



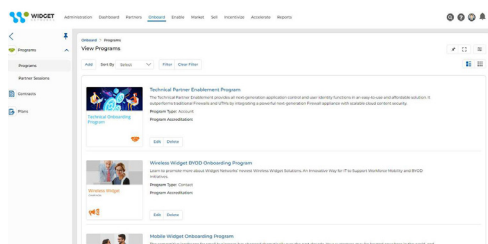
Partner Programs Management

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

Partner Onboarding and Enablement Flow

The Partner Programs Management application gives your organization a hawk's eye view and complete control over the new and existing partner engagement cycle. Partner Programs can be configured for the Partner Account or individual Contacts via Program Type and via Accreditation Type – Programs can be created for existing or ready-to-be onboarded Partners. Partner Programs comprising priority-based Program Levels are further segregated into Program Level Tasks inclusive of Task Requirements -with defined activities to be performed by your Partners to complete the Partner Program successfully. Through the Programs process, Channel Partners can review and track the completed and still-outstanding Programs, Program Levels, and Level Tasks, helping them monitor their engagement process.

Promote your Partners to upgraded Partner Groups and Profiles with eligible Benefits, Badges, and certificates associated with completing Programs. Automate your Partners' progress through hierarchical Program Levels, review completed Program Level Tasks, and override completion status.



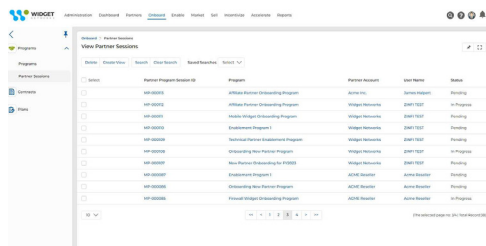
Key Features

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

Partner Setup and Tracking

Using Partner Programs Management, your organization can manage partner portal access for newly onboarded and existing channel partners so that partners can view and access the Portal as configured for them. Admins can easily track assigned Partner Programs via Partner Program Sessions with the related list upgraded to display Username, Last Session Activity Date, and Status and Completion Status. Similarly, Partners can utilize the View My Programs details page to view the Progress Donut Graph to keep track of his/her progress.

With Partner Programs setup management features, once channel partners sign contracts, they can be provided access to various partner training materials and UPM Applications based on the Partner Group Auto-assignment as per the Partner Program Configuration. Channel partners receive automated system notifications for each activity performed during this phase, keeping them posted on the progress they have made.



Partner Program Session ID	Program	Partner Account	User Name	Status
100-100001	Artisan Partner Onboarding Program	Artisan Inc.	John Doe	Pending
100-100002	Artisan Partner Onboarding Program	Artisan Inc.	John Doe	In Progress
100-100003	Artisan Partner Onboarding Program	Artisan Inc.	John Doe	Pending
100-100004	Endowment Program 1	Artisan Inc.	John Doe	Pending
100-100005	Endowment Program 1	Artisan Inc.	John Doe	Pending
100-100006	Endowment Program 1	Artisan Inc.	John Doe	Pending
100-100007	Endowment Program 1	Artisan Inc.	John Doe	Pending
100-100008	Endowment Program 1	Artisan Inc.	John Doe	Pending
100-100009	Endowment Program 1	Artisan Inc.	John Doe	Pending
100-100010	Endowment Program 1	Artisan Inc.	John Doe	Pending

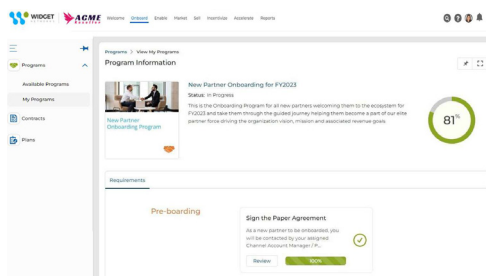
Key Features

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

Program Levels and Tasks Management

Partner Program Management of ZINFI's Unified Partner Management (UPM) platform makes it easy for your organization to automate the partner recruitment/onboarding/enableness process through a series of step-by-step activities. Partner Programs Management helps you configure program levels and task requirements for Partners assigned based on partner type, profile, level of engagement, and other variables.

Partner Program Management gives your organization a detailed view of and complete control over the partner engagement cycle. Dashboard-based Program management helps you quickly track and manage channel partners in your existing channel ecosystem.



Key Features

- ✓ Manage Program Levels and Tracks
- ✓ Auto-assign and Upgrade Partners via Programs
- ✓ Channel Ecosystem for your Partners

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