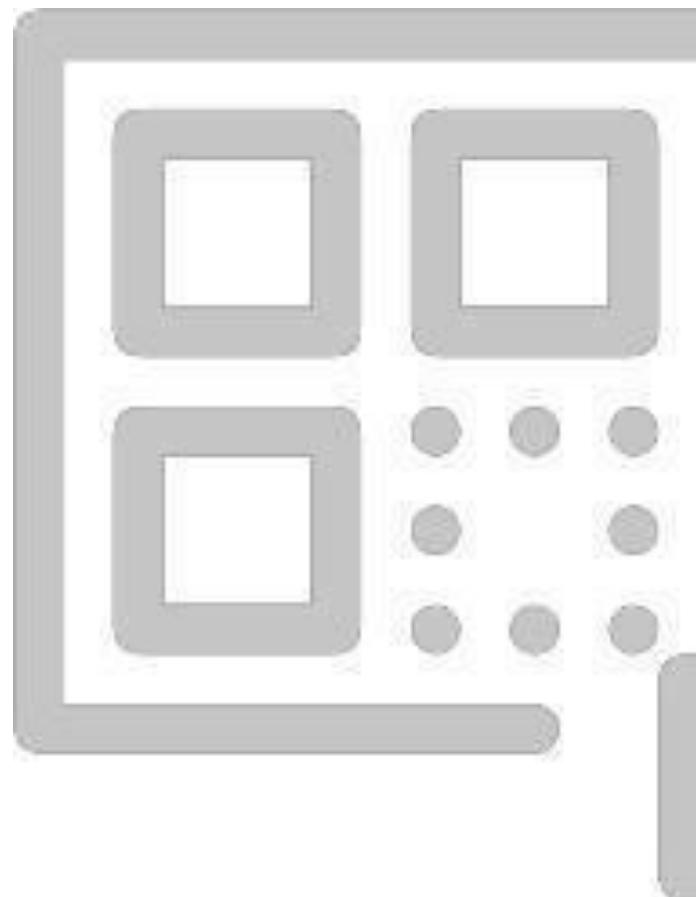


CMS™ Content Management

Ext.prd.003.03 | 06.07.25

UPM 25.x

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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™ 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.

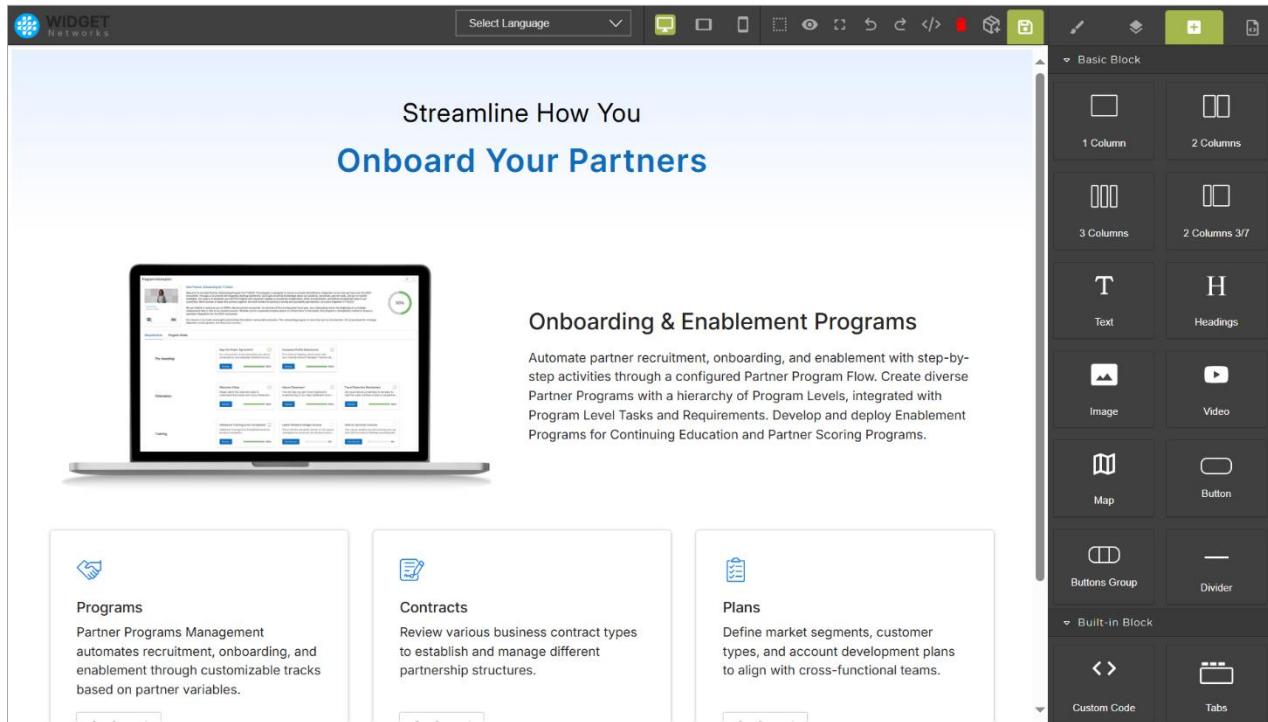
No code knowledge is required! You can easily orient yourself within CMS even if you aren't a computer geek. ZINFI's CMS team developed the tool specifically with non-technical users in mind, providing a simple, user-friendly interface. CMS drag-and-drop works like most computer programs you are familiar 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!

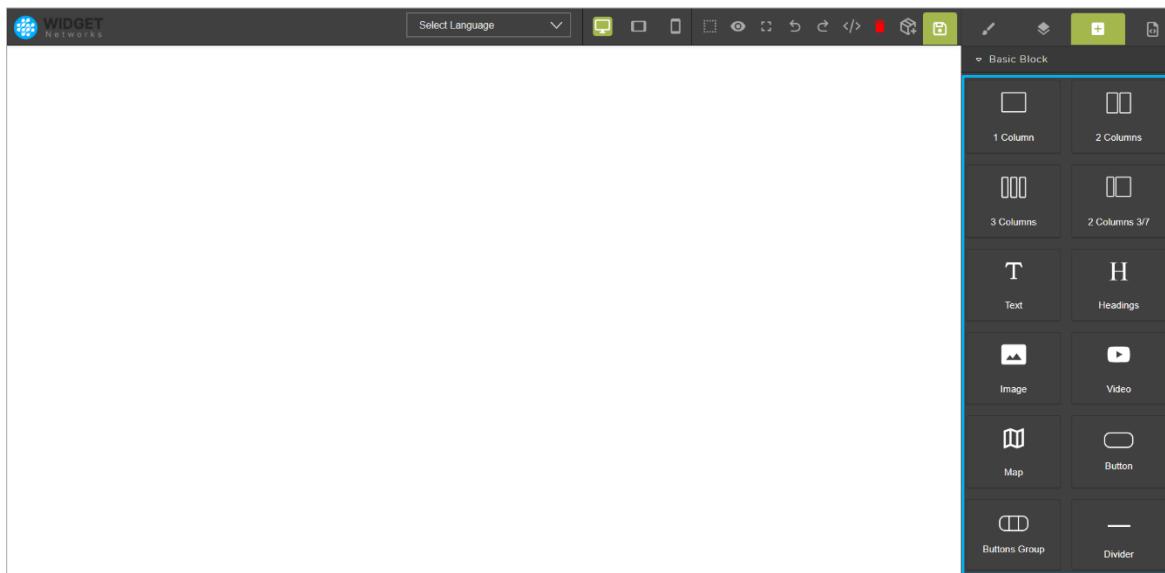


The screenshot shows the ZINFI WYSIWYG Editor interface. On the left, a large preview window displays a landing page with the title "Streamline How You Onboard Your Partners". Below the title is a tablet showing a detailed "Partner Onboarding Flow" with four stages: The Onboarding, Activation, Onboarding, and Training. To the right of the preview is a sidebar with a toolbar at the top. The "Basic Block" section contains a grid of icons for "1 Column", "2 Columns", "3 Columns", "2 Columns 3/7", "Text", "Headings", "Image", "Video", "Map", "Button", "Buttons Group", and "Divider". Below this is a "Built-in Block" section with "Custom Code" and "Tabs" options. The bottom of the sidebar has a "Source" button and a "Preview" button.

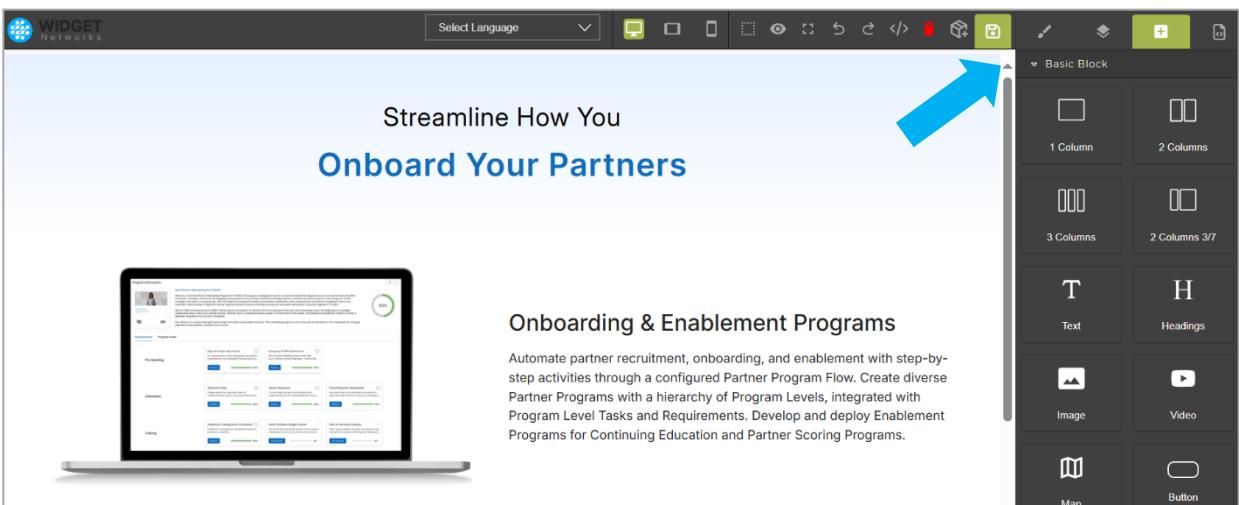
Dynamic Form Builder Using the WYSIWYG Editor

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 dragable 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="lx7c">
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="l8s92">
12              </td>
13              <td id="l4bgj">####PARTNER_LOGO#####
14            </td>
15            <td>
16              </td>
17            </tr>
18          </tbody>
19        </table>
20      </td>
21    </tr>
22  </tbody>
23  <tr align="left" bgcolor="#a2def6" height="" valign="top">
24    <td border="0" cellpadding="0" cellspacing="0" width="100%">
25      <tbody>
26        <tr>
27          <td align="left" valign="top" id="luqzo">
28            <p id="lx6g">
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).



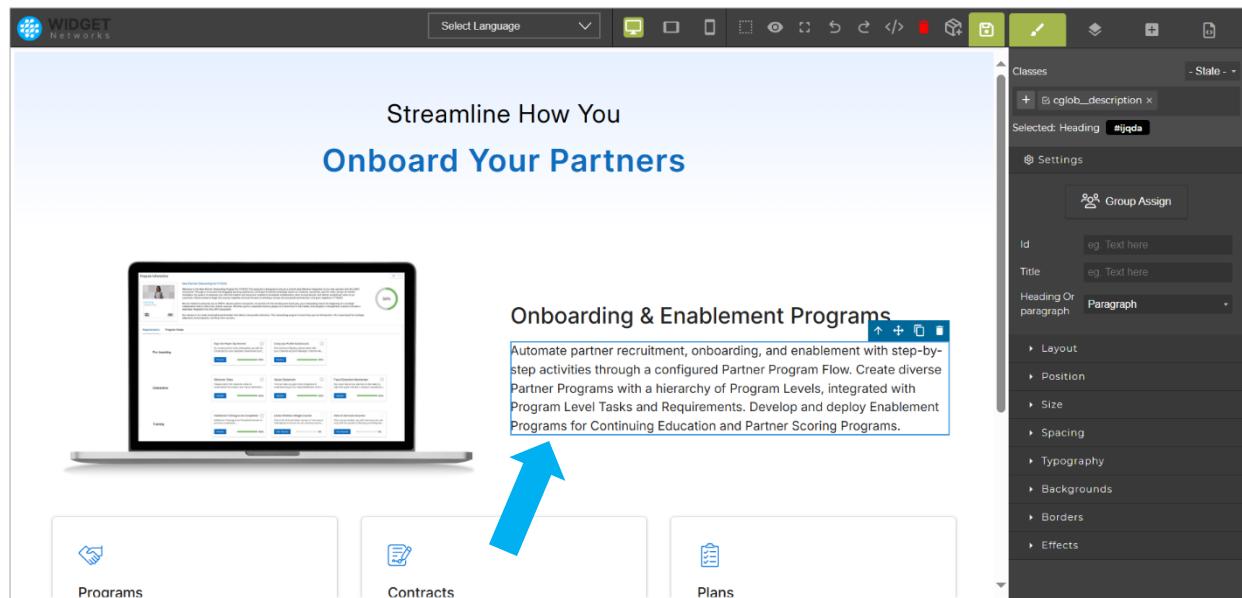
Streamline How You **Onboard Your Partners**

Onboarding & Enablement Programs

Automate partner recruitment, onboarding, and enablement with step-by-step activities through a configured Partner Program Flow. Create diverse Partner Programs with a hierarchy of Program Levels, integrated with Program Level Tasks and Requirements. Develop and deploy Enablement Programs for Continuing Education and Partner Scoring Programs.

Programs Contracts Plans

- 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.



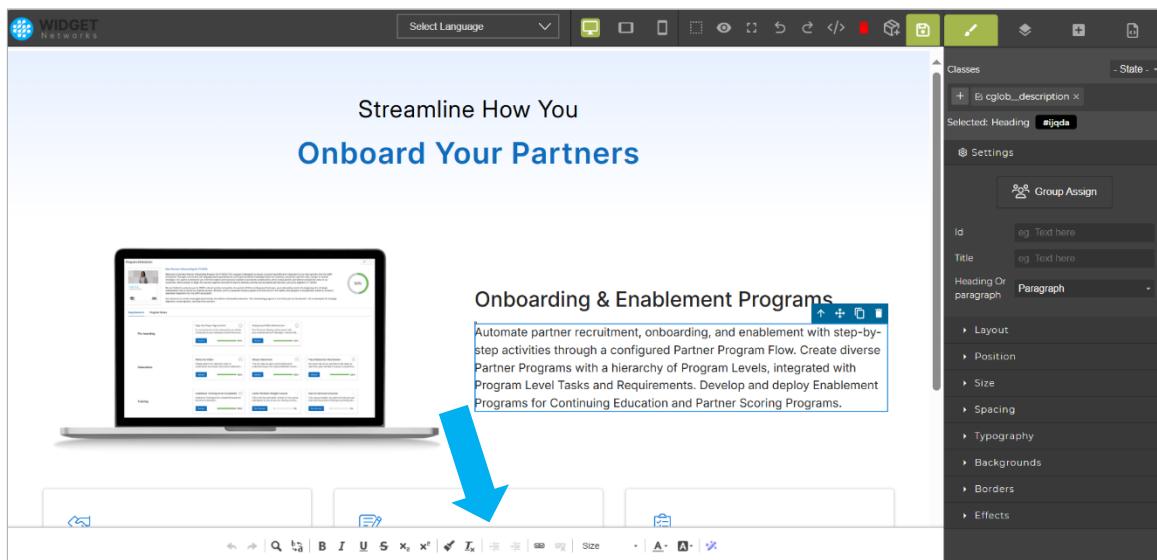
Streamline How You **Onboard Your Partners**

Onboarding & Enablement Programs

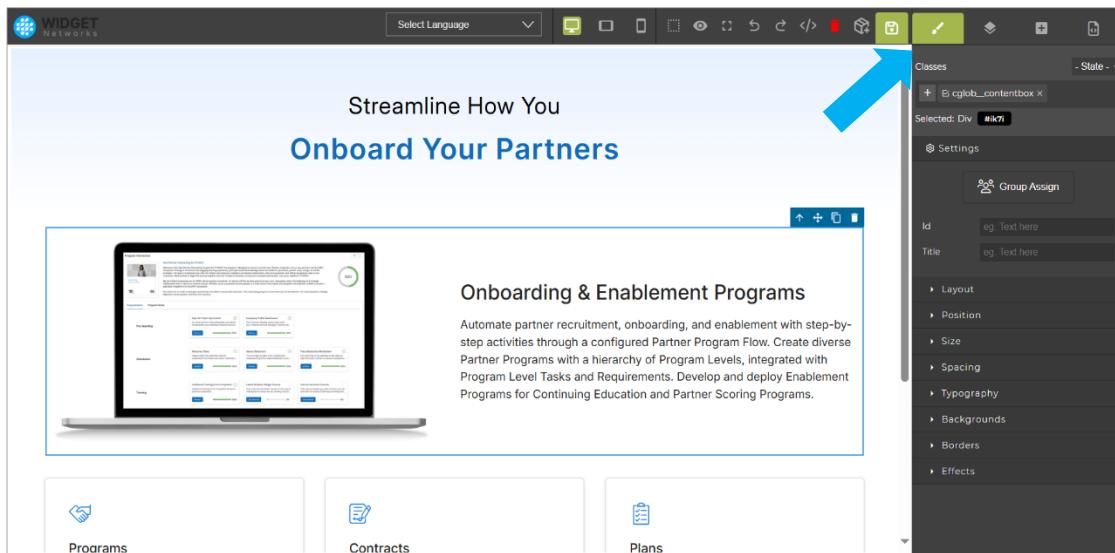
Automate partner recruitment, onboarding, and enablement with step-by-step activities through a configured Partner Program Flow. Create diverse Partner Programs with a hierarchy of Program Levels, integrated with Program Level Tasks and Requirements. Develop and deploy Enablement Programs for Continuing Education and Partner Scoring Programs.

Programs Contracts Plans

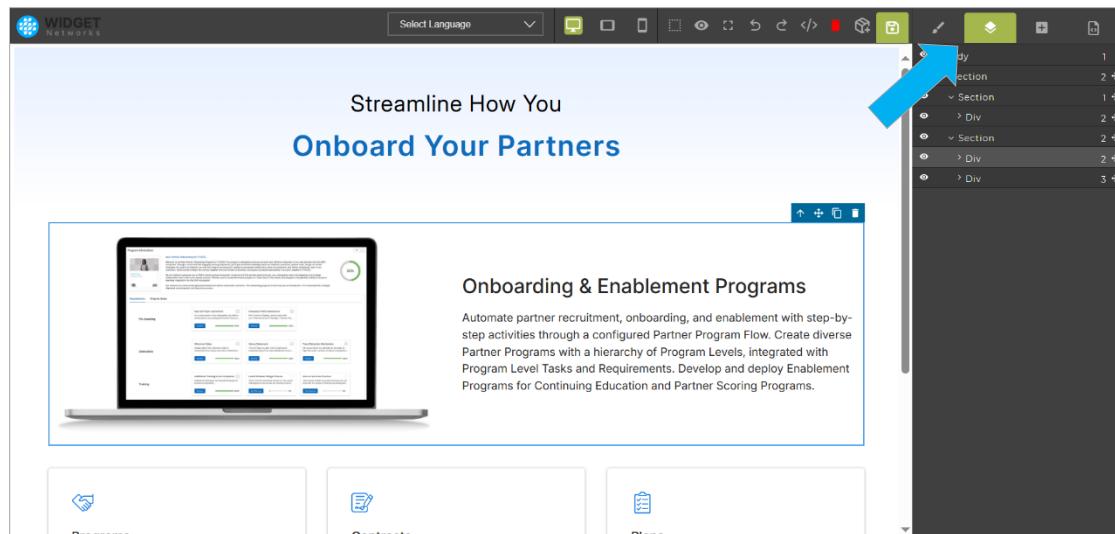
- If you double click on the section you are in, it will open simple WYSIWYG tools that will allow you basic tools to manage the content in that section.



- 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.



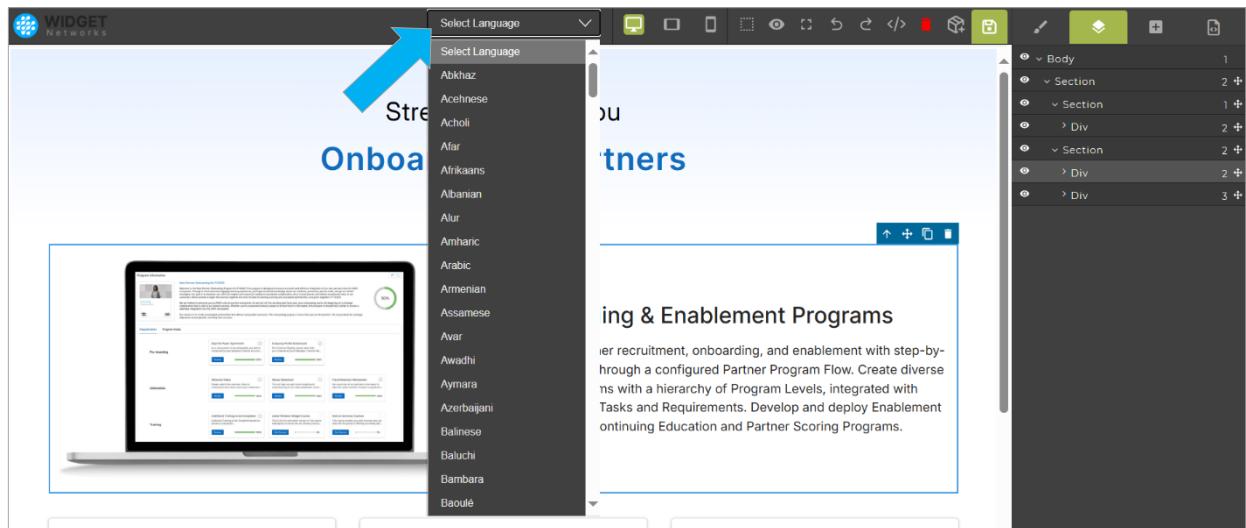
- When you are all done, click on the small disk icon in the upper right to Save your work



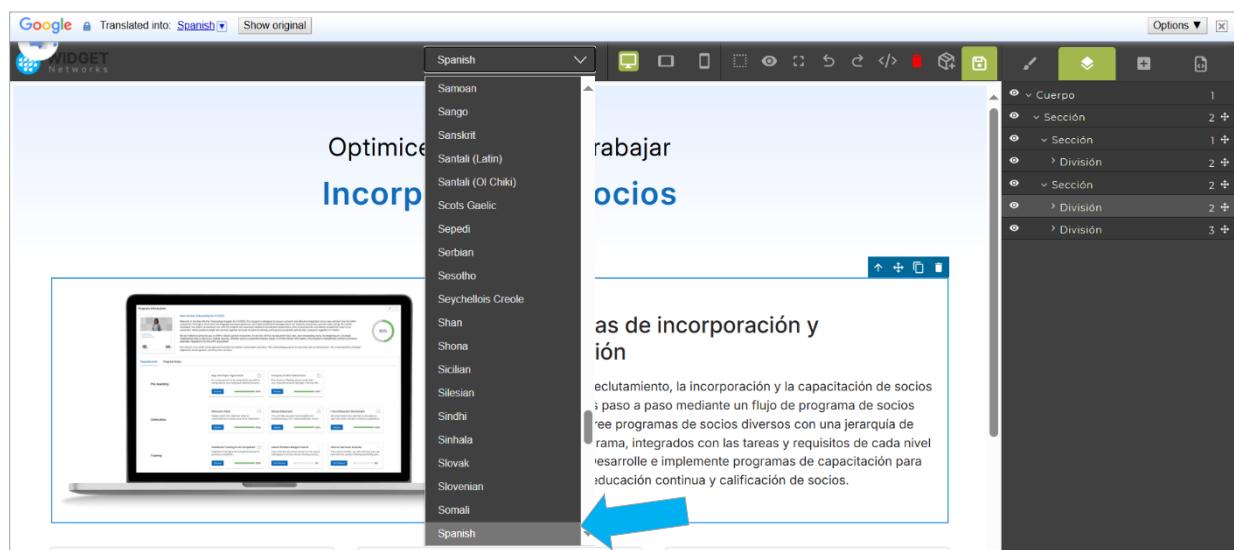
Translating Your Page into another Language

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.

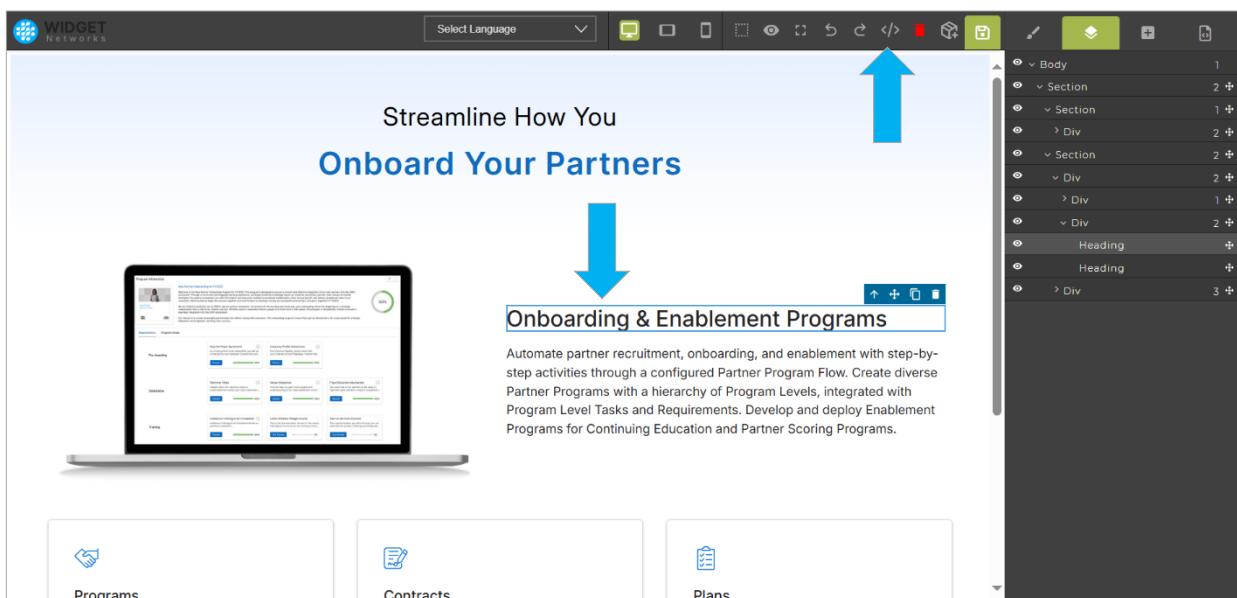


- When done, you can check the translation to make sure all the wording and phrasing is the way you want to use it – and then Save your work.

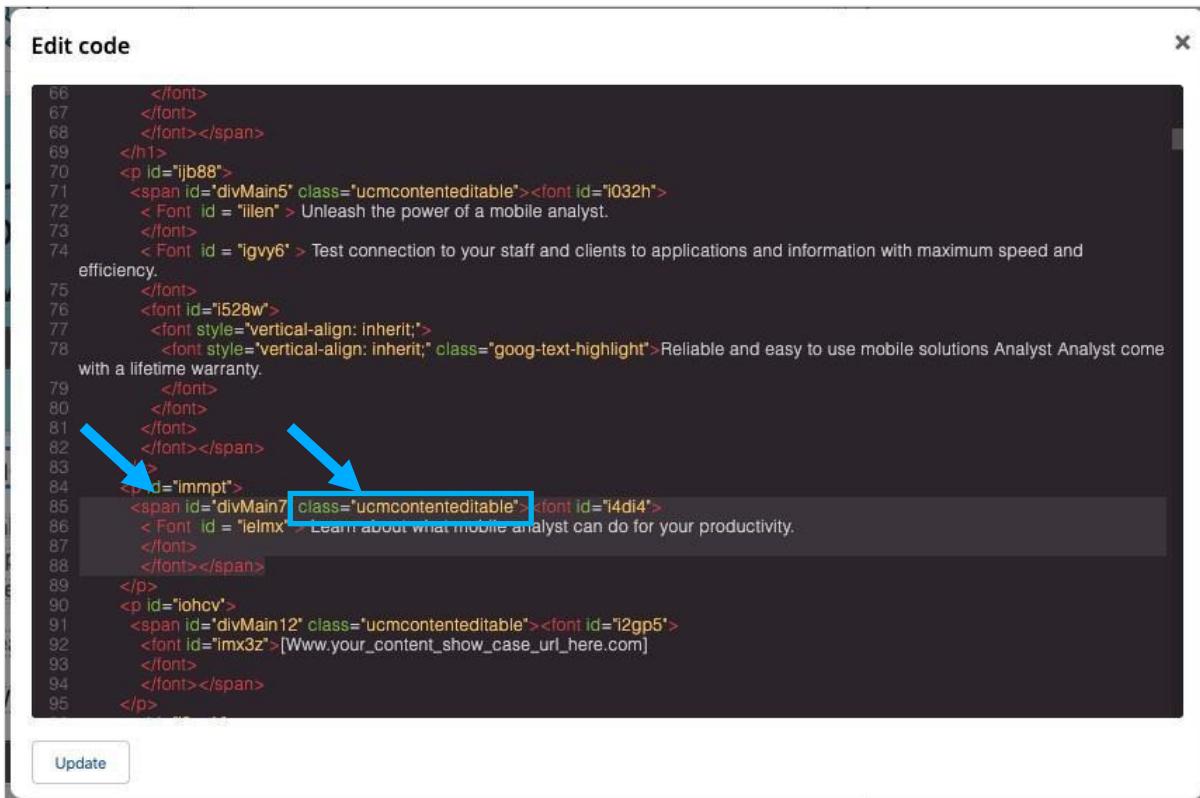


Making Zones/Sections Editable or Non-Editable

- 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.



The screenshot shows the 'Edit code' dialog box. The code editor displays the following HTML code:

```
66      </font>
67      </font>
68      </font></span>
69  </h1>
70  <p id="jjb88">
71  <span id="divMain5" class="ucmcontenteditable"><font id="l032h">
72  < Font id = "ilien" > 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="l528w">
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  >
84  <span id="lmmpt">
85  <span id="divMain7" class="ucmcontenteditable"><font id="l4di4">
86  < Font id = "lelmx" > Learn about what mobile analyst can do for your productivity.
87  </font>
88  </font></span>
89  </p>
90  <p id="l0hov">
91  <span id="divMain12" class="ucmcontenteditable"><font id="l2gp5">
92  <font id="lmx3z">[Www.your_content_show_case_url_here.com]
93  </font>
94  </font></span>
95  </p>
```

The line 85 is highlighted with a blue box, and two blue arrows point to the `class="ucmcontenteditable"` attribute within the `` tag. A 'Update' button is visible at the bottom left of the code editor.

- In the screenshot above, you can see that there is a code snippet of `class="UPMcontenteditable"` inserted into the `` or `<div>` tag of the code.
- By having this code snippet in the `` 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 `` 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.

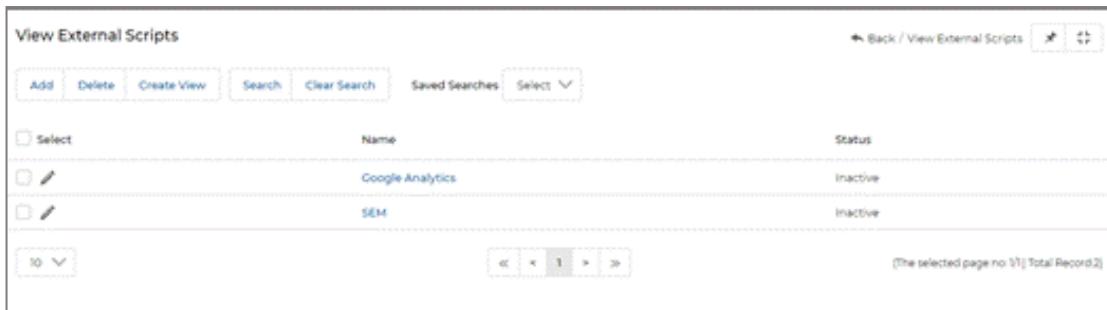
Edit code X

```
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 = "ilien" > 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="immp1">
85 <span id="divMain7" class="ucmcontenteditable"><font id="i4di4">
86 <font id = "ilmx" > Learn about what mobile analyst can do for your productivity.
87 </font>
88 </font></span>
89 </p>
90 <p id="iohov">
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>
```

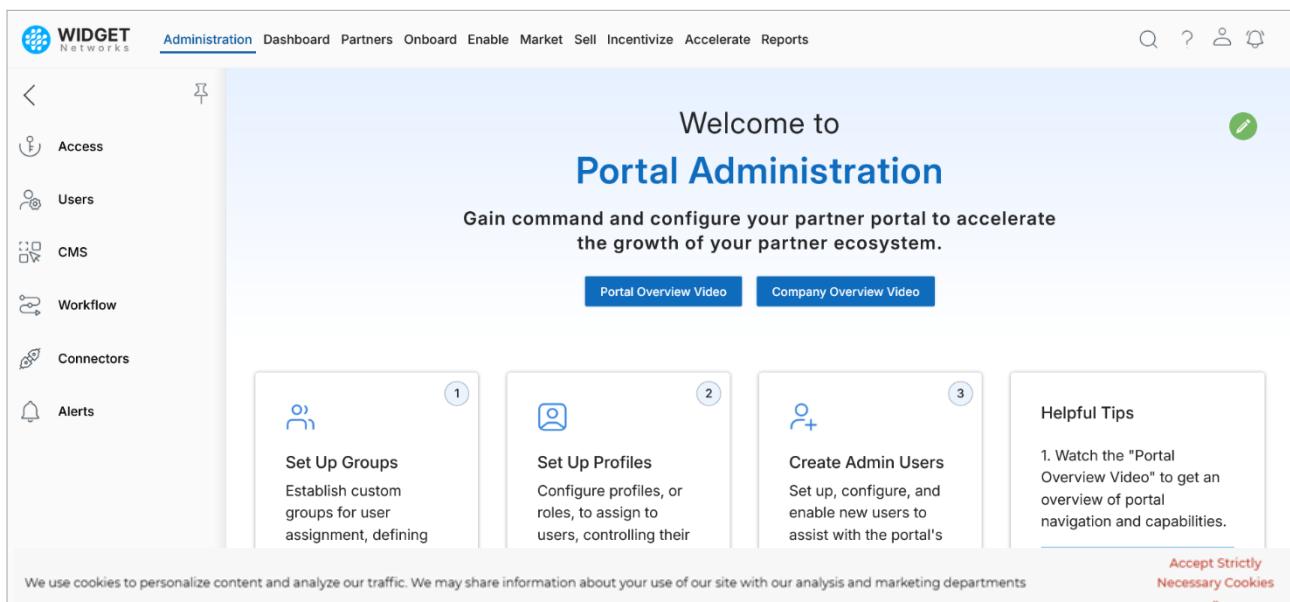
Update

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

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

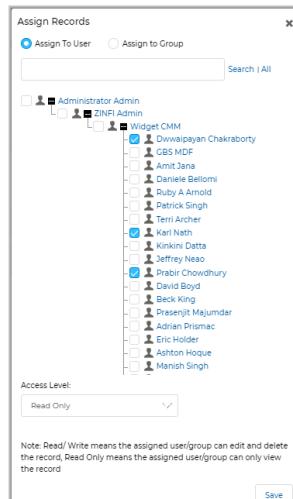
View Theme Details

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

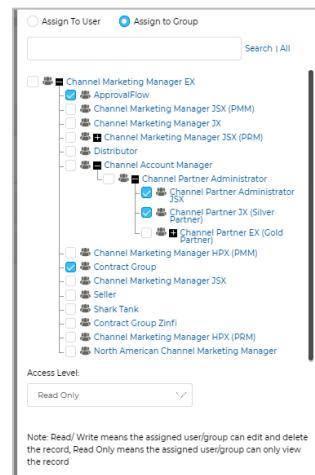
View Themes			
<input type="button" value="Delete"/>	<input type="button" value="Copy Theme"/>	<input type="button" value="Create View"/>	<input type="button" value="Search"/> <input type="button" value="Clear Search"/> <input type="button" value="Saved Searches"/> <input type="button" value="Select"/>
<input type="checkbox"/>	<input type="checkbox"/>	Name	Status Account
<input type="checkbox"/>	<input type="checkbox"/>	White Master Theme	Active Widget Networks
<input type="checkbox"/>	<input type="checkbox"/>	Blue Theme (don't delete)	Inactive Widget Partners
<input type="checkbox"/>	<input type="checkbox"/>	Grey Theme (don't delete)	Inactive Widget Partners
10		<input type="button" value="<<"/> <input type="button" value="<"/> <input type="button" value="1"/> <input type="button" value=">"/> <input type="button" value=">>"/>	(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

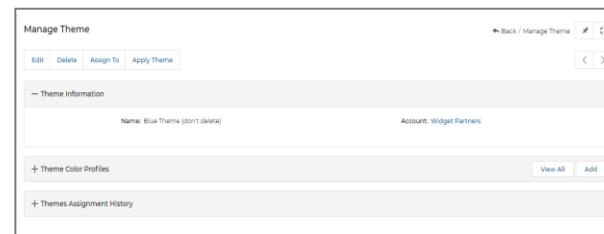
Read/Write permission they can view and edit the record as well. When done click on **Save**.



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**.



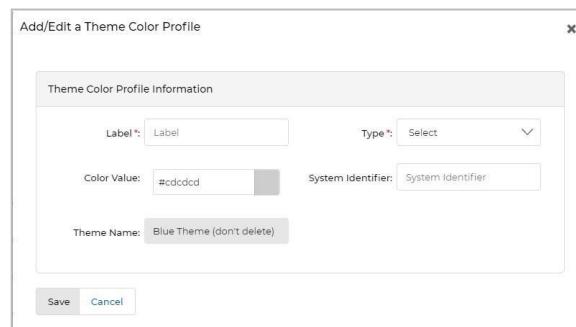
d. Apply Theme – Activates the theme to the application.



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.



The dialog box is titled 'Add/Edit a Theme Color Profile'. It contains a section for 'Theme Color Profile Information' with the following fields:

- Label:** A text input field containing 'Label'.
- Type:** A dropdown menu set to 'Select'.
- Color Value:** A color picker set to '#cdcdcd'.
- System Identifier:** A text input field containing 'System Identifier'.
- Theme Name:** A text input field containing 'Blue Theme (don't delete)'.

At the bottom are 'Save' and 'Cancel' buttons.

- i. Label – Theme attribute name.
- ii. Type – Implementation location of the theme attribute. Available list of theme configurations are: UI Area, Report, Content Area, Left Sidebar, Footer and Header.
- iii. Color Value – Color code for the theme attribute that would be applied in the specified location when the selected theme gets activated.
- iv. CSS Order – CSS order of the theme attribute.
- v. CssMasterId – Name of the theme with which the attribute would be associated.
- b. 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.
- c. Click on the pen icon to open the selected record in Edit mode.
- d. Click on the trash icon to delete the selected record.
- e. Label – Name of the theme attribute tied up with the theme.
- f. Type – Implementation location of the theme attribute.
- g. 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.

- a. 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.
- b. Assigned To – Assignee of the selected record either to user(s) or to group(s).
- c. Assignment Type – The type of assignment either to user/group.
- d. Assigned By – The user who has done the assignment.
- e. 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

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

View Themes			
<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

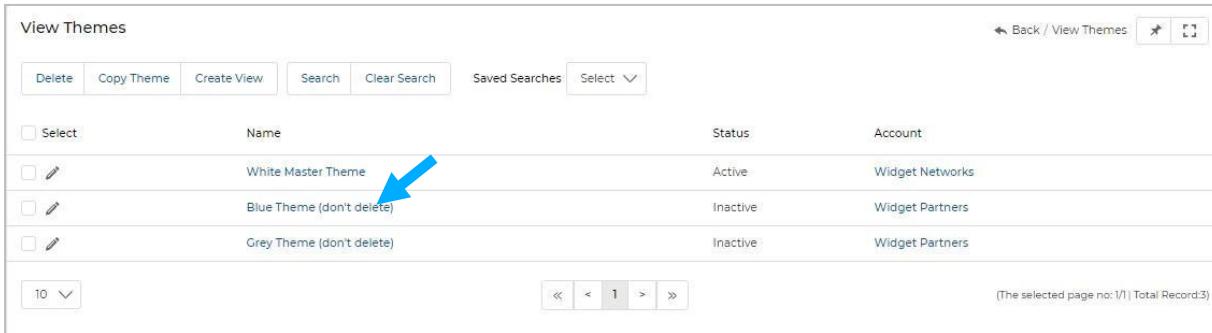
2. Under **View Theme** section, provide required data for the following fields:

- o Name – Unique name of the theme.
- o 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.

Select Account	
Search Add	
Account Name	
Vitae Incorporated	<input type="checkbox"/>
Morrison's Cafeteria	<input type="checkbox"/>
ABOC Foods	<input type="checkbox"/>
Widget Partners	<input type="checkbox"/>
Bert Industries	<input type="checkbox"/>
Austin Pharma Inc	<input type="checkbox"/>
BHY CO	<input type="checkbox"/>
Big Data Support Co.	<input type="checkbox"/>
Connectivity Kings	<input type="checkbox"/>
Devify	<input type="checkbox"/>

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

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



View Themes			
<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

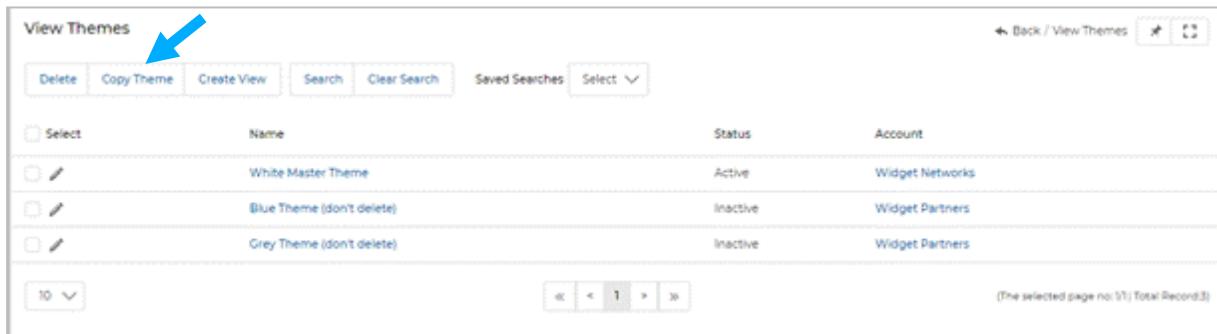
5. Once in the **View Theme** details page, you will see all the editable items – as described in the “View Theme Detail section” above (See that section for more details)



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.

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



View Themes			
<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

2. 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.

3. Provide your theme name in the field **New Theme Name**.

4. 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

Save Cancel

Select Theme * --Select--

New Theme Name * New Theme Name

Save Cancel

Manage Quarters

1. Click on
 - a. **Add** – To add a new quarter
 - b. **Delete** – Delete selected quarter
 - 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 quarter
3. Change the page view record limit

View Quarters

Add Delete Create View Search Clear Search Saved Searches Select

<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

10

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

View Quarter Details

1. 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	

2. Once in the View Quarter 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

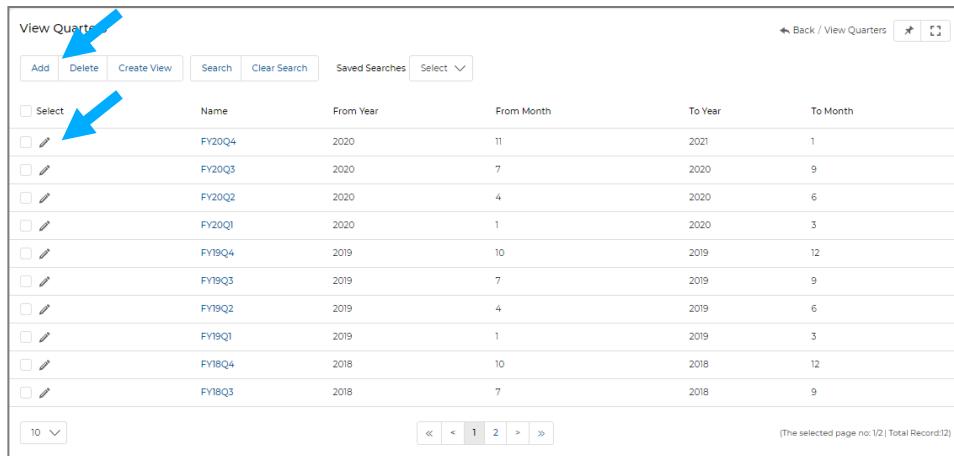
b. **View Fiscal Quarter:**

- i. Name – Name of the quarter.
- ii. From Year – Starting year of the quarter.
- iii. From Month – Starting month of the quarter.
- iv. To Month – Ending month of the quarter.
- v. To Year – Ending year of the quarter.

View Quarter		Back / View Quarter
Edit	Delete	>
— View Fiscal Quarter		
Name: FY20Q4	From Year: 2020	
From Month: 11	To Month: 1	
To Year: 2021		

Add/Edit a Quarter

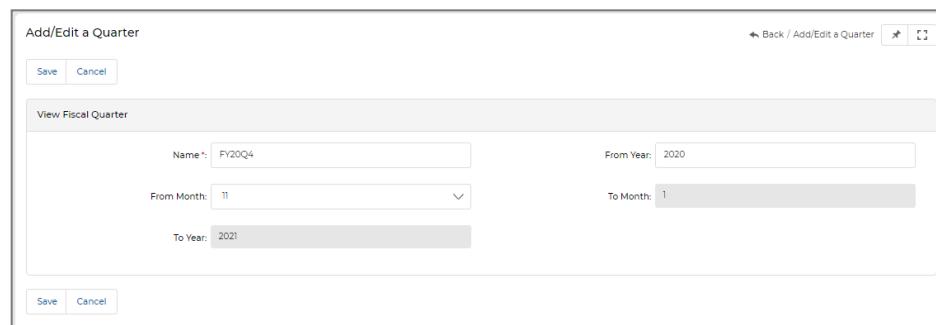
- From the listing page, click on Add to create new quarter or, click on the pencil icon next to the Quarter name to Edit the selected quarter.



View Quarters						Back / View Quarters
	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	

10 | [«](#) [<](#) [1](#) [2](#) [>](#) [»](#) (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	
<input type="button" value="Save"/>	<input type="button" value="Cancel"/>		
View Fiscal Quarter			
Name:	FY20Q4	From Year:	2020
From Month:	11	To Month:	1
To Year:	2021		
<input type="button" value="Save"/>	<input type="button" value="Cancel"/>		

Manage Currencies

1. Click on:
 - a. **Add** – To add a new currency
 - b. **Delete** – Delete selected currency
 - 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 currency
3. Click on **Currency Name** to view currency detail information
4. Change the page view record limit

View Currencies

Back / View Currencies  

<input type="button" value="Add"/>	<input type="button" value="Delete"/>	<input type="button" value="Create View"/>	<input type="button" value="Search"/>	<input type="button" value="Clear Search"/>	<input type="button" value="Saved Searches"/>	<input data-bbox="788 804 833 813" type="button" value="Select"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Select	Name	Currency ISO Code	Conversion Rate	Base Currency	Active	
<input type="checkbox"/>	Pound Sterling	GBP	0.72	No	Yes	
<input type="checkbox"/>	Bermuda Dollar	BMD	1	No	No	
<input type="checkbox"/>	CFA Franc (BEAC)	XAF	534.53	No	No	
<input type="checkbox"/>	Cambodian Riel	KHR	3997.55	No	No	
<input type="checkbox"/>	Burundi Franc	BIF	1756	No	No	
<input type="checkbox"/>	Bulgarian Lev	BCN	1.59	No	No	
<input type="checkbox"/>	Brunei Dollar	BND	132	No	No	
<input type="checkbox"/>	Brazil Real	BRL	3.34	No	No	
<input type="checkbox"/>	Norwegian Krone	NOK	7.83	No	No	
<input type="checkbox"/>	Botswanan Pula	BWP	9.61	No	No	
<input data-bbox="293 1212 339 1222" type="button" value="10"/>        						
(The selected page no: 1/4 Total Record:38)						

View Currency Details

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

View Currencies

Back / View Currencies

<input type="checkbox"/> Add	<input type="checkbox"/> Delete	<input type="checkbox"/> Create View	<input type="checkbox"/> Search	<input type="checkbox"/> Clear Search	<input type="checkbox"/> Saved Searches	<input type="checkbox"/> Select
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Name	Currency ISO Code	Conversion Rate	Base Currency	Active	
<input type="checkbox"/>	Pound Sterling	GBP	0.72	No	Yes	
<input type="checkbox"/>	Bermuda Dollar	BMD	1	No	No	
<input type="checkbox"/>	CFA Franc (BEAC)	XAF	534.53	No	No	
<input type="checkbox"/>	Cambodian Riel	KHR	3997.55	No	No	
<input type="checkbox"/>	Burundi Franc	BIF	1756	No	No	
<input type="checkbox"/>	Bulgarian Lev	BGN	1.59	No	No	
<input type="checkbox"/>	Brunei Dollar	BND	1.32	No	No	
<input type="checkbox"/>	Brazil Real	BRL	3.34	No	No	
<input type="checkbox"/>	Norwegian Krone	NOK	7.83	No	No	
<input type="checkbox"/>	Botswanan Pula	BWP	9.61	No	No	

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.

The screenshot shows a 'View Currency' page with the following details:

Currency Information:

- Name: Pound Sterling
- Currency ISO Code: GBP
- Active: Yes
- Conversion Rate: 0.72
- Description: (empty)

Currency History:

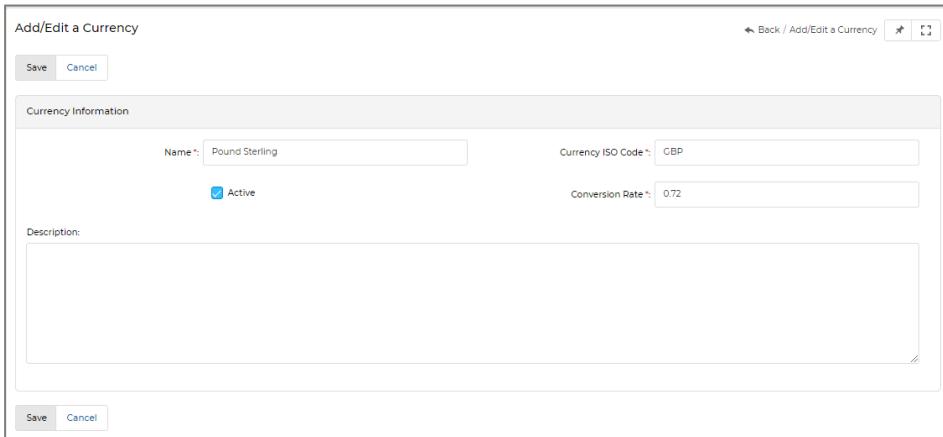
Created By	Created On	Conversion Rate	Currency ISO Code
Widget CMM	08/14/2018 12:32:40 PM	0.72	GBP

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.



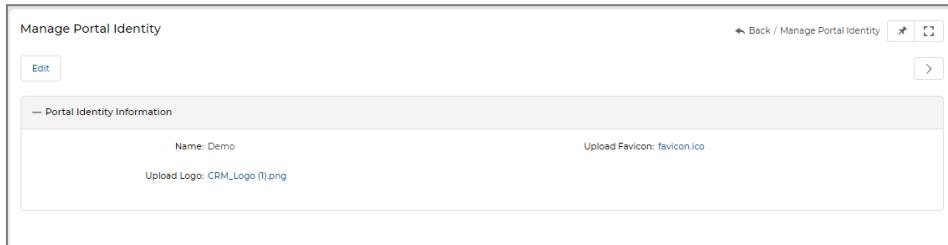
Portal Identity

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](#)

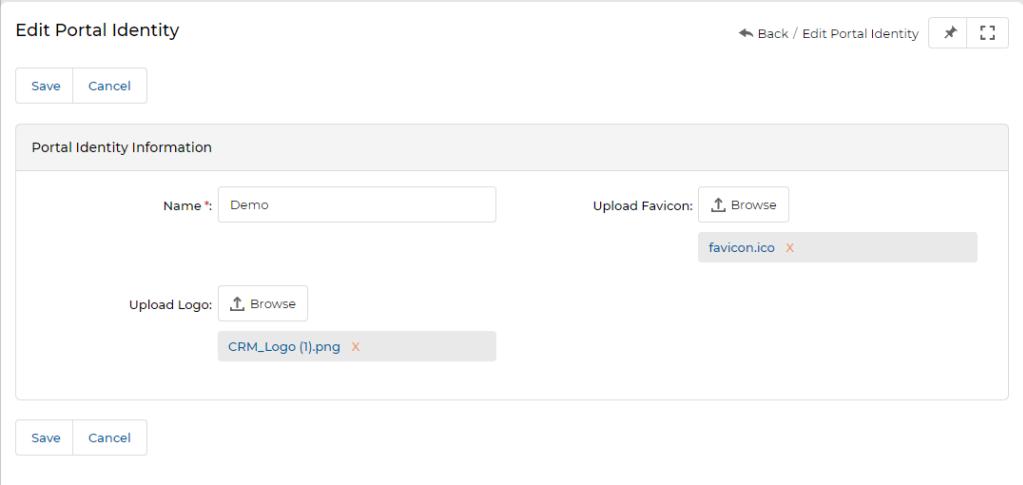
Portal Identity Information

Name*:

Upload Favicon: favicon.ico 

Upload Logo: CRM_Logo (1).png 

[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			
<input type="button" value="Add"/>	<input type="button" value="Delete"/>	<input type="button" value="Create View"/>	<input type="button" value="Search"/>
<input type="button" value="Clear Search"/>	<input type="button" value="Saved Searches"/>	<input type="button" value="Select"/>	<input type="button" value=""/>
<input type="checkbox"/>	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

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			
<input type="button" value="Add"/>	<input type="button" value="Delete"/>	<input type="button" value="Create View"/>	<input type="button" value="Search"/>
<input type="button" value="Clear Search"/>	<input type="button" value="Saved Searches"/>	<input type="button" value="Select"/>	<input type="button" value=""/>
<input type="checkbox"/>	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

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 shows a web-based application interface for managing menu links. At the top, there are 'Edit' and 'Delete' buttons. Below that is a section titled 'Menu Information' with the following details:

Menu Link Name: Access Management	Display Name: Access Management
Language Key: LNK_AccessManagement	Menu Enabled: Yes
Menu Icon Class: ucmllefticon ucmlicon-access-management-left	Marketing Module: Access

Below this is a section titled 'Menu Sub Links' with a table:

Action	Name	Enabled	Sort Order
	Manage Regions	No	3
	Manage Tiers	Yes	7
	Record Visibility	Yes	6
	Manage Groups	No	5
	Manage Languages	No	1

At the bottom of the table, there is a link 'Click to View More'.

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.

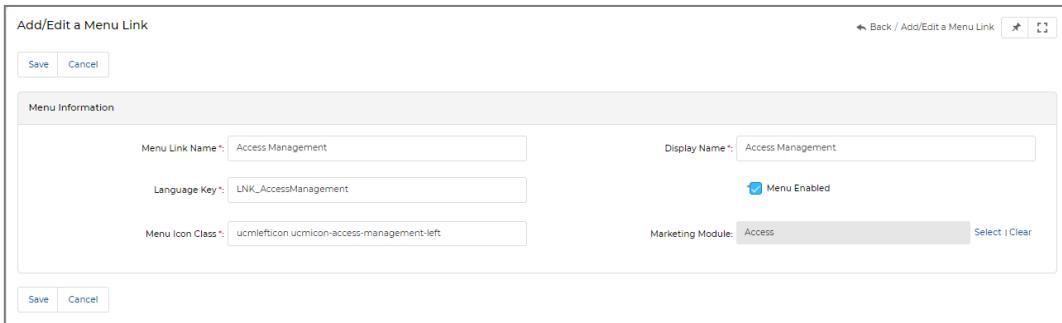
Manage Menu Links			
<input type="checkbox"/> Select	Menu Link Name ▾	Display Name	Menu Enabled
<input type="checkbox"/>	Access & License	Access & License	Yes
<input type="checkbox"/>	Access Management	Access Management	Yes
<input type="checkbox"/>	Accounts	Accounts	Yes
<input type="checkbox"/>	AdWords	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

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

3. Click on **Save** when done



Menu Information

Menu Link Name: Access Management

Display Name: Access Management

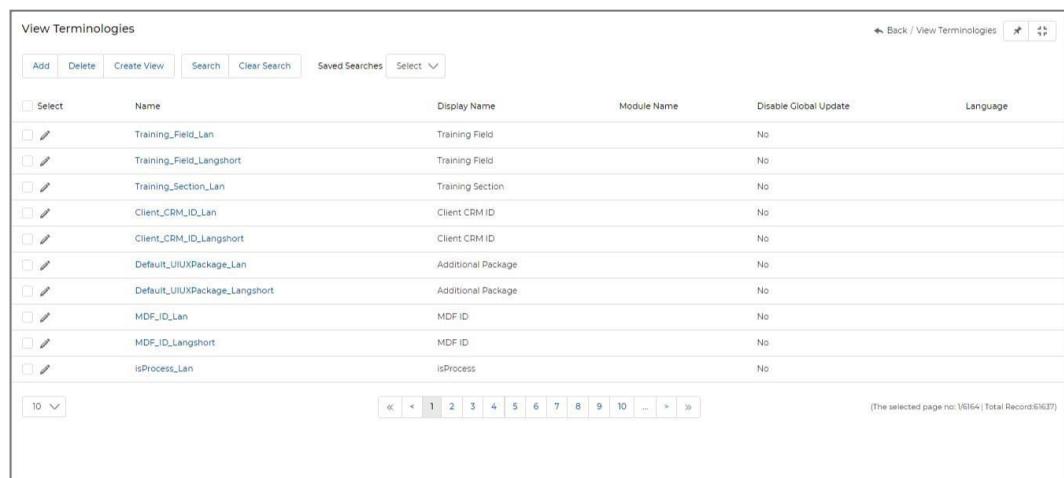
Language Key: LNK_AccessManagement

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

Marketing Module: Access

Manage Terminologies

1. 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
2. Click **pen icon** to edit the terminology, click on **Terminology Name** to view terminology detail information



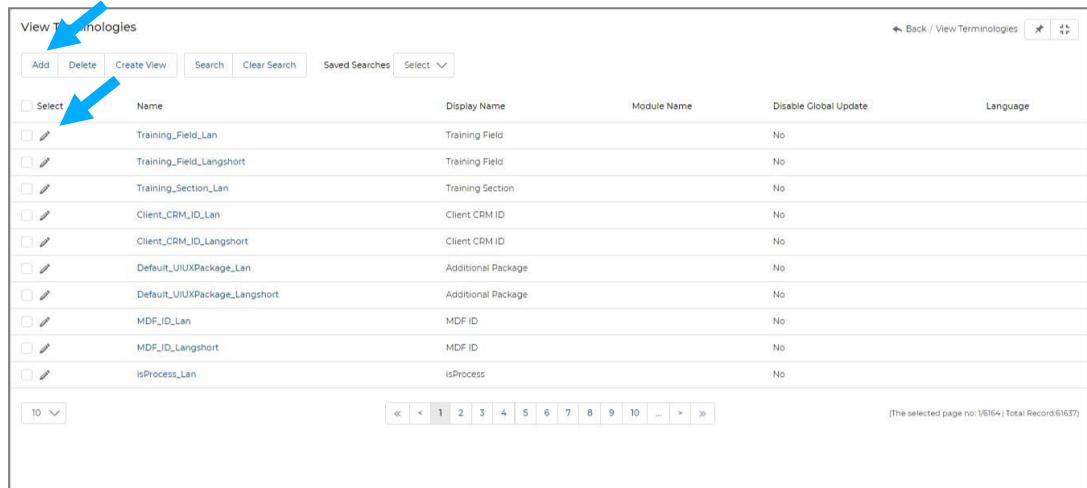
View Terminologies

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	

10 < 1 2 3 4 5 6 7 8 9 10 ... > 1064 (The selected page no: 1/1064 | Total Record 61637)

Add/Edit a Terminology

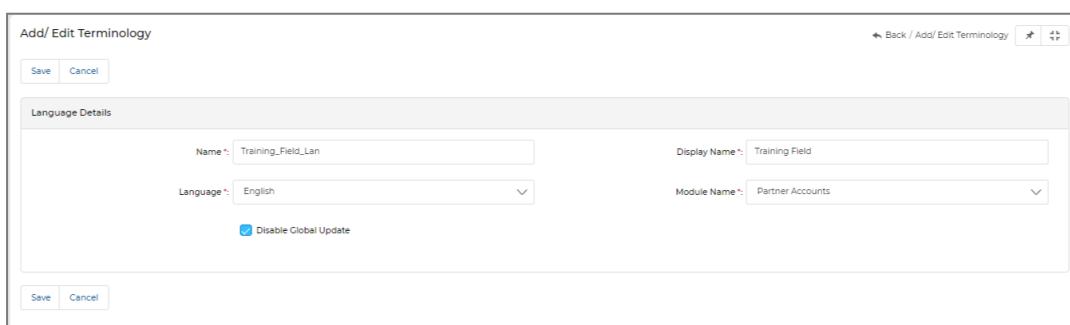
1. From the listing page, click on **Add** to create new Terminology or, click on the **pen icon** beside each terminology to edit the selected one.



<input type="checkbox"/> 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	

(The selected page no: 1/6164 | Total Record: 61637)

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:

- Edit** – Provides option to update the selected search name.
- Delete** – Deletes the selected search name from the search dropdown.

2. For each record in the grid, if you click on:

- Any linkable item** – Takes you to its details page.



View Message 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 message.
- Fields featured here are:
 - Message Description**: Details of the message to be shown with blast emails.



Edit a Message

- 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.

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				
<input type="checkbox"/> 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

10

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

View Tooltip 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 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.
3. Fields featured here are:
 - a. **Description**: Details of the tooltip message to be displayed.

View Section Tooltip

— 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.

The screenshot shows a web-based configuration interface for adding or editing a tooltip. The top navigation bar includes a 'Save' button and a 'Back / Add/Edit a Tooltip' link. The main content area is divided into two sections: 'Tooltip information' and 'Description'. The 'Tooltip information' section contains fields for Name (Badge Information Tooltip), Module (Badges), Language (en-US), Section/Attribute (Badge_Management_obj Information), Mode (Add), and Type (Section). The 'Description' section contains a text area with the placeholder text 'Feed in the mandatory Badge Information'. A 'Save' button is located at the bottom of the form.

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.

