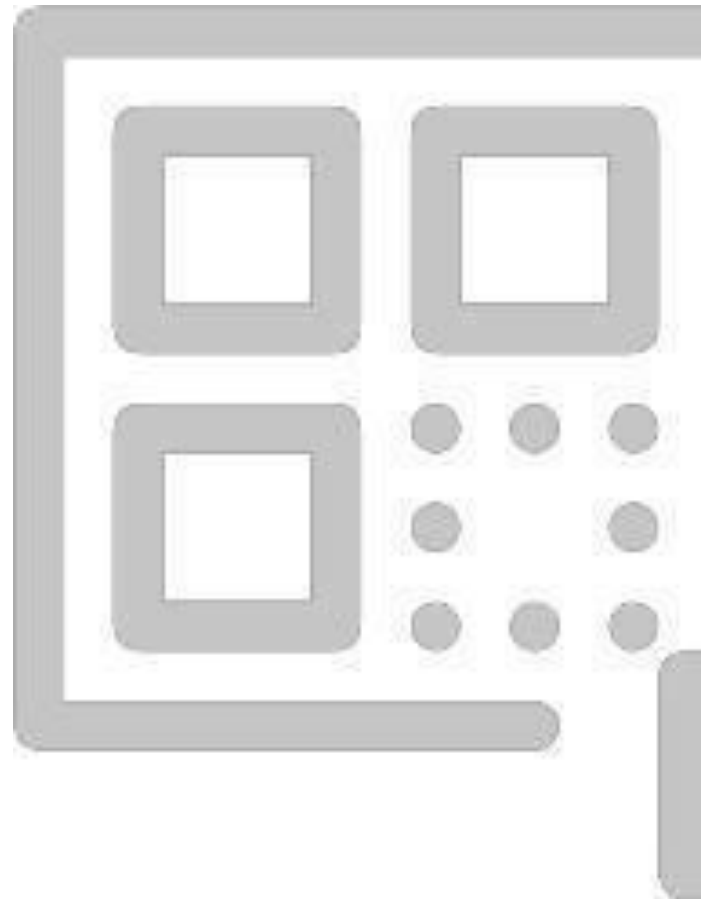


# CMS™ Content Management

Ext.prld.003.03 | 06.07.25

UPM 25.x

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Shared Under NDA



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# Unleash Your Imagination

Web applications or single-page-applications (SPAs) have become the industry standard for HTML5-based applications and responsive websites because they tend to be more user-friendly, feel faster and are more responsive.

Often, content and digital media are deployed statically along with the application. This approach creates unwanted dependencies on developers for content updates and requires cumbersome deployment processes that may lead to misalignment with current market conditions and standards.

In a business context, this misalignment and lack of independence can slow activities down dramatically and ultimately impact the bottom line. To address this common problem, developers often build custom applications for non-technical users or leverage content management system (CMS) technology. Building custom authoring tools doubles development time and creates an additional support burden on your development team. Leveraging a CMS is a great idea, but you need to make the right choice. Many CMS architectures impose serious limitations on application and API architecture and design.

As we'll see in this document, UPM's CMS<sup>TM</sup> supports application developers with content-as-a-service. This means you can build your portal or microsite in minutes using a simple drag-and-drop approach, without forcing any constraints on the application itself.

## Step Up to Next-Gen Web Publishing

ZINFI CMS pairs the latest CMS trend—its unique drag-and-drop technology—with a revolutionary real-time text writing and editing feature (the WYSIWYG Editor). These features enable an improved user experience, easier and quicker content management, a highly appealing visual environment and superior flexibility.

### Drag-and- Drop

CMS operates on drag-and-drop technology. This means that users can manage their content and arrange elements by dragging and dropping objects across the screen with just a click of the mouse. Drag-and-drop applies to all types of content: images, text fields, videos, and a wide variety of modules and additional customization options.

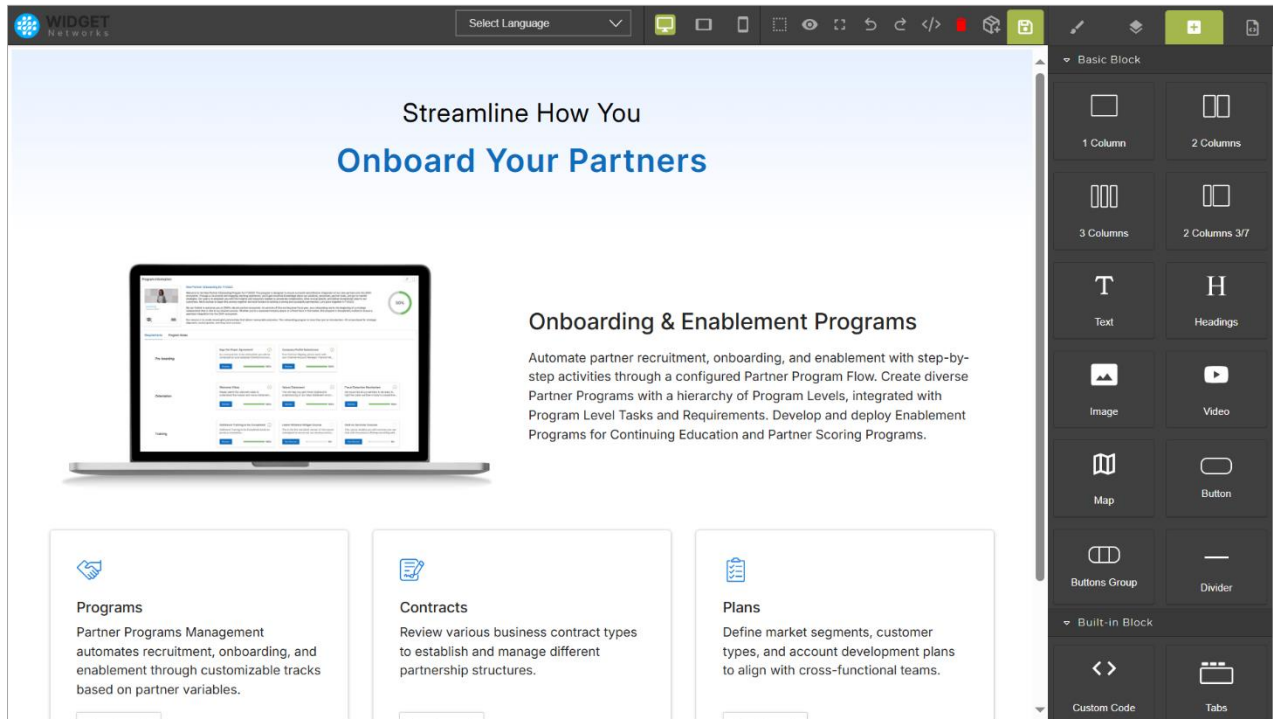
**No code knowledge is required!** You can easily orient yourself within CMS even if you aren't a computer geek. ZINFI's CMS team developed the tool specifically with non-technical users in mind, providing a simple, user-friendly interface. CMS drag-and-drop works like most computer programs you are familiar with. For example, To mount an image, drag and drop it into the desired location; to change the color, click on the appropriate icon. CMS provides an optimal and intuitive user experience for everybody.

Drag-and-drop functionality saves you much time and makes creating your website a fun, intuitive experience. Managing and rearranging your content now takes only minutes or even seconds.

**Just use your mouse and your imagination.**

## Live Edit

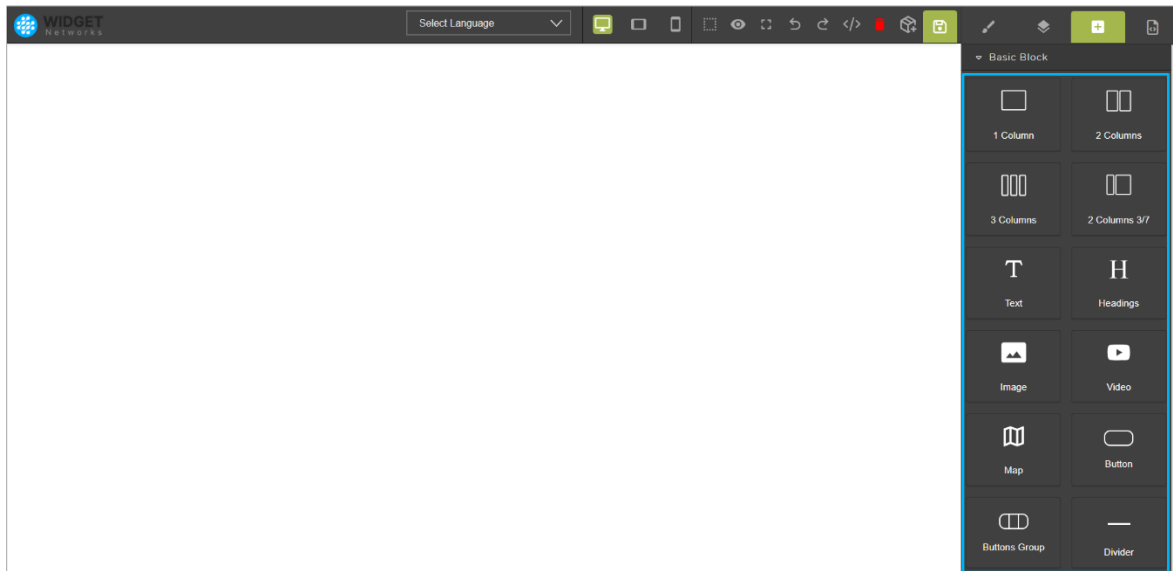
The ZINFI text writing and editing feature (WYSIWYG Editor) allow users to write, edit and manage their content in real time. Going “live” means you can work on the website interface itself any time you wish to—a true WYSIWYG experience!



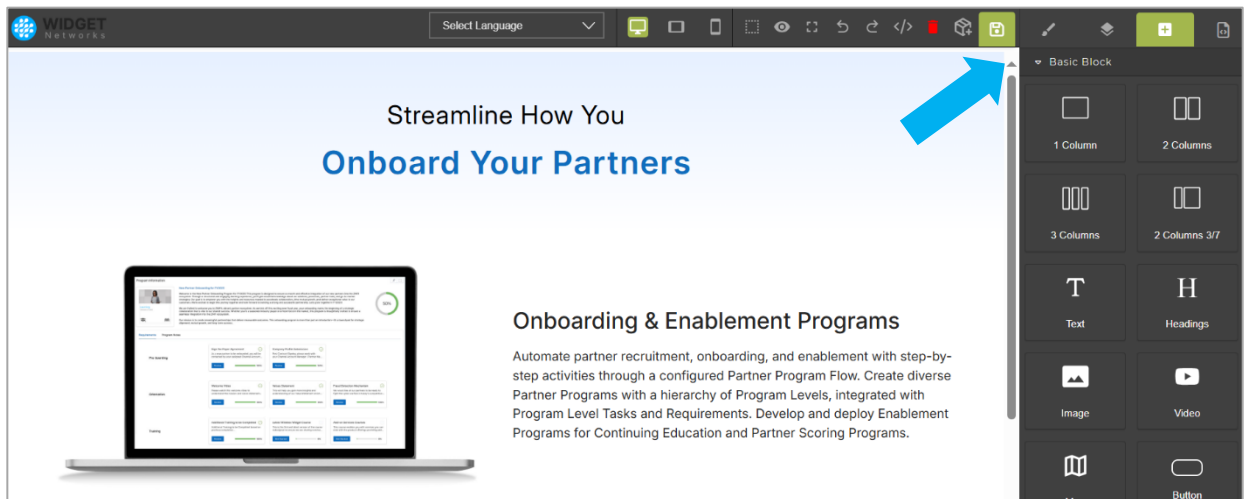
## Dynamic Form Builder Using the WYSIWYG Editor

You may use the various WYSIWYG tools to add content and manage it in a simplified way. The tools are self-explanatory (as it is a standard WYSIWYG). By clicking on the “Source” button in the upper right of the tools panel, you can access the HTML view of your template and edit directly in the HTML. Unclick “Source” to see your email rendered (with the images/graphics missing potentially, which you can add in using the WYSIWYG tools). At this point place your cursor in the cell/location you want your image/graphic to appear and click on the insert image tool (the small “mountain scene” looking icon).

You can use the tools on the right sidebar to insert your template content container, insert rows or columns, buttons, dividers, text areas, image areas, etc...using the draggable components shown here. They will make up the various visual areas of your template – and allow you to click inside anyone of them – to access the editor tools within that element to further configure and customize the content within that section.



- Or, you can begin by inserting HTML code into this template – if you have already designed this email offline and want to import that HTML in to start with that design and layout.



- By clicking on this icon, it opens the HTML editor window where you can insert the HTML.

Edit code

```

1 <table align="center" border="0" cellpadding="0" cellspacing="0" width="650" id="li7w">
2 <tbody>
3 <tr>
4 <td align="left" height="60" id="ix7c">
5 <table border="0" cellpadding="0" cellspacing="0" width="100%">
6 <tbody>
7 <tr>
8 <td width="145">
9 
10 </td>
11 <td valign="bottom" width="1" id="18s92">
12 </td>
13 <td id="i4bgj">####PARTNER_LOGO####
14 </td>
15 <td>
16 </td>
17 </tr>
18 </tbody>
19 </table>
20 </td>
21 </tr>
22 <tr>
23 <td align="left" bgcolor="#a2def6" height="" valign="top">
24 <table border="0" cellpadding="0" cellspacing="0" width="100%">
25 <tbody>
26 <tr>
27 <td align="left" valign="top" id="luqzo">
28 <p id="isx6g">
29 <span id="divMain3" class="ucmcontenteditable">Unleash the<br/>
30 Power of a<br/>
31 Mobile Analyst</span>

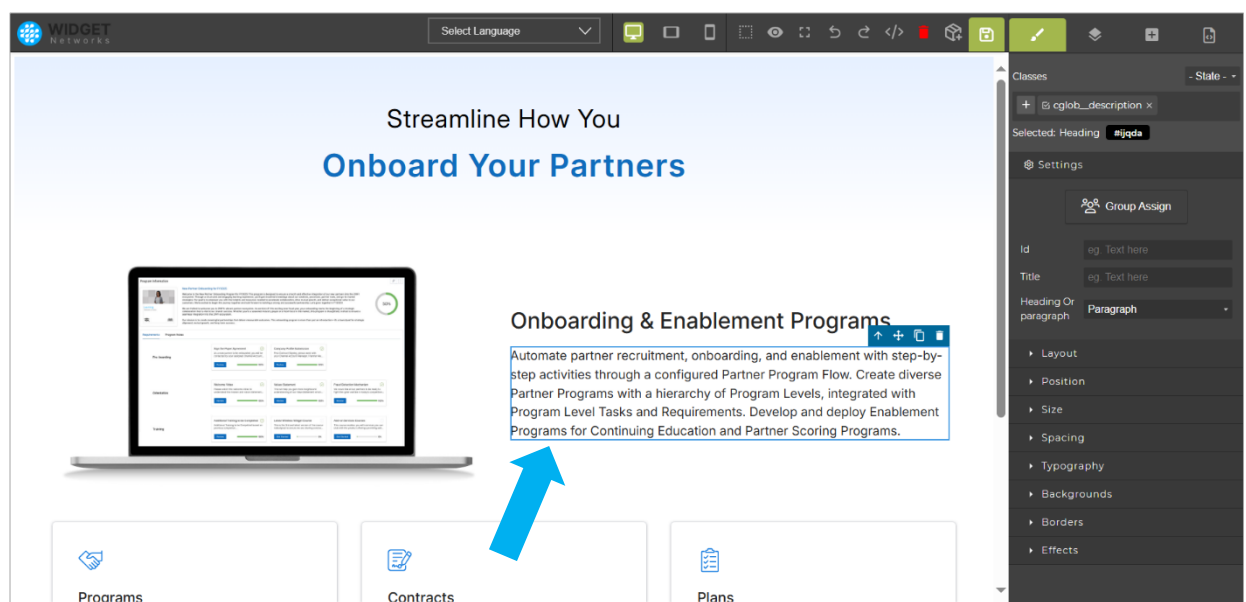
```

Update

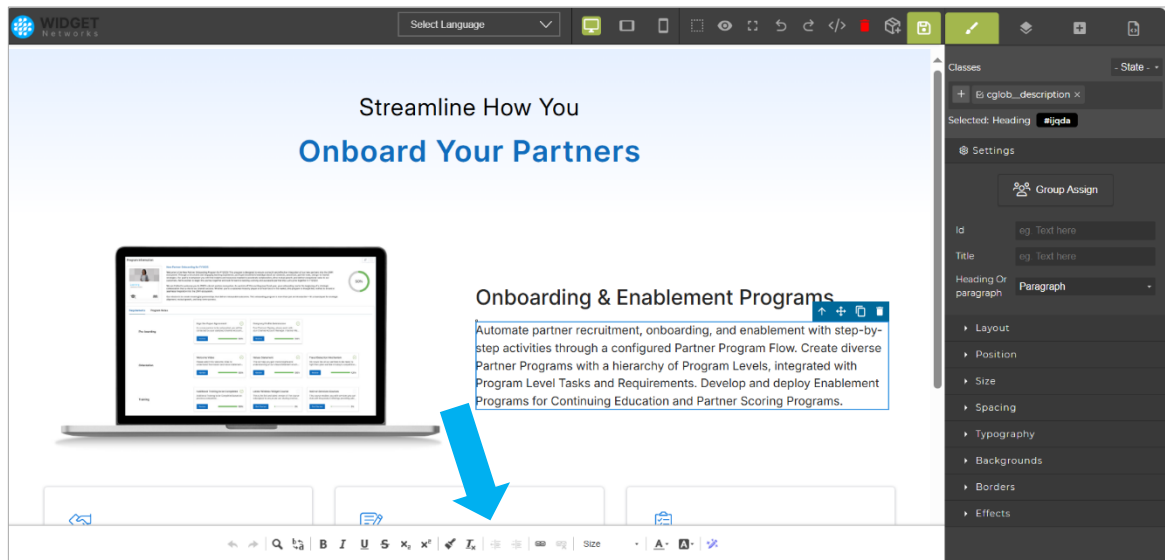
- Once you insert the HTML and click on the “Update” button in the lower left of that window, it will show you the rendered version of your templates (or you can have used the tools shown in step “a” above, to have built out these sections by dragging them in from the right hand sidebar).



- By clicking into any of the visual composer sections (the elements on the canvas page), it will open up the basic tools for that section where you can find tools to move (drag) the section around and replace it on the page, make a duplicate of this section or delete it.

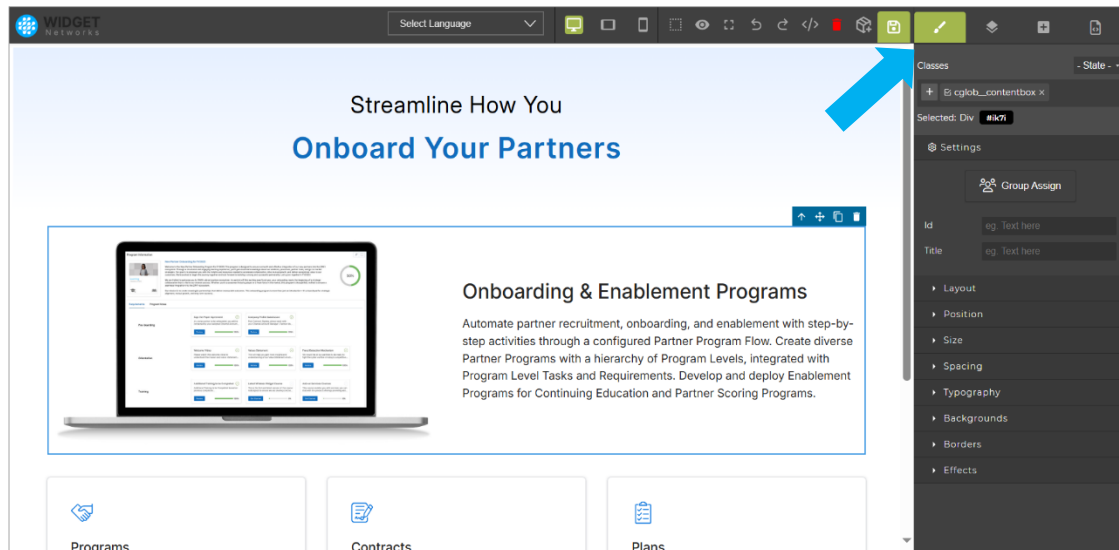


- If you double click on the section you are in, it will open simple WYSIWYG tools that will allow you basic tools to manage the content in that section.

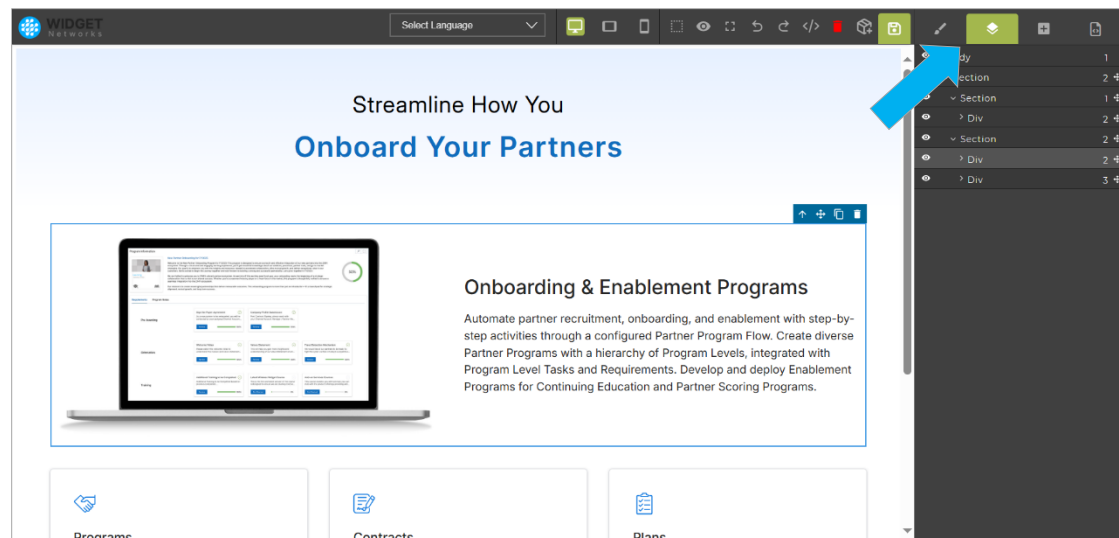




- While you are selected into a particular section, if you click on the small paint brush icon in the top of the right hand sidebar – this will open the full suite of management tools for that section element – with such tools as dimension management (size, padding and margins of the element) typography management (all controls over the font size and family, color, text type, alignment, etc...), and decoration (element borders and backgrounds).



- You can also click on the Open Layer Manager tool to see the structure of your template coding, in tables, columns and rows.



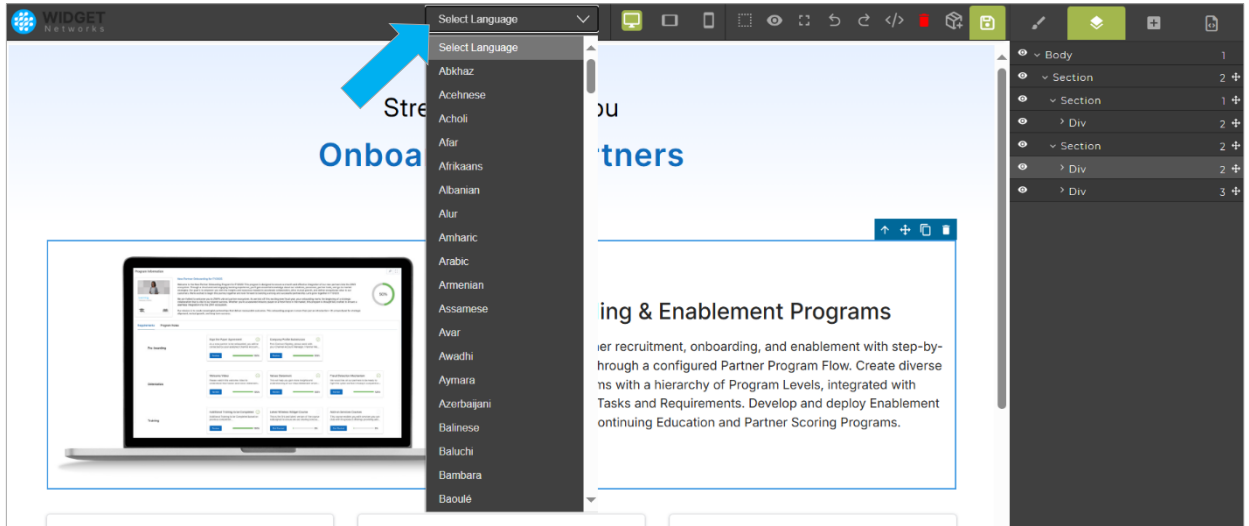
- When you are all done, click on the small disk icon in the upper right to Save your work



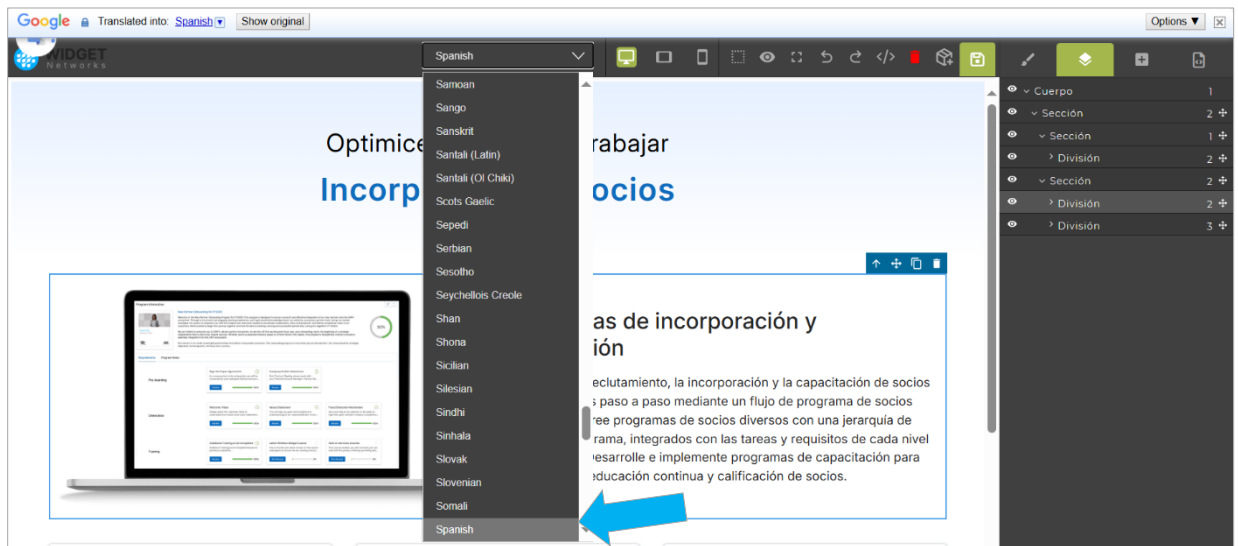
## Translating Your Page into another Language

Open the Drag-n-drop CMS editor as described in the section “Using the WYSIWYG Editor” and then follow the steps defined below.

- Click on the “Select Language” Google Translate menu in the upper left of the editor window.



- Select the language you want (let's use Spanish for this example) – and you will see the page instantly translate into Spanish.

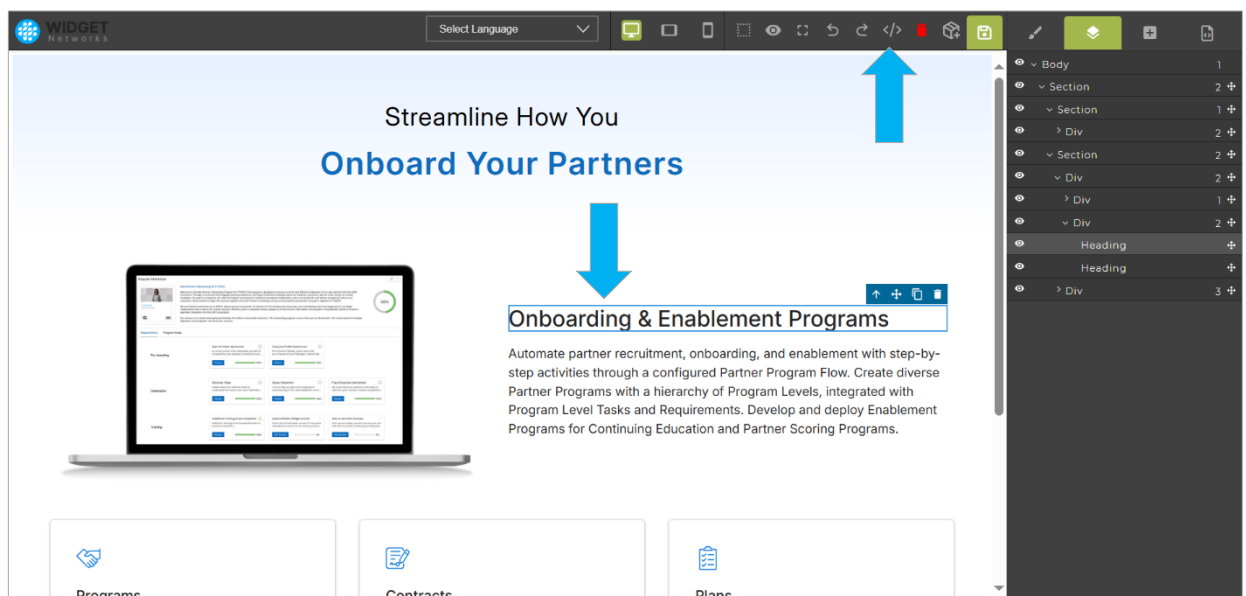


- When done, you can check the translation to make sure all the wording and phrasing is the way you want to use it – and then Save your work.



## Making Zones/Sections Editable or Non-Editable

- When in the Drag & Drop CMS Editor (see section above for how to get into and use the Drag & Drop CMS Editor), identify the area/section you want to make editable or non-editable (locked down) and click on the HTML Editor icon.



- Once in the HTML editor, find the section you are going to lock or unlock for editing by your Partner.

```

66      </font>
67    </font>
68  </font></span>
69  </h1>
70  <p id="ijb88">
71    <span id="divMain5" class="ucmcontenteditable"><font id="i032h">
72      <font id="iilen"> Unleash the power of a mobile analyst.
73    </font>
74    <font id="igvy6"> Test connection to your staff and clients to applications and information with maximum speed and
    efficiency.
75  </font>
76  <font id="i528w">
77    <font style="vertical-align: inherit;">
78      <font style="vertical-align: inherit;" class="goog-text-highlight">Reliable and easy to use mobile solutions Analyst Analyst come
    with a lifetime warranty.
79    </font>
80  </font>
81  </font>
82  </font></span>
83  </p>
84  <p id="lmmpt">
85    <span id="divMain7" class="ucmcontenteditable"><font id="i4di4">
86      <font id="ielmx"> Learn about what mobile analyst can do for your productivity.
87    </font>
88  </font></span>
89  </p>
90  <p id="iohcv">
91    <span id="divMain12" class="ucmcontenteditable"><font id="i2gp5">
92      <font id="imx3z">[www.your_content_show_case_url_here.com]
93    </font>
94  </font></span>
95  </p>

```

Update

- In the screenshot above, you can see that there is a code snippet of **class="UPMcontenteditable"** inserted into the <span> or <div> tag of the code.
- By having this code snippet in the <span> or <div> tag, this make this piece of content in the template editable by the Partner (able to be edited or customized). If you navigate to the code and find this code snippet is NOT in a <span> or <div> tag surrounding the item you wish to be editable...then add this **class="UPMcontenteditable"**, as you see above.
- You can delete this code snippet from anywhere you find it, to make the content non-editable by your Partner, reciprocally.

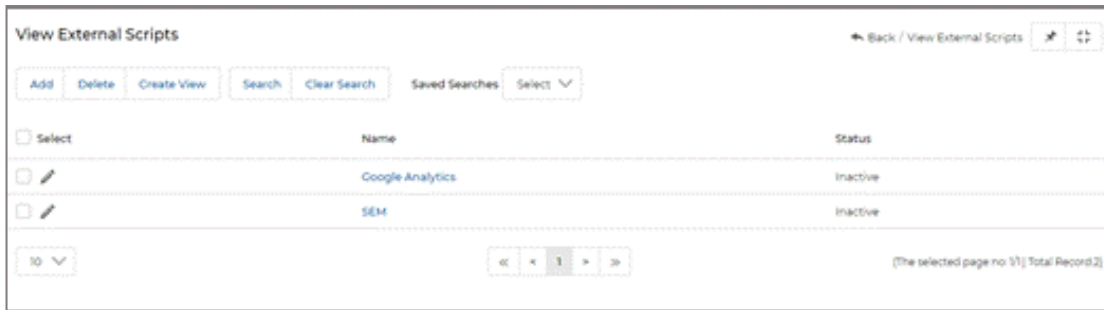
Edit code

```
66         </font>
67     </font>
68 </font></span>
69 </h1>
70 <p id="ijb88">
71     <span id="divMain5" class="ucmcontenteditable"><font id="i032h">
72         < Font id = "illen" > Unleash the power of a mobile analyst.
73     </font>
74     < Font id = "igvy6" > Test connection to your staff and clients to applications and information with maximum speed and
efficiency.
75     </font>
76     <font id="i528w">
77         <font style="vertical-align: inherit;">
78             <font style="vertical-align: inherit;" class="goog-text-highlight">Reliable and easy to use mobile solutions Analyst Analyst come
with a lifetime warranty.
79         </font>
80     </font>
81 </font>
82 </font></span>
83 </p>
84 <p id="immpt">
85     <span id="divMain7" class="ucmcontenteditable"><font id="i4di4">
86         < Font id = "ielmx" > Learn about what mobile analyst can do for your productivity.
87     </font>
88 </font></span>
89 </p>
90 <p id="iohcv">
91     <span id="divMain12" class="ucmcontenteditable"><font id="i2gp5">
92         <font id="imx3z"> [Www.your_content_show_case_url_here.com]
93     </font>
94 </font></span>
95 </p>
```

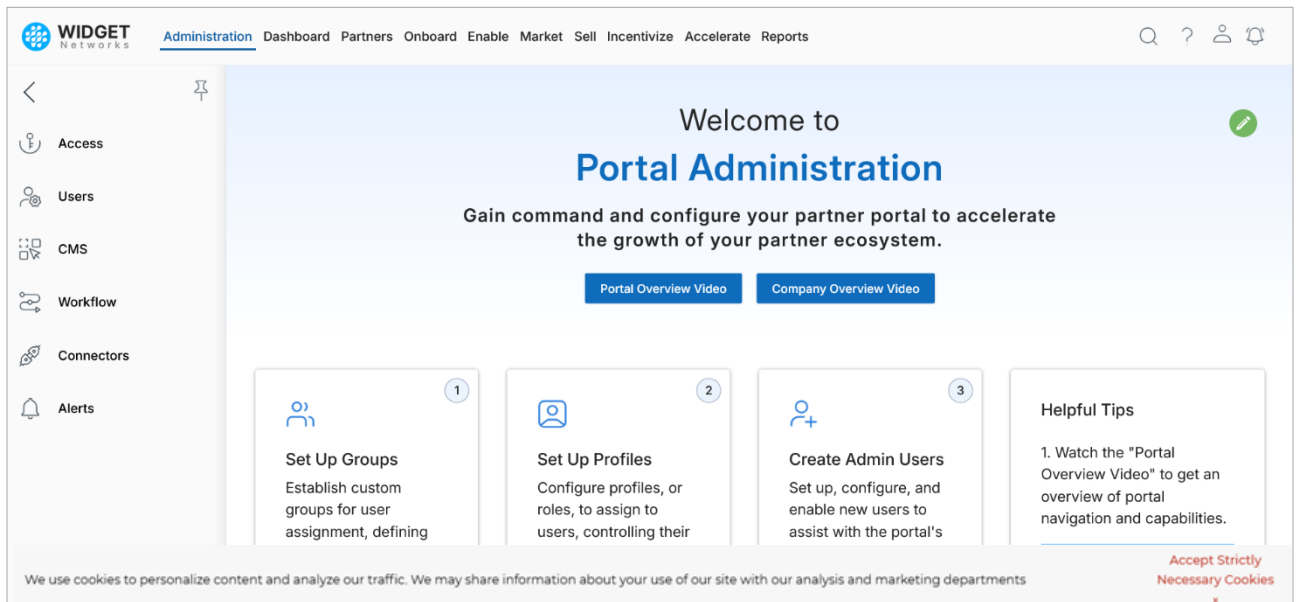
Update

## External Script Support

UPM has been a phenomenal experience through the releases, and with the latest release we are making it more extensible. UPM's CMS has been upgraded to support external plug-ins and extensions. Trusted external scripts can assist you to scale up the functionality of your UPM experience, like the addition of a floater through an external pre-generated script to advertise your products to your partners.



The external script in the application is run through the help of HTML header and body. Both header and body components must be made active to run the script. In the example below, an external script is used to generate an “accept cookies” option for the user (shown in yellow border) to click on.



## Search Engine Friendly

ZINFI CMS ensures people and search engines can find your site easily. Authors have complete control over the page URLs and can create custom metadata for pages, images and links.

## Multilingual

Let your content authors and website visitors use the language of their choice, including German and languages reliant on Unicode such as Chinese and Arabic.

## Manage Themes

1. Click on **theme names** to view the list of available and active themes. At a time only one theme can be set as **Active**
2. Click on **pen icon** to change the theme properties
3. Click on **Delete** to delete the selected themes
4. Click on **Copy Theme** to create new themes

View Themes				Back / View Themes	
<div> <span>Delete</span> <span>Copy Theme</span> <span>Create View</span> <span>Search</span> <span>Clear Search</span> <span>Saved Searches</span> <span>Select</span> </div>					
<input type="checkbox"/> Select	Name	Status	Account		
<input type="checkbox"/>	White Master Theme	Active	Widget Networks		
<input type="checkbox"/>	Blue Theme (don't delete)	Inactive	Widget Partners		
<input type="checkbox"/>	Grey Theme (don't delete)	Inactive	Widget Partners		
<div> <span>10</span> </div>				<div> <span>&lt;&lt;</span> <span>&lt;</span> <span>1</span> <span>&gt;</span> <span>&gt;&gt;</span> </div>	
				(The selected page no: 1/1   Total Record:3)	

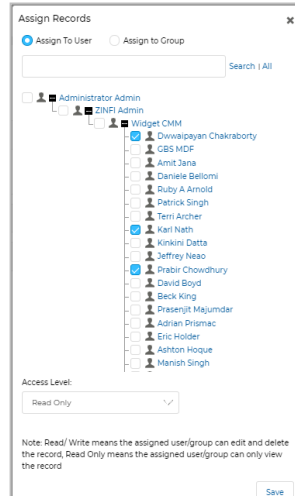
## View Theme Details

1. Click on the Name of any record to see the details.

View Themes				Back / View Themes	
<div> <span>Delete</span> <span>Copy Theme</span> <span>Create View</span> <span>Search</span> <span>Clear Search</span> <span>Saved Searches</span> <span>Select</span> </div>					
<input type="checkbox"/> Select	Name	Status	Account		
<input type="checkbox"/>	White Master Theme	Active	Widget Networks		
<input type="checkbox"/>	Blue Theme (don't delete)	Inactive	Widget Partners		
<input type="checkbox"/>	Grey Theme (don't delete)	Inactive	Widget Partners		
<div> <span>10</span> </div>				<div> <span>&lt;&lt;</span> <span>&lt;</span> <span>1</span> <span>&gt;</span> <span>&gt;&gt;</span> </div>	
				(The selected page no: 1/1   Total Record:3)	

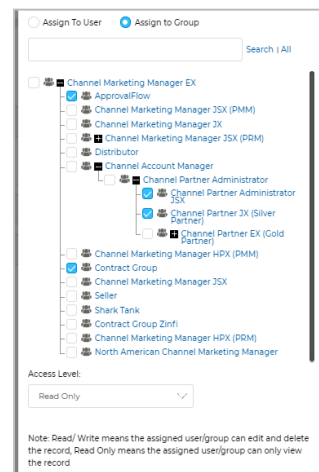
2. The top part of the page provides some buttons:
  - a. Edit – Opens the record in Edit mode.
  - b. Delete – Deletes the record.
  - c. Assign To – Assign the theme to user/group. When you click on this, you will see a popup gets opened.
    - i. Click on **Assign To A User** if you want to provide access permission of this contract to specific users. Then check the users you need. Then select the **Access Level** either **Read Only** or **Read/Write**. **Read Only** users can only view the records but with

**Read/Write** permission they can view and edit the record as well. When done click on **Save**.



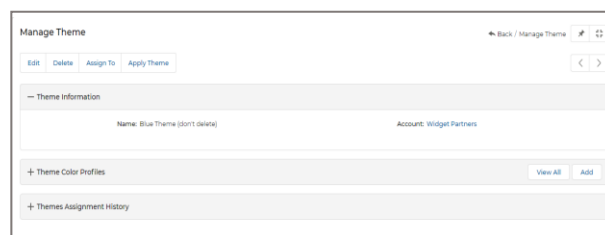
The 'Assign Records' dialog box shows two tabs: 'Assign To User' (selected) and 'Assign To Group'. A search bar is at the top. Below, a tree view lists users under 'Widget CMM', including 'CBS MCF', 'Amit Jana', 'Daniele Bellomi', 'Duby A Arnold', 'Patrick Singh', 'Terri Archer', 'Karl Nath', 'Kinkini Datta', 'Jeffrey Neao', 'Prabir Chowdhury', 'David Boyd', 'Beck King', 'Prasenjit Majumdar', 'Adrian Prizmac', 'Eric Holder', 'Ashton Hoque', and 'Manish Singh'. The 'Access Level' dropdown is set to 'Read Only'. A note at the bottom explains the permissions: 'Read/Write means the assigned user/group can edit and delete the record, Read Only means the assigned user/group can only view the record'. A 'Save' button is at the bottom right.

- ii. Click on **Assign To Group** if you want to provide access permission of this contract to specific partner user group. Then check the groups you need. Then select the **Access Level** either *Read Only* or *Read/Write*. **Read Only** groups can only view the records but with **Read/Write** permission they can view and edit the record as well. When done click on **Save**.



The 'Assign Records' dialog box now shows the 'Assign To Group' tab selected. The search bar is at the top. Below, a tree view lists various groups under 'Channel Marketing Manager EX', including 'ApprovalFlow', 'Channel Marketing Manager 25X (PMM)', 'Channel Marketing Manager 3X', 'Channel Marketing Manager 35X (PMM)', 'Distributor', 'Channel Account Manager', 'Channel Partner Administrator', 'Channel Partner 3X (Silver Partner)', 'Channel Partner EX (Gold Partner)', 'Channel Marketing Manager HPX (PMM)', 'Contract Group', 'Channel Marketing Manager 35X', 'Seller', 'Shark Tank', 'Contract Group Zinfi', 'Channel Marketing Manager HPX (PMM)', and 'North American Channel Marketing Manager'. The 'Access Level' dropdown is still set to 'Read Only'. The same note and 'Save' button are present.

- d. Apply Theme – Activates the theme to the application.



The 'Manage Theme' dialog box has a title bar with 'Back / Manage Theme' and navigation icons. Below the title bar are buttons for 'Edit', 'Delete', 'Assign To', and 'Apply Theme'. The main content area is divided into three sections: 'Theme Information' (showing 'Name: Blue Theme (don't delete)' and 'Account: Widget Partners'), 'Theme Color Profiles' (with 'View All' and 'Add' buttons), and 'Themes Assignment History'.



3. The **Theme Details** related list shows the list of theme configurations.

Action	Label	Type	Color Value
 	Footer Background Color	Footer	 #636361
 	Header Background Color	Header	 #ffffff
 	Footer Link Color	Footer	 #ffffff
 	Left Sidebar Child Links / Dropdown Area Background Color	Left Sidebar	 #005076
 	Footer Text Color	Footer	 #ffffff

a. Click on **Add** button to create and associate new theme attribute to the selected theme.

Add/Edit a Theme Color Profile

Theme Color Profile Information

Label:

Type:
Select

Color Value:



System Identifier:

Theme Name:
Blue Theme (don't delete)

Save Cancel

- Label – Theme attribute name.
  - Type – Implementation location of the theme attribute. Available list of theme configurations are: UI Area, Report, Content Area, Left Sidebar, Footer and Header.
  - Color Value – Color code for the theme attribute that would be applied in the specified location when the selected theme gets activated.
  - CSS Order – CSS order of the theme attribute.
  - CssMasterId – Name of the theme with which the attribute would be associated.
- Click on **View All** or **Click To View More** to view the list of all theme attributes associated with this page. Please Note: Maximum of 5 items is shown in the details page. Rest of these items can only be viewed when you click any one of these buttons.
  - Click on the pen icon to open the selected record in Edit mode.
  - Click on the trash icon to delete the selected record.
  - Label – Name of the theme attribute tied up with the theme.
  - Type – Implementation location of the theme attribute.
  - Color Value – Color code for the theme attribute that would be applied in the specified location when the selected theme gets activated.
4. The **Themes Assignment History** section shows the historical assignment of the theme to users/groups.

- Action – Click on the small globe icon to withdraw an assignment. But note: this can only be done with the user who has done this assignment.
- Assigned To – Assignee of the selected record either to user(s) or to group(s).
- Assignment Type – The type of assignment either to user/group.
- Assigned By – The user who has done the assignment.
- Date Entered – Date of assignment by the user.

— Themes Assignment History				
Action	Assigned To	Assignment Type	Assigned By	Date Entered
	Channel Partner Administrator	Group	Widget CMM	08/24/2018 11:09:07 AM
	Widget CPA [Widget Partners]	User	Widget CMM	08/17/2018 12:36:43 PM

## Edit a Theme

- Click on the pencil icon next to the Theme name to Edit the selected theme.

View Themes

[Back / View Themes](#)

Delete

Copy Theme




Create View

Search

Clear Search

Saved Searches

Select

<input type="checkbox"/> Select	Name	Status	Account
<input type="checkbox"/> 	White Master Theme	Active	Widget Networks
<input type="checkbox"/> 	Blue Theme (don't delete)	Inactive	Widget Partners
<input type="checkbox"/> 	Grey Theme (don't delete)	Inactive	Widget Partners

10

<<

<

1

>

>>

(The selected page no: 1/1 | Total Record:3)

- Under **View Theme** section, provide required data for the following fields:
  - Name – Unique name of the theme.
  - Account – The account to which the theme has been tagged with. Click on Select – a popup window opens. Click on desired account name to include the same with the theme.

Search | Add

Account Name

Vitae Incorporated

Morrison's Cafeteria

ABOC Foods

Widget Partners

Bert Industries

Austin Pharma Inc

BHY CO

Big Data Support Co.

Connectivity Kings

Devify

10

<<

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1

2

3

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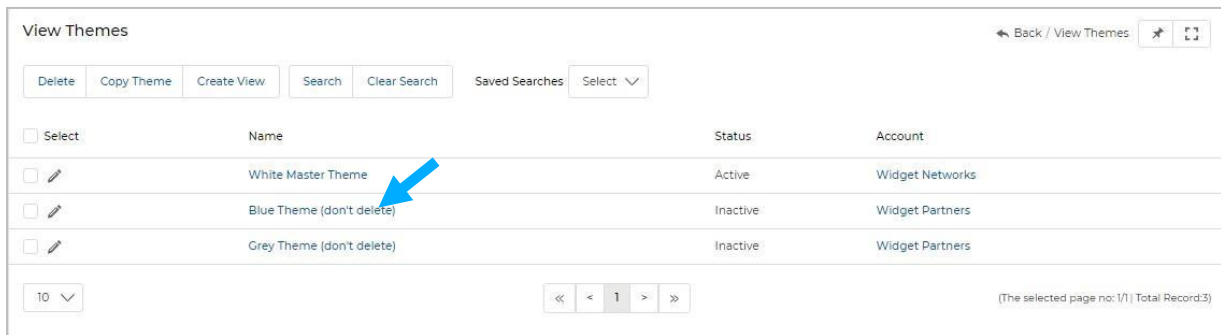
>

>>

(The selected page no: 1/7 | Total Record:65)

- Click on **Save** when done with this portion.

- To Edit the **Color Profiles** within a Theme, click on the Name/Title of that theme.



View Themes

Back / View Themes

Delete Copy Theme Create View Search Clear Search Saved Searches Select

Select	Name	Status	Account
<input type="checkbox"/>	White Master Theme	Active	Widget Networks
<input type="checkbox"/>	Blue Theme (don't delete)	Inactive	Widget Partners
<input type="checkbox"/>	Grey Theme (don't delete)	Inactive	Widget Partners

10

<< < 1 > >>

(The selected page no:1/1 Total Record:3)

- Once in the **View Theme** details page, you will see all the editable items – as described in the “View Theme Detail section” above (See that section for more details)



Manage Theme

Back / Manage Theme

Edit Delete Assign To Apply Theme

Theme Information

Name: Blue Theme (don't delete) Account: Widget Partners

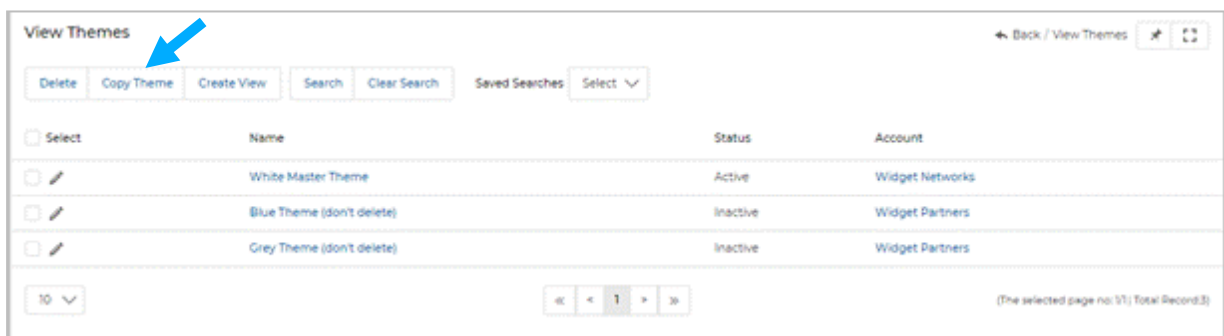
Theme Color Profiles View All Add

Themes Assignment History

## Copying a Theme

Themes supplied with the application are system themes which are advised as **Don't Delete** for smooth working of the application. But you can create your own one by just copying an existing theme with a new name and later can update its configurations to suit your needs.

- Click on **Copy Theme**. This will land you on a new page.



View Themes

Back / View Themes

Delete Copy Theme Create View Search Clear Search Saved Searches Select

Select	Name	Status	Account
<input type="checkbox"/>	White Master Theme	Active	Widget Networks
<input type="checkbox"/>	Blue Theme (don't delete)	Inactive	Widget Partners
<input type="checkbox"/>	Grey Theme (don't delete)	Inactive	Widget Partners

10

<< < 1 > >>

(The selected page no:1/1 Total Record:3)

- Select a theme by choosing one available from the dropdown. This selected theme configurations would be copied to the new theme you would be creating.
- Provide your theme name in the field **New Theme Name**.
- When done click on **Save** to copy the selected theme configurations to your new name. Please Note: The existing theme configuration would remain unchanged if you do any changes to the copied version.

New Theme

Back / New Theme

Save Cancel

Select Theme \* --Select--

New Theme Name \* New Theme Name

Save Cancel

## Manage Quarters

- Click on
  - Add** – To add a new quarter
  - Delete** – Delete selected quarter
  - Create View** – Create a new view
  - Search** – Open the search form
  - Clear Search** – Clear filtered view
- Click **pen icon** to edit the quarter
- Change the page view record limit

View Quarters

Back / View Quarters

Add Delete Create View Search Clear Search Saved Searches Select

Select	Name	From Year	From Month	To Year	To Month
<input type="checkbox"/>	FY20Q4	2020	11	2021	1
<input type="checkbox"/>	FY20Q3	2020	7	2020	9
<input type="checkbox"/>	FY20Q2	2020	4	2020	6
<input type="checkbox"/>	FY20Q1	2020	1	2020	3
<input type="checkbox"/>	FY19Q4	2019	10	2019	12
<input type="checkbox"/>	FY19Q3	2019	7	2019	9
<input type="checkbox"/>	FY19Q2	2019	4	2019	6
<input type="checkbox"/>	FY19Q1	2019	1	2019	3
<input type="checkbox"/>	FY18Q4	2018	10	2018	12
<input type="checkbox"/>	FY18Q3	2018	7	2018	9

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(The selected page no:12/ Total Record:12)

## View Quarter Details

- Click on the Name of any record to see the details.

**View Quarters** Back / View Quarters

<input type="checkbox"/> Select	Name	From Year	From Month	To Year	To Month
<input type="checkbox"/>	FY20Q4	2020	11	2021	1
<input type="checkbox"/>	FY20Q3	2020	7	2020	9
<input type="checkbox"/>	FY20Q2	2020	4	2020	6
<input type="checkbox"/>	FY20Q1	2020	1	2020	3
<input type="checkbox"/>	FY19Q4	2019	10	2019	12
<input type="checkbox"/>	FY19Q3	2019	7	2019	9
<input type="checkbox"/>	FY19Q2	2019	4	2019	6
<input type="checkbox"/>	FY19Q1	2019	1	2019	3
<input type="checkbox"/>	FY18Q4	2018	10	2018	12
<input type="checkbox"/>	FY18Q3	2018	7	2018	9

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(The selected page no: 1/2 | Total Record: 12)

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

**a. Buttons:**

- Edit** – To edit the quarter information
- Delete** – To delete this quarter

**b. View Fiscal Quarter:**

- Name – Name of the quarter.
- From Year – Starting year of the quarter.
- From Month – Starting month of the quarter.
- To Month – Ending month of the quarter.
- To Year – Ending year of the quarter.

**View Quarter** Back / View Quarter

View Fiscal Quarter

Name: FY20Q4
 From Year: 2020

From Month: 11
 To Month: 1

To Year: 2021

## Add/Edit a Quarter

- From the listing page, click on Add to create new quarter or, click on the pencil icon next to the Quarter name to Edit the selected quarter.

View Quarters

Back / View Quarters

AddDeleteCreate View

SearchClear Search

Saved Searches

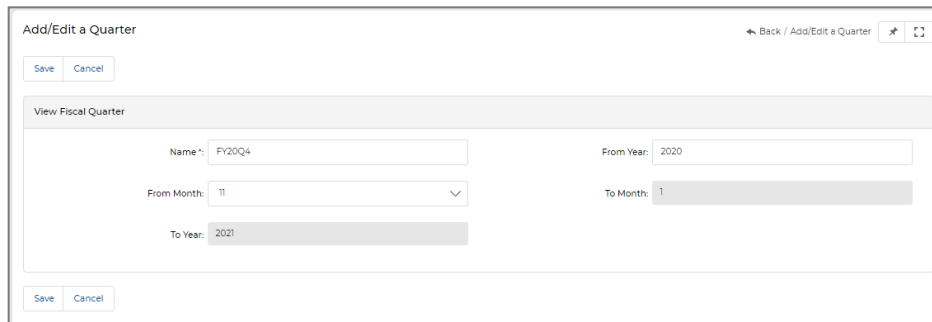
Select

Select	Name	From Year	From Month	To Year	To Month
<input type="checkbox"/>	FY20Q4	2020	11	2021	1
<input type="checkbox"/>	FY20Q3	2020	7	2020	9
<input type="checkbox"/>	FY20Q2	2020	4	2020	6
<input type="checkbox"/>	FY20Q1	2020	1	2020	3
<input type="checkbox"/>	FY19Q4	2019	10	2019	12
<input type="checkbox"/>	FY19Q3	2019	7	2019	9
<input type="checkbox"/>	FY19Q2	2019	4	2019	6
<input type="checkbox"/>	FY19Q1	2019	1	2019	3
<input type="checkbox"/>	FY18Q4	2018	10	2018	12
<input type="checkbox"/>	FY18Q3	2018	7	2018	9

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(The selected page no: 1/2 | Total Record: 12)

- Under **View Theme** section, provide required data for the following fields:
  - Name – Name of the quarter.
  - From Year – Starting year of the quarter.
  - From Month – Starting month of the quarter.
  - To Month – Ending month of the quarter.
  - To Year – Ending year of the quarter.
- Click on **Save** when done.



Add/Edit a Quarter

Back / Add/Edit a Quarter

Save Cancel

View Fiscal Quarter

Name: FY20Q4 From Year: 2020

From Month: 11 To Month: 1

To Year: 2021

Save Cancel

## Manage Currencies

- Click on:
  - Add** – To add a new currency
  - Delete** – Delete selected currency
  - Create View** – Create a new view
  - Search** – Open the search form
  - Clear Search** – Clear filtered view
- Click **pen icon** to edit the currency
- Click on **Currency Name** to view currency detail information
- Change the page view record limit

View Currencies						<a href="#">Back / View Currencies</a>		
<div><a href="#">Add</a> <a href="#">Delete</a> <a href="#">Create View</a> <a href="#">Search</a> <a href="#">Clear Search</a> <a href="#">Saved Searches</a> <a href="#">Select</a> </div>								
<input type="checkbox"/> Select	Name	Currency ISO Code	Conversion Rate	Base Currency	Active			
<input type="checkbox"/>	<a href="#">Pound Sterling</a>	GBP	0.72	No	Yes			
<input type="checkbox"/>	<a href="#">Bermuda Dollar</a>	BMD	1	No	No			
<input type="checkbox"/>	<a href="#">CFA Franc (BEAC)</a>	XAF	534.53	No	No			
<input type="checkbox"/>	<a href="#">Cambodian Riel</a>	KHR	3997.55	No	No			
<input type="checkbox"/>	<a href="#">Burundi Franc</a>	BIF	1756	No	No			
<input type="checkbox"/>	<a href="#">Bulgarian Lev</a>	BCN	1.59	No	No			
<input type="checkbox"/>	<a href="#">Brunei Dollar</a>	BND	1.32	No	No			
<input type="checkbox"/>	<a href="#">Brazil Real</a>	BRL	3.34	No	No			
<input type="checkbox"/>	<a href="#">Norwegian Krone</a>	NOK	7.83	No	No			
<input type="checkbox"/>	<a href="#">Botswana Pula</a>	BWP	9.61	No	No			
<div><div>10 </div><div>  1 2 3 4  </div></div>						(The selected page no: 1/4   Total Record:38)		

## View Currency Details

- Click on the Name of any record to see the details.

View Currencies						<a href="#">Back / View Currencies</a>		
<div><a href="#">Add</a> <a href="#">Delete</a> <a href="#">Create View</a> <a href="#">Search</a> <a href="#">Clear Search</a> <a href="#">Saved Searches</a> <a href="#">Select</a> </div>								
<input type="checkbox"/> Select	Name	Currency ISO Code	Conversion Rate	Base Currency	Active			
<input type="checkbox"/>	<a href="#">Pound Sterling</a>	GBP	0.72	No	Yes			
<input type="checkbox"/>	<a href="#">Bermuda Dollar</a>	BMD	1	No	No			
<input type="checkbox"/>	<a href="#">CFA Franc (BEAC)</a>	XAF	534.53	No	No			
<input type="checkbox"/>	<a href="#">Cambodian Riel</a>	KHR	3997.55	No	No			
<input type="checkbox"/>	<a href="#">Burundi Franc</a>	BIF	1756	No	No			
<input type="checkbox"/>	<a href="#">Bulgarian Lev</a>	BCN	1.59	No	No			
<input type="checkbox"/>	<a href="#">Brunei Dollar</a>	BND	1.32	No	No			
<input type="checkbox"/>	<a href="#">Brazil Real</a>	BRL	3.34	No	No			
<input type="checkbox"/>	<a href="#">Norwegian Krone</a>	NOK	7.83	No	No			
<input type="checkbox"/>	<a href="#">Botswana Pula</a>	BWP	9.61	No	No			
<div><div>10 </div><div>  1 2 3 4  </div></div>						(The selected page no: 1/4   Total Record:38)		

2. Once in the View Currency details page, you will see various buttons and sections such as:
  - a. **Buttons:**
    - i. **Edit** – To edit the quarter information
    - ii. **Delete** – To delete this quarter
  - b. **Currency Information:**
    - i. **Name** – Currency name.
    - ii. **Currency ISO Code** – Three lettered code for identifying a currency.
    - iii. **Active** – Current status of the currency.
    - iv. **Conversion Rate** – Currency conversion rate.
    - v. **Description** – Currency description.
3. **Currency History:** This related list shows the historical assignment of the theme to users/groups.
  - a. **Created By** – The user who created the record.
  - b. **Created On** – Entry date of the record in application's database.
  - c. **Conversion Rate** – Currency conversion rate.
  - d. **Currency ISO Code** – Three lettered code for identifying a currency.

View Currency

Back / View Currency

EditDelete

>

Currency Information

Name: Pound Sterling

Currency ISO Code: GBP

Active: Yes

Conversion Rate: 0.72

Description:

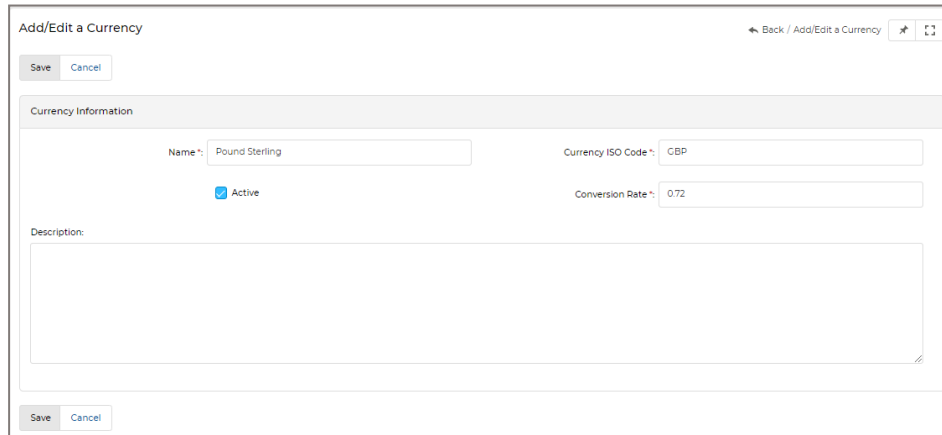
Currency History

Created By	Created On	Conversion Rate	Currency ISO Code
Widget CMM	08/14/2018 12:32:40 PM	0.72	GBP

## Add/Edit a Currency

1. Fields:
  - a. Add **Currency Name**
  - b. Set is as **Active**
  - c. Add **Currency ISO Code**
  - d. Add **Currency Conversion Rate**
  - e. Add **Description**
2. Click on **Save** when done.





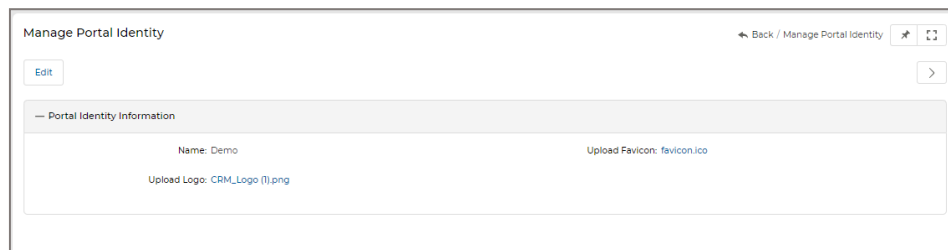
## Portal Identity

### View Identity Details

1. From the listing page, click on Name of the identity to view its details.



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



#### a. Buttons:

- i. **Edit** – To edit the Identity information

#### b. Identity Information:

- i. **Name** – Name of the OEM portal identity.
- ii. **Upload Favicon** – The favicon icon of the OEM portal.
- iii. **Upload Logo** – The logo image of the OEM portal.

## Edit Identity

1. Update identity name (if required)
2. Click on Browse option to select a file from local and **Upload Logo**
3. Click on Browse option to select a file from local and **Upload Favicon**
4. Click **Save** to upload the files

Edit Portal Identity

Back / Edit Portal Identity

Save

Cancel

Portal Identity Information

Name \*

Demo

Upload Favicon:

Browse

favicon.ico X

Upload Logo:

Browse

CRM\_Logo (1).png X

Save

Cancel

## Manage Menu

1. Click on:
  - a. **Add** – To add a new module
  - b. **Delete** – Delete the selected module
  - c. **Create View** – Create a new view
  - d. **Search** – Open the search form
  - e. **Clear Search** – Clear filtered view
2. Click **pen icon** to edit the module, Click on **Menu Name** to view its detail information

Manage Menu Links

Back / Manage Menu Links

Add

Delete

Create View

Search

Clear Search

Saved Searches

Select

Select	Menu Link Name	Display Name	Menu Enabled
<div><div></div><div></div></div>	Access & License	Access & License	Yes
<div><div></div><div></div></div>	Access Management	Access Management	Yes
<div><div></div><div></div></div>	Accounts	Accounts	Yes
<div><div></div><div></div></div>	AdWords	AdWords	Yes
<div><div></div><div></div></div>	Alerts	Alerts	Yes
<div><div></div><div></div></div>	Alerts Management	Alerts Management	Yes
<div><div></div><div></div></div>	Approval Flow	Approval Flow	Yes
<div><div></div><div></div></div>	Apps Library	Apps Library	Yes
<div><div></div><div></div></div>	Apps Setup	Apps Setup	Yes
<div><div></div><div></div></div>	Assessments	Assessments	Yes

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(The selected page no: 1/13 | Total Record:121)

## View Menu Details

1. From the listings page, click on the name of the Menu listing to go into the details page.

Manage Menu Links

Back / Manage Menu Links

AddDeleteCreate View

SearchClear Search

Saved Searches

Select

Select	Menu Link Name	Display Name	Menu Enabled
<div><div></div><div></div></div>	<a href="#">Access &amp; License</a>	Access & License	Yes
<div><div></div><div></div></div>	<a href="#">Access Management</a>	Access Management	Yes
<div><div></div><div></div></div>	<a href="#">Accounts</a>	Accounts	Yes
<div><div></div><div></div></div>	<a href="#">AdWords</a>	AdWords	Yes
<div><div></div><div></div></div>	<a href="#">Alerts</a>	Alerts	Yes
<div><div></div><div></div></div>	<a href="#">Alerts Management</a>	Alerts Management	Yes
<div><div></div><div></div></div>	<a href="#">Approval Flow</a>	Approval Flow	Yes
<div><div></div><div></div></div>	<a href="#">Apps Library</a>	Apps Library	Yes
<div><div></div><div></div></div>	<a href="#">Apps Setup</a>	Apps Setup	Yes
<div><div></div><div></div></div>	<a href="#">Assessments</a>	Assessments	Yes

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(The selected page no: 1/13 | Total Record:121)

2. Once in the Manage Menu details page, you will see various buttons and sections such as:
  - a. **Buttons:**

- i. **Edit** – To edit the menu
- ii. **Delete** – To delete this menu

**b. Menu Information:**

- i. **Name** – Name of the menu. Please Note: Here each menu represents a module in UPM.
- ii. **Display Name** – The user-friendly name that is getting displayed in application to its users.
- iii. **Language Key** – The label used to link UI of the application to its internal database.
- iv. **Menu Enabled** – Current status of the menu. If the menu is not enabled then it will not be visible and also not accessible to the users.
- v. **Menu Icon Class** – The UI class used to build-up the menu.
- vi. **Marketing Module** – The actual module name in the database to which the selected module is being associated with.

**c. Shortcuts:**

- i. Click on **Add** to create new sub-menus. Please refer to “Add/Edit a Shortcut” section for more details.
- ii. Click on **Sort Order** to sort the ordering of the sub-menu items in which they are displayed in the UPM application starting from “1” and moving upwards.
- iii. Click on the pen icon to edit the selected record.
- iv. Click on the trash icon to delete the selected record.
- v. **Name** – Name of the sub-menu item.
- vi. **Enabled** – Current status of the menu. If the menu is not enabled then it will not be visible and also not accessible to the users.
- vii. **Sort Order** – The order in which they would be displayed in the UPM application starting from “1” and moving upwards.

The screenshot displays the 'View Menu Link' interface. At the top, there are 'Edit' and 'Delete' buttons. Below this is the 'Menu Information' section, which contains the following details:

- Menu Link Name: Access Management
- Display Name: Access Management
- Language Key: LNK\_AccessManagement
- Menu Enabled: Yes
- Menu Icon Class: uomlefticon uomicon-access-management-left
- Marketing Module: Access

Below the menu information is the 'Menu Sub Links' section, which includes a table with columns for Action, Name, Enabled, and Sort Order. The table lists five sub-links: 'Manage Regions' (Sort Order 3), 'Manage Tiers' (Sort Order 7), 'Record Visibility' (Sort Order 6), 'Manage Groups' (Sort Order 5), and 'Manage Languages' (Sort Order 1). Each row has an edit (pencil) and delete (trash) icon. At the bottom of the sub-links section, there is a 'Click to View More' button.

## Add/Edit a Menu

1. From the listing page, click on Add to create new menu or, click on the pencil icon next to the Menu name to Edit the selected menu.

**Manage Menu Links** Back / Manage Menu Links

<input type="checkbox"/> Select	Menu Link Name ▼	Display Name	Menu Enabled
<input type="checkbox"/>	Access & License	Access & License	Yes
<input type="checkbox"/>	Access Management	Access Management	Yes
<input type="checkbox"/>	Accounts	Accounts	Yes
<input type="checkbox"/>	AdWords	AdWords	Yes
<input type="checkbox"/>	Alerts	Alerts	Yes
<input type="checkbox"/>	Alerts Management	Alerts Management	Yes
<input type="checkbox"/>	Approval Flow	Approval Flow	Yes
<input type="checkbox"/>	Apps Library	Apps Library	Yes
<input type="checkbox"/>	Apps Setup	Apps Setup	Yes
<input type="checkbox"/>	Assessments	Assessments	Yes

<< < 1 2 3 4 5 6 7 8 9 10 ... > >>
(The selected page no: 1/13 | Total Record:12)

2. Under Menu Information section, provide required data for the following fields:

- Name – Name of the menu. Please Note: Here each menu represents a module in UPM.
- Display Name – The user-friendly name that is getting displayed in application to its users.
- Language Key – The label used to link UI of the application to its internal database.
- Menu Enabled – Check to enable the menu. If the menu is not enabled then it will not be visible and also not accessible to the users.
- Menu Icon Class – The UI class used to build-up the menu.
- Marketing Module – The actual module name in the database to which the selected module is being associated with. Click on **Select** which will open a popup window. Click on the module you want to associate with the menu.

Search / Add

Name	Apps	Display Name	Licence Sub Type	Licence Type	Icon	Is Checked
Learning	Partner Relationship Management (PRM)	Learning	Simplified UCM	Full PCM	umicons-umicon-learning-system	No
Support	Partner Growth Management (PGM)	Support		Full PCM	umicons-umicon-support-system	No
CENTRI	Partner Portal Management (PPM)	CENTRI	Simplified UCM	Full PCM	umicons-umicon-centri-system	No
Deals	Partner Relationship Management (PRM)	Deals	Simplified UCM	Full PCM	umicons-umicon-deals-system	No
Direct Mail	Partner Marketing Management (PMM)	Direct Mail	Simplified UCM	Full PCM	umicons-umicon-direct-email-system	No
Marketplace	Partner Growth Management (PGM)	Marketplace		Full PCM	umicons-umicon-marketplace-system	No
Products	Partner Growth Management (PGM)	Products	Simplified UCM	Full PCM	umicons-umicon-products-system	No
Reports	Partner Portal Management (PPM)	Reports	Simplified UCM	Full PCM	umicons-umicon-intelligence-system	No
Users	Partner Portal Management (PPM)	Users	Simplified UCM	Full PCM	umicons-umicon-users	Yes
Alerts	Partner Portal Management (PPM)	Alerts	Simplified UCM	Full PCM	umicons-umicon-bell-system	Yes

<< < 1 2 3 4 5 > >>
(The selected page no: 1/1 | Total Record:4)

- Click on **Save** when done

Add/Edit a Menu Link
Back / Add/Edit a Menu Link

Save Cancel

Menu Information

Menu Link Name: Access Management

Display Name: Access Management

Language Key: LNK\_AccessManagement

Menu Icon Class: ucmlefticon ucmicon-access-management-left

Marketing Module: Access Select | Clear

Menu Enabled

Save Cancel

## Manage Terminologies

- Click on:
  - Add** – To add a new terminology
  - Delete** – Delete the selected terminology
  - Create View** – Create a new view
  - Search** – Open the search form
  - Clear Search** – Clear filtered view
- Click **pen icon** to edit the terminology, click on **Terminology Name** to view terminology detail information

View Terminologies
Back / View Terminologies

Add Delete Create View Search Clear Search Saved Searches Select

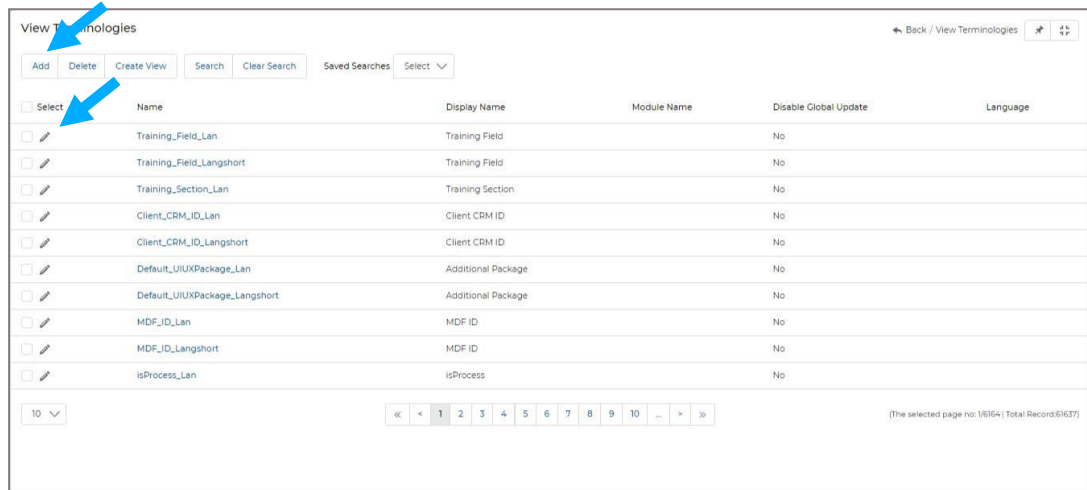
Select	Name	Display Name	Module Name	Disable Global Update	Language
<input type="checkbox"/>	Training_Field_Lan	Training Field		No	
<input type="checkbox"/>	Training_Field_Langshort	Training Field		No	
<input type="checkbox"/>	Training_Section_Lan	Training Section		No	
<input type="checkbox"/>	Client_CRM_ID_Lan	Client CRM ID		No	
<input type="checkbox"/>	Client_CRM_ID_Langshort	Client CRM ID		No	
<input type="checkbox"/>	Default_UIUXPackage_Lan	Additional Package		No	
<input type="checkbox"/>	Default_UIUXPackage_Langshort	Additional Package		No	
<input type="checkbox"/>	MDF_ID_Lan	MDF ID		No	
<input type="checkbox"/>	MDF_ID_Langshort	MDF ID		No	
<input type="checkbox"/>	isProcess_Lan	isProcess		No	

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1 2 3 4 5 6 7 8 9 10 ... »

(The selected page no: 1/164 | Total Record: 1637)

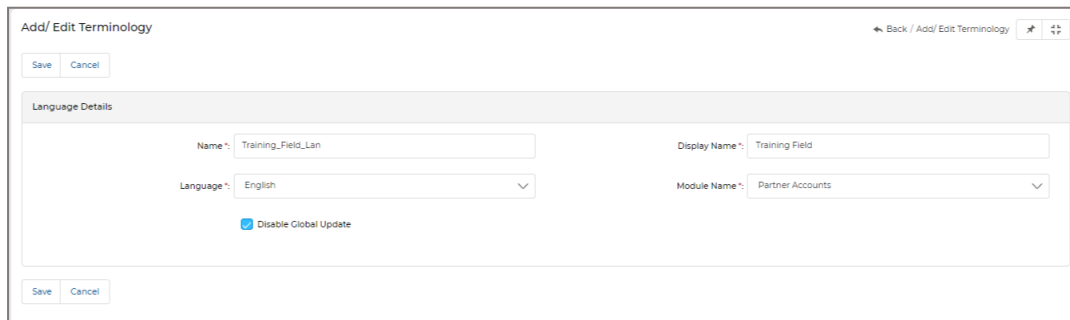
## Add/Edit a Terminology

- From the listing page, click on **Add** to create new Terminology or, click on the **pen icon** beside each terminology to edit the selected one.



Select	Name	Display Name	Module Name	Disable Global Update	Language
<input type="checkbox"/>	Training_Field_Lan	Training Field		No	
<input type="checkbox"/>	Training_Field_Langshort	Training Field		No	
<input type="checkbox"/>	Training_Section_Lan	Training Section		No	
<input type="checkbox"/>	Client_CRM_ID_Lan	Client CRM ID		No	
<input type="checkbox"/>	Client_CRM_ID_Langshort	Client CRM ID		No	
<input type="checkbox"/>	Default_UIUXPackage_Lan	Additional Package		No	
<input type="checkbox"/>	Default_UIUXPackage_Langshort	Additional Package		No	
<input type="checkbox"/>	MDF_ID_Lan	MDF ID		No	
<input type="checkbox"/>	MDF_ID_Langshort	MDF ID		No	
<input type="checkbox"/>	isProcess_Lan	isProcess		No	

2. Under **Language Details** section, provide value for the following fields:
  - a. Name – Name of the terminology object.
  - b. Display Name – The user-friendly display name of the terminology.
  - c. Language – The language of the terminology.
  - d. Module Name – The name of the module to which the terminologies object is attached with.
  - e. Disable Global Update – Check to disable update of the field in the database globally.
3. Click on **Save** when done.



## Unsubscribe Messaging

This module is used to provide unsubscribe message description that will appear in email blasted through UPM. There would be only one unsubscribe message in the application.

### Looking Up for Existing Unsubscribe Message Listing

1. The top part of the page provides some actions:
  - a. **Create View** – Lets you create own view with set of columns as needed.
  - b. **Search** – Opens a new pop-up window where you can put search criteria to find desired records.
  - c. **Clear Search** – Clears the search made.

- d. **Saved Searches** – Shows a list of saved searches in the search dropdown. When selected, two more options are shown:
    - i. **Edit** – Provides 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. **Any linkable item** – Takes you to its details page.

Select	Name	Message Description	Created by
<input type="checkbox"/>	Unsubscribe Message	<p>To no longer receive our emails, please click to <a href="#">unsubscribe</a></p>	Widget CMM

## View Message Details

1. The top part of the page provides some action:
  - a. **Edit** – Opens the record in Edit mode.
  - b. **Delete** – Deletes selected record from the list.
2. Fields featured here are:
  - a. **Name**: An identifiable name to the message.
3. Fields featured here are:
  - a. **Message Description**: Details of the message to be shown with blast emails.

**Unsubscribe Messaging**  
[Back / Unsubscribe Messaging](#)

[Edit](#) [Delete](#)

**Message**  
**Name:** Unsubscribe Message

**Details**  
**Message Description:** To no longer receive our emails, please click to [unsubscribe](#)

## Edit a Message

1. Edit these fields:
  - **Name**: An identifiable name to the message.
  - **Message Description**: Details of the message to be shown with blast emails.



2. Click on **Save** when done.

unsubscribe'."/>

Unsubscribe Messaging

Back / Unsubscribe Messaging

Save Cancel

Message

Name \* Unsubscribe Message

Details

Message Description:

Source Source Copy Paste Undo Redo Bold Italic Underline Strikethrough Text Color Background Color Bulleted List Numbered List Indent Outdent Link Unlink Image Video Audio Embed Table Horizontal Line Full Screen Source

Font Size A A

To no longer receive our emails, please click to [unsubscribe](#)

Save Cancel

## Section Tooltip

This module is used to provide a tooltip message for sections of the specified module in the application.

### Looking Up for Existing Section Tooltip Listing

1. The top part of the page provides some actions:
  - a. **Add** – Opens a new page to add a new record.
  - b. **Edit** – Opens the record in Edit mode.
  - c. **Create View** – Lets you create own view with 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 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. **Any linkable item** – Takes you to its details page.

View Tooltips

Back / View Tooltips

Add

Delete

Create View

Search

Clear Search

Saved Searches

Select

Select	Name	Module	Section/Attribute	Mode
<input type="checkbox"/>	Badge Information Tooltip	Badges	Badge_Management_obj Information	Add
<input type="checkbox"/>	Partner Information Tooltip	Partner Prospects	Partner Information	Add
<input type="checkbox"/>	Onboarding Program	Programs	Program Details	Both
<input type="checkbox"/>	Application Help	Application Help Content	Application Help Content Information	Both
<input type="checkbox"/>	Application help content description	Application Help Content	Description	Both

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(The selected page no: 1/1 | Total Record:5)

## View Tooltip Details

- The top part of the page provides some action:
  - Edit** – Opens the record in Edit mode.
  - Delete** – Deletes selected record from the list.
- Fields featured here are:
  - Name**: An identifiable name to the tooltip.
  - Module**: The name of the module with which the tooltip is associated.
  - Language**: Tooltip language.
  - Section/Attribute**: The section of the selected module for which the tooltip is associated.
  - Mode**: Represents that the tooltip is allowed for both the modes – Add and View.
  - Type**: Represents the type of the tooltip where it is associated – Section, Field or Header.
- Fields featured here are:
  - Description**: Details of the tooltip message to be displayed.

View Section Tooltip

Back / View Section Tooltip

Edit

Delete

>

Tooltip Information

Name: Badge Information Tooltip

Module: Badges

Language: en-US

Section/Attribute: Badge\_Management\_obj Information

Mode: Add

Type: Section

Description

Description: Feed in the mandatory Badge Information

## Add/Edit a Tooltip

1. Edit these fields:
  - a. **Name:** An identifiable name to the tooltip.
  - b. **Module:** The name of the module with which the tooltip is associated.
  - c. **Language:** Tooltip language.
  - d. **Section/Attribute:** The section of the selected module for which the tooltip is associated.
  - e. **Mode:** Represents that the tooltip is allowed for both the modes – Add and View.
  - f. **Type:** Represents the type of the tooltip where it is associated – Section, Field or Header.
  - g. **Description:** Details of the tooltip message to be displayed.
2. Click on **Save** when done.

Add/Edit a Tooltip

Back / Add/Edit a Tooltip

Save

Tooltip Information

Name: Badge Information Tooltip

Module: Badges

Language: en-US

Section/Attribute: Badge\_Management\_obj Information

Mode: Add

Type: Section

Description

Description:

Feed in the mandatory Badge Information

Save

## Modular Architecture

ZINFI CMS operates on a modular architecture that is very simple, yet powerful. This software offers users the opportunity to extend their website's capabilities as well as the tools they need to accomplish it.

The modular architecture is valuable because it scales well with your needs and adjustments. If your brand has gained broader awareness and needs to be fueled by richer customization—including multimedia and other features—the modular architecture of CMS gives you the flexibility to make that happen.

