



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.

The dynamic reporting module of the Partner Lead Management gives clear understanding into each dimension of the business pipeline made by your channel sales group. Singular channel partners can likewise follow their own sales activities by assessing their individualized progress dashboard.

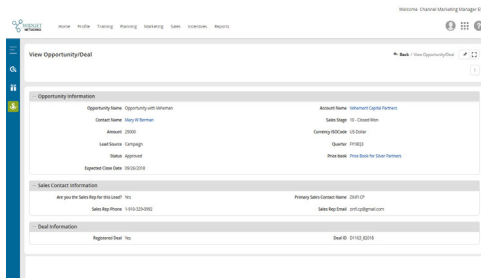
Select	Deal ID	Name	Account Name	Sales Stage	Amount	Expected Close Date	Status
<input type="checkbox"/>	0114E,2019	Opportunity with Veterans	Veterans Capital Partners	10 - Closed Won	\$15,000.00	09/30/2019	Approved
<input type="checkbox"/>	0114E,2019	New Opp	Electra Link, Inc.	10 - Closed Won	\$25,000.00	08/31/2019	Pending Approval
<input type="checkbox"/>	0114E,2019	Opportunity for Veterans Link	Electra Link, Inc.	10 - Closed Won	\$25,000.00	10/31/2019	Approved
<input type="checkbox"/>	0010A,2019	Opportunity	Partech Associates	10 - Closed Won	\$17,000.00	11/30/2017	Pending Approval
<input type="checkbox"/>	0066B,2019	Opportunity for Switches	Lee Mack Consulting	11 - PO Received	\$75,000.00	08/01/2019	Ready for Submission
<input type="checkbox"/>	0076L,2019	Simulation	Alquora Inc.	11 - PO Received	\$76,000.00	09/30/2019	Ready for Submission
<input type="checkbox"/>	0062A,2019	Ready for Signing	Topcon Inc.	10 - Closed Won	\$60,000.00	09/30/2019	Ready for Submission
<input type="checkbox"/>	0065L,2019	Storage Solution	Competition Adjoining Ltd.	10 - Closed Won	\$300,000.00	02/15/2019	Ready for Submission
<input type="checkbox"/>	0001A,2019	Bank Services	Liberty One Company	10 - Closed Won	\$300,000.00	06/30/2019	Ready for Submission
<input type="checkbox"/>	0008L,2019	Chen Hsien	Dolan Incorporated	11 - PO Received	\$60,000.00	09/30/2019	Ready for Submission

Key Features

- ✓ Opportunity Management
- ✓ Deal Registration
- ✓ Approval & Review Management

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

- ✓ Deal Assignment
- ✓ Notes Capture
- ✓ Addition of new fields as required

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