Identity and Access Management (IAM)

UCM's Identity and Access Management, enables your organization to granularly manage partner records, such as accounts, contacts and performance data. This allows you to segment partners effectively into groups with various parameters for optimized management. UCM's access management features can be used to control user access to transactions (such as converting an opportunity) and activities related to an object type (such as creating or deleting a product).

UCM makes it very convenient for organizations to set up and configure visibility for all records of a specific UCM Module. Account Level Visibility feature can be enabled for a UCM module by the Admin - all Users/Partners mapped to the same Account will have visibility to all records of that Module.

Group and Role Management

By leveraging ZINFI UCM's Access Management featurette, your organization can create different types of groups (sets of users) to manage a set of common records. Groups can be created for managing a variety of activities, including team selling, team support and event management. Users associated with a group can then access the records shared within the group and perform the required operations on those records.

A user group contains users, roles, subordinates and subgroups. You can easily share records within these groups by setting up data sharing rules through Access Management.
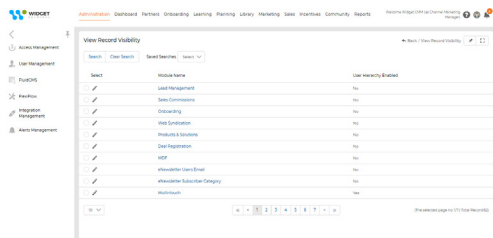

Key Features Include:

✔ Module Access Management

✔ Role Management

✔ User Profile Management

✔ User Group Management

Module Management

Through Access Management, enable your organization to set up and manage various modules in the partner portal using the module management functionality. This allows you to manage the visibility of modules and features to be made available to various user groups, depending on their profile.

With the module management features, you can pick and choose from a list of available modules and make those modules available to your channel partners. You can also make specific modules available to portal users based on their role and access privileges, allowing you to manage portal access at a granular level.

Key Features Includes:

✔ Portal Modules Setup

✔ Portal Modules Management

✔ Modules & Zone Access Management

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