



# Deals Registration Management

ZINFI's UCM deal management associates partners related contact, record and deal data to give a total customer view for your group, empowering you to oversee information in a single place.

## Opportunity & Deal Management

Organizations utilize our Partner Lead Management module to set up an automated survey and endorsement mechanism for all submitted opportunities and arrangements finished by the channel sales group. The module likewise enables you to push submitted opportunities and arrangements submitted to your internal CRM through designed system connectors.

UCM's latest offering, the SFDC FIRE Installer, lets you connect and map to your SFDC implementation quickly to make the deal registration work and sync on the fly. The dynamic reporting module of the Partner Lead Management provides insight into each dimension of the business pipeline made by your channel sales group.

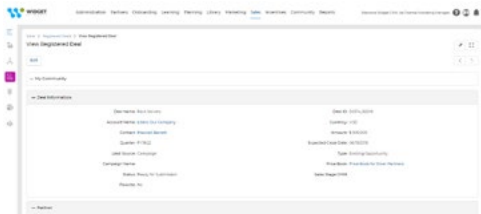
Deal ID	Deal Name	Amount	Deal Stage	Registered Date	Status
2019-0001	Deal Name 1	\$1000	Deal Stage 1	2019-01-01	Ready to be Submitted
2019-0002	Deal Name 2	\$2000	Deal Stage 2	2019-01-02	Ready to be Submitted
2019-0003	Deal Name 3	\$3000	Deal Stage 3	2019-01-03	Ready to be Submitted
2019-0004	Deal Name 4	\$4000	Deal Stage 4	2019-01-04	Ready to be Submitted
2019-0005	Deal Name 5	\$5000	Deal Stage 5	2019-01-05	Ready to be Submitted
2019-0006	Deal Name 6	\$6000	Deal Stage 6	2019-01-06	Ready to be Submitted
2019-0007	Deal Name 7	\$7000	Deal Stage 7	2019-01-07	Ready to be Submitted
2019-0008	Deal Name 8	\$8000	Deal Stage 8	2019-01-08	Ready to be Submitted
2019-0009	Deal Name 9	\$9000	Deal Stage 9	2019-01-09	Ready to be Submitted
2019-0010	Deal Name 10	\$10000	Deal Stage 10	2019-01-10	Ready to be Submitted

### Key Features

- ✓ Opportunity Management
- ✓ Deal Registration
- ✓ Approval & Review Management
- ✓ Sync on the Fly to SFDC

## Deal Details

Deal properties vary from business to business. Along these lines, you ought to have the capacity to catch each data identified with your deal without being limited to standard fields. In UCM, you can make custom fields from a scope of field types to execute a structure to your view. While making your deal, you can connect it with the related contact, allocate possibility, surmise a normal close date, set yourself as the primary assignee or appoint to another, and accomplish more. You can likewise see related discussions by means of telephone and email on the notes section.



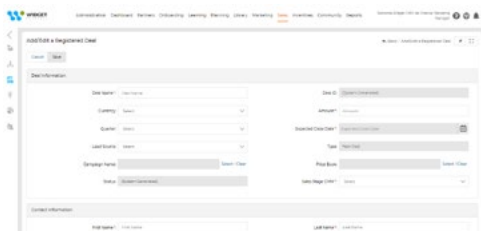
### Key Features

- ✓ Tag Deals as Favorites
- ✓ Deal Assignment
- ✓ Notes Capture
- ✓ Add New Fields

## Simplified Deal Registration

UCM's Simplified Deal Registration methodology lets you register a Deal as the Primary Contact or for a Channel Partner at one go, through a single viewpoint provided through the one-page Deal Registration Form. You no more need to traverse through the time-magnum Deal Conversion process and concentrate on the optimized steadfast approach to create Deals faster.

Once a Deal is created through the Simplified Form, completed and submitted, the Contact and Account Records are auto created and can be found in the respective Account and Contact List Pages. Configure the Deal approval process easily sync to an external CRM for Admin Review.



### Key Features

- ✓ Simple
- ✓ Fast Track Approach
- ✓ Auto create Account and Contact

**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.zinfo.com/contact-us](http://www.zinfo.com/contact-us) to see the locations and contact information of our other global offices.

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