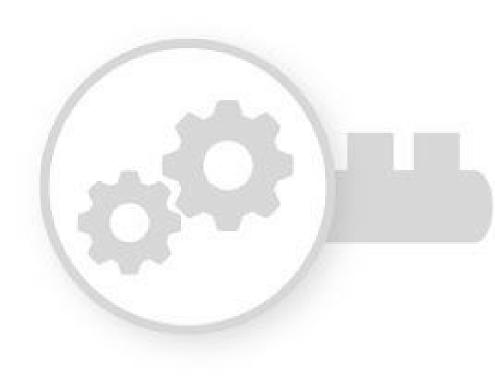
# License Management

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### Contents

Introduction	3
Partner Users and Unique Partner Accounts	4
Assigning Licenses to Partner Accounts	6
How to Create Accounts & Activate License	7
Viewing, Creating and Activating Partner Accounts	
View Partner Account Details	7
Add Partner Account	8
Activate License for Partner Account	8
Calculating License Bands	9
Frequently Asked Questions1	1



## 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:**

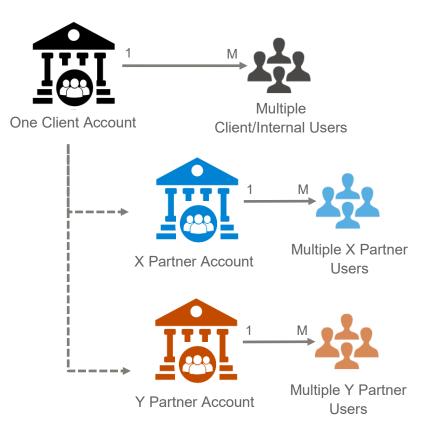
- For example If a Client has licensed up to 100 Partners band then on an annual basis no more than 100 UPAs can access the UCM platform.
  - Clarification If a Client has licensed up to 100 Partners band and assigned access rights to 100 UPAs then for licensing purposes, ZINFI would consider all 100 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
  - o 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 nur	nber 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.
- 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.

Partners A	View Partner A	ccounts				Sack / View I	Partner Accounts 🖈
Partner Prospects Partner Companies	Add Delete	e Export Create View Sea	rch 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	1	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
	1	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
	1	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
			116520918		1-801-555-7465	globalcmm@flashpoint.com	Inactive

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

View Partner Account				Sack / View Partner Account
Edit Delete Clone Assign To	Scorecard			
- Partnership Information				
Accourt	t 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	
Pa	rtner ID: 162091273		Master Account:	
Parts	ier Logo: 📿 🖉		Territory Focus: Entire USA	
	faeb00c0-5331-4197-8684-636256b27832Barnet	linc-logo.png		
4	ddress 1: 241 5 Wethenly Dr			
	ddress 2:			
— License Management History				
Modified by	Modified On	Previous Status	Changed/ Current Statu	5
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.

<b>\$</b> \$*	MIDGET Administration Dasht	oard Partners Onboarding Learning	Planning Library Marketing	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 Nam	e *: Non Lobortis Quis Industries		License Status :	Active V
	Count	y ": USA	~	State / Province ":	Select Active Inactive
	ci	y ": Santa Fe		Zip/Postal Code *:	87501
	Websi	e *: www.non-lobortis-inc.com		Main Phone:	1-505-555-3169
	Partner	ID: 103736928		Master Account:	Pro Garden Management Select   Clear
	Partner Lo	go: 1 Browse		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:

<b>S</b> .	WIDGET Administration Dashboard	d Partners Onboarding Learning Planning Library Marketing	Sales Incentives Community	Reports	Welcome Widget CMM (as Channel Marketing Manager) 🔞 🕼 옱
<	Add/Edit a Partner Account				◆ Back / Add/Edit a Partner Account 💉 🚺
0.4	Save Cancel				
	Partnership Information				
	Account Name *:	Non Lobortis Quis Industries		License Status :	Active V
	Country *:	USA 🗸		State / Province *:	Active
	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   Clear
	Partner Logo:	1 Browse		Territory Focus:	Entire USA
	Address 1*:				
	1140 Cooks Mine Road				
					12

• 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.

Partners	View Partner	Accounts	← Back / View Partner Accounts 🖈 🚦				
Partner Prospects	Add Dek	ete Export Create View Si	earch Clear Search	Saved Searches Active 🗸	Edit Delete		
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	01	Connectivity Kings	844015142	www.connectivitykings.com	1-642-555-4400	globalcmm@connectivitykings.com	Active
Channel Scorecard	1	Devify	19/3770021	www.devify.com	1-456-555-7328	globalcmm@devify.com	Active
Badge Management	1	Aliquet Metus Incorporated	542187031	www.aliquet.com	1-456-555-7321	globalcmm@aliquet.com	Active
	1	ABOC Foods	519201812	www.abocfoods.com	1-303-555-6041	globalcmm@abocfoods.com	Active
	1	Stark Automotives	108842013	www.stark-automotives.com	1-852-555-7401	globalcmm@stark-automotives.com	Active
	1	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 🗸			< « <b>1</b> » >		(The selecte	d page 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



Partners ^	View Partner A	ccounts				🐟 Back / View Pa	artner Accounts 🖈 🖸
Partner Prospects	Add Delet	e Export Create View Sear	rch Clear Search	Saved Searches Inactive V	Edit Delete		
Partner Companies Partner Contacts	Select	Account Name	Partner ID	Website	Main Phone	Assigned To	License Status
Partner Accounts	01	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 Badge Management							

• 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.