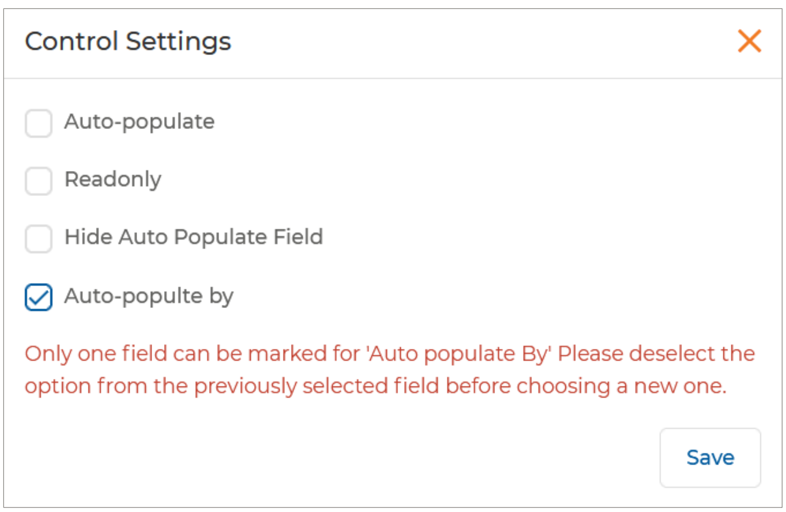
6. To enable this feature on this field, we have to click the Settings icon (this icon becomes visible once we hover the mouse over the field area), which will open the Control Settings window.



7. Select “Auto-populate by” and click Save.

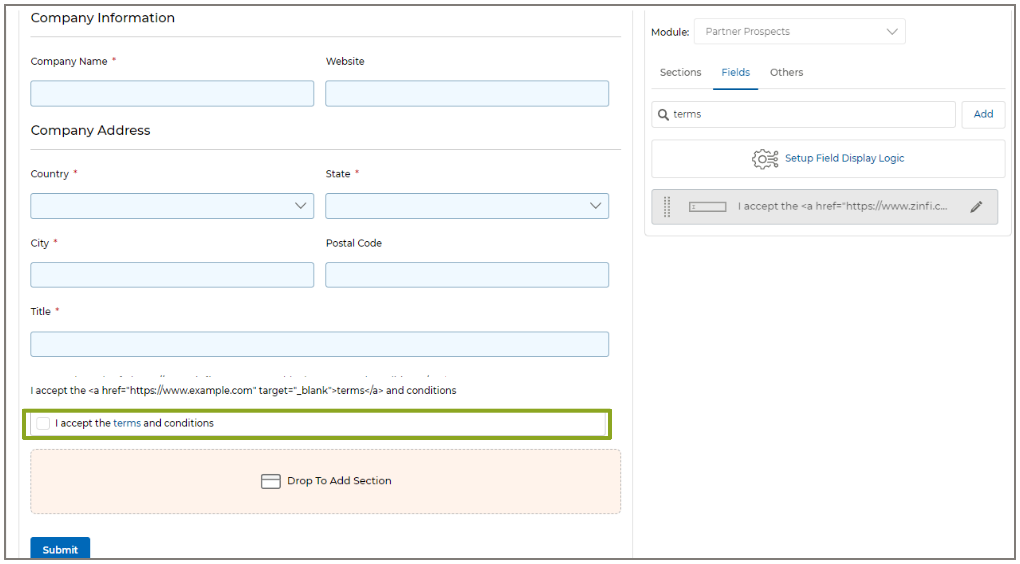


8. Only one field in the form can be tagged as “Auto Populate By.” If the admin attempts to apply this setting to multiple fields, the system will trigger an alert, enforcing this constraint.



9. Other fields can still be configured independently (e.g., hidden or auto-populated).

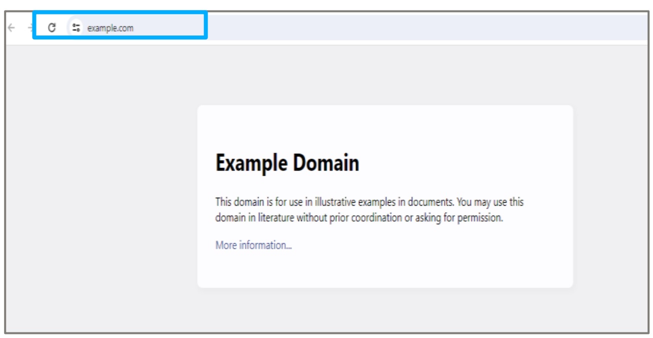
- The "**Terms and Conditions**" section within a Dynamic Form can be enhanced by incorporating HTML hyperlinks.



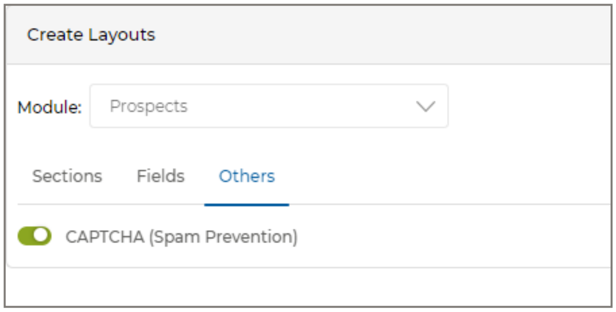
  - The hyperlink can be linked to a web page or a pdf file.

I accept the terms and conditions

  - In the text ‘I accept the terms and conditions’, the word 'terms' is hyperlinked so that when clicked, it opens in the same tab or a new one, depending on the browser' settings.

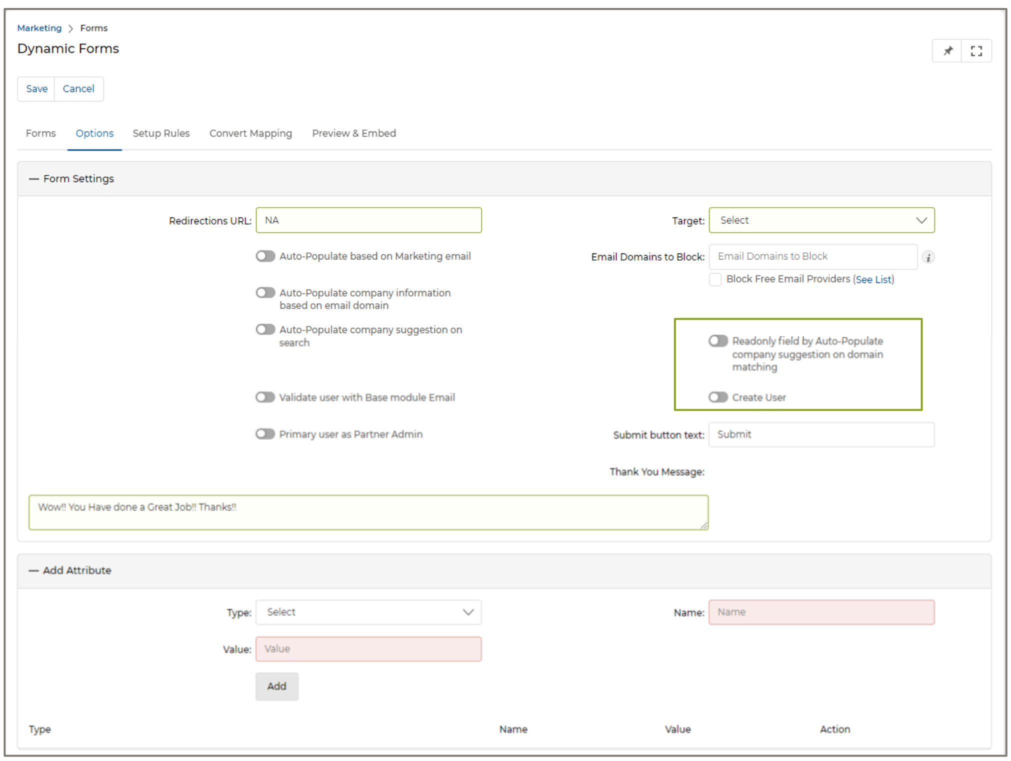


iv. **Others –** Captcha helps us to contain spam and secure the Form. Enabling the toggle associated with the captcha will ensure the Form will not get submitted by the end-user until captcha conditions are met.



v. When done click the **Save** button**.**

b. **Options:**



Form settings:

i. **Redirection URL –** Contains the URL of the specific page, where the user will be taken after submitting the Form.
ii. **Auto populate based on Marketing Email –** Enabling the toggle key will ensure that **all** the details of the recipient Prospect will get auto-populated when the Form, tagged to any marketing tactics, is clicked on.
iii. **Auto populate Company Information based on email domain –** Enabling the toggle key ensures that based on the email domain, only the details pertaining to the recipient's Company will get auto-populated in the Form when it is opened.
iv. **Auto-populate Company suggestion on Search –** Enabling this will assist the user in searching for his 'Company Name' from a range of previous searches for that specific field. This is mainly used with the Forms associated with the 'Before login' stage (e.g., Partner Prospects).
v. **Read only Field by Auto-Populate Company Suggestion on Domain Matching –**. Enabling this field ensures that Company Information will be auto-filled based on the email domain match of existing records; the fields will be set to read-only mode by default, preventing edits.
vi. **Validate User with Basic Module Email –** The email the user provides will be pre-validated.
vii. **Create User –** Enabling this ensures a respective User Record is also created along with the Module Record. When the toggle key is enabled, the fields 'Profile Assigned', 'Group Assigned', 'Reports To', and 'User Country' become mandatory during the rule setup process. Disabling the toggle key makes these fields optional for the "Set Up Rule" configuration.
viii. **Primary User as Partner Admin –** Ensures that the User – the Primary User is the Partner Admin.
ix. **Submit Button Text –** After filling up the Registration Form prospects/prospective partners are required to submit the form by clicking the Submit button. The text displayed on the Submit button can be customized by the administrator by updating this field.
x. **Thank You Message –** The default message will be displayed post-submission of the 'Form.
xi. **Alert Message For Existing User –** If an existing user fills up the registration form, an alert message will get triggered, the contents of which can be customized by the admin from here.
xii. **Email domain to block –** Contains all the domains of the emails that you want to be blocked by the portal for saving via the Form.
xiii. Block **Free Email providers –** UPM allows you to block certain Free Email providers, which can be checked by clicking the link associated with 'See List'. If you want to block these Free Email providers, put a checkmark on the box**.** Records with such email domains won't be saved.

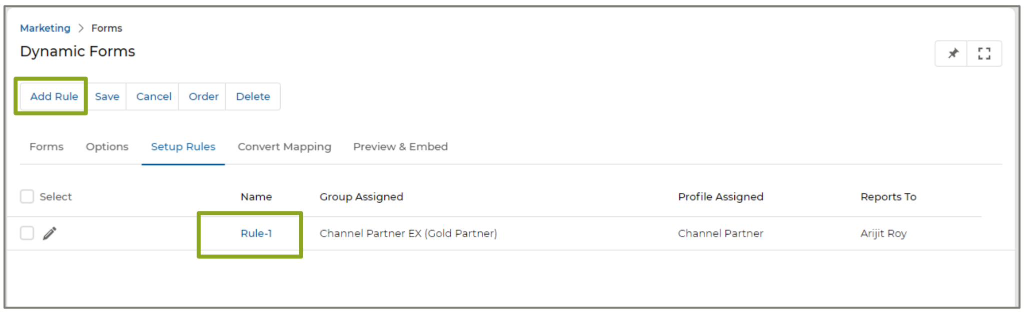
Add Attributes: This section adds hidden Fields in a Form**.** Hidden Fields in a Form include additional data that needs to be submitted along with the Form but are not visible to the user.

- **Type –** Need to select Static Field/Query String. A Static Field is a shared variable that is used by all instances of a class. Query String is a part of the URL and is usually indicated by a question mark symbol. It is a way to pass information from a client-side application (such as a web browser) to a server-side application (such as a web server).
- **Name –** Shows the Name of the Field**.**
- **Value –** Shows the value in this field.

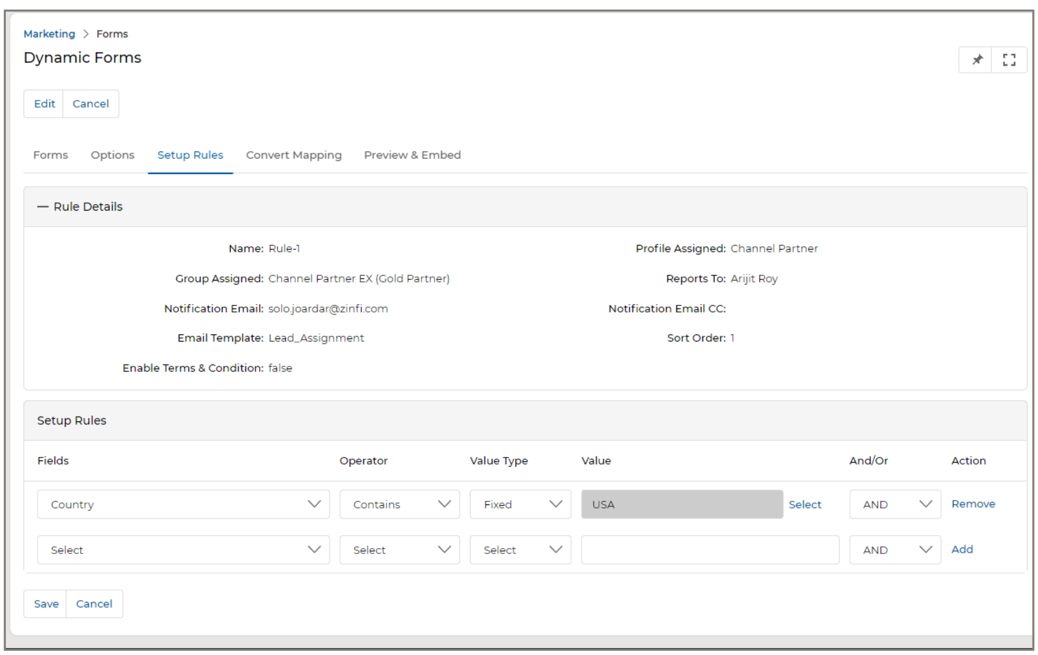
c. **Set Up Rules:** Adding and validating a set of rules with certain criteria gives you the privilege to assign 'Profiles' and Groups to any user. This is mainly used in the Forms, associated with the 'Before Login' page.

i. Clicking 'Set up Rules' will take you to the page where all the rules associated with a specific Form are displayed.

ii. New Rules can be created by clicking the 'Add Rule' button whereas the 'Delete' button allows you to remove any existing rule.



iii. Clicking the Name of any rule will take you to the details page of the specific Rule.



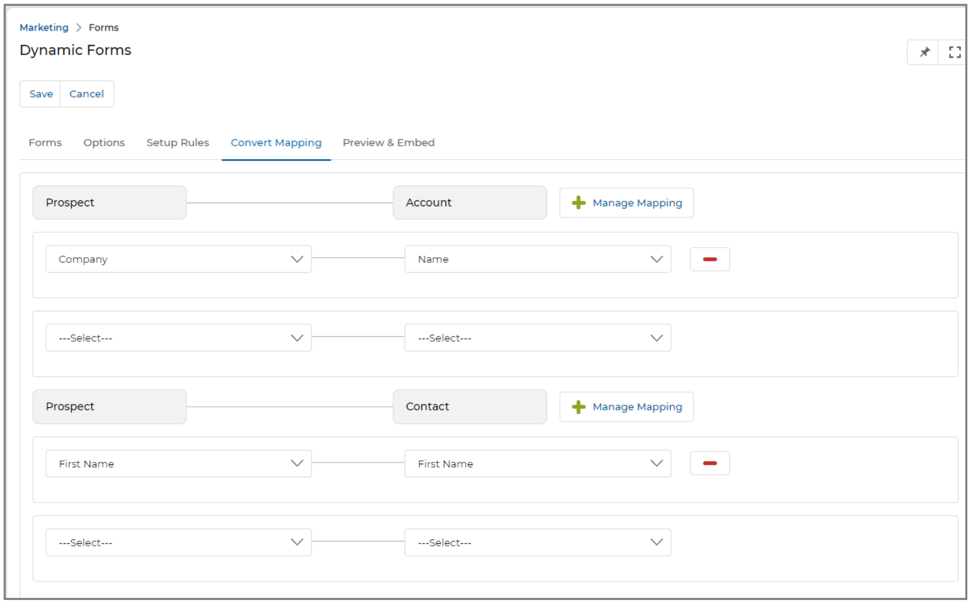
Rule Details:

- **Name –** Shows the Name of the specific rule.

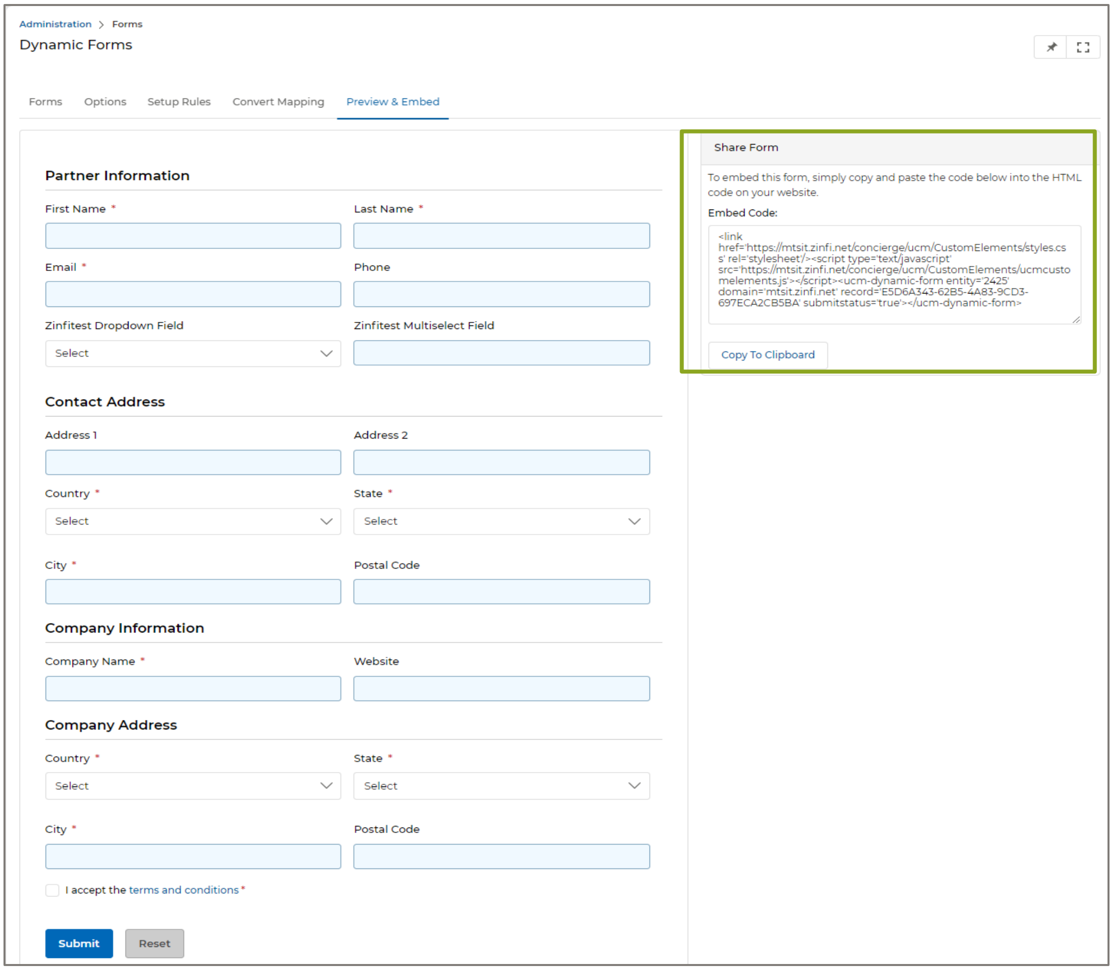
- **Profile Assigned –** Select the relevant Profile. This field becomes mandatory only when a user is created from the ‘Form’, provided the ‘Create User’ toggle key is enabled in the ‘Options’ section.
- **Groups Assigned –** Select the relevant Group. This field becomes mandatory only when a user is created from the ‘Form’, provided the ‘Create User’ toggle key is enabled in the ‘Options’ section.
- **Reports to –** The admin has the provision to select the name of the person to whom the newly registered individuals should report to by default. This field becomes mandatory only when a user is created from the ‘Form’, provided the ‘Create User’ toggle key is enabled in the ‘Options’ section.
- **User Country –** Select the relevant ‘User Country’. This field becomes mandatory only when a user is created from the ‘Form’, provided the ‘Create User’ toggle key is enabled in the ‘Options’ section.
- **Notification Email –** Shows the mail address where notifications will be received.
- **Record created By –** Shows the Name of the person who has created this record.
- **User Status –** The admin can configure the default status of the newly registered user(s), registering from this Form. Available choices are ‘’Approved’’ and ‘Pending’. If set to “Approved”, then User is auto-approved.
- **User Language –** The admin has the provision to select the language of the prospect registering from this Form, However when no language is selected by default the user’s language will be English.
- **Default Time Zone –** The admin has the provision to select the ‘Default Time Zone’ of the user registering with this Form.

Setup Rules: Contains all the criteria that are set up to validate the aforementioned rule. If no validation criteria are set for any rule, then data will get pulled from the Rule that is set as default. e.g. if the country of the user – registered is USA, then the rule is auto-applied.

d. **Convert Mapping:** This tab allows you to map the Fields contained in the 'Prospects' details page with the Fields associated with the Accounts and Contacts modules.



e. **Preview & Embed**: This tab allows you to preview the contents of the Form before they are published. At the same time, an HTML code also gets generated which can be copied and pasted in the CMS editor of any marketing tactics.

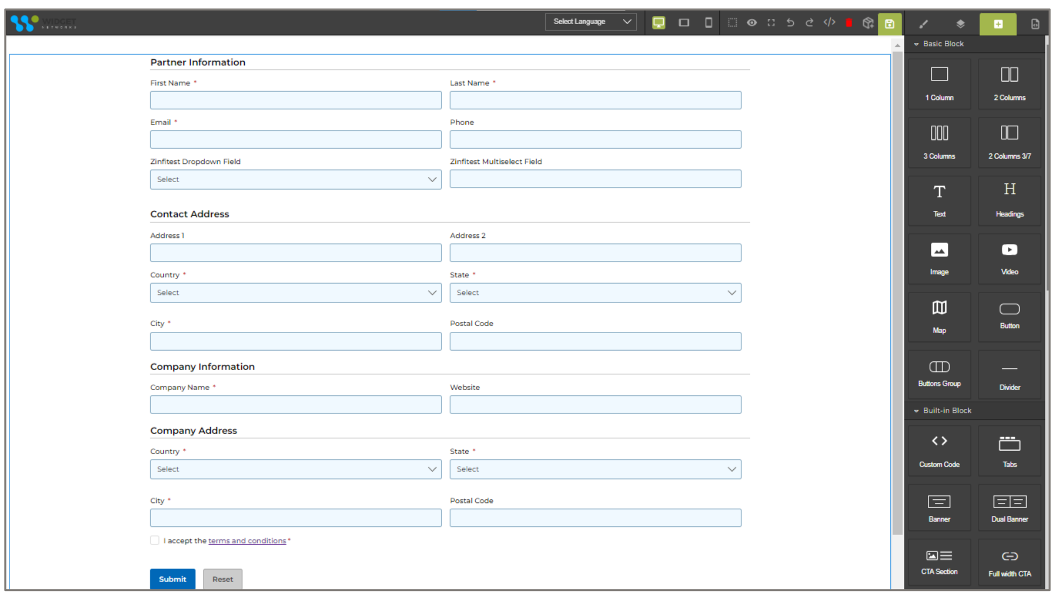


i. Clicking **Market** -> **Multi-Touch** -> **Campaigns**, we can get into the Campaign Library where all the campaigns are listed.

ii. A click on the Name of any specific Campaign will take us to the details page of the Campaign, where all the tactics associated with the Campaign are listed.

iii. Clicking the Name of any specific tactic will take us to its details page, from where we can reach the CMS editor by clicking the **Manage Content** button. Here a click on the 'Import' button will take you to the HTML editor window as shown in the image below.

iv. Here you need to insert the generated HTML code and click on the **Import** button displayed in the lower-left corner of the window. Now the rendered version of the Form template will be displayed as shown in the image below.

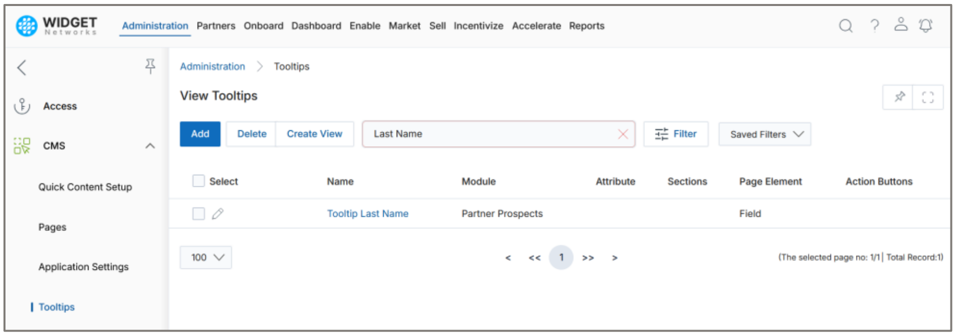


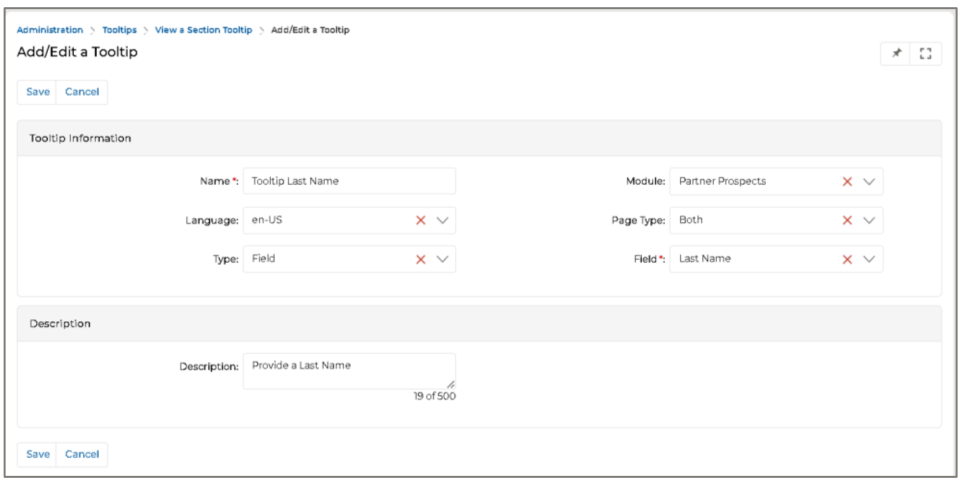
v. When Prospect fills up the mandatory Fields and clicks on Submit, he will get registered into the Prospects module.

vi. Similarly, you can copy the HTML code linked to the Dynamic Form used for registering a Partner Prospect and insert it into the CMS editor of the page dedicated to Partner Prospect creation. Once any Partner Prospect fills up the mandatory Fields and clicks on Submit, he will get registered into the Partner Prospect

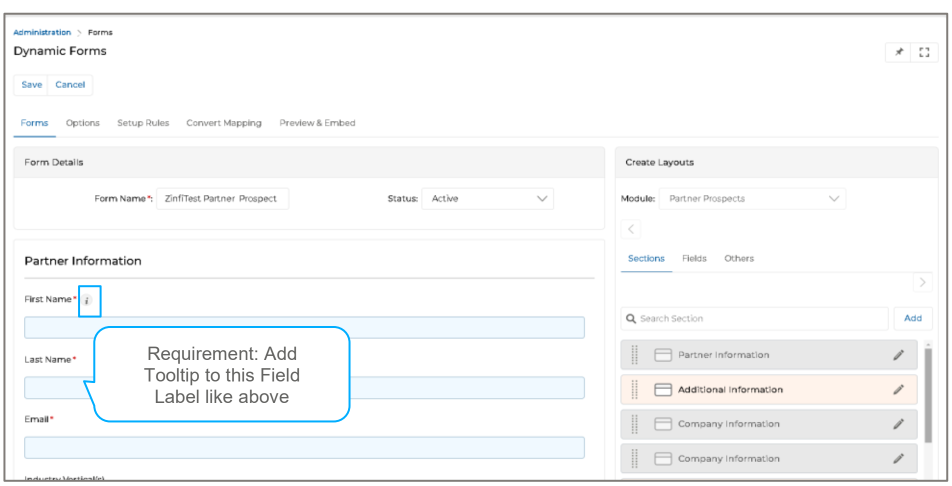
Adding Tooltips to Sections and Fields

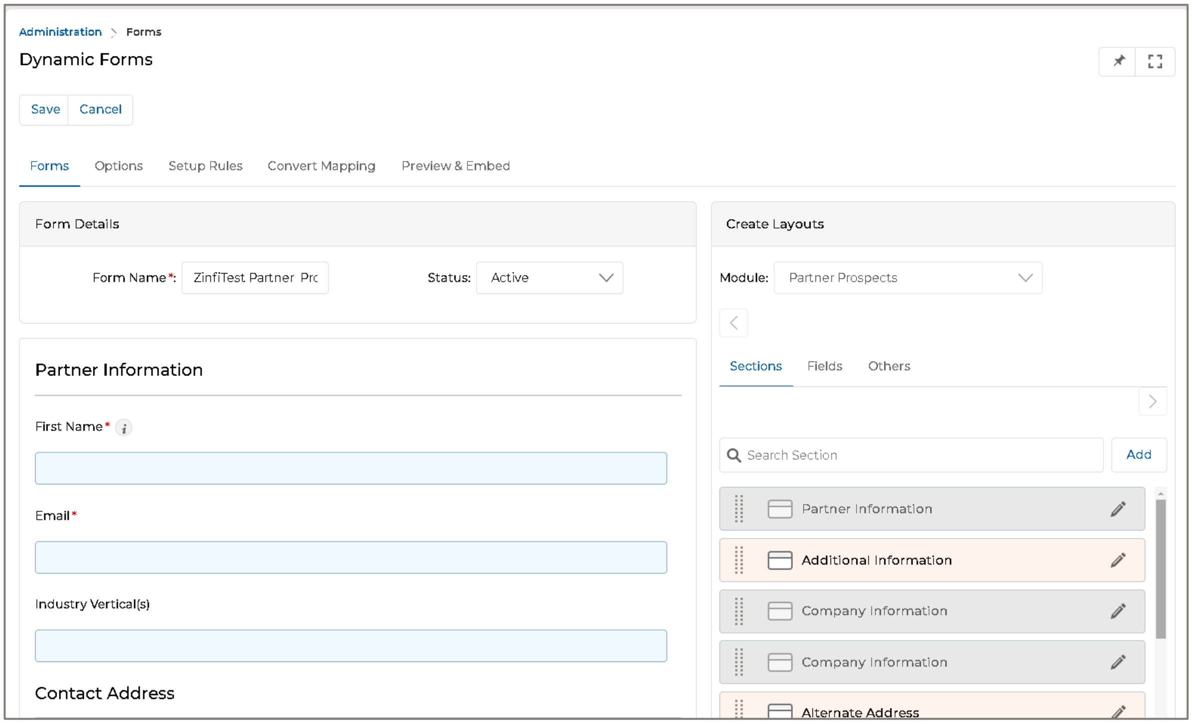
1. To add a tooltip to any control on the pre-login page, the control must first be configured with a tooltip in the CMS. For instance, the 'Last Name' field can be configured with a tooltip by navigating to **Administration** > **CMS** > **Tooltips**.



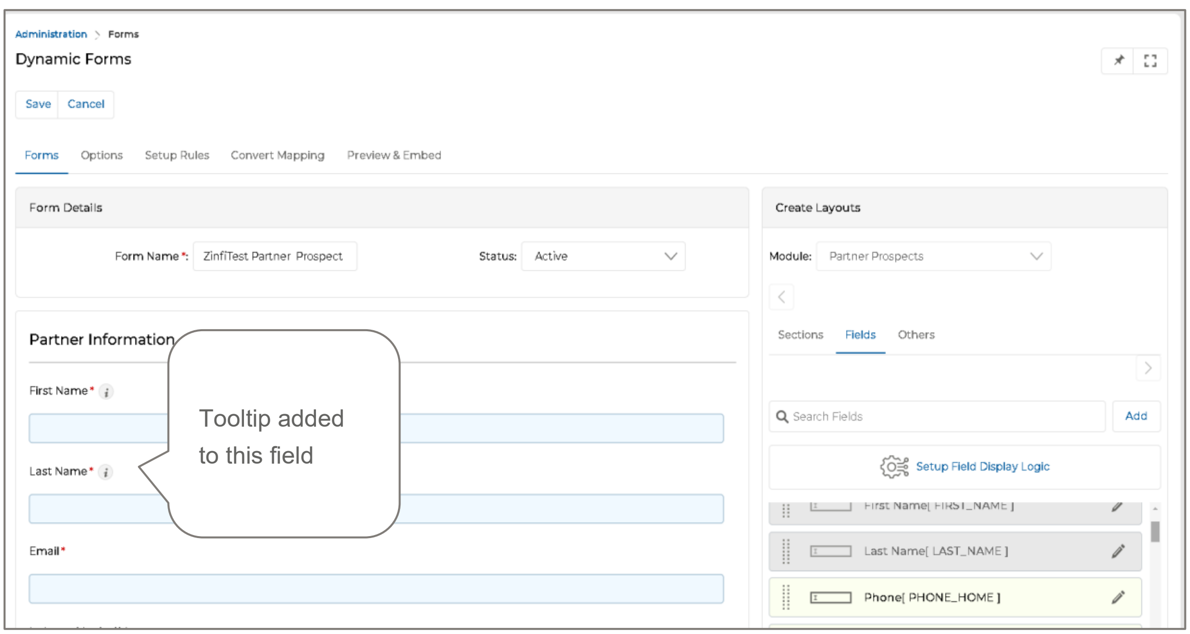


2. Next, the existing field (without a tooltip) must be removed from the current form.

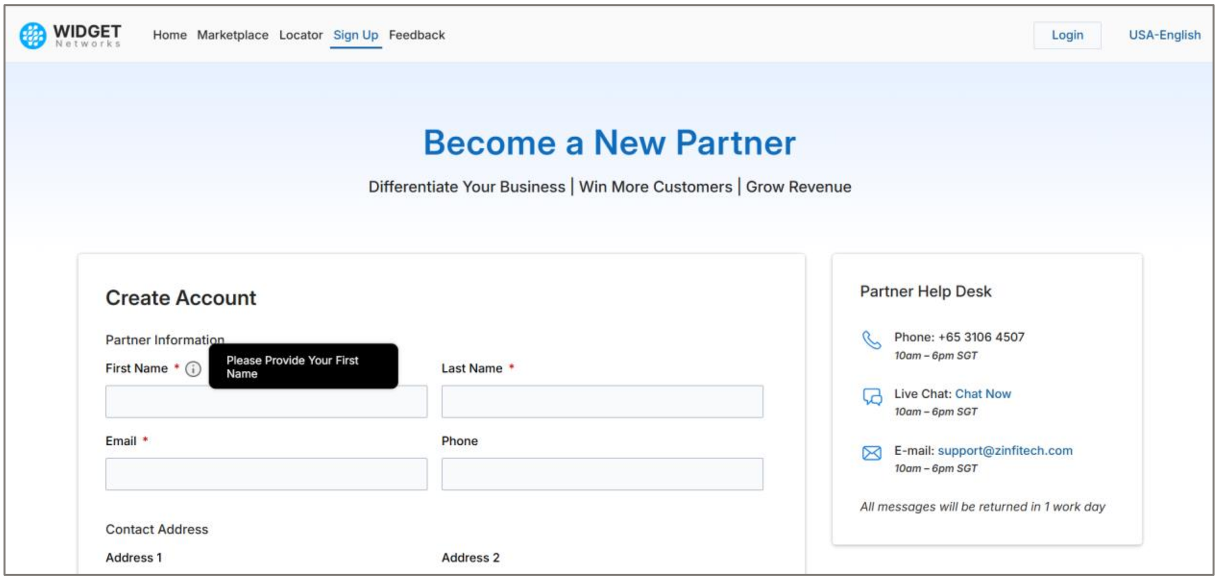




3. Finally, the ‘Last Name’ field can be re-added from the ‘Create Layout’ panel using drag-and-drop functionality.



4. Once tooltips are added to the required controls and the record is saved, they will appear on the pre-login page, as illustrated in the image below.


WIDGET
Networks
Home
Marketplace
Locator
Sign Up
Feedback
Login
USA-English
Become a New Partner
Differentiate Your Business | Win More Customers | Grow Revenue
Create Account
Partner Information
First Name *
Please Provide Your First Name
Last Name *
Email *
Phone
Contact Address
Address 1
Address 2
Partner Help Desk
Phone: +65 3106 4507
10am – 6pm SGT
Live Chat: Chat Now
10am – 6pm SGT
E-mail: support@zinfitech.com
10am – 6pm SGT
All messages will be returned in 1 work day

Conversion Mapping

Converting a Prospect to a Contact

1. Click on the dropdown to choose between:
    a. **Convert to Prospect** – Converts contact to prospect.
    b. **Convert to Contact** – Converts prospect to contact.
2. Choose the destination database field where the source field content would be mapped. During conversion, the source content data gets mapped to the chosen destination field.
3. Click on **Save** when done.