



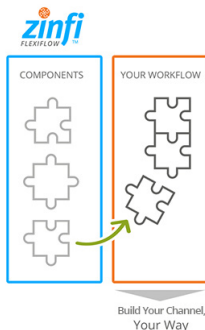
# FlexiFlow™ Workflow Management

ZINFI's Unified Channel Management (UCM) platform comes with a dynamic configuration tool (FlexiFlow™) that facilitates the design, configuration and automation of various business processes. It guides ZINFI customers and their partners through a step by step process to develop automated business and campaign workflows. The ZINFI FlexiFlow™ user interface enables teams to easily grasp how channel programs and campaigns are executed from start to finish. The tool establishes a logical, iterative design process in which every part of a business flow is tested before it goes into production. With FlexiFlow™, the days of coding are gone and now you just have to drag, drop and build what you want to automate.

## FlexiFlow™ Process Automation

Create sophisticated, targeted flows without the headaches, and give every contact in your database the attention they deserve. The FlexiFlow™ visual editor makes it easy to envision workflows in real time—while building simple or complex follow-up workflows. Use advanced segmentation logic to determine exactly who gets enrolled in your organization workflows and when. Utilizing FlexiFlow – Custom or Associate Modules along with custom fields for any UCM Module can be created viz. Text Box, Dropdown List, Date, Checkbox, etc. Implement custom Regular Expressions to validate values entered in textbox fields, Bulk Import Dropdown Field Values for Dropdown List and Multi Select Dropdown List Fields, Define Sort Order for selected values in a Multi Select Dropdown Field, Manage Page Layouts and Configure Sort Order(s) for List Pages and Card Layout Pages.

The FlexiFlow™ engine automates the regular and repetitive tasks of a business process, allowing your organization to define workflows without any code changes, thus saving both time and money. The FlexiFlow™ engine also helps you to improve the stability of the platform—again, with no code changes required.



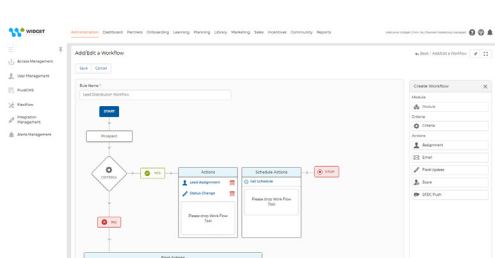
### Key Features Include:

- ✓ Define workflows for MDF, lead management, campaigns, deal reg., etc.
- ✓ Automated Emails and Record Assignment based on defined conditions
- ✓ Option to define Default value of a Field and Dropdown values Sort Order Configuration
- ✓ Automatic Record value update based on user provided criteria

# FlexiFlow™ Campaign Management

ZINFI's FlexiFlow™ capability enables your channel management organization to create campaigns with a combination of easily configurable elements. Define actions for every record in the platform via Program Step. Use Decision Rule to define a process for records to flow through.

In FlexiFlow™ campaign management, Wait Step allows your organization to define a wait process across all or selected steps. With Switch Step, you can define a process that permits users to easily switch between different existing flows in the platform.



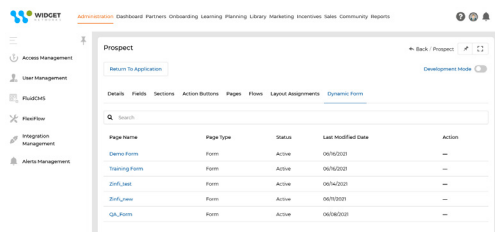
### Key Features Includes:

- ✓ Program Step Management
- ✓ Decision Rule Management
- ✓ Wait Step Management
- ✓ Switch Step Management

# Dynamic Form Builder

The latest upgradation to the FlexiFlow™ module, features creation of Dynamic Forms to input values and create module-specific Records, captured via the Dynamic Form created specifically for that specific module. For example, the Dynamic Form which the user will create for the Prospects module, will upload Prospect detail information to the Prospects Module.

Dynamic Forms can be further integrated with Marketing tactics - customized Campaign Pages and executed to the end-user. The Dynamic Form will help you to reach out to Prospects and capture valuable information through the Form directly - syncing the record(s)/information to the specific UCM module.



### Key Features Includes:

- ✓ Module specific Dynamic Forms
- ✓ Selective UCM Module Fields
- ✓ Auto-Sync Information to Modules
- ✓ Downloadable Assets Configuration

**AMERICAS**  
[sales.noram@zinfitech.com](mailto:sales.noram@zinfitech.com)  
 6200 Stoneridge Mall Road, Suite 300  
 Pleasanton, CA 94588  
 United States of America

**EUROPE, MIDDLE EAST AND AFRICA**  
[sales.emea@zinfitech.com](mailto:sales.emea@zinfitech.com)  
 Davidson House  
 Forbury Square, Reading  
 RG1 3EU, United Kingdom

**ASIA PACIFIC**  
[sales.apj@zinfitech.com](mailto:sales.apj@zinfitech.com)  
 3 Temasek Avenue  
 #21-00 Centennial Tower  
 Singapore 039190

Please visit [www.zinfi.com/contact-us](http://www.zinfi.com/contact-us) to see the locations and contact information of our other global offices.

© ZINFI Technologies Inc. All Rights Reserved.

Australia • China • Hong Kong • India • Indonesia • Japan • Korea • Romania • Singapore • UK • USA