



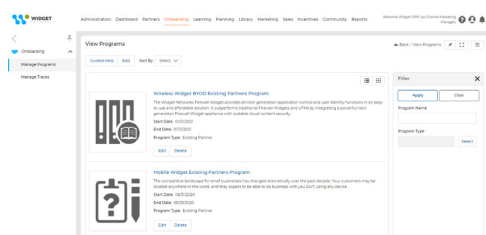
Partner Onboarding Management

The Partner Onboarding Management module of ZINFI's partner relationship management (PRM) platform enables your organization to automate the partner recruitment and onboarding process with a series of step-by-step activities through a configured Partner Onboarding Flow. The module helps you create varied Partner Programs comprising a hierarchy of Program Levels integrated with Program Tasks. Partner Onboarding Programs can be auto assigned to Partners based on the partner details and segmentation logic.

Partner Onboarding Flow

The Partner Onboarding Management module gives your organization a hawk's eye view and complete control over the new partner engagement cycle. Define Programs comprising of Program Levels to be completed by the Channel Partner. Further, configure Program Levels comprising of Level Tasks which may comprise multiple assets or activities to be performed by your Partners based on the configuration defined by you. Your organization can easily define a flow of Program Levels involving multiple sequence of Level Tasks which needs to be completed by a prospective Channel Partner allocated to a specific Group – Group Account/Account/Contact during the onboarding cycle. Channel Partners through the onboarding process can review and track the completed and still-outstanding Programs, Program Levels and Level Tasks, helping them monitor their own engagement process.

Promote your Partners with eligible Benefits, Badges & Certificates associated with completion of Program Levels. Automate your Partners progress to hierarchical Program Levels by completing associated Level Tasks to unlock special Benefits, Badges & Certificates.



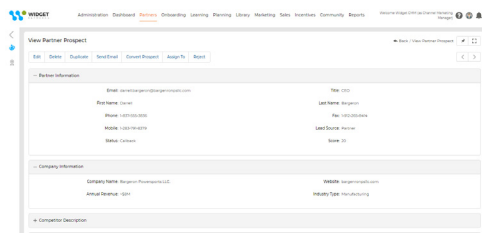
Key Features

- ✓ Partner Onboarding Flow Configuration
- ✓ Auto Assignment of Programs to Partners
- ✓ Program Enrolment
- ✓ Program Level Advancement
- ✓ Provision Benefits, Badges and certificates

Partner Setup Management

Using the Onboarding Management module, your organization can manage partner portal access for newly onboarded channel partners so that partners view and access only the onboarding steps that apply to them.

With our partner setup management features, once channel partners sign contracts they will have access to various partner training materials (certifications, courses and tests) based on your configuration of the partner profile. Channel partners receive automated system notifications for each activity performed during this phase, keeping them posted on the progress they have made.



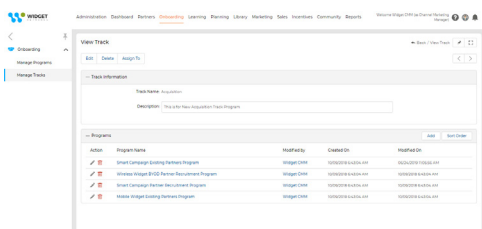
Key Features

- ✓ Contract Sign-up & Management
- ✓ Partner Profile Configuration
- ✓ Training Assets/Program Management

Tracks and Programs Management

The Partner Onboarding Management module of ZINFI's partner relationship management (PRM) platform makes it easy for your organization to automate the partner recruitment and onboarding process through a series of step-by-step activities. The module helps you create different onboarding tracks based on partner type, profile, level of engagement and other variables.

The Partner Onboarding Management module gives your organization a detailed view of, and complete control over, the new partner engagement cycle. Dashboard-based Track and Programs management helps you quickly define a step-by-step process for onboarding new channel partners in your existing channel ecosystem.



Key Features

- ✓ Manage Onboarding Tracks
- ✓ Associate Partner Programs with Tracks
- ✓ Define your Channel Ecosystem for your Partners

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