



# Deals Registration Management

ZINFI's UCM deal management associates partners related contact, record and deal data to give a total customer view for your group, empowering you to oversee information in a single place.

## Opportunity & Deal Management

Organizations utilize our Partner Lead Management module to set up an automated survey and endorsement mechanism for all submitted opportunities and arrangements finished by the channel sales group. The module likewise enables you to push submitted opportunities and arrangements submitted to your internal CRM through designed system connectors.

UCM's latest offering, the SFDC FIRE Installer, lets you connect and map to your SFDC implementation quickly to make the deal registration work and sync on the fly. The dynamic reporting module of the Partner Lead Management provides insight into each dimension of the business pipeline made by your channel sales group.

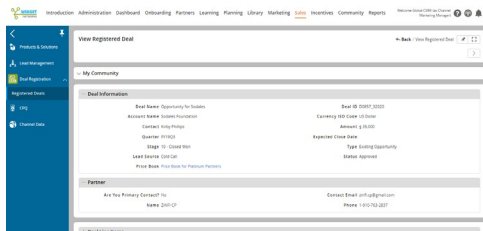
Deal ID	Deal Name	Account	Sales Stage	Amount	Business Unit Date	Final Sales Status	Status
00001_0000	Opportunity for Zinfi	Company Foundation	10 - Closed Won	\$ 5000	04/03/2018	2018-CP	Approved
00002_0000	Part Opportunity	Company PC	10 - Closed Won	\$ 10000	04/03/2018	2018-CP	Approved
00003_0000	New Deal Opportunity for Print Deal PC	Print Deal PC	10 - Closed Won	\$ 10000	10/10/2018	2018-CP	Approved
00004_0000	Part Opportunity	Print Deal PC	10 - Closed Won	\$ 10000	10/10/2018	2018-CP	Approved
00005_0000	Opportunity for Zinfi	Part Deal PC	10 - Closed Won	\$ 10000	10/10/2018	2018-CP	Approved
00006_0000	Part Opportunity	Part Deal PC	10 - Closed Won	\$ 10000	10/10/2018	2018-CP	Approved
00007_0000	Part Opportunity	Part Deal PC	10 - Closed Won	\$ 10000	10/10/2018	2018-CP	Approved
00008_0000	Part Opportunity	Part Deal PC	10 - Closed Won	\$ 10000	10/10/2018	2018-CP	Approved
00009_0000	Part Opportunity	Part Deal PC	10 - Closed Won	\$ 10000	10/10/2018	2018-CP	Approved
00010_0000	Part Opportunity	Part Deal PC	10 - Closed Won	\$ 10000	10/10/2018	2018-CP	Approved

### Key Features

- ✓ Opportunity Management
- ✓ Deal Registration
- ✓ Approval & Review Management
- ✓ Sync on the Fly to SFDC

## Deal Details

Deal properties vary from business to business. Along these lines, you ought to have the capacity to catch each data identified with your deal without being limited to standard fields. In UCM, you can make custom fields from a scope of field types to execute a structure to your view. While making your deal, you can connect it with the related contact, allocate possibility, surmise a normal close date, set yourself as the primary assignee or appoint to another, and accomplish more. You can likewise see related discussions by means of telephone and email on the notes section.



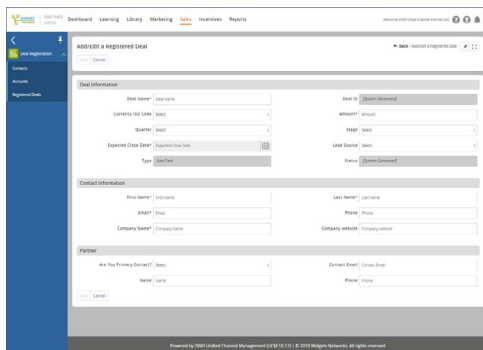
### Key Features

- ✓ Deal Assignment
- ✓ Notes Capture
- ✓ Addition of new fields as required

## Simplified Deal Registration

UCM's Simplified Deal Registration methodology lets you create a Deal at one go, through a single viewpoint provided through the one-page Deal Registration Form. You no more need to traverse through the time-magnum Deal Conversion process and concentrate on the optimized steadfast approach to create Deals faster.

Once a Deal is created through the Simplified Form, completed and submitted, the Contact and Account Records are auto created and can be found in the respective Account and Contact List Pages. Configure the Deal approval process easily sync to an external CRM for Admin Review.



### Key Features

- ✓ Simple
- ✓ Fast Track Approach
- ✓ Auto create Account and Contact

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