

License Management

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UCM 12.x

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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.

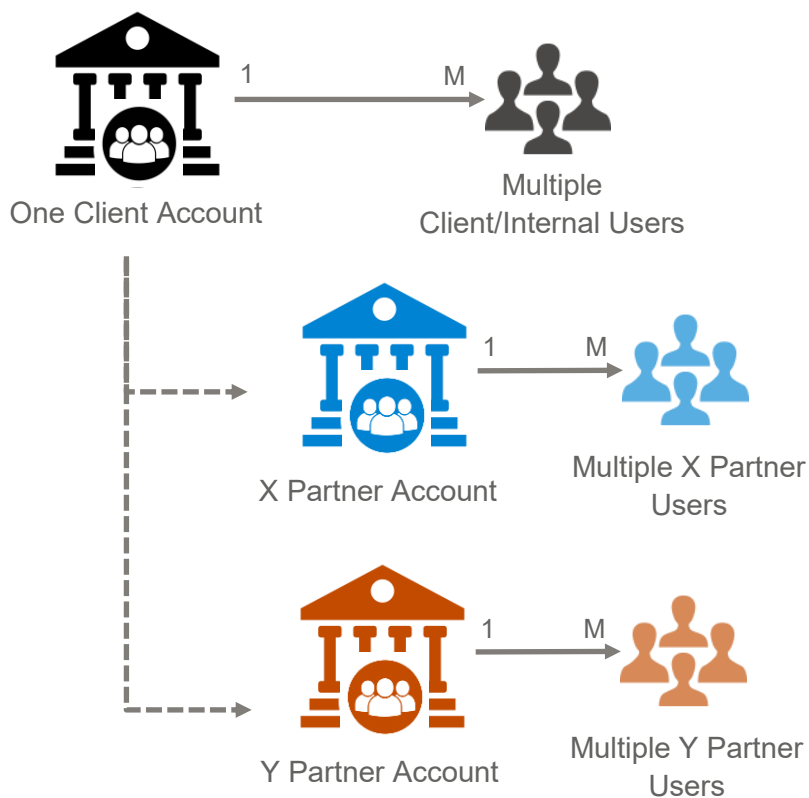
Important Notes:

- **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 this MSA. 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 this agreement.

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 number of licenses consumed			4

Assigning Licenses to Partner Accounts

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

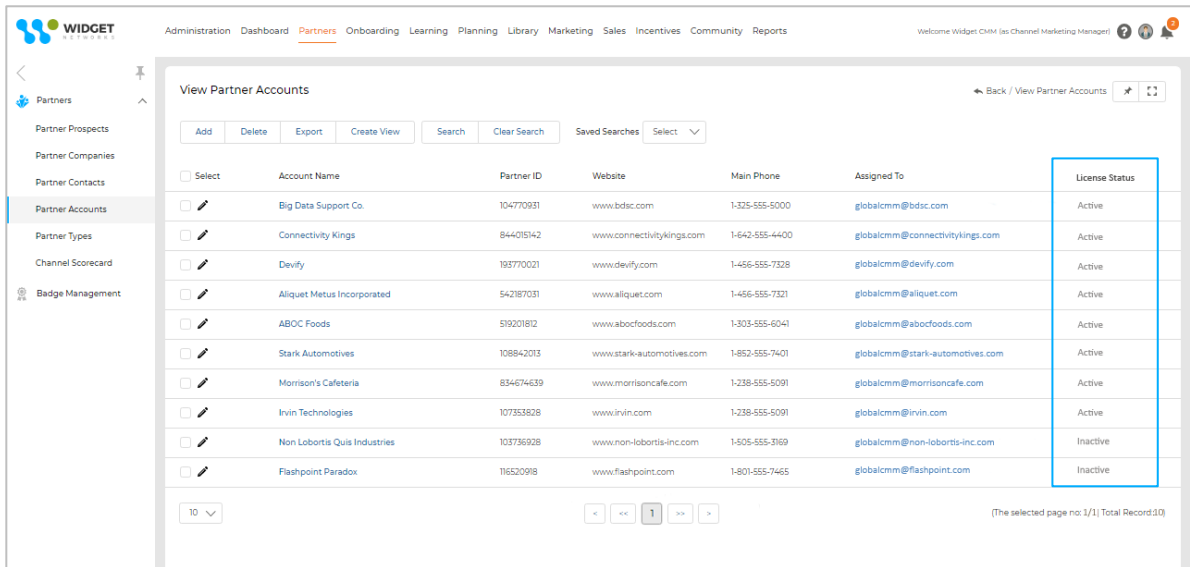
1. **License Provisioning by Client Admin** - Once the Client has created a Partner Account, Client can assign a license to a Unique Partner Account.
2. **License Provisioning Through User Registration** - Partner users can directly provide their details through the Partner Signup Form provided via Client's 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

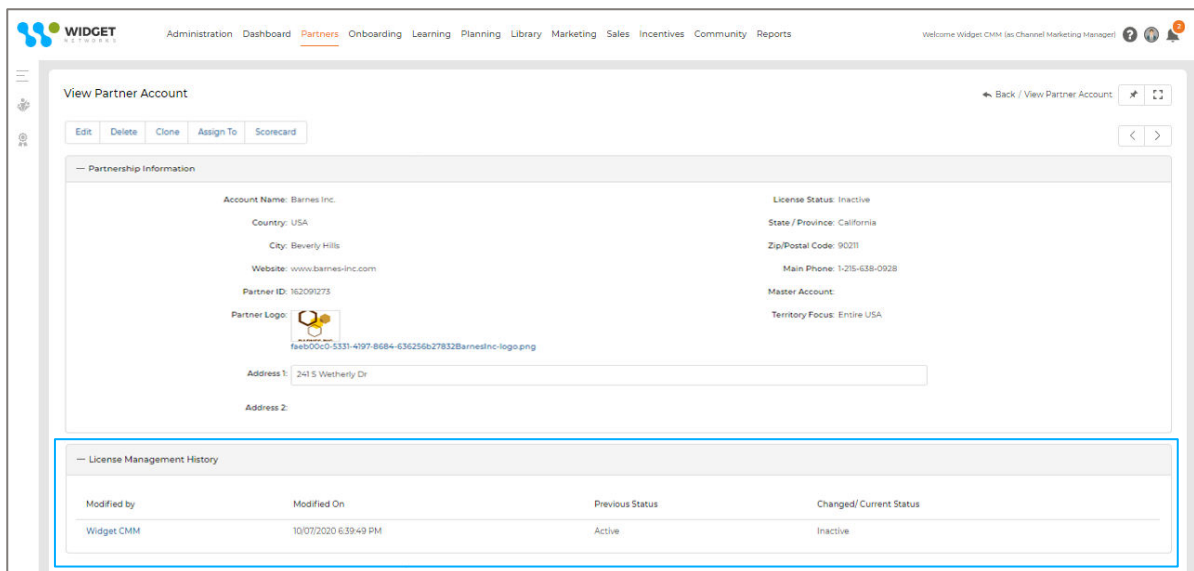
Viewing, Creating and Activating Partner Accounts

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.



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



- 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.

The screenshot shows the 'Add/Edit a Partner Account' page in the WIDGET system. The form is titled 'Partnership Information' and contains the following fields:

- Account Name: Non Lobortis Quis Industries
- Country: USA
- City: Santa Fe
- Website: www.non-lobortis-inc.com
- Partner ID: 103736928
- Partner Logo: [Browse]
- License Status: Active (dropdown menu is open showing Select, Active, Inactive)
- State / Province: [dropdown menu]
- Zip/Postal Code: 87501
- Main Phone: 1-505-555-3169
- Master Account: Pro Garden Management (with Select | Clear button)
- Territory Focus: Entire USA
- Address 1*: 1140 Cooks Mine Road

Activate License for Partner Account

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

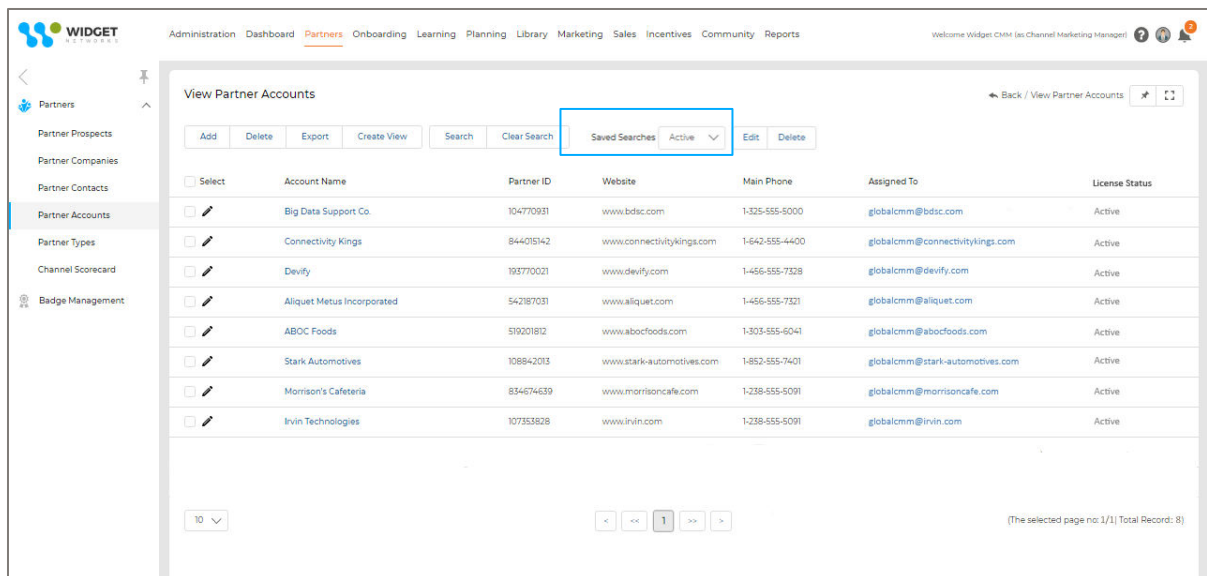
This screenshot is identical to the previous one, showing the 'Add/Edit a Partner Account' form. A blue rectangular box highlights the 'License Status' dropdown menu, which is open and shows the options: Select, Active, and Inactive.

- 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 which are Active and contribute to the calculation of License Band as Active Partner Accounts.

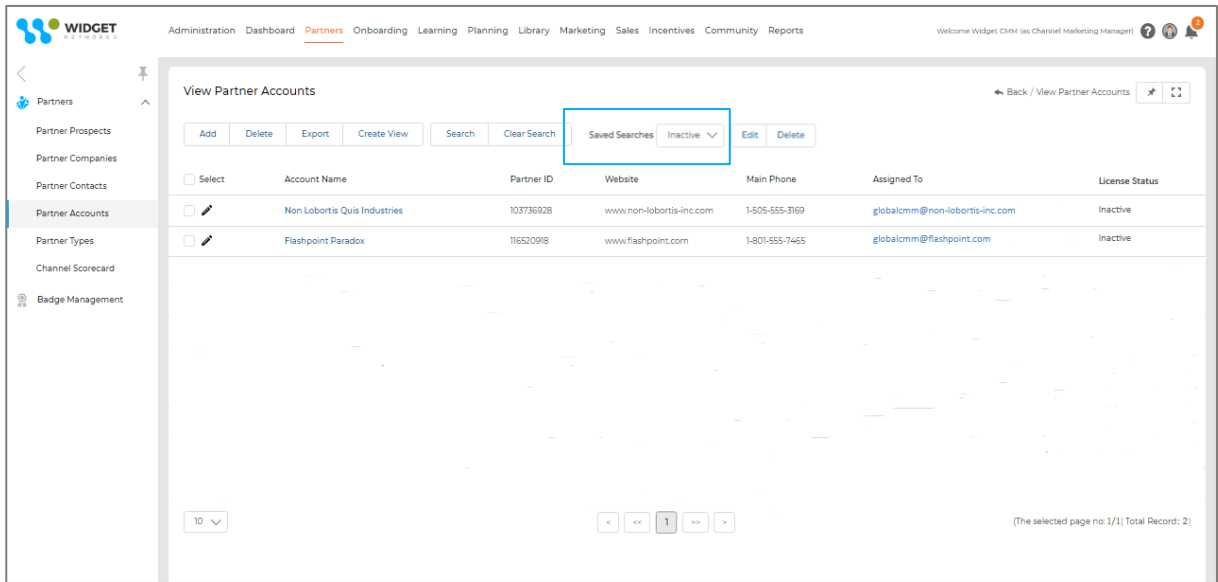


- Calculate the Active Partner Accounts as per the Filtered List of License Status Active Accounts. In the above example we have eight (8) Unique Partner Accounts with License Status set to Active:

Big Data Support Co.
 Connectivity Kings
 Devify
 Aliquet Matus Incorporated
 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



- 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.