



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.

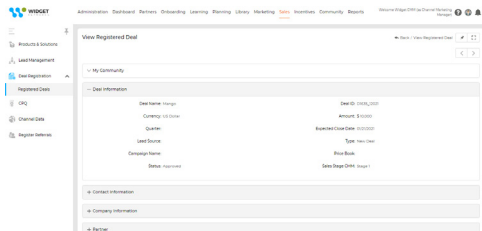
Deal ID	Deal Name	Amount	Sales Stage	Amount	Expected Close Date	Campaign Name	Status
DM01_0001	Training Deal to Video	USD Training		\$1000	2023-03-31	Mobile Bridge Campaign	Pending Approval
DM01_0002	Training Deal	Training ABC	10 - Closed Won	\$1000	2023-03-31	Mobile Bridge Campaign	Approved
DM01_0003	Market			\$1000	2023-03-31		Approved
DM01_0004	Small Tech Sign Ups			\$1000	2023-03-31		Pending Approval
DM01_0005	Software Sign Ups 2024		10 - Closed Won	\$1000	2023-03-31		Pending Approval
DM01_0006	Training Deal	Training	10 - Closed Won	\$1000	2023-03-31	Mobile Bridge Campaign	Revised
DM01_0007	App Campaign	App Campaign		\$1000	2023-03-31		Approved
DM01_0008	GrantHub	2024	10 - Closed Won	\$1000	2023-03-31		Pending Approval
DM01_0009	Training Deal	Training ABC	10 - Closed Won	\$1000	2023-03-31	Mobile Bridge Campaign	Pending Approval
DM01_0010	Small Business	Business	10 - Closed Won	\$1000	2023-03-31		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.



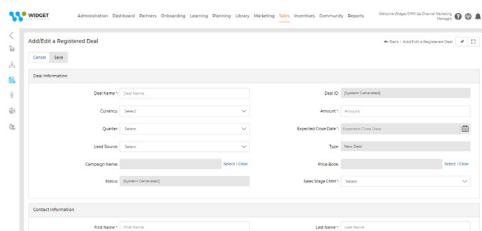
Key Features

- ✓ 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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