



Centralized Interconnection (CENTRi™) Management

Every partner management organization needs a system connecting and unifying multiple third-party platforms, tools, and reports in a centralized location. This is where ZINFI's Connection Management comes in and connects to external third-party systems and processes all workflows and requests from those external systems. The external systems communicate through Connection Management's secured APIs, and the internal systems communicate directly through the centralized Connection Management's data access layer.

Connection Management is an event-driven workflow scheduling engine. Built on top of high-performance, scalable data storage, Connection Management is a data management interface that can quickly process data in any shape or form.

Centralized Connection Management Overview

With ZINFI Connection Management system, your partner management organization can easily integrate, transform, aggregate, and visualize data with a user-friendly graphical interface. Connection Management's integrated job scheduler automates routine data operations, so data analysts no longer have to extract and process the data manually.

Openness and connectivity are the key concepts driving ZINFI Connection Management. The platform can efficiently work with data from almost any online or cloud service. ZINFI Connection Management can provide the data via REST API to any of your existing tools or services, making Connection Management the centralized system processing all workflows – whether time-based or immediate.



Key Features Include:

- ✓ OOTB Pre-Configured Integrations
- ✓ Third Party CRM Connection Management
- ✓ CRM Entity and Attribute Mapper
- ✓ Creation & Management of Business Workflows

Centralized Connection Management & Data Synchronization

The updated version of ZINFI's Connection Management system supports OOTB data synchronization through integration with third-party CRMs (Salesforce, Sugar CRM, MS Dynamics, HubSpot, and more) and various marketing platforms (Google Analytics, Facebook, Twitter, etc.) via pre-configured data connectors with an enhanced graphical user interface. Connection Management also connects to popular marketing automation platforms (Marketo, Eloqua, etc.) and any other web application with defined interfaces.

Workflow-based record sync across all configured and integrated third-party platforms is available with the latest Connection Management version 3 launch of the ZINFI UPM platform. Support for automated and custom data synchronization in a defined time or period is integrated with Connection Management's backend Workflow Management Engine. Data sync algorithms can be easily created and configured through workflows to process workflow-based record synchronizations. The latest feature incorporated in this Integration Management module allows you to sync single data or record set to multiple third-party platform instances from the ZINFI UPM, viz. Sync Lead X to both Salesforce and HubSpot.

Using ZINFI Connection Management, any organization can make any data set accessible by third-party services, enabling organizations to connect to their own CRM, marketing automation, point-of-sales, and other third-party systems, and enhance business operations by utilizing cross-platform data analytics using Connection Management's business intelligence reporting and data explorer capabilities.



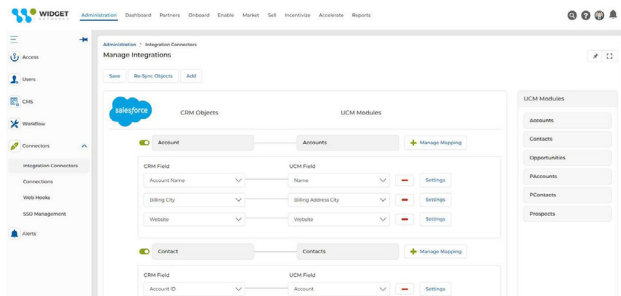
Key Features Includes:

- ✓ Universal Data Integrations Management
- ✓ Workflow-based Automated Record Sync Management
- ✓ Simultaneous Record/Data Sync to multiple Platforms
- ✓ Data Structure and Records Explorer
- ✓ Configurable/DIY SSO – SAML Integration (SP/IDP)

SFDC Rapid Installer

UPM's latest offering, the SFDC Rapid Installer, allows you to instantly connect with Salesforce to automate your work and find productivity superpowers. With the SFDC Rapid Installer, Proxy objects instead of actual component attributes are utilized to connect to Salesforce, and interactions with a Proxy object are the same way as we interact with the actual object. The proxy objects act as middleware for UPM and Salesforce, providing the following advantages:

- Permission to direct access Salesforce records are not needed.
- Data being updated at the middleware through the usage of the proxy objects, synchronization between the two platforms is more stable.
- Add-on rulesets can be added between the middleware and Salesforce.
- Salesforce reports can be generated on the proxy objects, eliminating the need of the user to login to UPM to generate similar reports.



Key Features Includes:

- ✓ Proxy Object Mapping
- ✓ Utilize WebHooks
- ✓ Access API Log Status
- ✓ Secure and Stable

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