# License Management

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## Introduction

ZINFI UCM's adaptive Software as a Service (aSaaS) is a license-based web platform where UCM is provided on a subscription basis, hosted in a central location, and typically accessed via a web browser. ZINFI provides licenses to clients based on partners accessing ZINFI's UCM aSaaS platform.

Definition of the word "Partners" in "Partner Bands" related to any license band is defined as follows:

The word "Partners" refers to unique partner accounts (UPA). Each UPA is determined by their email domain, e.g., @partner.com and each UPA can have unlimited users under that email domain of @partner.com. However, if a Client has licensed up to a certain partner band then at any moment the total number of UPAs having "access rights" to the Portal on an annual basis cannot exceed the licensed partner band. ZINFI will notify the Client on a monthly basis the total UPAs that have access right to the Portal, and Client has the right to remove access of any UPA to keep the total UPAs accessing the Portal and stay within the licensed band.

#### **Important Notes:**

- For example If a Client has licensed up to 100 Partners band then on an annual basis no more than 100 UPAs can access the UCM platform.
  - Clarification If a Client has licensed up to 100 Partners band and assigned access rights to 100 UPAs then for licensing purposes, ZINFI would consider all 100 UPAs have access rights, independent of the fact a great portion of them may not ever access the Portal at all. Client will have to manage this access right proactively to make sure at any time no more than 100 UPAs have access to the Portal under the "100 Partners" licensed band. Client does have the right to replace one UPA with another UPA to remain within the 100 UPA limit in this case.
  - Upgrade to the next partner band can be done by signing an addendum to the Unified Channel Management (UCM) Subscription Order Form executed by ZINFI and Client ("Order Form"). Both parties must agree in writing for such increase.
- For example if the total number of UPAs who need to access the Portal during the term of this agreement exceed from 100 partners to 101 partners then both parties must sign an addendum in upgrading the license band from 100 to the next available license band, for example 250, or to another authorized level
  - Downgrade to a lower partner band is not available during the term of the egreement.



### Partner Users and Unique Partner Accounts

Approved users with login credentials who logs in to ZINFI's UCM platform is a UCM user. Users, such as Client's sales representatives and channel marketing managers are primarily considered as *Internal Users* and are mapped to the Client Account. *Partner Users*, i.e., channel partners and channel partner administrators are mapped to respective Unique Partner Accounts that represent unique partner organizations.

Every user of the UCM platform is provided with a user account. Each partner user belongs to a unique Partner Account. The following diagram illustrates the hierarchy between Client and Partner Accounts:



In the above diagram, we have a single Client Account (@client.com) having two associated Partner Accounts (X and Y), determined by their email domain, e.g., @client.com, @xpartner.com, @xpartner.de, @ypartner.com, and each account can have unlimited approved users under their respective email domains of @client.com, @xpartner.com, @xpartner.de and @ypartner.com.



To understand the actual numbers, we will follow up with the table provided below:

Unique Account Approved	Unique Email Domain	No. of Users	License Consumed
Parent/Client Account	@client.com.	5	None
X Partner US Account	@xpartner.com	3	1
X Partner German Account	@xpartner.de	2	1
Y partner Account	@ypartner.com	1	1
Z partner Account	@zpartner.com	0	1
Total num	4		



# Assigning Licenses to Partner Accounts

The following scenarios describe three ways a license can be assigned to a specific partner account.

- 1. License Provisioning by Client Admin Once the Client has created a Partner Account, Client can assign a license to a Unique Partner Account.
- License Provisioning Through User Registration Partner users can directly provide their details through the Partner Signup Form provided via Client's UCM portal and on a successful match with a pre-licensed Unique Partner Account, the Partner User is auto approved and can access the client UCM instance.
- 3. Licensing Provisioning via Single-Sign-On (SSO) Partner users can be registered via SSO, and on a successful match with a pre-licensed Unique Partner Account, the Partner User is auto approved and can access the client UCM instance.



## How to Create Accounts & Activate License

### Viewing, Creating and Activating Partner Accounts

### **View Partner Account Details**

- Navigate to Partners -> Partner Accounts to View Partner Accounts List along with the respective License Status for each UPA (highlighted in blue border).
- Click on the Account Name of the Partner Account listing to see the Partner Account Details.

	View Partner A	Accounts	ining corary man	eeing sales incentives comm	unity Reports	Back / View Pa	rtner Accounts 🖈 🖸
Partner Prospects Partner Companies	Add Delet	e Export Create View Search	Clear Search	Saved Searches Select V			
Partner Contacts	Select	Account Name	Partner ID	Website	Main Phone	Assigned To	License Status
Partner Accounts		Big Data Support Co.	104770931	www.bdsc.com	1-325-555-5000	globalcmm@bdsc.com	Active
Partner Types		Connectivity Kings	844015142	www.connectivitykings.com	1-642-555-4400	globalcmm@connectivitykings.com	Active
Channel Scorecard	□ /	Devify	193770021	www.devify.com	1-456-555-7328	globalcmm@devify.com	Active
Badge Management		Aliquet Metus Incorporated	542187031	www.aliquet.com	1-456-555-7321	globalcmm@aliquet.com	Active
	. /	ABOC Foods	519201812	www.abocfoods.com	1-303-555-6041	globalcmm@abocfoods.com	Active
	□ /	Stark Automotives	108842013	www.stark-automotives.com	1-852-555-7401	globalcmm@stark-automotives.com	Active
	. /	Morrison's Cafeteria	834674639	www.morrisoncafe.com	1-238-555-5091	globalcmm@morrisoncafe.com	Active
	□ /	Irvin Technologies	107353828	www.irvin.com	1-238-555-5091	globalcmm@irvin.com	Active
		Non Lobortis Quis Industries	103736928	www.non-lobortis-inc.com	1-505-555-3169	globalcmm@non-lobortis-inc.com	Inactive
	. /	Flashpoint Paradox	116520918	www.flashpoint.com	1-801-555-7465	globalcmm@flashpoint.com	Inactive
	10 🗸			< << 1 >> >		(The selected	page no: 1/1  Total Record:10

• Once you land in the View Partner Account details page, you will see the detailed view, such as:

<b>\$\$</b> • y	VIDGET	Administration Dashboar	d Partners Onboarding	Learning Planni	ing Library	Marketing Sale	es Incentives	Community	Reports	Welcome Widget CMM (as Channel Marketing Manager) 🔞 🚳 💺
*	/iew Partner Acco	unt								♣ Back / View Partner Account 🖈 🚺
	Edit Delete Clo	one Assign To Scoreca	ard							< >
	— Partnership Inform	nation								
		Account Name	: Barnes Inc.						License Status: Inactive	
		Country	USA						State / Province: California	
		City	Beverly Hills						Zip/Postal Code: 90211	
		Website	: www.barnes-inc.com						Main Phone: 1-215-638-0928	
		Partner ID	162091273						Master Account:	
		Partner Logo	faeb00c0-5331-4197-8684-63	6256b27832Barnesk	nc-logo.png				Territory Focus: Entire USA	
		Address 1	241 S Wetherly Dr							
		Address 2								
	— License Managem	ent History								
	Modified by		Modified On			Previo	us Status		Changed/ Current Statu	
	Widget CMM		10/07/2020 6:39:49 PM			Active			Inactive	



• The License Management History of the specific Partner Account related list provides historical data of License Status updates by respective users along with the date of such action.

### **Add Partner Account**

• The "Add/Edit a Partner Account" page provides the form to add/edit the details of the Partner Account and update the License Status.

Add/Edit a Partner Account			← Back / Add/Edit a Partner Account
Partnership Information			
Account Name *:	Non Lobortis Quis Industries	License Status :	Active
Country *:	USA 🗸	State / Province *:	Active Inactive
City *:	Santa Fe	Zip/Postal Code *:	87501
Website *:	www.non-lobortis-inc.com	Main Phone:	1-505-555-3169
Partner ID:	103736928	Master Account:	Pro Garden Management Select   Cle
Partner Logo:	⊥ Browse	Territory Focus:	Entire USA
Address 1:			

### **Activate License for Partner Account**

• To Activate the License select Activate from the License Status List and click Save:

<b>SS</b> •	WIDGET Administration Dashbos	rd Partners Onboarding Learning Planning Library Ma	arketing	Sales Incentives	Community	Reports	Welcome Widget CMM (as Channel Marketing Manager) 🔞 🚳 单
< *	Add/Edit a Partner Account						← Back / Add/Edit a Partner Account 🖉 🚺
÷	Save Cancel						
	Partnership Information				_		
	Account Name	Non Lobortis Quis Industries			L	License Status :	Active V
	Country '	USA	$\sim$		9	State / Province *:	Active Inactive
	City '	Santa Fe			2	Zip/Postal Code *:	87501
	Website '	www.non-lobortis-inc.com				Main Phone:	1-505-555-3169
	Partner ID	: 103736928				Master Account:	Pro Garden Management Select   Clear
	Partner Logo	x 🛕 Browse				Territory Focus:	Entire USA
	Address 1 *:						
	1140 Cooks Mine Road						
							1

 Similarly, to deactivate the License Status, edit the Partner Account and select Inactive and click Save. Such user action of Activating/Deactivating the License Status is captured and logged to be displayed in the License Status History related list.



# **Calculating License Bands**

License Bands can be calculated from the View Partner Accounts list page through the following steps:

• Select the "Licensed Partner Accounts" Saved Search to display the UPAs that are Active and contribute to the calculation of License Band as Active Partner Accounts.

<b>WIDGET</b> Notworks	Administration Dash	board Partners Onboarding Learning Plan	nning Library Mark	keting Sales Incentives Comm	nunity Reports	Welcome Widget CMM (as Channel Marke	sting Manager) 👔 👘 🔎
< T Partners A Partner Prospects	View Partner A	e Export Create View Search	Clear Search	Saved Searches Active V	Edit Delete	◆ Back / View Partn	er Accounts 🖈 🖸
Partner Companies Partner Contacts	Select	Account Name	Partner ID	Website	Main Phone	Assigned To	License Status
Partner Accounts	01	Big Data Support Co.	104770931	www.bdsc.com	1-325-555-5000	globalcmm@bdsc.com	Active
Partner Types	1	Connectivity Kings	844015142	www.connectivitykings.com	1-642-555-4400	globalcmm@connectivitykings.com	Active
Channel Scorecard		Devify	193770021	www.devify.com	1-456-555-7328	globalcmm@devify.com	Active
👰 Badge Management		Aliquet Metus Incorporated	542187031	www.aliquet.com	1-456-555-7321	globalcmm@aliquet.com	Active
		ABOC Foods	519201812	www.abocfoods.com	1-303-555-6041	globalcmm@abocfoods.com	Active
		Stark Automotives	108842013	www.stark-automotives.com	1-852-555-7401	globalcmm@stark-automotives.com	Active
		Morrison's Cafeteria	834674639	www.morrisoncafe.com	1-238-555-5091	globalcmm@morrisoncafe.com	Active
	01	Irvin Technologies	107353828	www.irvin.com	1-238-555-5091	globalcmm@irvin.com	Active
	10 🗸			< < 1 >> >		(The selected pay	ge no: 1/1  Total Record: 8)

- Calculate the Active Partner Accounts as per the Filtered List of License Status Active Accounts. In the above example we have eight (8) Unique Partner Accounts with License Status set to Active:
  - Big Data Support Co. Connectivity Kings Devify Aliquet Matus Incroporated ABOC Foods Stark Automotives Morrison's Cafeteria Irvin Technologies
- Similarly, Select the "Pending Accounts" Saved Search to display the UPAs which are Pending and do not contribute to the calculation of License Band as Active Partner Accounts.

Two (2) Unique Partner Accounts License Status are displayed as Pending:

Non Labortis Quis Industries Flashpoint Paradox



	Administration Das	hboard Partners Onboarding Le	earning Planning Library N	farketing Sales Incentives Con	nmunity Reports	Welcome Widget CMM (as Chan	el Marketing Manager) 👔 🍈 🔎
< II Partners ^	View Partner A	Accounts			1	← Back / View	Partner Accounts 🖈 🖸
Partner Prospects	Add Dele	te Export Create View	Search Clear Search	Saved Searches Inactive 🗸	Edit Delete		
Partner Companies	Select	Account Name	Partner ID	Website	Main Phone	Assigned To	License Status
Partner Accounts		Non Lobortis Quis Industries	103736928	www.non-lobortis-inc.com	1-505-555-3169	globalcmm@non-lobortis-inc.com	Inactive
Partner Types		Flashpoint Paradox	116520918	www.flashpoint.com	1-801-555-7465	globalcmm@flashpoint.com	Inactive
Channel Scorecard							
	10 🗸			< < <b>1</b> >>>	>	(The selec	ted page no: 1/1  Total Record: 2)

• Therefore, from the above example, we have eight (8) Unique Partner Accounts with License Status Active and thus total number of Partner Accounts participating in the Licensing process for the Client would be eight (8).



# **Frequently Asked Questions**

• What is meant by "Unique Partner Company" (UPA)?

UPA refers to a Unique Partner Account in ZINFI's Partner Management area.

• What will happen if we activate a UPA, but no one has logged in?

We calculate license at a UPA level, so once a UPA has been Activated - then one license is taken, and it doesn't matter if any user from subject UPA logs in or not.

• What happens when a list of pre-approved partner accounts and contacts are uploaded manually into the Portal via Excel or dynamically synchronized via 3rd party integrations, how will the licenses be assigned?

Unless a Partner Account has been "Activated" in ZINFI Partner Management area no licenses will be assigned. This approval can be done via Partner Management area in the ZINFI portal or the Activate Status or via synchronization process and automatically the license band would be updated.