



Yealink Video Conferencing Opportunity Registration System User Guide for Reseller

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About This Guide

This guide provides operations for Reseller to use the Yealink Video Conferencing Opportunity Registration System. Reseller can use this system to manage the project.

In This Guide

Topics provided in this guide include:

- Chapter 1 [Basic Operation](#)
- Chapter 2 [Video Conferencing Opportunity Registration System](#)

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Basic Operation

This chapter provides basic operating instructions for Yealink Video Conferencing Opportunity Registration System.

Topics include:

- [Changing the Language](#)
- [Register/Login](#)
- [Editing Personal Information](#)
- [Logout](#)

For more information, please contact your system administrator.

Changing the Language

You can choose the language to display in English or Chinese on web page.

As the following figure shows:

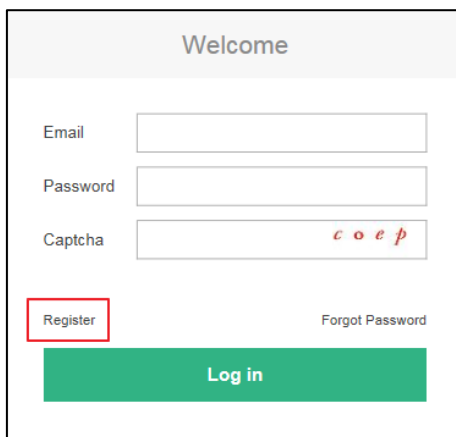


Register/Login

You can log into the system to create project reports. If this is your first login, you need to register an account.

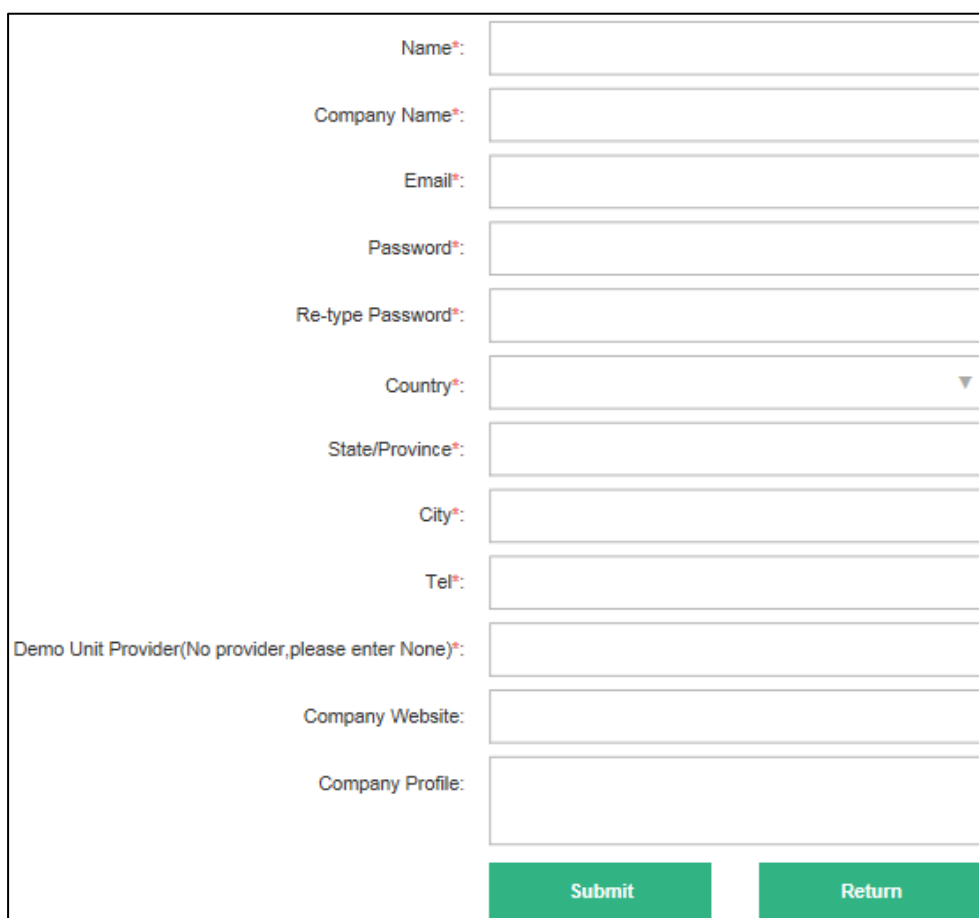
To register an account:

1. Enter the Yealink Video Conferencing Opportunity Registration System address in the address bar of a web browser on your PC, and then click **Enter**.
2. Click **Register** in the login page.



The screenshot shows a login page titled "Welcome". It contains three input fields: "Email", "Password", and "Captcha". The "Captcha" field contains the text "c o e p". Below the input fields, there is a "Register" button (highlighted with a red box) and a "Forgot Password" link. At the bottom, there is a large green "Log in" button.

3. Configure the information in corresponding fields.
Fields with * are mandatory, others are optional. As shown below:



The screenshot shows a registration form with the following fields:

- Name* (mandatory)
- Company Name* (mandatory)
- Email* (mandatory)
- Password* (mandatory)
- Re-type Password* (mandatory)
- Country* (mandatory, dropdown menu)
- State/Province* (mandatory)
- City* (mandatory)
- Tel* (mandatory)
- Demo Unit Provider(No provider, please enter None)* (mandatory)
- Company Website (optional)
- Company Profile (optional)

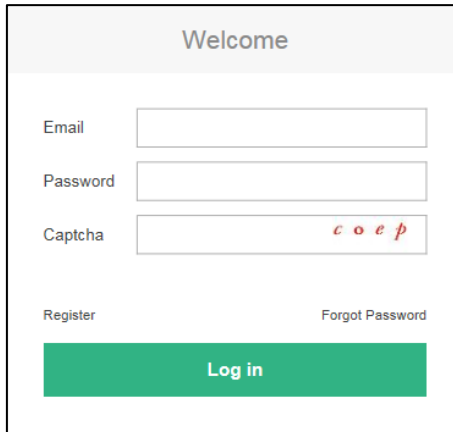
At the bottom right, there are two green buttons: "Submit" and "Return".

4. Click **Submit** to complete register.

You can log into the system after registered.

To log into video conferencing opportunity registration system:

1. In the login page, enter email, password and captcha.

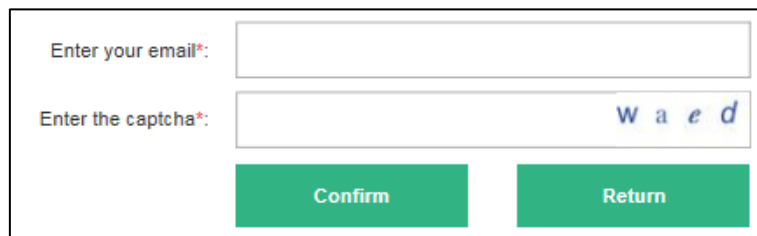


2. Click **Log in**.

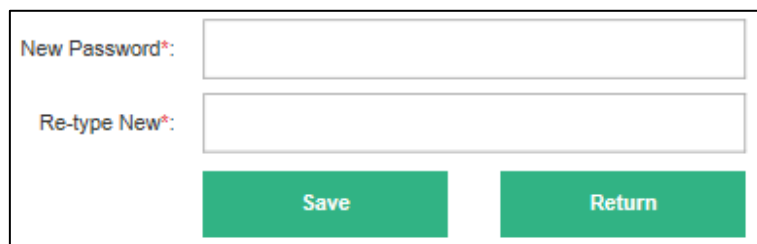
If you forget your password, you can reset the password. The reset link is sent to your registered email.

To reset password:

1. In the login page, click **Forgot Password**.
2. Enter the registered email and captcha.



3. Click **Confirm**.
System will send an email for you to reset the password.
4. Log into your email to receive the reset email.
5. Click the reset link.



6. Enter your new password in the **New Password** and **Re-type New** field

respectively.

7. Click **Save** to reset.

Editing Personal Information

After logging into the system, you can click user name at the top-right corner to view and edit your personal information such as email, telephone number.

The screenshot displays the 'Personal Information Edit' interface. At the top, there is a navigation bar with 'Yealink Video Conferencing Opportunity Registration System' and 'Projects'. The user's name 'sunmy' and a 'Log out' button are visible in the top right. The main form contains the following fields:

- Name*: sunmy
- Country: China
- Company Name: yealink
- Email*: yesm@yealink.com
- State/Province*: Fujian
- City*: Xiamen
- Tel*: 123456
- Demo Unit Provider(No provider, please enter None)*: None
- Company Website:
- Company Profile:
- Current Password:
- New Password:
- Re-type New:

At the bottom of the form, there are two buttons: 'Save' and 'Return'.

Logout

You can log out of the current account.

Click **Log out** to log out of the current account. As the following figure shows:



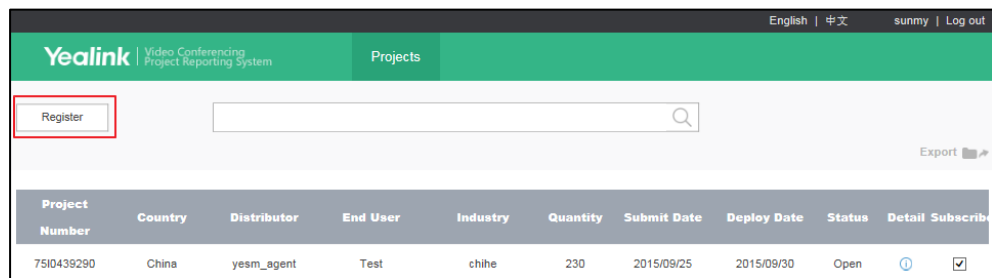
Video Conferencing Opportunity Registration System

You can use Yealink Video Conferencing Opportunity Registration System to create a new project report. You can also view, edit or delete the projects which have been added to the system.

Creating Project Reports

To create a project report:

1. Log into the Video Conferencing Opportunity Registration System.
2. Click **Register**.



3. Configure the end user information in the **End User Information** block.
Reseller can only create project reports for end users that subordinate to Reseller's country.
Fields with * are mandatory, others are optional. As shown below:

End User Information	End User Information	
Opportunity Information	End User Name*:	<input type="text"/>
Yealink & Competitor	Country*:	<input type="text" value="China"/>
Additional Information	State/Province*:	<input type="text"/>
	City*:	<input type="text"/>
	Contact Name:	<input type="text"/>
	Tel:	<input type="text"/>
	Industry*:	<input type="text" value="-"/>

4. Configure the project information in the **Opportunity Information** block.
If you have performed a product demo to customers, you need to select the date when you have performed the demo.

Fields with * are mandatory, others are optional. As shown below:

End User Information	Opportunity Information	
Opportunity Information	Type of Opportunity*: <input checked="" type="radio"/> New Project <input type="radio"/> Extended Project	
Yealink & Competitor	Sites*: <input type="text"/>	
Additional Information	User Scenario*: <input type="text"/>	
	When to Deploy*: <input type="text"/>	
	Demo Yealink VCS to End User*: <input type="radio"/> Yes <input checked="" type="radio"/> No	
	Brief Description of Opportunity: <input type="text"/>	

5. Configure the information of Yealink and Competitor in the **Yealink & Competitor** block.

You can also add or delete information by clicking **Add a line** or **Del**.

Fields with * are mandatory, others are optional. As shown below:

End User Information	Yealink & Competitor																			
Opportunity Information	Competitor Name: <input type="text"/>																			
Yealink & Competitor	Competitor Information:																			
Additional Information	<table border="1"> <thead> <tr> <th>Model/Part Number</th> <th>Quantity</th> <th>Price from Competitor</th> <th>Price for End user</th> <th>Note</th> <th></th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td>Del</td> </tr> <tr> <td colspan="5"></td> <td>Add a line</td> </tr> </tbody> </table>		Model/Part Number	Quantity	Price from Competitor	Price for End user	Note							Del						Add a line
Model/Part Number	Quantity	Price from Competitor	Price for End user	Note																
					Del															
					Add a line															
	Comments																			
	<input type="text"/>																			
	Yealink Information*:																			
	<table border="1"> <thead> <tr> <th>Model/Part Number*</th> <th>Quantity*</th> <th>Expect Price from Distributor</th> <th>Price for End user</th> <th>Note</th> <th></th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td>Del</td> </tr> <tr> <td colspan="5"></td> <td>Add a line</td> </tr> </tbody> </table>		Model/Part Number*	Quantity*	Expect Price from Distributor	Price for End user	Note							Del						Add a line
Model/Part Number*	Quantity*	Expect Price from Distributor	Price for End user	Note																
					Del															
					Add a line															
	Key Points of Yealink to Win																			
	<input type="text"/>																			

6. You can configure more information in the **Additional Information** filed.
7. Click **Submit** to accept the changes.

System will assign a 10-digit number to the project automatically. You will receive a mail to notice you the project report has been created successfully.

Project Number	Country	Distributor	End User	Industry	Sites	Submit Date	Deploy Date	Status	Detail	Subscribe
5619k80144	China		MEE	Medical	1	2015/11/06	2015/11/20	Unknown	i	<input checked="" type="checkbox"/>

Viewing Project Reports

You can log into the Video Conferencing Opportunity Registration System to view project reports which have been added to the system, such as project number, country, agent, end user and industry.

Project Number	Country	Distributor	End User	Industry	Quantity	Submit Date	Deploy Date	Status	Detail	Subscribe
7510439290	China	yesm_agent	Test	chihe	230	2015/09/25	2015/09/30	Open	i	<input checked="" type="checkbox"/>

You can click **Detail** icon [i](#) to view the details about corresponding report. If you check the **Subscribe** checkbox, all the users who follow the report will receive a notice email about the operation on this report.

End User Information
End User Name: MEE
Country: China
State/Province: Fujian
City: Xiamen
Contact Name:
Tel:
Industry: Medical

Every modification will be recorded in the **Operation log**, you can click **Operation log** to view the operation log.

Operation Log			
Serial Number	Operation Time	Operator	Event
1	2015-11-06 15:34	sunny	created a Project.


Searching project reports

You can search the project reports by country, industry, status or submit date.

To search the project reports:

1. Log into the Video Conferencing Opportunity Registration System.
2. Click the search field.

The screenshot shows the 'Projects' section of the Yealink system. A search form is highlighted with a red box, containing the following fields: Country (dropdown), Industry (dropdown), Status (dropdown), and Submit Date (range selector). A search button with a magnifying glass icon is located to the right of the Country field. Below the search form, a table displays project data with columns for Project Number, Country, Deploy Date, Status, Detail, and Subscribe. The first row shows Project Number 7510439290, Country China, Deploy Date 2015/09/30, Status Open, and a checked Subscribe checkbox.

3. Select the corresponding option from the country, industry, status or submit time pull-down list.
4. Click  to search.

The results will display in the page.

If you didn't select any search condition, the results show all reports by default.

Exporting Project Reports

You can also export the project reports in the format of excel.

To export one project report:

1. Click the desired report you want to export.

The screenshot shows the 'Project' page in the Yealink system. On the left, there is a sidebar menu with options: End User Information (selected), Opportunity Information, Yealink & Competitor, Additional Information, Assignment and process, and Operation log. The main content area displays the 'End User Information' form with the following fields and values:

End User Name:	YAMAHA
Country:	Japan
State/Province:	SAKURA
City:	MOMIJI
Contact Name:	
Tel:	
Industry:	chihe

At the top of the form, there are buttons for 'Return', 'Edit', 'Export', and 'Delete'.

2. Click **Export** to open file download window, and then save the file to your local system.

To export all project reports:

1. Click **Export** to open file download window, and then save the file to your local system.

The screenshot shows the 'Projects' page in the Yealink system. At the top right, there are links for 'English | 中文' and 'sunny | Log out'. Below the header, there is a 'Register' button and a search bar. An 'Export' button with a download icon is highlighted with a red box. Below the buttons is a table of projects:

Project Number	Country	Distributor	End User	Industry	Sites	Submit Date	Deploy Date	Status	Detail	Subscribe
5619K80144	China		MEE	Medical	1	2015/11/06	2015/11/20	Unknown		<input checked="" type="checkbox"/>

Editing Project Reports

You can log into the Video Conferencing Opportunity Registration System to edit project reports which have been added to the system. The project reports cannot be edited when it has been assign to salesman. When the status of project reports is not order, you can edit the project except the end user's personal information.

To edit a project report:

1. Log into the Video Conferencing Opportunity Registration System.
2. Click the desired project report.
3. Click **Edit**.

The screenshot shows the 'Projects' page in the Yealink Video Conferencing Opportunity Registration System. The page has a green header with the Yealink logo and the system name. Below the header, there is a navigation bar with a 'Return' button and three action buttons: 'Edit', 'Export', and 'Delete'. The 'Edit' button is highlighted with a red rectangular box. Below the navigation bar, there is a sidebar menu on the left with options: 'End User Information', 'Opportunity Information', 'Yealink & Competitor', 'Additional Information', 'Assignment and Processment', and 'Operation Log'. The main content area displays the 'End User Information' form with the following fields and values:

End User Name:	MEE
Country:	China
State/Province:	Fujian
City:	Xiamen
Contact Name:	
Tel:	
Industry:	Medical

4. Edit the project report.
5. Click **Save** to accept the change.

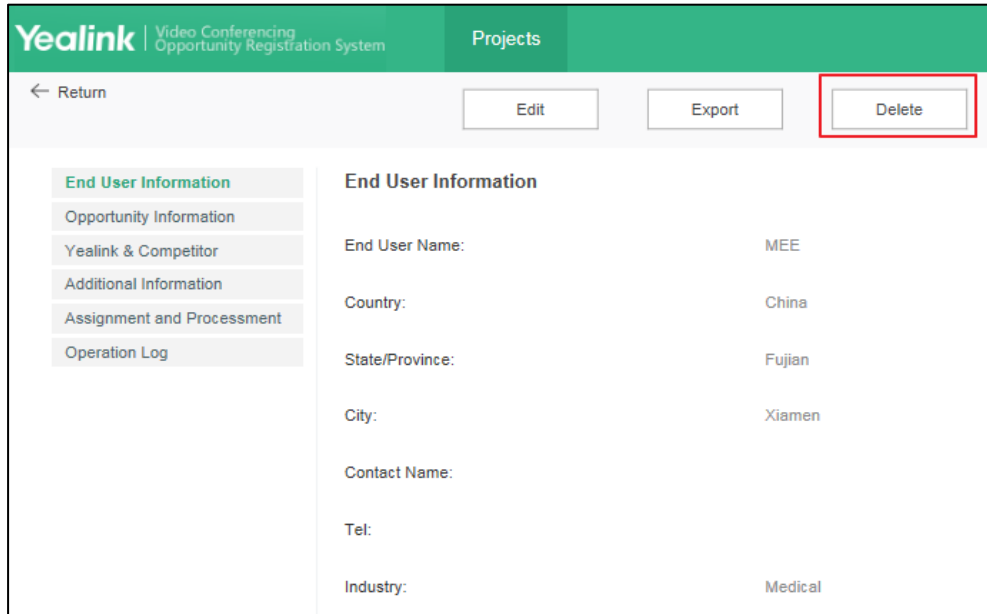
If you have checked the **Subscribe** checkbox, all the users who follow the report will receive a notice email about the operation on this report.

Deleting Project Reports

You can log into the Video Conferencing Opportunity Registration System to delete project reports which have been added to the system. You can't delete the project reports that have been assigned to salesman.

To delete a project report:

1. Log into the Video Conferencing Opportunity Registration System.
2. Click the desired project report.
3. Click **Delete**.



4. Click **Confirm** to delete the project report.

If you have checked the **Subscribe** checkbox, all the users who follow the report will receive a notice email about the operation on this report.