

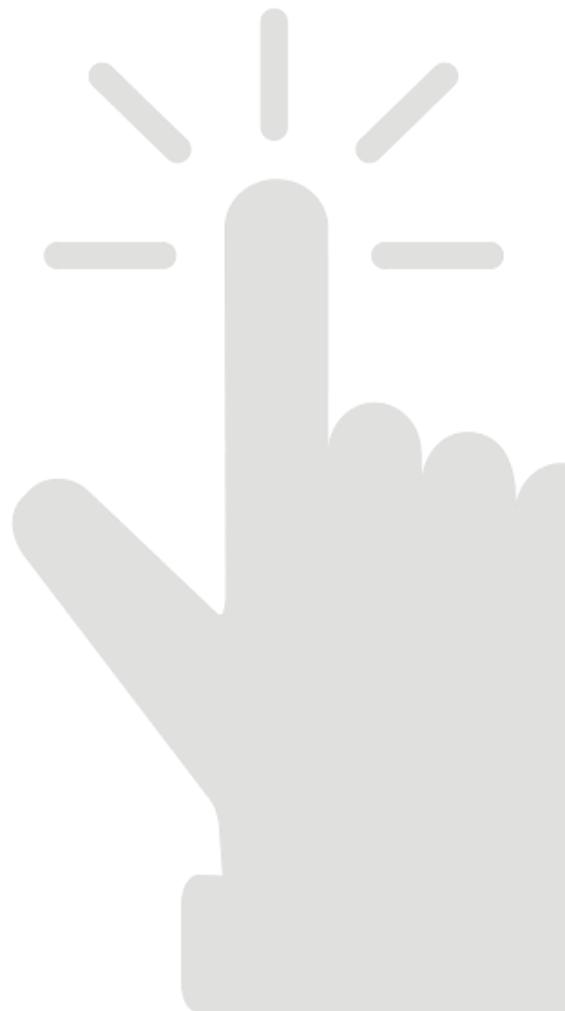
Accessing Help Portal and Support Documentation

Ext.prd.001.06 | 07.27.2025

UPM 25.x

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Accessing Help Portal via SSO

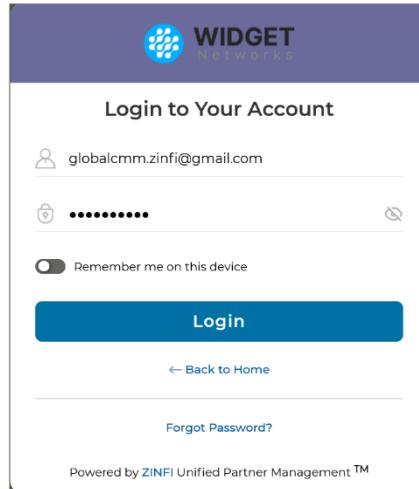
ZINFI provides a dedicated Help Portal with Application walkthroughs for each Application provided in UPM along with the respective Help Videos. The ZINFI Help Portal is easily accessible from the UPM Portal for all Admins, Partners, Users and Partner Users through the Single Sign On feature, utilizing a single set of credentials used to login to the UPM portal.

We have integrated Deep Link Feature, to enable version control to the Help Portals respective to the UPM Portal Version. Users need not search the Help Portal to access the Help Page version respective to the Portal version, but direct redirection is integrated to ease the user experience, by providing direct access to the help Page version which is respective to the UPM Portal, the user is operating on.

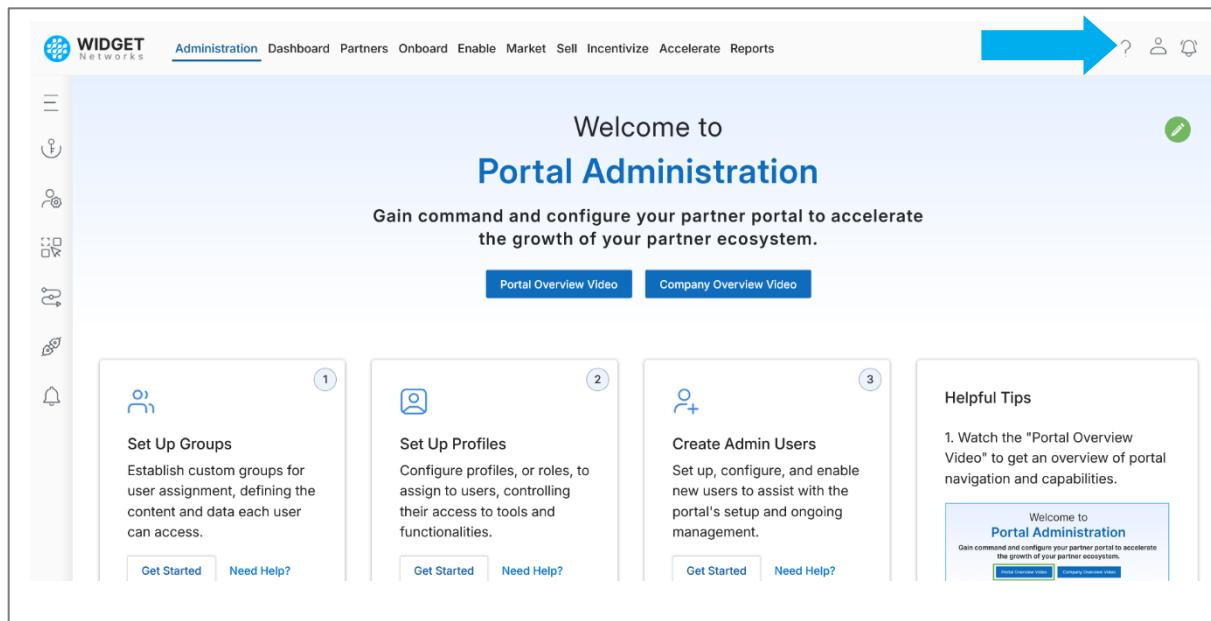
To access the Help Portal, users need not have another set of credentials to login to the Help portal and can easily login by following the steps as formulated below:

Log In & Gain Access to Support Documentation

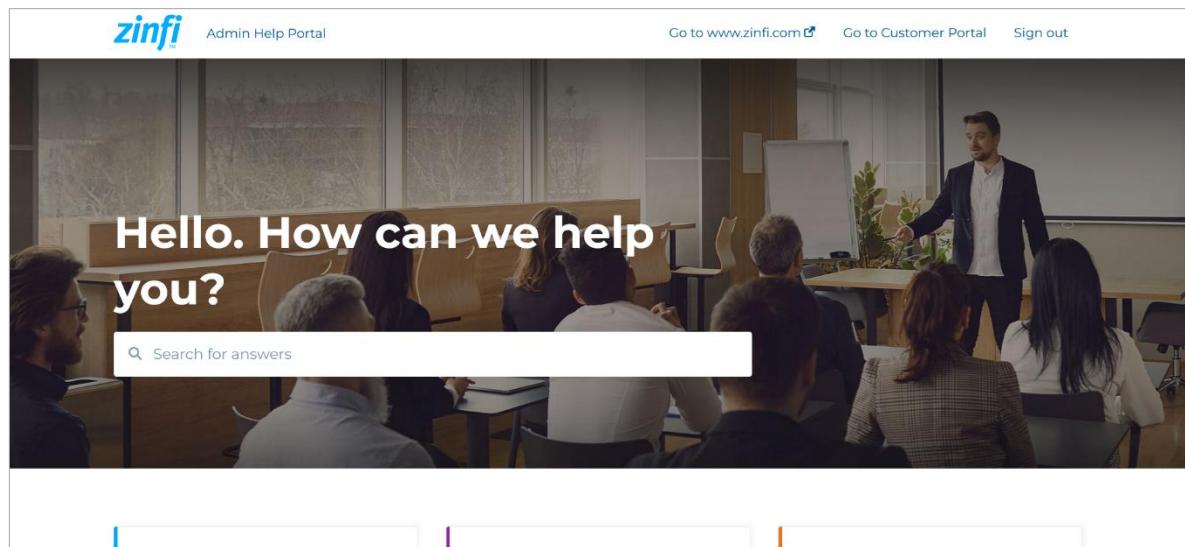
1. Login to the Portal using your credentials.



2. Once inside, click on the Support Icon - the question mark (?) in the upper right of the screen to open the HELP Portal. The Support Icon is marked with a trailing Blue Arrow in the image provided below:

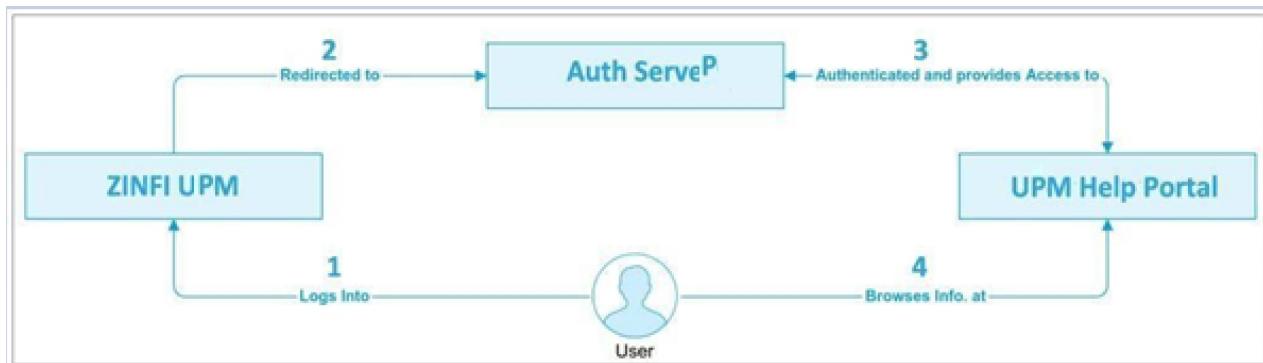


3. This will redirect you to the ZINFI Help Portal via SSO (Single Sign On feature). With a single set of valid login credentials to UPM now you have access to our help process documentation.



4. The Help Portal is a mirror portal of the UPM Portal with respective process guidance/walkthrough provided for each Application and Sub-Applications. Respective Videos can be played directly from the right-hand window and the guidebook for the specific application can be easily downloaded by the link provided.

SSO Process from UPM to UPM Help Portal



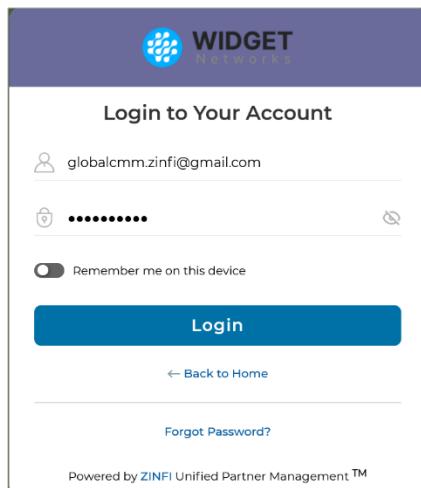
Authentication is initiated by ZINFI UPM and performed through a central domain (Auth Server) and then the session is shared with the UPM Help Portal. Whenever the user redirects to UPM Help Portal from ZINFI UPM, authentication is required, and the User is redirected to the authentication server along with the federated identity from ZINFI UPM. As the user is already logged in at ZINFI UPM, the user is immediately redirected to the UPM Help Portal with the necessary authentication token received from the authentication server.

Accessing Support Documents

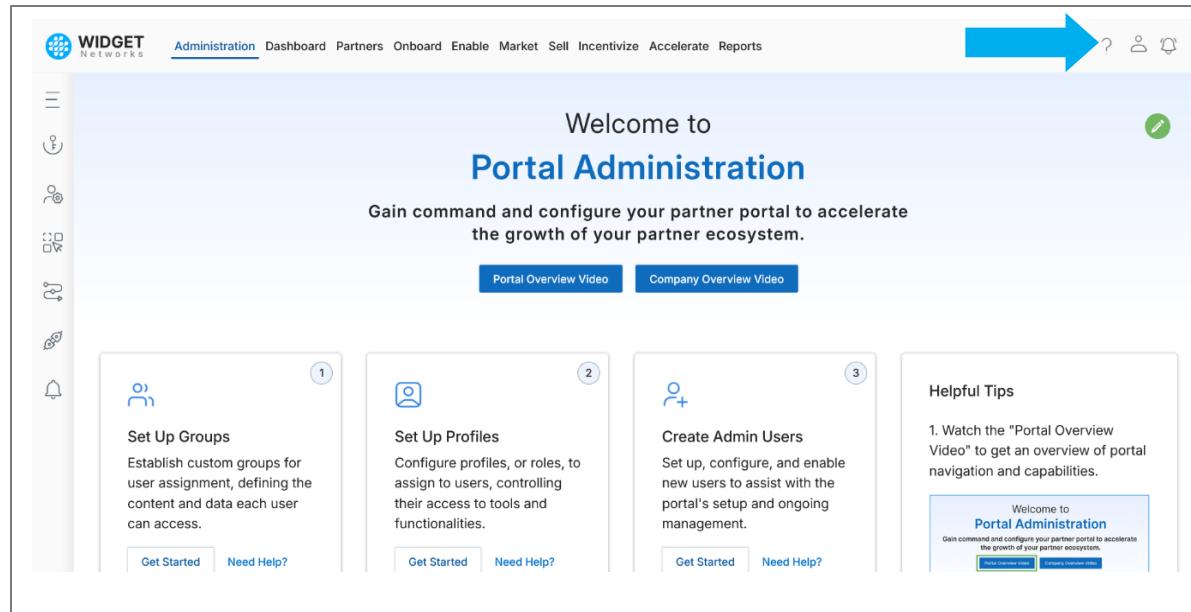
We have provided references to various documents that are available in your UPM Free Trial Portal. These documents and videos are available online. This is an Easy-to-Use guide for quickly accessing the ZINFI Knowledge Base loaded with Customer Success stories, Company and UPM Overview, Architecture, Infrastructure, Compliance, Security and UPM Help Manuals Documentation.

Log In & Gain Access to Support Documents

1. Login to the Portal using your credentials.



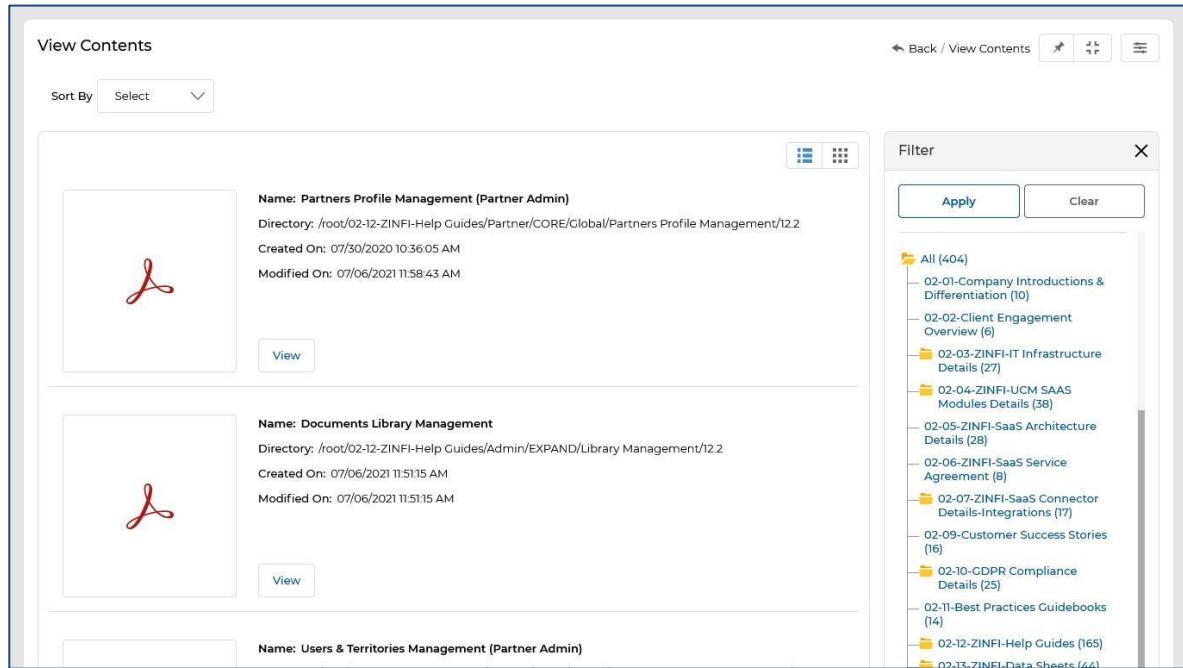
- Once inside, click on the Support Icon - the question mark (?) in the upper right of the screen to open the HELP Portal. The Support Icon is marked with a trailing Blue Arrow in the image provided below:



- This will take you to the ZINFO Help Portal with all Documentation. Now you need to go to Supporting Documents and find the reference documents.



4. Once inside the Supporting Documents section, you will have access to all Supporting Documentation.



The screenshot shows the 'View Contents' section with three items listed:

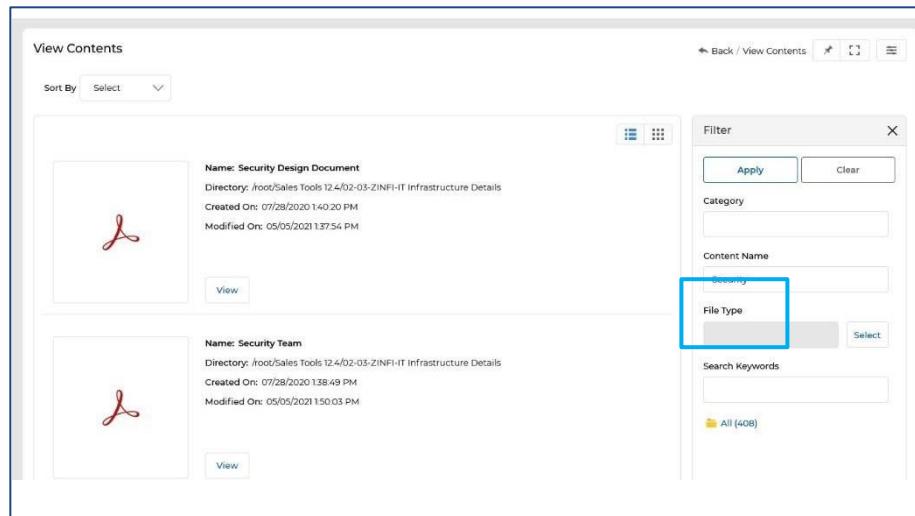
- Name: Partners Profile Management (Partner Admin)**
Directory: /root/02-12-ZINFI-Help Guides/Partner/CORE/Global/Partners Profile Management/12.2
Created On: 07/30/2020 10:36:05 AM
Modified On: 07/06/2021 11:58:43 AM
- Name: Documents Library Management**
Directory: /root/02-12-ZINFI-Help Guides/Admin/EXPAND/Library Management/12.2
Created On: 07/06/2021 11:51:15 AM
Modified On: 07/06/2021 11:51:15 AM
- Name: Users & Territories Management (Partner Admin)**

On the right, a 'Filter' sidebar is open, showing a list of categories and sub-categories under 'All (404)'.

5. You can easily jump to the specific Supporting Document Directory by Clicking on the respective List Items provided in the Filter Window and easily navigate to the desired document contained in that directory.

6. Listed items available in Filter Window provides Look-and-Search option of specific Supporting Document residing in specific Directory.

7. The Filter on the right-hand panel supports smallest keywords and helps to identify Supporting Documents and its Directory pool using internal algorithm and pull up specific Supporting Document with precise accuracy.

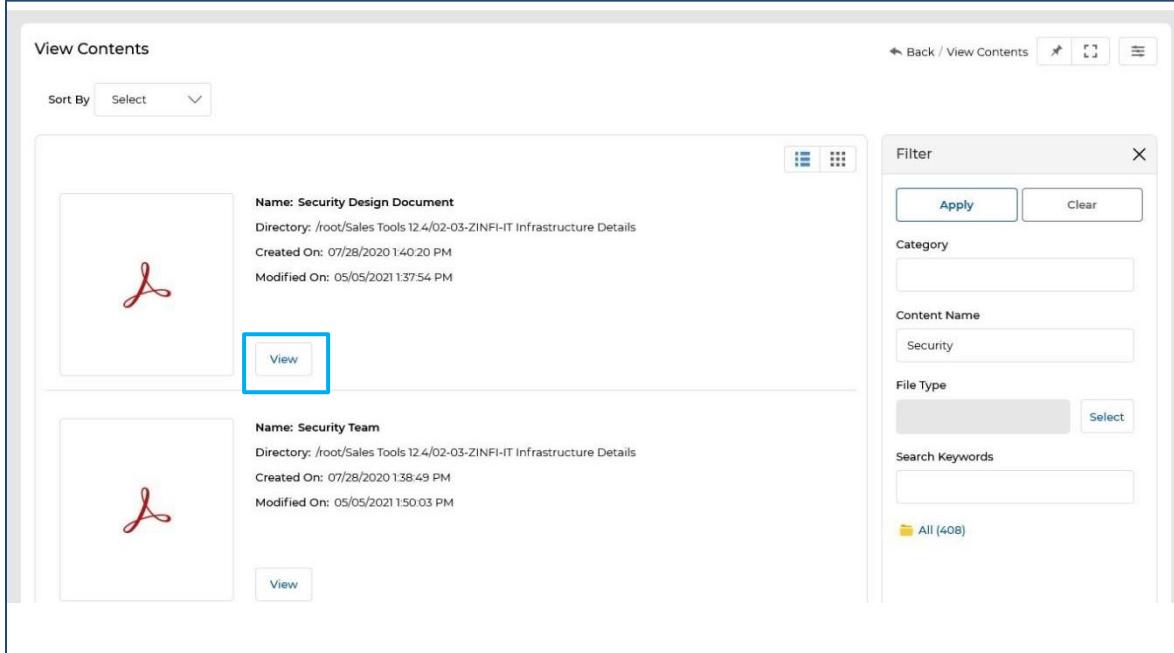


The screenshot shows the 'View Contents' section with two items listed:

- Name: Security Design Document**
Directory: /root/Sales Tools 12.4/02-03-ZINFI-IT Infrastructure Details
Created On: 07/28/2020 14:02:20 PM
Modified On: 05/05/2021 1:37:54 PM
- Name: Security Team**
Directory: /root/Sales Tools 12.4/02-03-ZINFI-IT Infrastructure Details
Created On: 07/28/2020 13:49:49 PM
Modified On: 05/05/2021 1:50:03 PM

On the right, a 'Filter' sidebar is open, showing fields for Category, Content Name, File Type (which is selected), and Search Keywords, along with a list of categories under 'All (408)'.

8. Clicking the **View** button of the desired Supporting Document of specific version of UPM will open the document in PDF format in separate window displaying the name of the document with convenient download option.



View Contents

Sort By: Select

Name: Security Design Document
Directory: /root/Sales Tools 12.4/02-03-ZINFI-IT Infrastructure Details
Created On: 07/28/2020 1:40:20 PM
Modified On: 05/05/2021 1:37:54 PM

View

Name: Security Team
Directory: /root/Sales Tools 12.4/02-03-ZINFI-IT Infrastructure Details
Created On: 07/28/2020 1:38:49 PM
Modified On: 05/05/2021 1:50:03 PM

View

Filter

Category:
Content Name:
File Type: Select
Search Keywords:
All (408)



Security Design Document

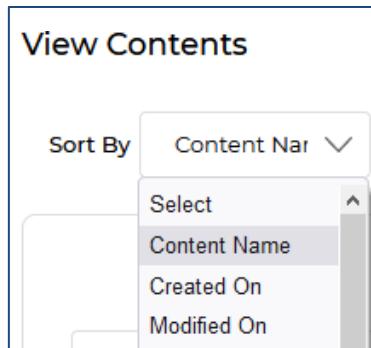
Security Design Overview
Int.prc.002.04 | 01.29.2021
UCM 12.x

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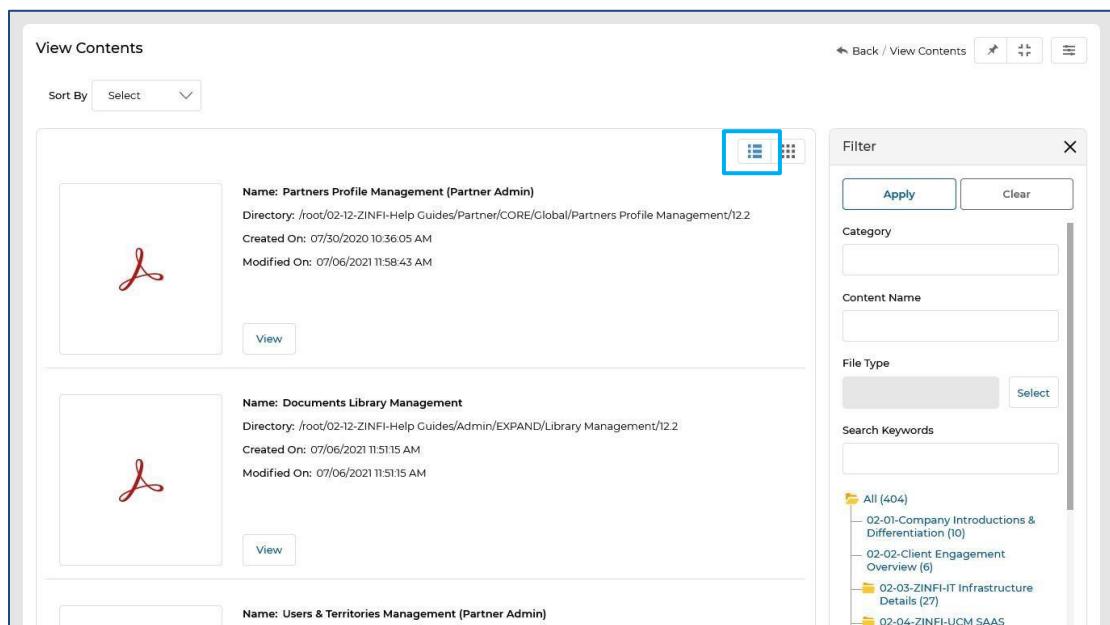
02-03-02-14-ZINFI-Security-Design-Document.002.04-12.x.pdf

9. Click on Sort By to sort the documents based on “Content Name”, “Created On” and “Modified On”.



10. Click on either List View (the lined icon in the upper right of the content area) or Thumb View (the “waffle” icon in the upper right of the content area) to change the visual arrangement of each of the contents.

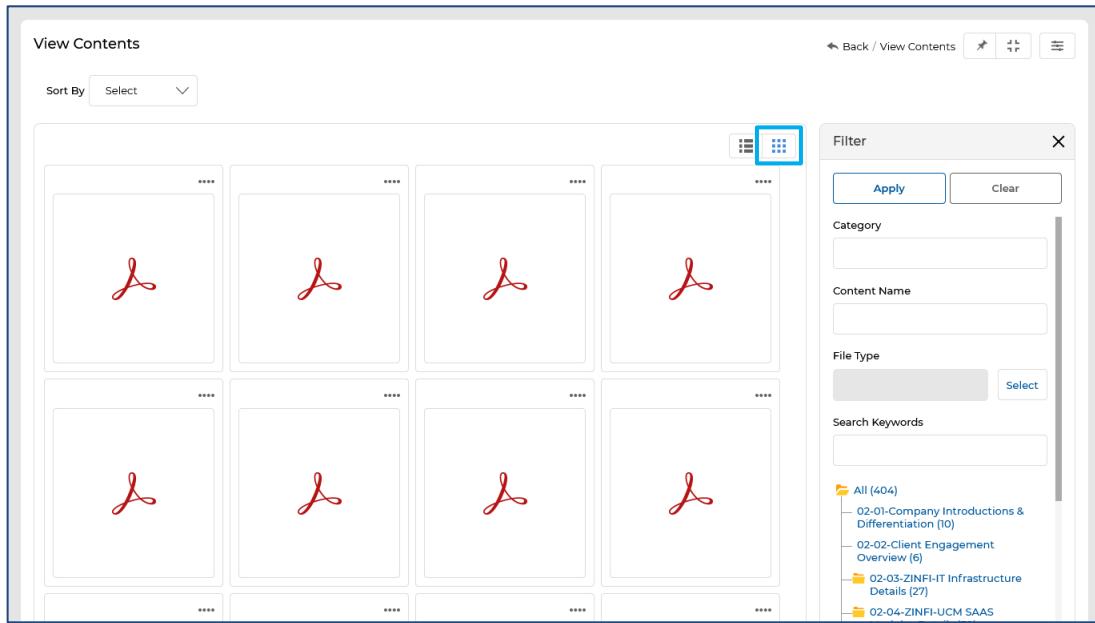
a. List View Representation



The screenshot shows the 'View Contents' interface in List View mode. The interface includes a 'Sort By' dropdown, a content area with three document entries, and a 'Filter' sidebar on the right.

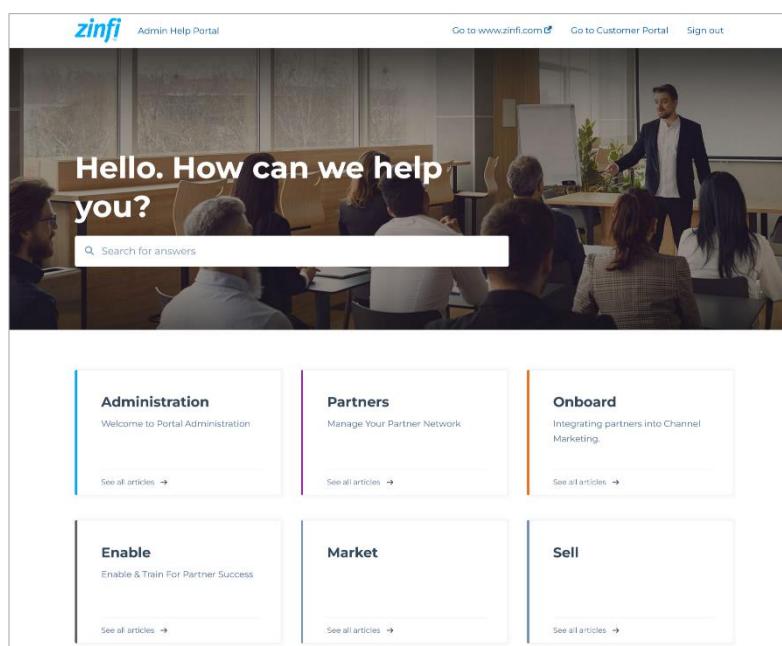
- Content Area (List View):**
 - Partners Profile Management (Partner Admin)**
Directory: /root/02-12-ZINFI-Help Guides/Partner/CORE/Global/Partners Profile Management/12.2
Created On: 07/30/2020 10:36:05 AM
Modified On: 07/06/2021 11:58:43 AM
 - Documents Library Management**
Directory: /root/02-12-ZINFI-Help Guides/Admin/EXPAND/Library Management/12.2
Created On: 07/06/2021 11:51:15 AM
Modified On: 07/06/2021 11:51:15 AM
 - Users & Territories Management (Partner Admin)**
- Filter Sidebar:**
 - Category: (empty)
 - Content Name: (empty)
 - File Type: (empty)
 - Search Keywords: (empty)
 - Filter Options:
 - All (404)
 - 02-01-Company Introductions & Differentiation (10)
 - 02-02-Client Engagement Overview (6)
 - 02-03-ZINFI-IT Infrastructure Details (27)
 - 02-04-ZINFI-UCM SAAS

b. Thumb View Representation

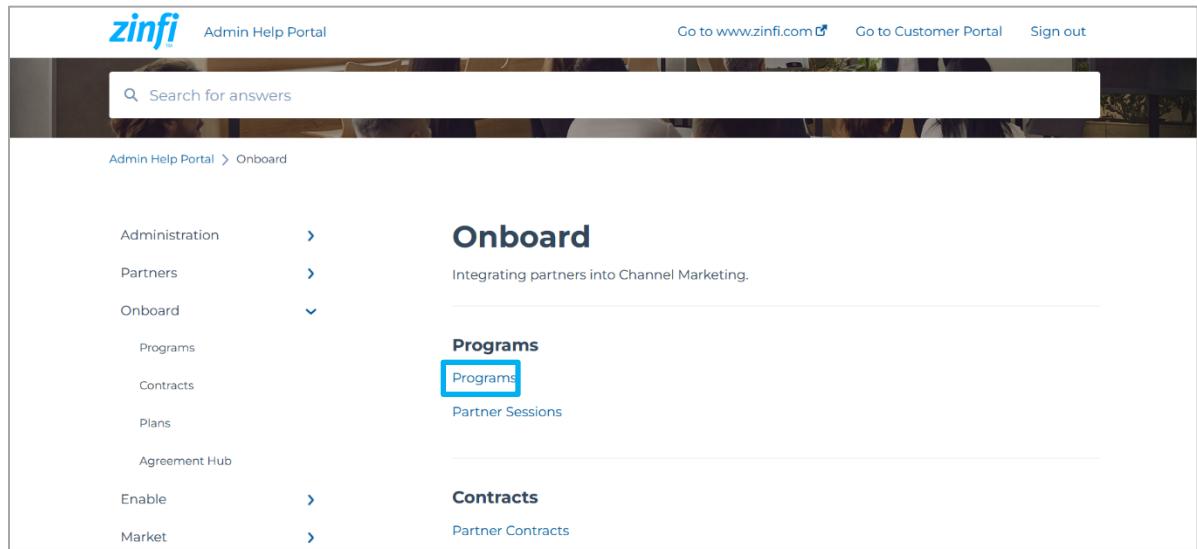


Getting Access to Knowledge Base

1. In ZINFO UPM Knowledge Centre, Knowledge Base is the confluence where application-specific updated static articles are found replete with latest features and downloadable supporting documents.



2. Clicking on Knowledge Base will catapult you to ZINFI Knowledge Base Articles section which pools all articles related to usage of UPM and distribute it through application-based segregation.
3. Click on any listed article link, it will give you seamless access to articles repository where you get 'click and read' option to navigate through the articles and get latest updates on UPM. Play the associated videos and enhance knowledge of using UPM through audio-visual experience. Download articles in PDF format for future reference.



The screenshot shows the ZINFI Admin Help Portal interface. At the top, there is a navigation bar with the ZINFI logo, a search bar labeled 'Search for answers', and links to 'Go to www.zinfo.com', 'Go to Customer Portal', and 'Sign out'. The main content area has a header 'Onboard' with the subtext 'Integrating partners into Channel Marketing.' Below this, there are two main sections: 'Programs' and 'Contracts'. The 'Programs' section is highlighted with a blue box around the 'Programs' link, and it includes 'Partner Sessions' and 'Plans'. The 'Contracts' section includes 'Partner Contracts'. On the left side, there is a sidebar with a navigation menu: 'Administration', 'Partners', 'Onboard' (which is expanded to show 'Programs', 'Contracts', 'Plans', and 'Agreement Hub'), 'Enable', and 'Market'.



4. It is to be noted that instead of descending into ZINFO Knowledge Base Articles and getting access of specific articles from listed links, specific application-based articles can also be accessed more conveniently along with downloadable PDF and audio-visual walkthrough videos by clicking right option in the top menu bar and then choosing the desired application from the left menu bar.

