



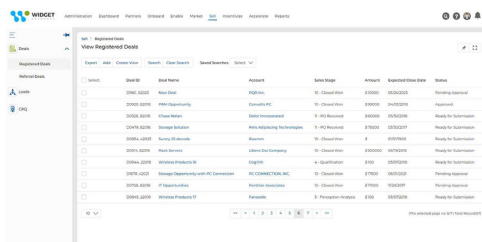
Deals Registration Management

ZINFI's Deals Registration Management associates partners related contact, record, and deal data to give a total customer view for your group, empowering you to oversee Registered and Referral Deal information in a single place. Deals Management provides setup for deal registration criteria and workflows for their partner base. Workflows can be straightforward or can cover complex, comprehensive deal registration processes.

Opportunity & Deal Management

Organizations utilize our Deals Registration Management to easily create, share, clone, and move your opportunities and referrals through your sales process and convert them to Registered Deals. Deals Management enables you to push submitted opportunities and Deals to your internal CRM through designed system connectors.

UPM's latest offering-Connectors, lets you quickly connect and map to your third-party implementation to make the deal registration work and sync on the fly. The dynamic reporting feature of Partner Deal Management provides insight into each dimension of the business pipeline made by your channel sales group.

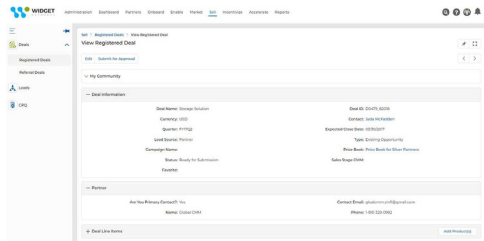


Key Features

- ✓ Opportunity management
- ✓ Deal registration
- ✓ Approval and review management
- ✓ Sync on the Fly to SFDC

Registered/Referral Deal Details

Registered/Referral Deal properties vary from business to business. Along these lines, you should be able to catch each data identified with your deal without being limited to standard fields. In UPM, 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 possibilities, surmise an expected close date, set yourself as the primary assignee or appoint to another, and accomplish more. Likewise, You can see related telephone and email discussions in the notes section.



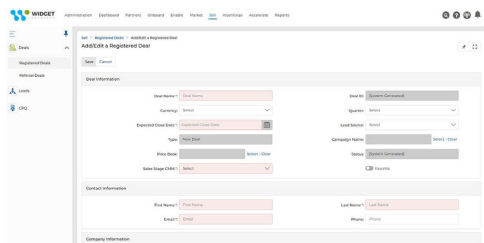
Key Features

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

Simplified Deal Registration

UPM'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 longer need to traverse 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 to sync easily to an external CRM for Admin Review.



Key Features

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

AMERICAS
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
 Davidson House
 Forbury Square, Reading
 RG1 3EU, United Kingdom

ASIA PACIFIC
sales.apj@zinfitech.com
 3 Temasek Avenue
 #21-00 Centennial Tower
 Singapore 039190

Please visit www.zinfi.com/contact-us to see the locations and contact information of our other global offices.

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