

Unified Partner Management - Applications Checklist

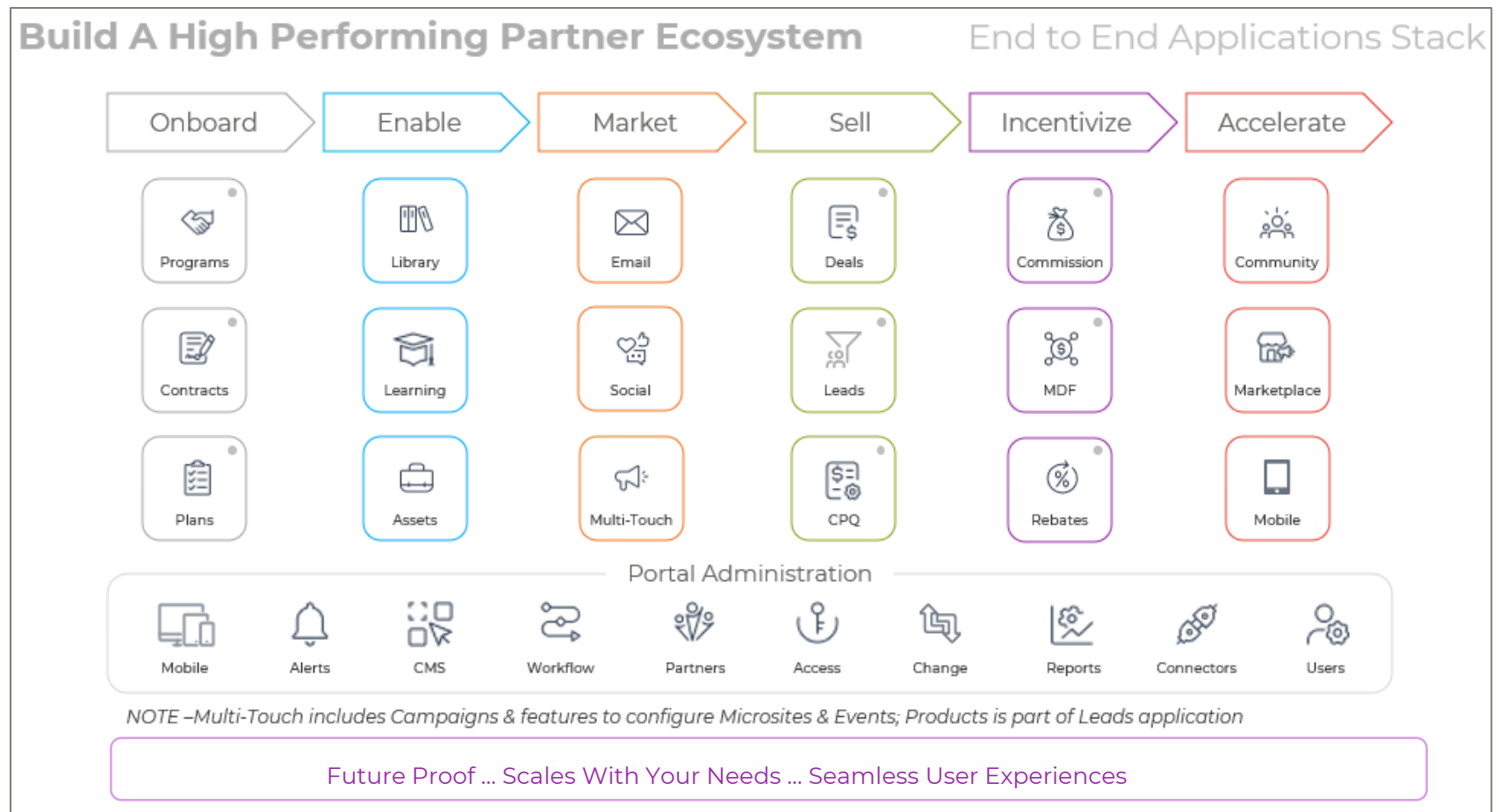
ext.sal.003.07 | 06.09.25

UPM 25.x

ZINFI Confidential & Proprietary
Shared Under NDA






UPM Applications Stack






Please fill out the following pages by selecting your preferred options and applications, and note any third-party systems required to integrate in the Notes section.




Onboard Applications Overview

Application Name		Application Descriptions	Priority	Notes
	Partner Programs Management	Partner Programs Management automates partner recruitment, onboarding, and enablement processes via step-by-step activities. Based on partner type, engagement, and other variables, you can create different program tracks.		
	Partner Contracts Management	The Partner Contracts Management Application enables an organization to dynamically manage and track all the contractual documents that channel partners sign during the various phases of the partner engagement cycle.		
	Partner Business Plans Management	The Partner Business Plans Management Application enables an organization to develop business plans by working with internal and external partner stakeholders to ensure plan execution and compliance.		




Enable Applications Overview

Application Name		Application Descriptions	Priority	Notes
	Content Library Management	Content Library enables channel organizations to share partner-facing documents with various partner users based on status & access rights. Documents can be dynamically published and configured with expiration dates/times based on custom rules.		
	Partner Learning Management	The Partner Learning Management Application enables an organization to manage channel partner training and certification by various partner tiers and types to grow partner competencies systematically through structured curricula.		
	Co-Branded Assets Management	The Co-Branded Assets Management Application enables an organization to provide digital assets to channel partners, who can co-brand and reuse them for various marketing- and sales-related activities.		



Market Applications Overview

Application Name		Application Descriptions	Priority	Notes
	Email Marketing Management	The Email Marketing Management Application enables an organization to create multi-touch co-branded emails. These emails create the foundation of various integrated campaigns, whether they lead to microsites, events, syndication, or call campaigns.		
	Social Syndication Management	The Social Syndication Management Application enables an organization to syndicate social media content via the channel partner network. Partners can auto-stream or manually customize each social feed for instant or delayed posting.		
	Multi-Touch (or Single) Campaign Management	The Multi-Touch Campaign Management Application enables customers and their partners to easily define the flow of a multi-tactic, multi-touch campaign, create a multi-touch drip campaign with pre-configured tactics and assets, and utilize them in various marketing activities. Multi-Touch's canvas user interface with drag-and-drop functionality is essential for creating quick and effective marketing initiatives.		




Sell Applications Overview

Application Name		Application Descriptions	Priority	Notes
	Deals Registration Management	Deals provide setup for deal registration criteria and workflows for their partner base using UPM's Workflow and Connectors Applications. Workflows can be very simple or cover complex, comprehensive deal registration processes.		
	Partner Leads Management	Partner Leads Management enables lead distribution to your partner base and manages the entire "contacts to contracts" process. It can also help engage partner sales reps via round-robin, shark tank, and other lead management strategies.		
	Configure Price Quote (CPQ) Management	The Configure Price Quote (CPQ) Application enables an organization to offer special pricing and quote approval mechanisms for partner sales reps, channel reps, and channel management team members.		




Incentivize Applications Overview

Application Name		Application Descriptions	Priority	Notes
	Commissions Management	Both internal channel teams and external partners can use the Commission model to align with quarterly programs, campaigns, and run-rate business. Users can set up business logic with UPM's Workflow Application.		
	Market Development Funds (MDF) Management	Market Development Funds Management enables organizations to allocate MDF and co-op funds to partners. It is also used to help partners apply for program funding and claim compensation through proper proof of execution.		
	Rebates Management	With Rebates, organizations can set up company rebates based on specified performance targets and business rules. This makes it easy to develop an application process for partners to establish eligibility for rebate programs and claim rebates.		











Accelerate Applications Overview

Application Name		Application Descriptions	Priority	Notes
	Community & Discussions Management	The Community Application enables organizations to connect socially—both internally and externally—to facilitate communication and collaboration. This Application seamlessly integrates with multiple UPM Applications but can also work in a standalone fashion.		
	Marketplace Management	The Marketplace Application enables an organization to create a thriving marketplace where end-users can find partners to work with and where partners can sell their products and services to each other.		
	Mobile Ready Application	The Mobile Application comes with a set of mobile apps for both the iOS and Android platforms. Administrators can define which applications are available via mobile app and which users have access rights via mobile.		

Add-On Applications Overview

Application Name		Application Descriptions	Priority	Notes
	Partner Support Management	The Support (Help Desk) Application gives organizations the tools to establish a structured support infrastructure for end users that extends above and beyond traditional product and service support. The Application uses an industry-standard ticketing system.		
	Web Syndication Management	Web Syndication Management enables distribution of product and solution web showcases via a partner's website. Web syndication amplifies organizational reach and lead generation through a distributed channel partner network.		
	Projects & Tasks Management	The Project Application facilitates seamless collaboration with internal and external team members on projects and programs. It includes tasks, notebooks, file-sharing, and messaging features.		

Portal Administration Applications Overview

Application Name		Application Descriptions
	Responsive Ready Application	[This is a capability]
	Alerts & Notification Management	The Alert Application aggregates all system alerts via a unified console and allows users to set one or more notification preferences via email, SMS, or mobile app. Users can also control the frequency of alerts, including individual or aggregate alerts.
	CMS Content Management System	The CMS Application allows administrators to use drag-and-drop tools to create and manage web and campaign content to build dynamic and personalized portal pages, campaigns and other content on the fly.
	Workflow Management	Using Workflow, administrators can set up different application layouts, approval logics, alerts, reports, and other functions to automate any business workflow. This capability allows organizations to adapt to rapidly changing business needs dynamically.
	Partners Profile Management	Partners Profile Management granularly manages partner records - accounts, contacts, performance data, etc. Using this Application, organizations can segment partners effectively into groups with various parameters for optimized management capabilities.
	Identify and Access Management (IAM)	With the Identify and Access Management (IAM) Application, administrators can dynamically set up and manage users, groups, and granular access rights to various portal pages, applications, campaign contents, and assets.
	Enterprise Change Management	Enterprise Change Management tracks all changes made to the portal related to groups, users, content, workflows, etc. This is essential for audit purposes and for reversing changes that have been made unintentionally or intentionally.
	Business Intelligence Reports	The Business Intelligence Reports Application provides hundreds of default reports as well as tools for creating custom reports. This allows users to understand what is working and what needs improvement in channel performance/ programs locally and globally.
	Connectors	The Connector Application allows administrators to connect seamlessly to third-party applications like CRM, LMS, ERP, and POS via an easy-to-use connection management and field mapping interface, including SAML 2.0 SSO.
	Users & Group Management	The Users Management Application allows administrators to quickly set up users and assign them to various groups and profiles. Users can be added manually or set up via group upload using Excel or third-party SSO.

Application Dependencies Summary

Onboard Application Dependency

Onboard Application Dependency Chart				
Sr. No.	Primary Application Name	Dependent Application		
		Application 1	Application 2	Application 3
1	Partner Programs Management	Partner Learning Management (for Training & Courses only) (*See Note below)		
2	Partner Contracts Management			
3	Partner Business Plans Management			

***Note:** Partners often need additional functionality from other applications to complete program tasks, such as Learning/Training, Enablement, Sales, etc....to deliver optimum results. The Learning Management Application is an example of an application that would be required to assign these task types in a program.

Market Application Dependency

Market Application Dependency Chart				
Sr. No.	Primary Application Name	Dependent Application		
		Application 1	Application 2	Application 3
1	Email Marketing Management (<i>*See Note below</i>)	Partner Leads Management		
2	Social Syndication Management			
3	Multi-Touch (or Single) Campaign Management			

****Note:** Multi-Touch Campaign allows you to conduct marketing campaigns and send emails to Prospects regularly based on the campaign's flow. While Email Marketing Management can be standalone, we propose combining it with Multi-Touch Campaigns to automate email-based drip marketing campaigns.*

Sell Application Dependency

Sell Application Dependency Chart				
Sr. No.	Primary Application Name	Dependent Application		
		Application 1	Application 2	Application 3
1	Deals Registration Management (<i>*See Note below</i>)			
2	Partner Leads Management			
3	Configure Price Quote (CPQ) Management	Partner Leads Management (for Product Line Items)		

****Note:** During Deal Registration, if you want to add/manage Product Line Items to your Deal(s), you must also include Partner Leads Management since Products/Items are part of Partner Leads Management.*